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FAQ: Student Profile General FAQ

This FAQ provides answers to general questions about the Student Profile in ATLAS.

Can users change student info in ATLAS? (student address for example)

Yes, and it will update in ATS. Likewise, edits to the student record in ATS will show up in ATLAS.

In R1 the following fields are editable by users with edit rights:

- First Name
- Last Name
- Date of Birth
- Gender
- Ethnicity
- Housing (address, borough, city, district, state, zip code)

Please note that when you update these fields in ATLAS, it will take 5-10 minutes for the update to show up on the student profile.

How will we know when student data (address for example) changes in ATS?

There is no notification, when you open the student profile, data is pulled from ATS and will show up in ATLAS. If it is updated in ATS, it will reflect those updates in ATLAS. Some ATLAS users also have edit rights to update key student demographic details, which will flow into ATS to reflect the update in both systems.

Will CAP events be migrated to ATLAS?

Events from CAP have been migrated to ATLAS and show up in the event log indicating the Special Education Workflow-related Actions that were completed in CAP.

What is an Interaction?

Interactions are records of calls, emails, letters, texts, or in-person visits by individuals who support students with IEPs or who are moving through the referral process.

Where can I find the Events Log?

Events logs are specific to each student. Locate the student to find their Events Log.

1. Log in to ATLAS.
2. Search for a student.

3. Use either the search box above the student list, or the box at the top right of the screen to find the student by first name, last name, or Student ID.
4. Select the student's name to access their Student Profile.
5. Then click on the **Events Log** tab.

What do I see in the Events Log?

The Events Log shows all interactions logged by users as well as system-generated events. System generated events are automatically generated by ATLAS when key actions are initiated or finalized. For example, when a referral is opened, or when an initial social history is finalized.

How do I log a new interaction?

1. Click the **+Log Interaction** button on the top left corner of the screen.
2. Complete each of the fields for the interaction, including the *Related Action*, *To*, and *Additional Notes* fields. Your user details will automatically populate in the contact details and cannot be edited.

How do I select the Related Action for the Interaction?

Use the dropdown menu within the *Related Action* field to select the type of interaction you are logging. This links the interaction to the corresponding case action, such as selecting "Initial Referral" if you contacted a parent/guardian about a new referral.

How detailed should the Additional Notes be?

Include all relevant details in the *Additional Notes* field so that someone unfamiliar with the interaction can understand what occurred.

How do I finalize the Interaction?

To finalize the interaction, click the blue **Log Interaction** button on the bottom right of the pop-up. After logging the interaction, you will be returned to the *Events Log* screen.

How can I view, edit, or delete user-generated interactions?

Follow these steps to manage user-created interactions:

- View an Interaction:
  - Select the three vertical dots next to the logged interaction.
  - Select **View User Interaction** to see the details in a pop-up window where you can review the information.
- Edit an Interaction:
  - Select the three vertical dots next to the logged interaction.
  - Select **Edit User Interaction**.
  - You will be able to modify the details you originally entered. You can only edit an interaction that you created.
- Delete an Interaction:
  - Select the three vertical dots next to the logged interaction.
  - Select **Delete User Interaction**. You can only delete an interaction that you created.
  - Confirm that you want to permanently delete it by selecting **Delete Interaction Log**.

How can I edit or delete system-generated events?

You cannot edit or delete system-generated events. System generated events do not include additional information and cannot be edited or deleted, therefore there is no option to view additional information, edit, or delete them.

How do I access a student's documents?

Navigate to the student's profile and click on the tab titled *Documents*. You can access the student's profile by clicking on their name from the dashboard or by searching for them by first name, last name, or Student ID in the search bar.

How are documents organized?

Documents are organized by school year. To view documents from a specific year, click the triangle to the right of the school year and select the year you're looking for. Only years for which a student has documents will appear in the drop-down. If a student has no documents yet, the menu will read "No Data Found".

How do I view the documents within folders?

On the *Documents* tab, click on the triangle to the right of the document category headers to expand the folders and view associated documents for the student.

What information is available for each document?

The list will show *Date Created*, *Document Name*, *Document Type*, *Uploaded By*, and actions you can perform—*Print*, *Download*, and *Delete*.

How do I open a document?

Click on the document name in blue under *Document Name* to be directed to the document. The finalized document will open as a PDF in a new tab. **How do I print a document?**

To print the document, click on the **Print** icon (the first icon, which resembles a printer) under *Action*. After you have clicked on the **Print** icon, the document will show in print preview in a new tab. From there, click on the blue **Print** button in the lower right corner to print the document. To return to the ATLAS dashboard, either click the original *Student Profile* tab at the top of your browser or simply close the PDF tab.

How do I download a document?

To download a document, click on the **Download** icon (the second icon or down arrow) under *Action*.

How do I delete a document?

To delete a document, click on the **Delete** icon (the third icon resembling a trash can) under *Action*. After clicking the icon, a pop-up will appear. This icon will only be available to users with deletion rights for a given document. Choose **Yes** to delete the document. Choose **No** for the document to remain in the student's documents. To be directed back to the documents page, click on the X in the top right corner to close the pop up.

Can documents that come from DTS be deleted?

No.

If I attach a document via an event log, will it show up on the documents list on the student profile?

Yes.