

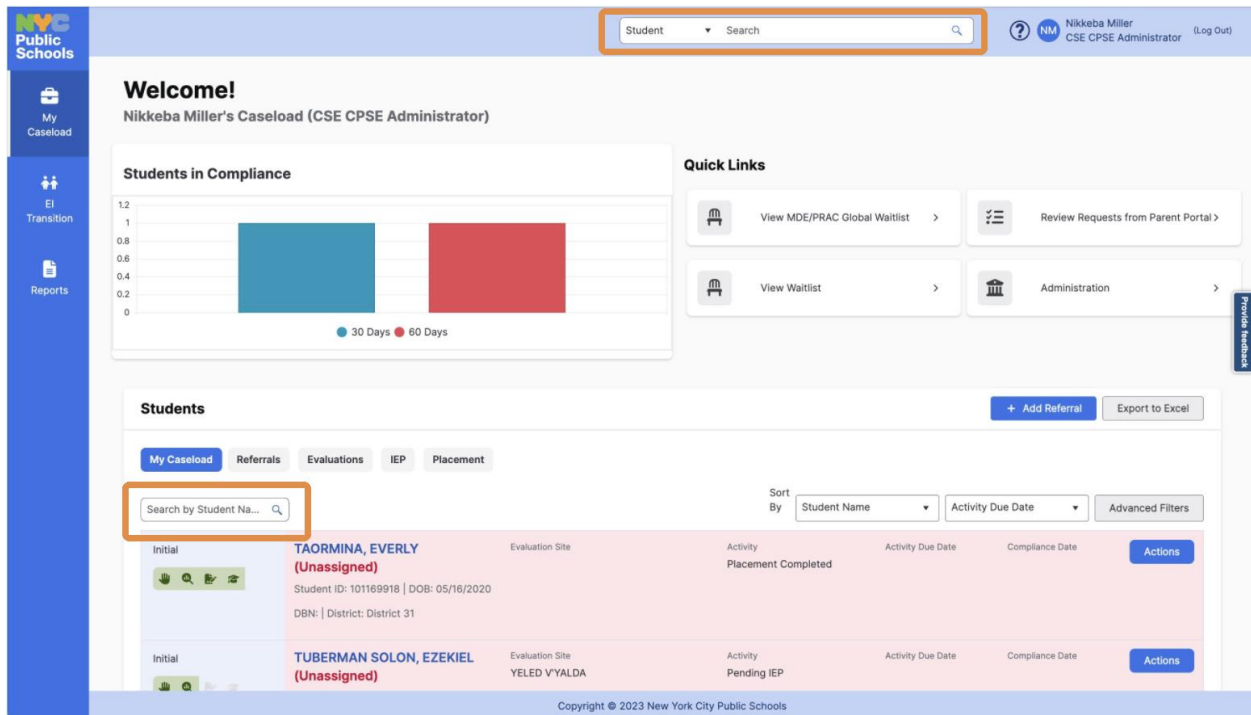
How to Search for a Student

This guide describes how to search for a student using the search function in the dashboard. It explains how to input the student's first name, last name, or student ID, and then select the desired student from the search results.

Note: Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

1. There are two ways to search for a student.

- The search box below **My Caseload** allows a user to search all of the students who are viewable to them in ATLAS. For some users this will be just the students on their caseload. For users with broader permissions to view students, they might see all of the students in their school or district. Users may search by first name, last name, or student ID. Instructions are detailed in step 2.
- The search box in the blue banner at the top right corner allows users to search all of ATS, meaning it may return search results for students who are not in ATLAS. For example, since ATLAS currently only includes preschool aged students, a search using the top right search bar might return records for school aged students who are not in ATLAS. Using the top right search bar, a user can search by student ID, or a combination of first name, last name, and DBN. Instructions are detailed in step 4.



The screenshot displays the NYC Public Schools dashboard interface. At the top right, there is a search bar with the text "Student" and a search icon. Below the dashboard header, the user is logged in as "Nikkeba Miller, CSE CPSE Administrator". The main content area is titled "Welcome! Nikkeba Miller's Caseload (CSE CPSE Administrator)".

On the left sidebar, there are navigation options: "My Caseload", "EI Transition", and "Reports". The "My Caseload" section is active, showing a "Students in Compliance" bar chart with two bars: a blue bar for "30 Days" and a red bar for "60 Days".

Below the chart, there is a "Students" section with tabs for "My Caseload", "Referrals", "Evaluations", "IEP", and "Placement". The "My Caseload" tab is selected. A search box labeled "Search by Student Na..." is highlighted with an orange border. To the right of the search box, there are "Sort By" dropdowns for "Student Name" and "Activity Due Date", and an "Advanced Filters" button.

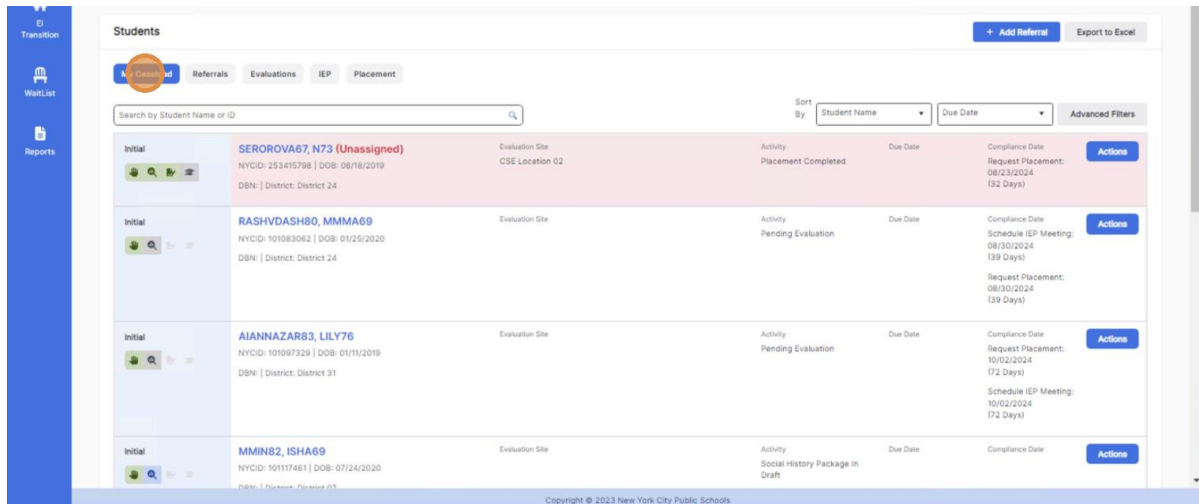
The student list shows two entries:

Initial	Student Name	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
Initial	TAORMINA, EVERLY (Unassigned) Student ID: 101189918 DOB: 05/16/2020 DBN: District: District 31		Placement Completed			Actions
Initial	TUBERMAN SOLON, EZEKIEL (Unassigned)	YELED VYALDA	Pending IEP			Actions

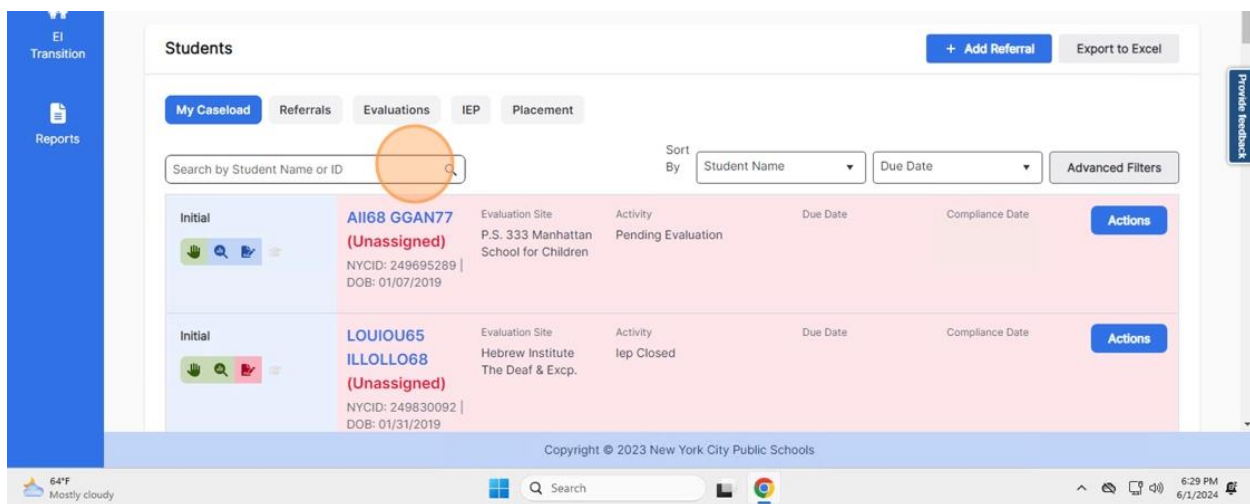
At the bottom of the dashboard, there is a footer: "Copyright © 2023 New York City Public Schools".

2. To use the search box below **My Caseload**:

- First, select or deselect **My Caseload** (blue = selected, grey = deselected). If you're searching for a student not assigned to your caseload, deselect **My Caseload**.



- Type the student's first name, last name, or student ID, and click enter.

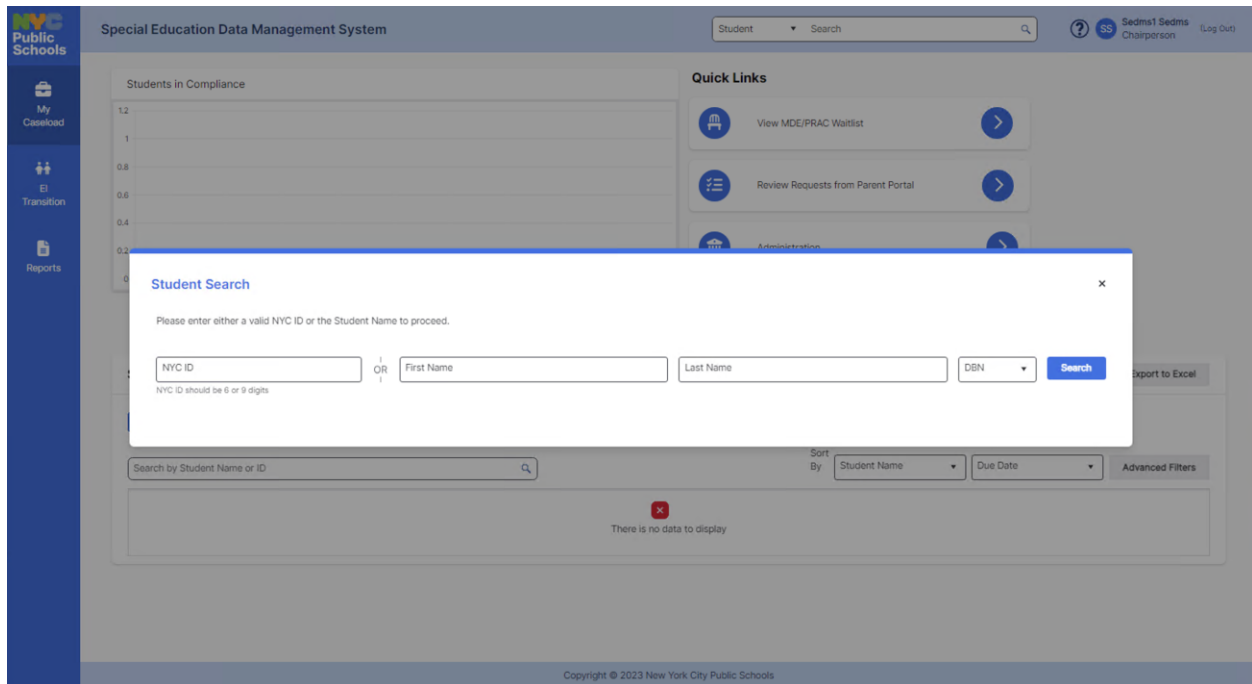


3. In this example, the user is searching for a student whose name is Anil. Four students were returned whose names include "Anil". Click on the desired student's name to open their student profile.

The screenshot shows the SEDMS dashboard interface. At the top, there is a search bar with the text 'Student' and a search icon. Below the search bar, there are dropdown menus for 'Sort By' (set to 'Student Name') and 'Due Date'. A table of student records is displayed with columns for Initial, Student Name, Evaluation Site, Activity, Due Date, Compliance Date, and Actions. The table contains four rows of data. The first row is for 'ALANILA68 HKIYELEVS75' with a due date of 05/16/2024 and a note 'Finalize IEP: (-16 Days Left)'. The second row is for 'EDYNNED75 CLANILLAN77' with a due date of 05/10/2024 and a note 'Send Initial PWN: (-22 Days Left)'. The third row is for 'mcdonald anil' and the fourth for 'anilmayseven test'. A sidebar on the left contains navigation options: My Caseload, EI Transition, and Reports. The bottom of the dashboard shows a footer with 'Copyright © 2023 New York City Public Schools' and a system tray with weather and time information.

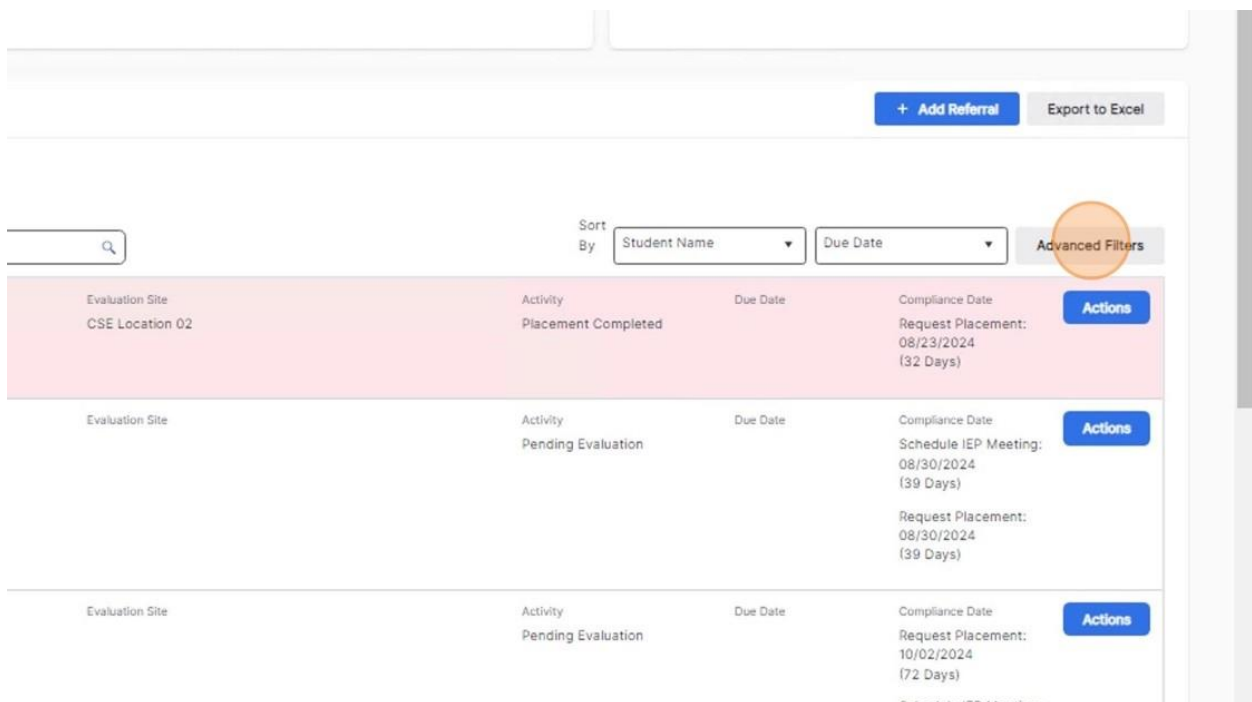
Initial	Student Name	Evaluation Site	Activity	Due Date	Compliance Date	Actions
ALANILA68 HKIYELEVS75 NYCID: 203498746 DOB: 04/14/2009	CSE Location 01	lep In Draft	Finalize IEP: 05/16/2024 (-16 Days Left)			
EDYNNED75 CLANILLAN77 NYCID: 222826109 DOB: 06/02/2019		Referral: Pending Pwn				
mcdonald anil NYCID: 230003872 DOB: 01/01/2020		Referral: Pending Pwn				
anilmayseven test NYCID: 230100373 DOB: 01/01/2021		Referral: Pending Pwn	Send Initial PWN: 05/10/2024 (-22 Days Left)			

4. The search box at the top of the page allows users to search either by student ID, or first name, last name, and DBN associated with the student. If you do not search by student ID you must enter the student's first name, last name, and DBN. Enter the fields you wish to search for and click **Search** to see the matching results.



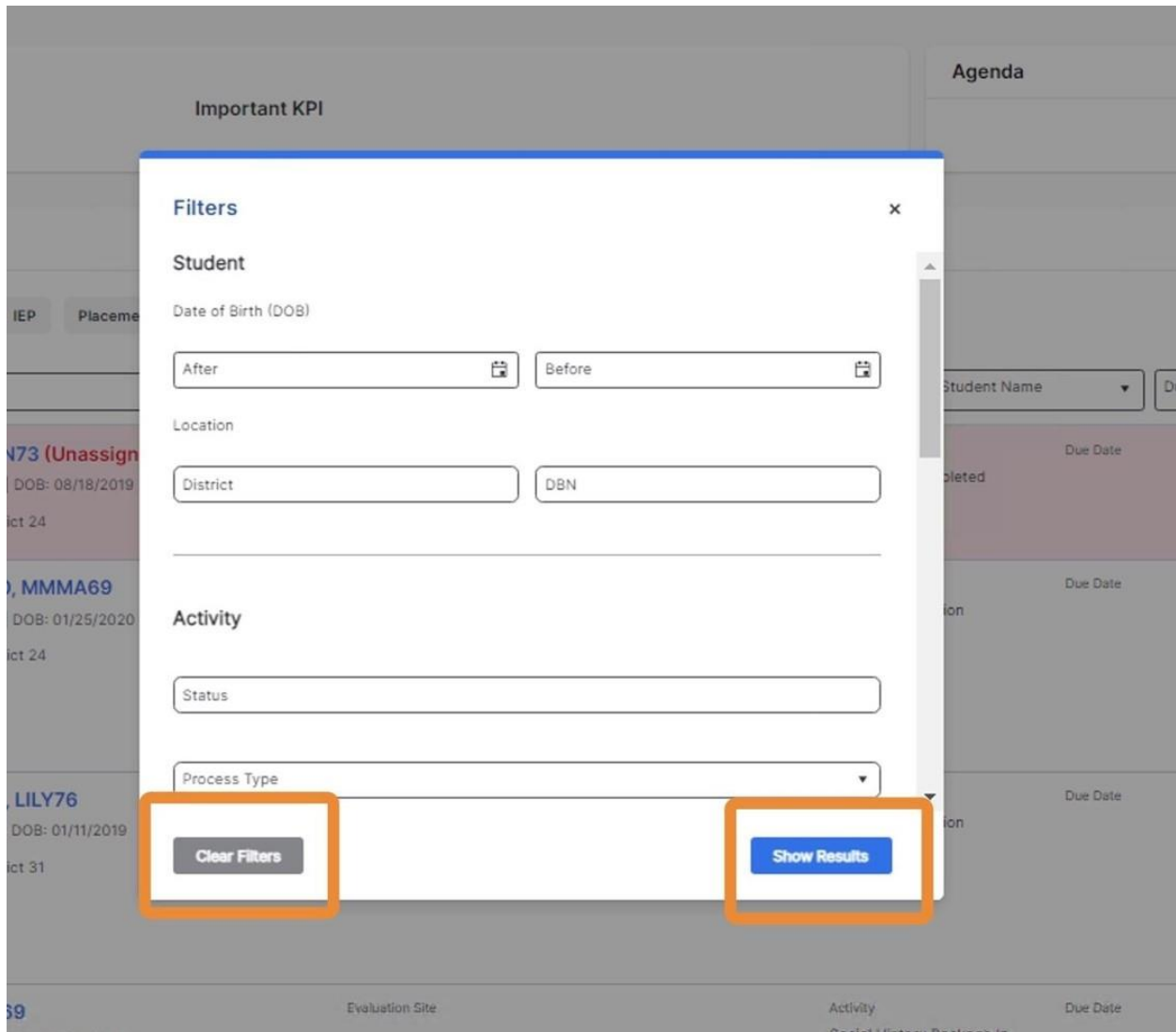
Tip: Searching by student ID is recommended to avoid confusion with students who have the same name.

5. Use the **Advanced Filters** feature, at the top right of the dashboard, to refine your search by specific criteria like date of birth or location. After selecting filters, click **Show Results** to apply them. To clear all filters, click **Clear Filter**.



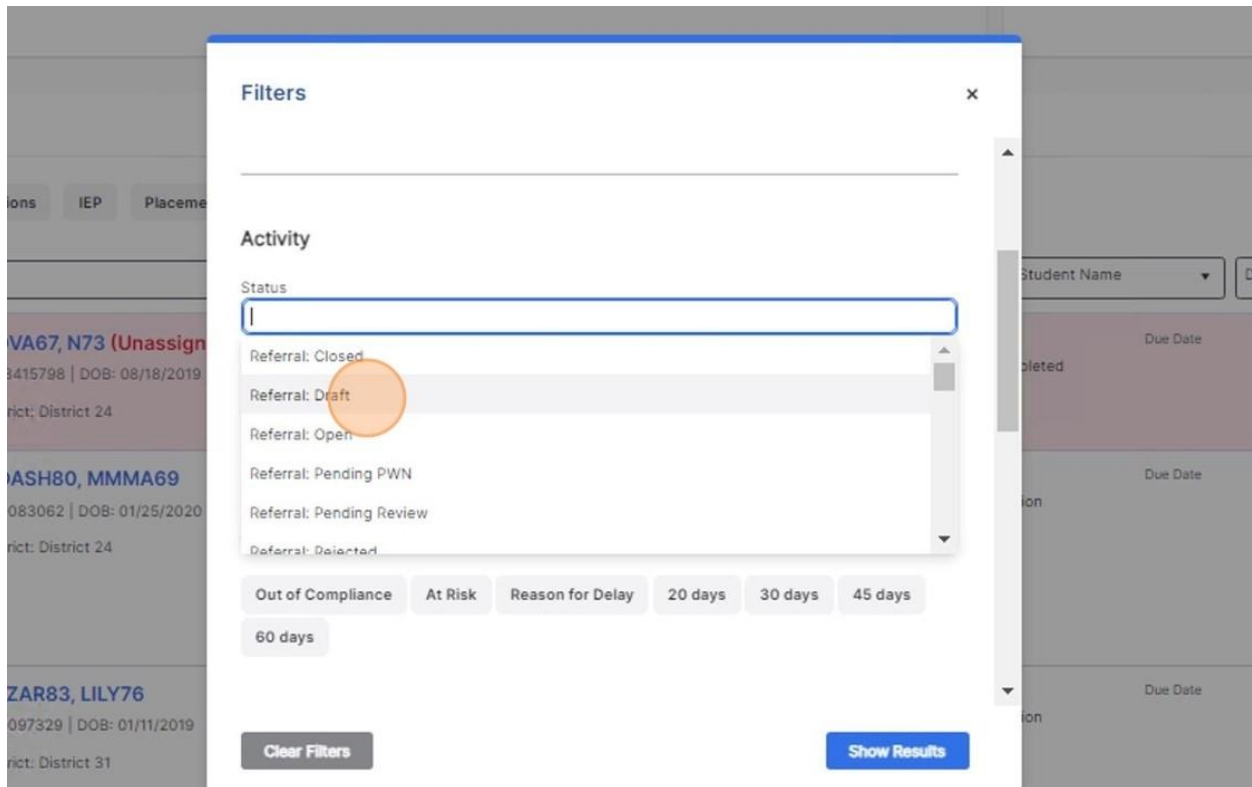
6. Within the Filters pop-up, search by *activity status* for more detailed results. A pop-up titled *Filters* will appear. This provides a variety of advanced filters including student date of birth and location.

7. After an advanced filter is selected, click **Show Results** in the bottom right corner of the pop-up to apply the filters you have selected to the dashboard or lick **Clear Filter** in the bottom left corner of the pop up to clear all previously applied dashboard filters.

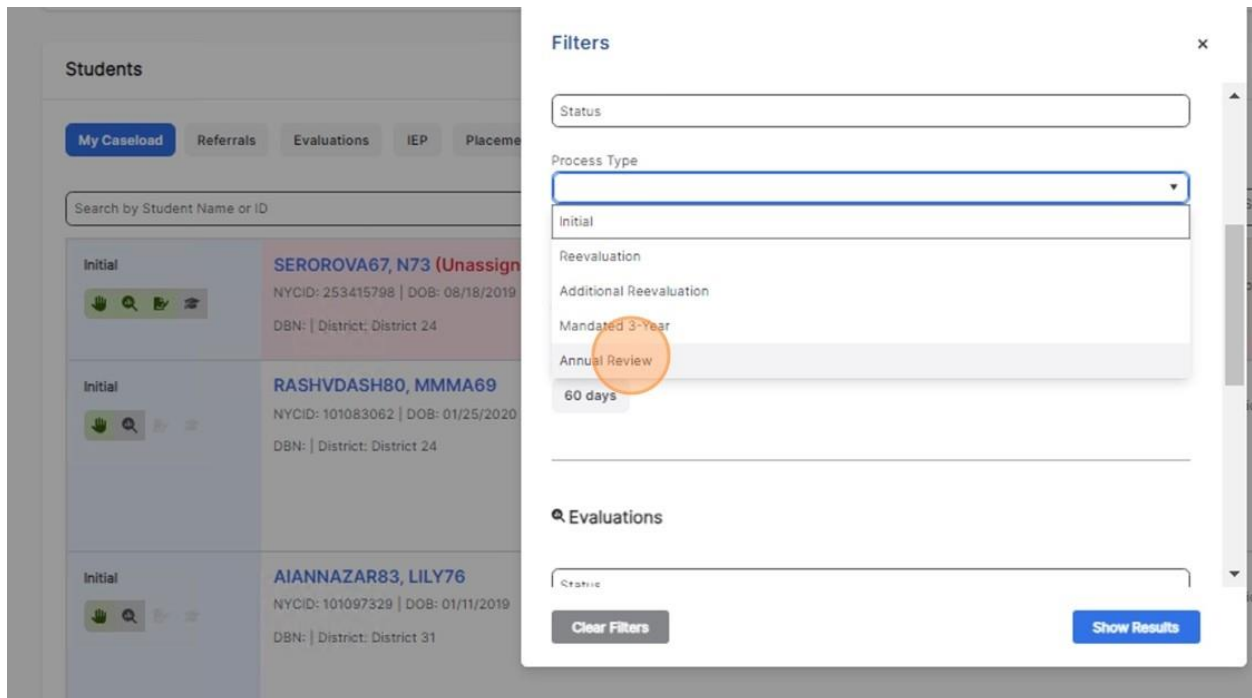


Click the “X” on the top right of the Filters pop up to close the Filters pop up.

8. A more detailed **Activity** status search is available within the Filters pop up. You can select from various statuses across process stages such as pending states.

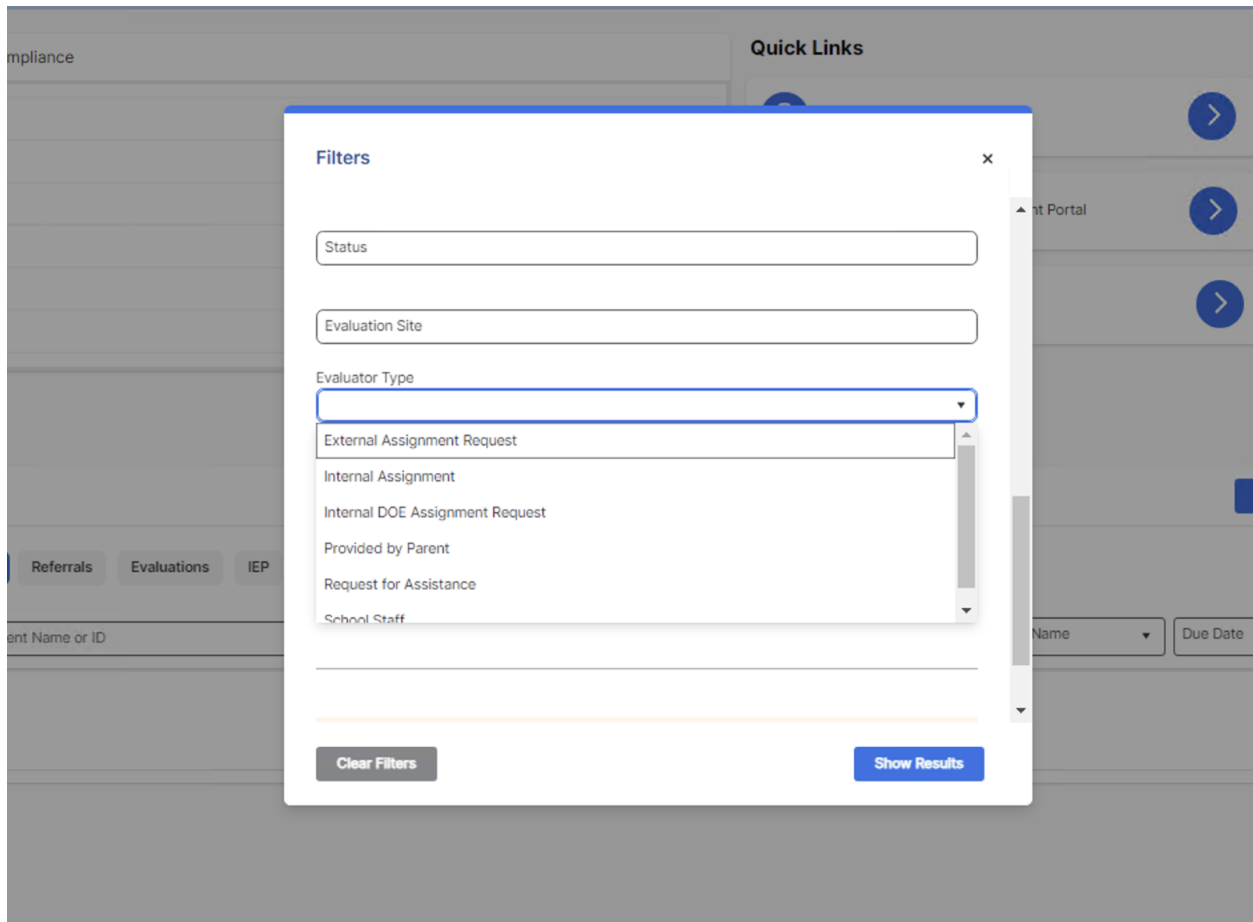


9. Use the **Process Type** dropdown, to filter by Process Type. For example, selecting **Annual Review** will return all students awaiting their annual review. Users can then search for a student that they know is awaiting an annual review.

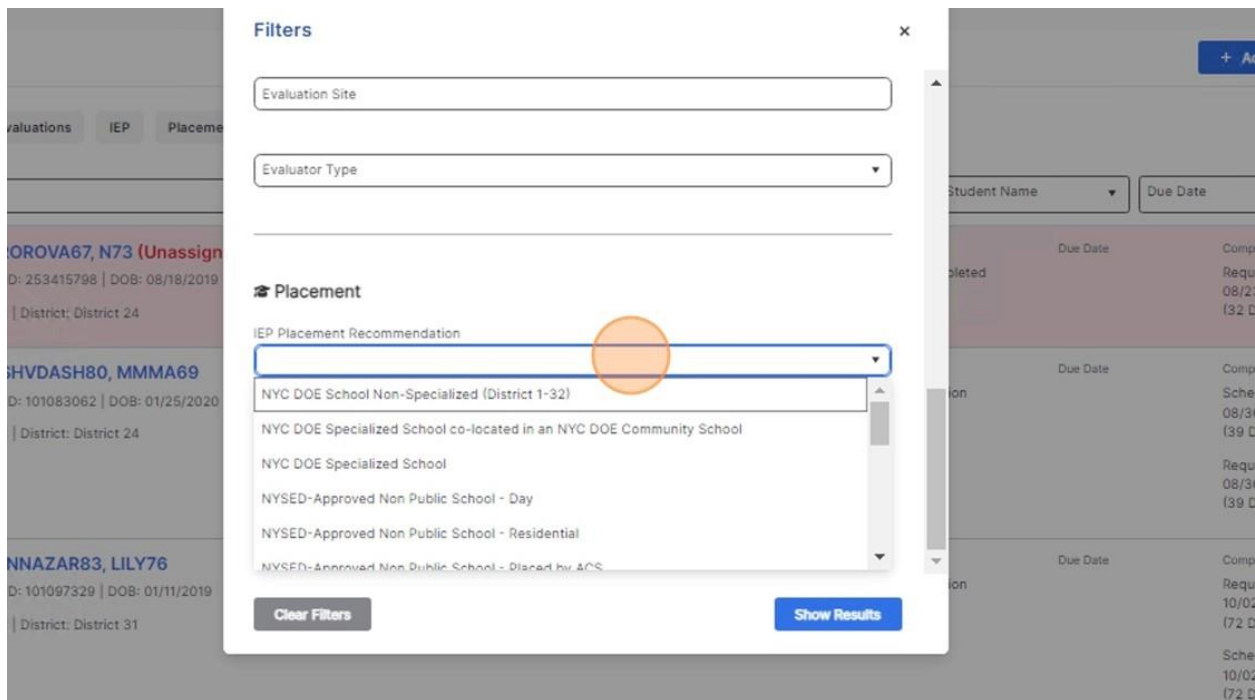


10. Sort students by *Evaluation Status*, *Evaluation Site*, or *Evaluator Type*.

The screenshot displays a 'Filters' modal window overlaid on a student data table. The modal is titled 'Filters' and includes a close button (x) in the top right corner. It features a search bar at the top with the text '60 days'. Below this, there are two main sections: 'Evaluations' and 'Placement'. The 'Evaluations' section contains three input fields: 'Status', 'Evaluation Site', and 'Evaluator Type' (a dropdown menu). The 'Placement' section contains a 'Clear Filters' button. At the bottom of the modal, there is a 'Show Results' button. The background shows a table with columns for 'Student Name', 'Due Date', and 'Compliance'. The table contains several rows of student data, including names like 'PROVA67, N73 (Unassign)', 'IVDASH80, MMMA69', and 'NAZAR83, LILY76'. The table also shows 'Due Date' and 'Compliance' information for each student.



11. Using the advanced filters pop-up, the dashboard can also be filtered by *IEP Placement Recommendation*. After the dashboard is filtered, the user can search for a student in a specific placement.



12. The dashboard can also be filtered by **Compliance** status. Choosing one of these indicators will show all students who fit the criteria for that compliance status. For example, if the user chooses **Out of Compliance**, all students whose case status is considered out of compliance will show on the dashboard.

management system

Important KPI

Agenda

Evaluations IEP Placeme

SEROROVA67, N73 (Unassign
NYCID: 253415798 | DOB: 08/18/2019
DBN: | District: District 24

RASHVDASH80, MMA69
NYCID: 101083062 | DOB: 01/25/2020
DBN: | District: District 24

AIANNAZAR83, LILY76
NYCID: 101097329 | DOB: 01/11/2019
DBN: | District: District 31

Student Name Due Date

Due Date Co
Re
06
(3

Due Date Co
Sc
06
(3

Re
06
(3

Due Date Co
Re
10
(7

Sc
10
(7

Filters x

Status

Process Type
Initial

Compliance

Out of Compliance At Risk Reason for Delay 20 days 30 days 45 days
60 days

Evaluations

Status

Clear Filters Show Results