How to View and Log Interactions

This guide provides step-by-step instructions on how to view and log interactions in ATLAS.

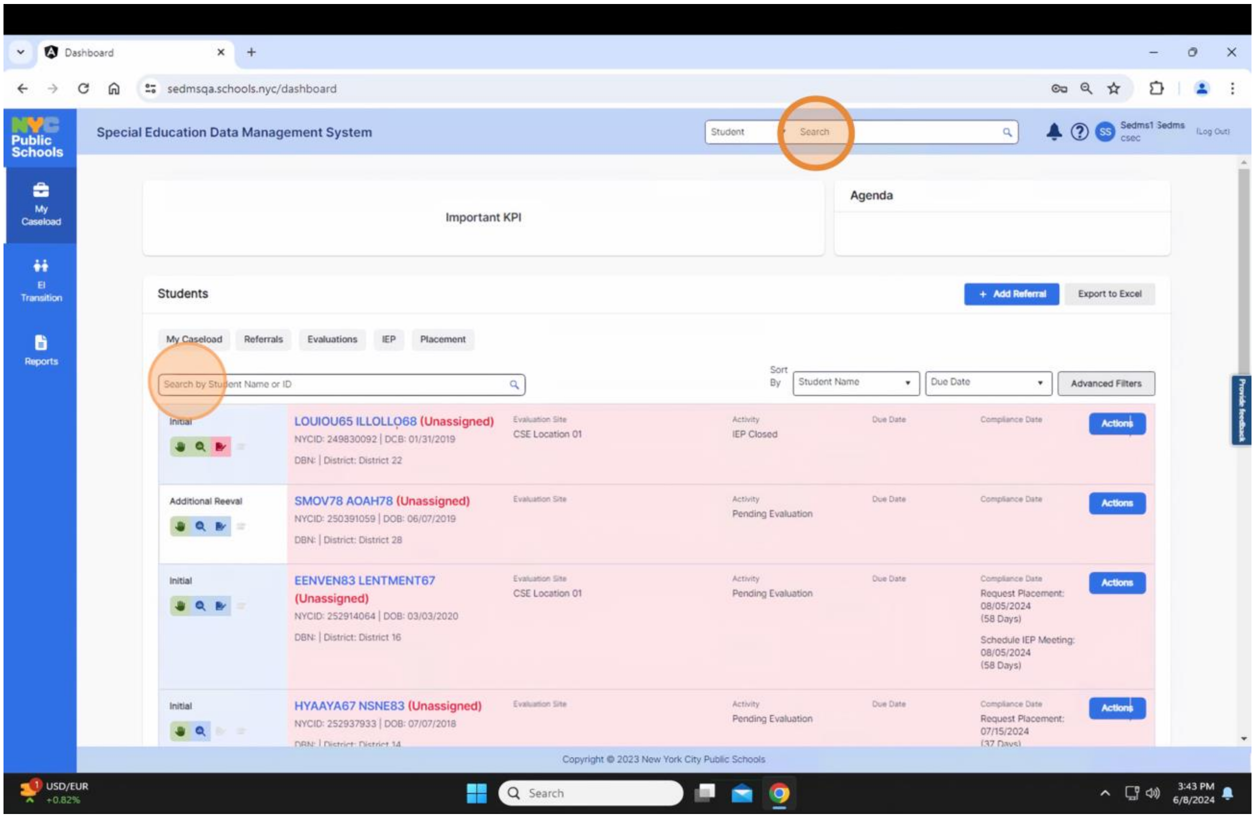
In ATLAS, interactions refer to records of calls, emails, letters, texts, or in-person visits made by individuals supporting students. By following these steps, users can navigate through the system, log new interactions, and view previously logged interactions. This guide emphasizes the importance of including detailed information in the interaction log and provides tips on how to do so effectively.

Overall, this guide is a resource for anyone who needs to manage and track communication in ATLAS. Interactions are logged in ATLAS so that users can track instances of communication between various parties involved in supporting the student.

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.*

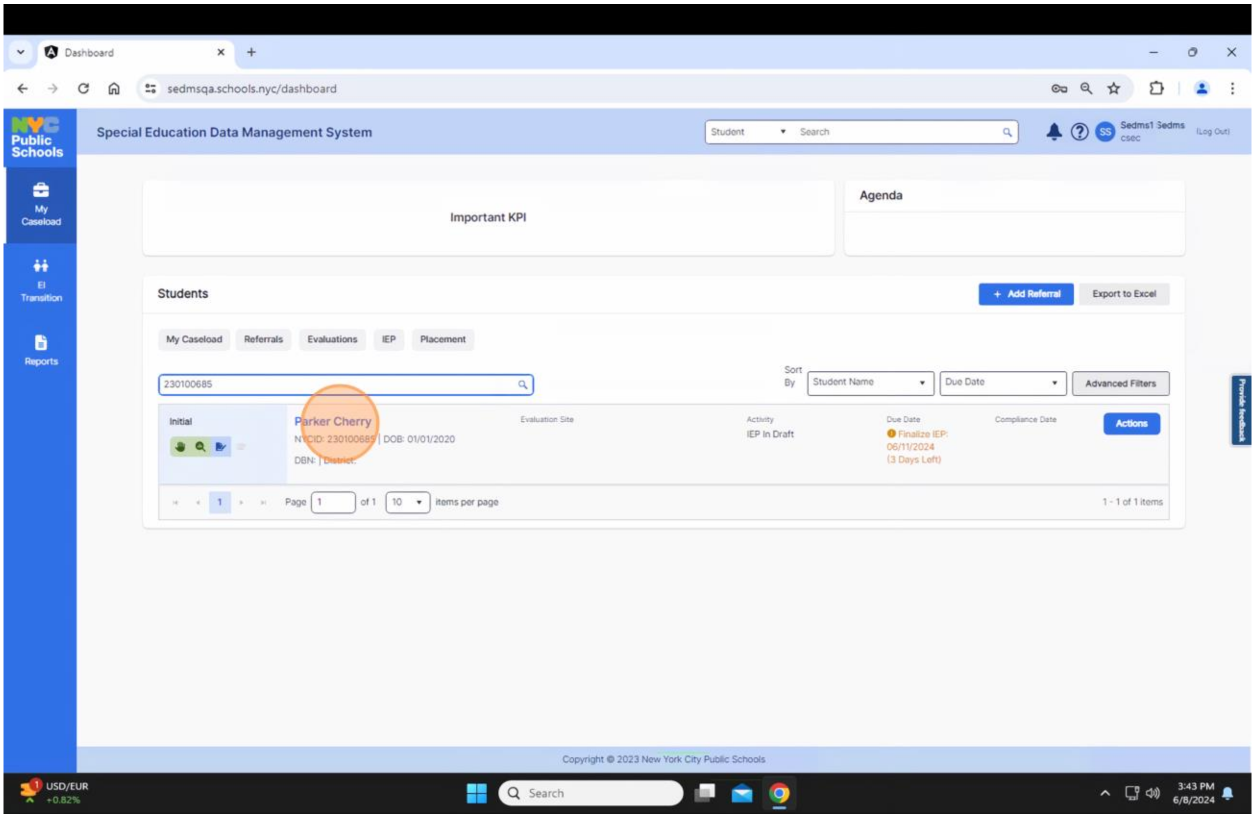
1. Log in to ATLAS.

2. Search for a student. From the **My Caseload** dashboard, search for the student you wish to log an interaction for. You can search by First Name, Last Name, or Student ID in either the search box above the student list, or the box at the top right of the screen.

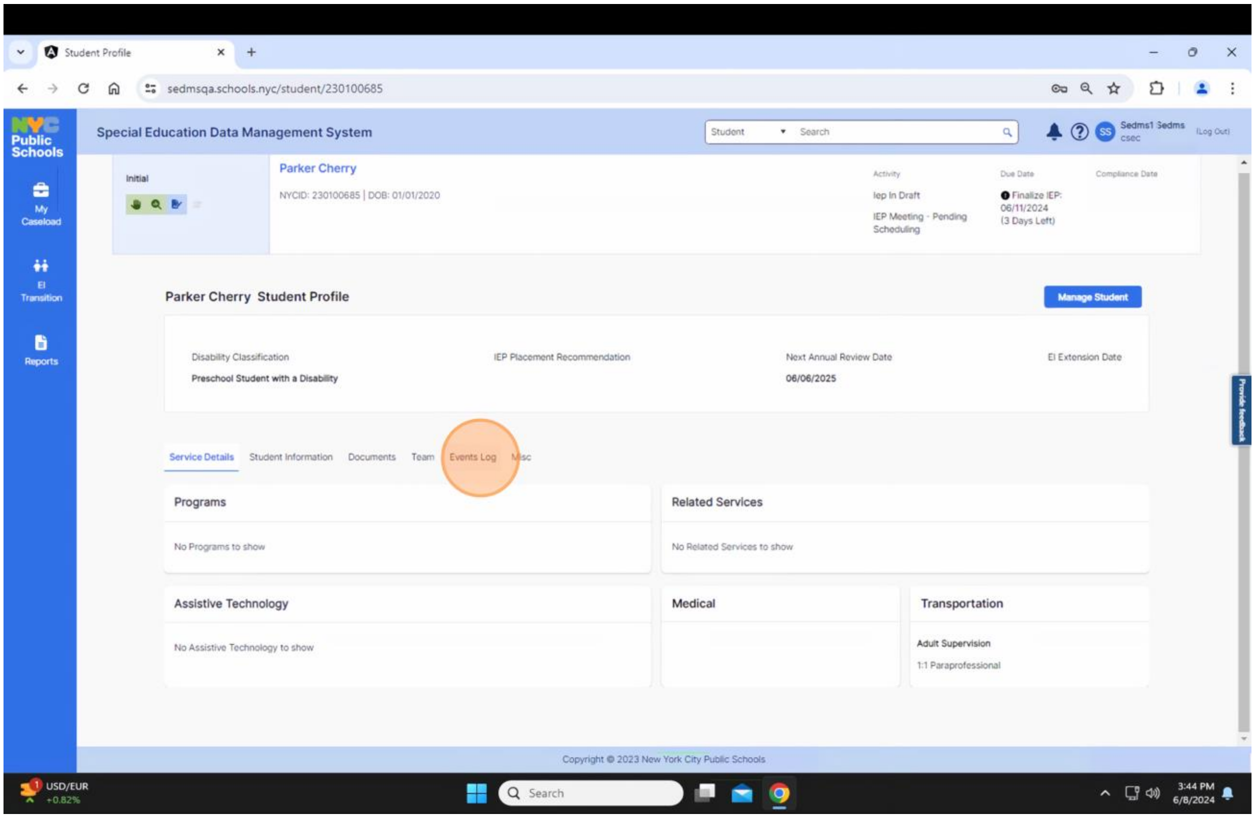


Tip: If the student doesn't appear in your search, try unchecking the **My Caseload** button at the top of the grid. The button will be blue when it is enabled and gray when it is disabled. Some users can only see students assigned to their caseload. In that case, unchecking **My Caseload** would not return any search results.

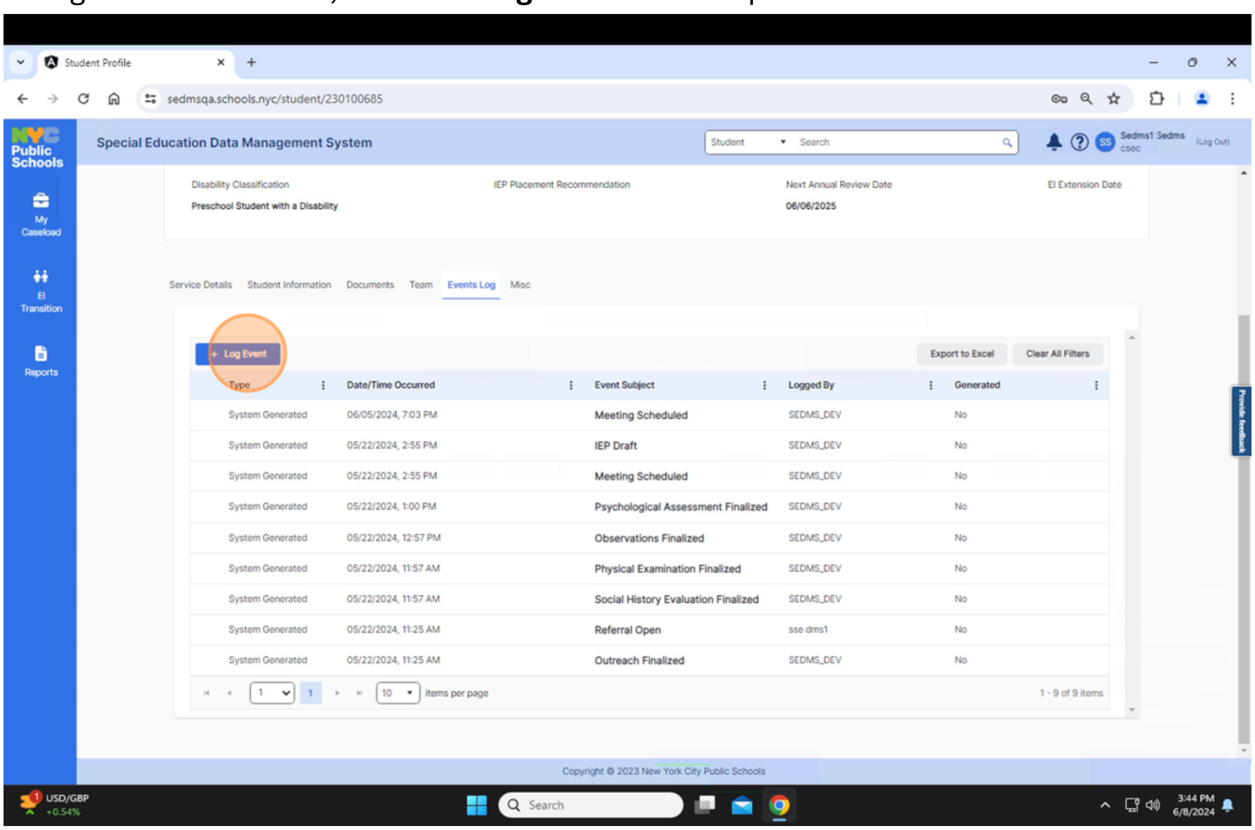
3. Once you've found the student, click on their name to open their Student Profile.



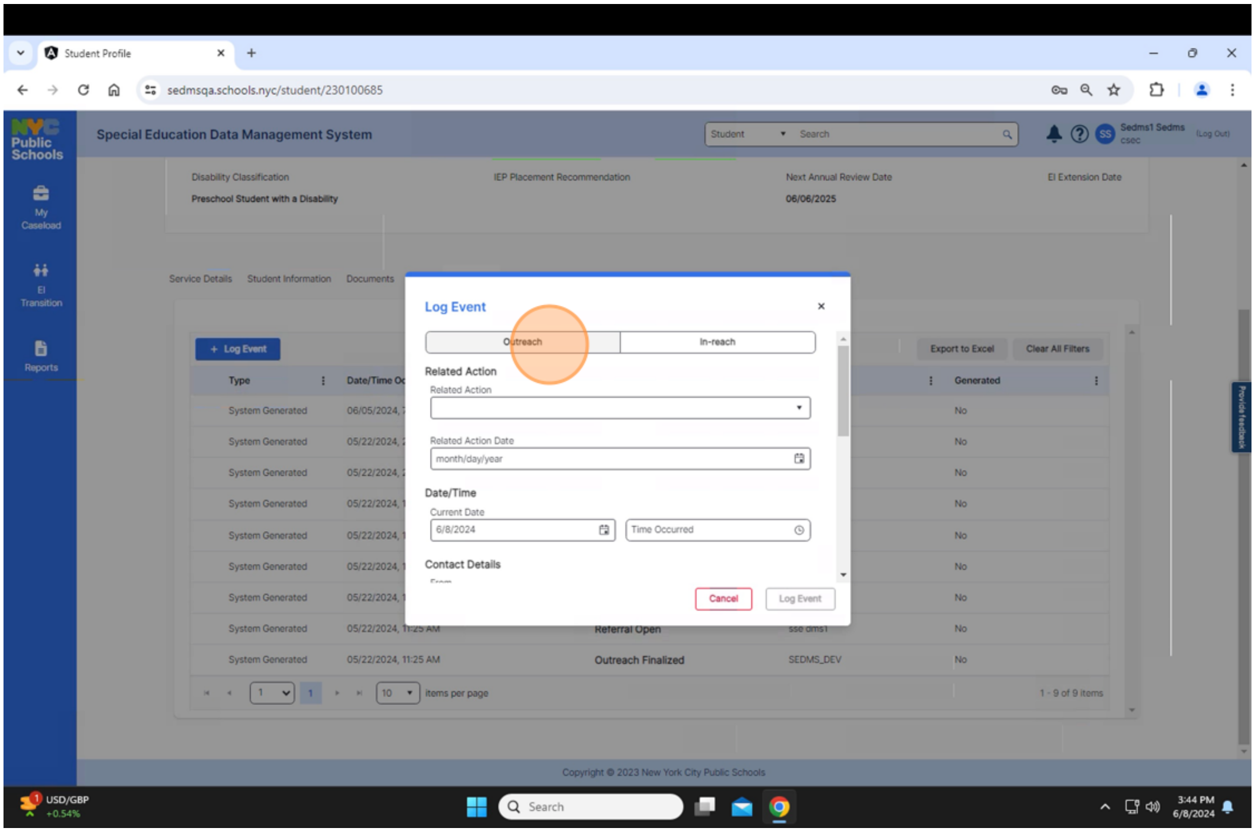
4. Once you are on the Student Profile, click on the **Events Log** tab. This log shows both user-logged interactions and system generated events. System generated events are automatically logged by ATLAS when key actions are initiated or finalized. For example, when a referral is opened, or when an initial social history is finalized.



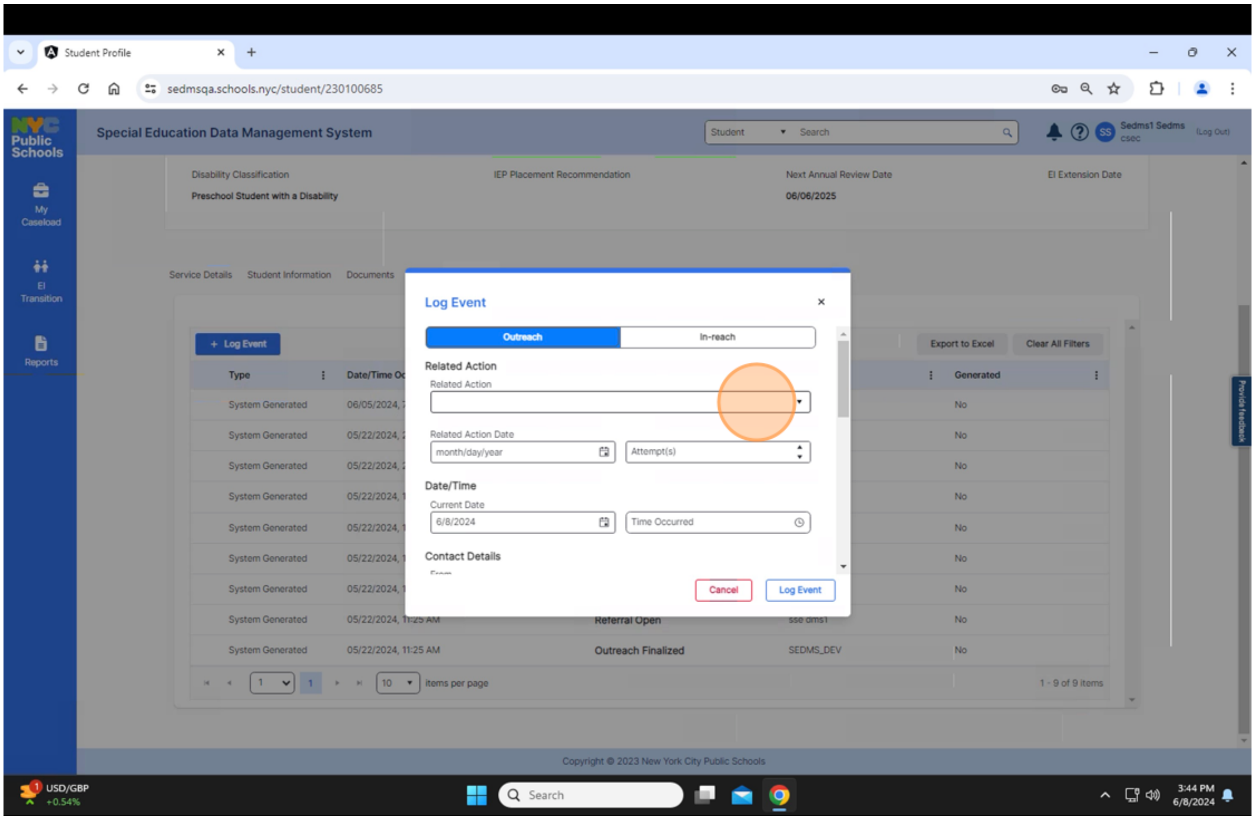
5. To log a new interaction, Click on **+Log Event** on the top left side.



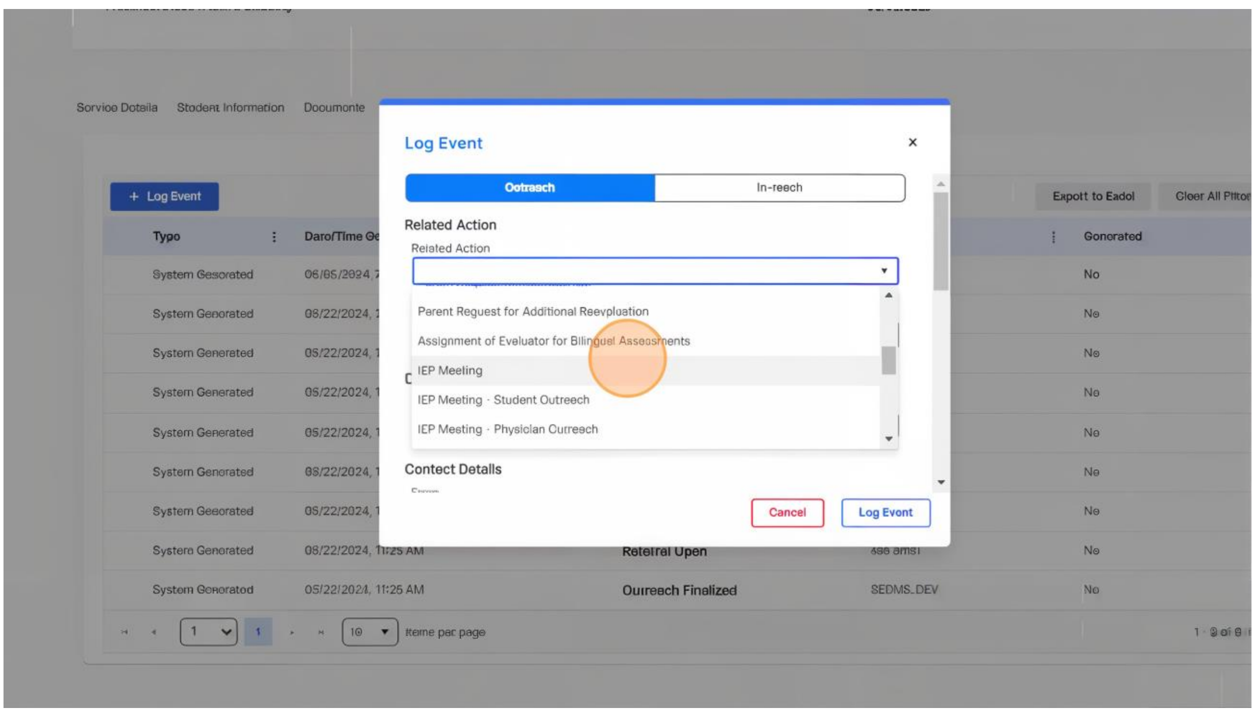
6. Indicate whether an interaction is “Outreach” (you have attempted to contact another entity – for example, you have attempted to contact a related service provider, an evaluator, or a CPSE administrator) or “Incoming” someone contacted you – for example, a parent contacts you about their child).



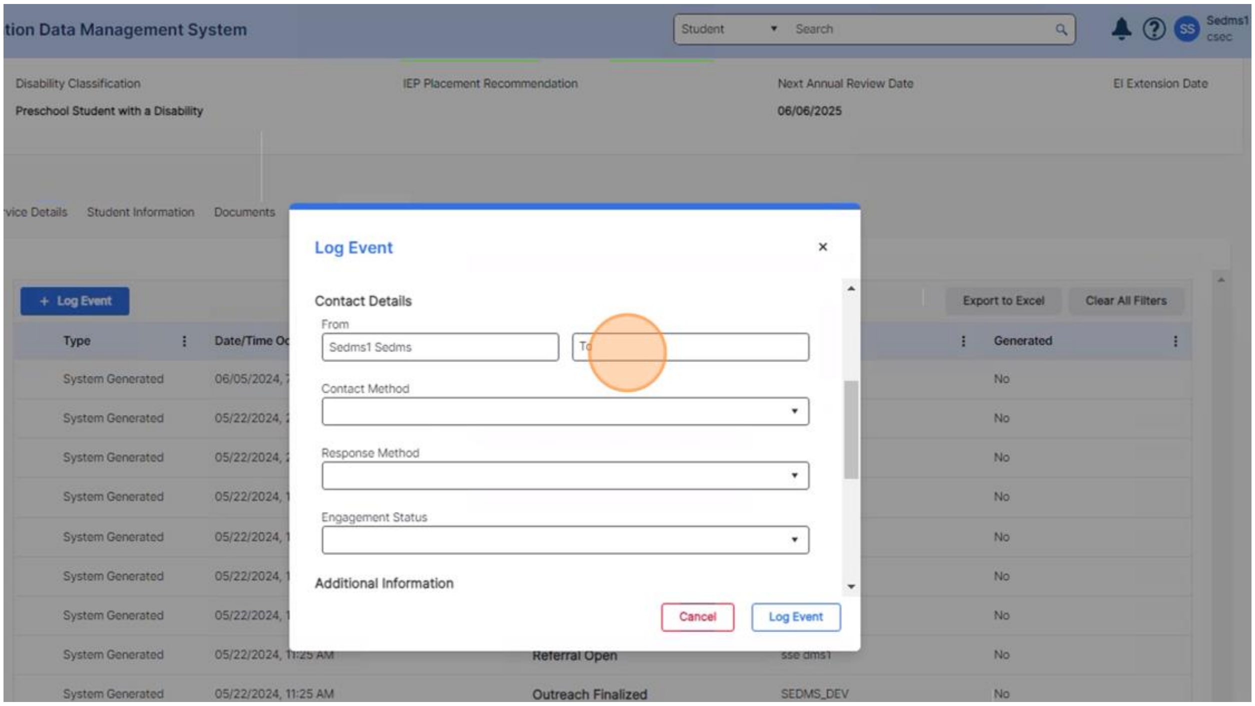
7. Then complete the Interaction details. A dialogue box will appear with fields to fill in about the interaction.



8. Use the **Related Action** dropdown to choose the most relevant action for the interaction, for example, "Initial Referral" if you contacted a parent/guardian about a new referral.

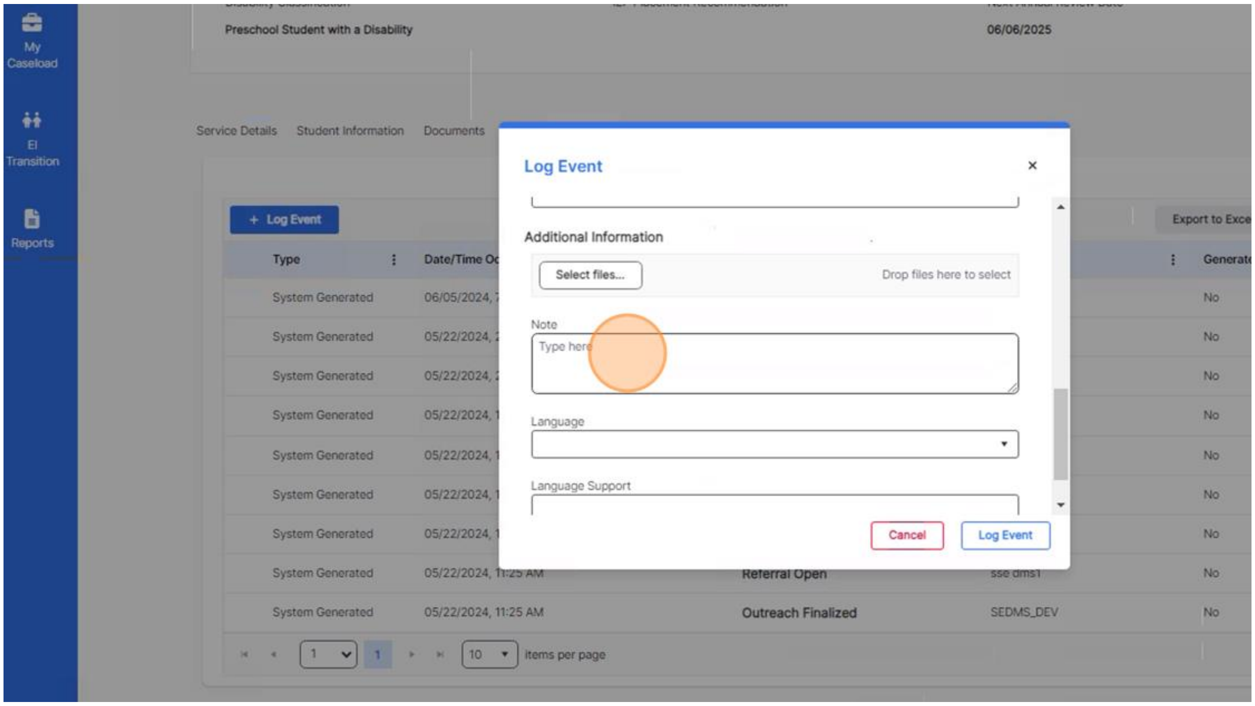


9. Your user details will automatically populate in the contact details and cannot be edited. Complete the “To” field and any other necessary information.

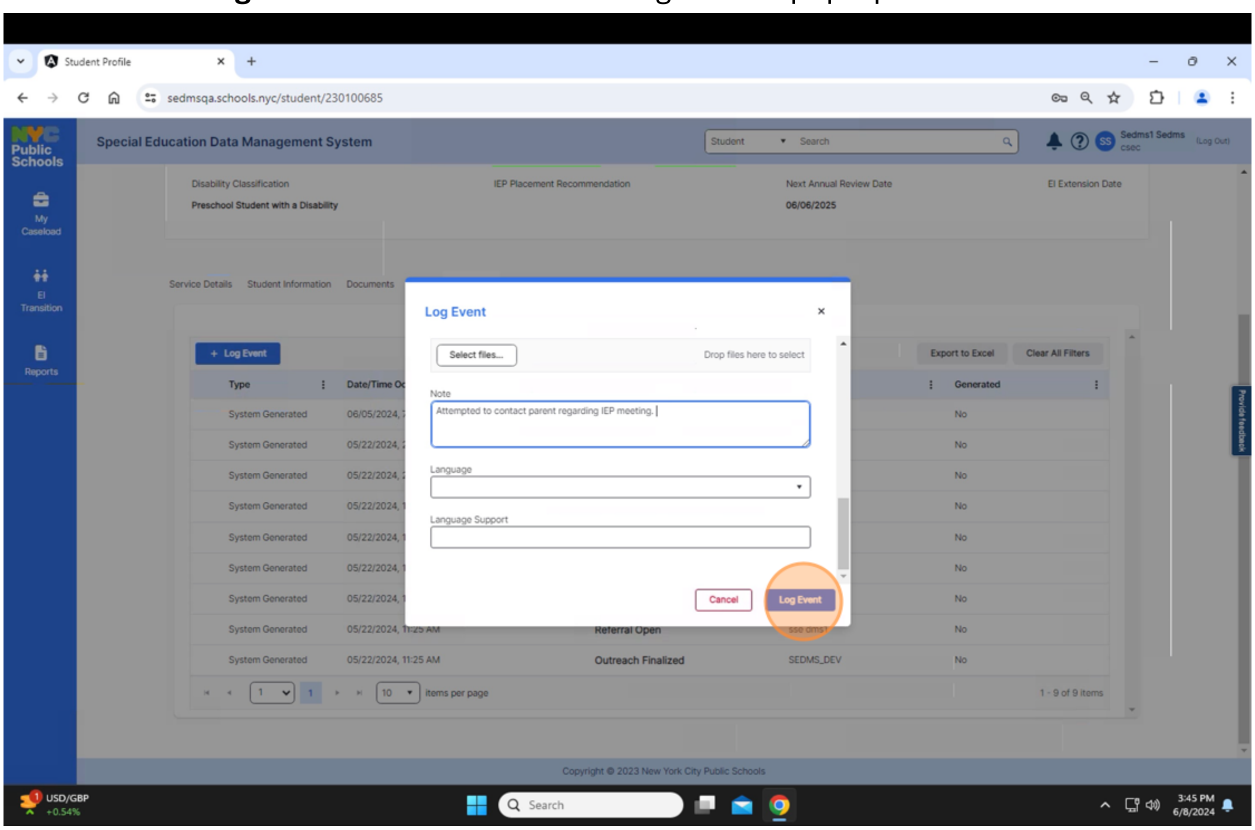


10. In the *Notes* field, include relevant information about the interaction. None of the fields are required, but filling out relevant details will help other users understand the context. Be as detailed as possible in the *Notes* section.

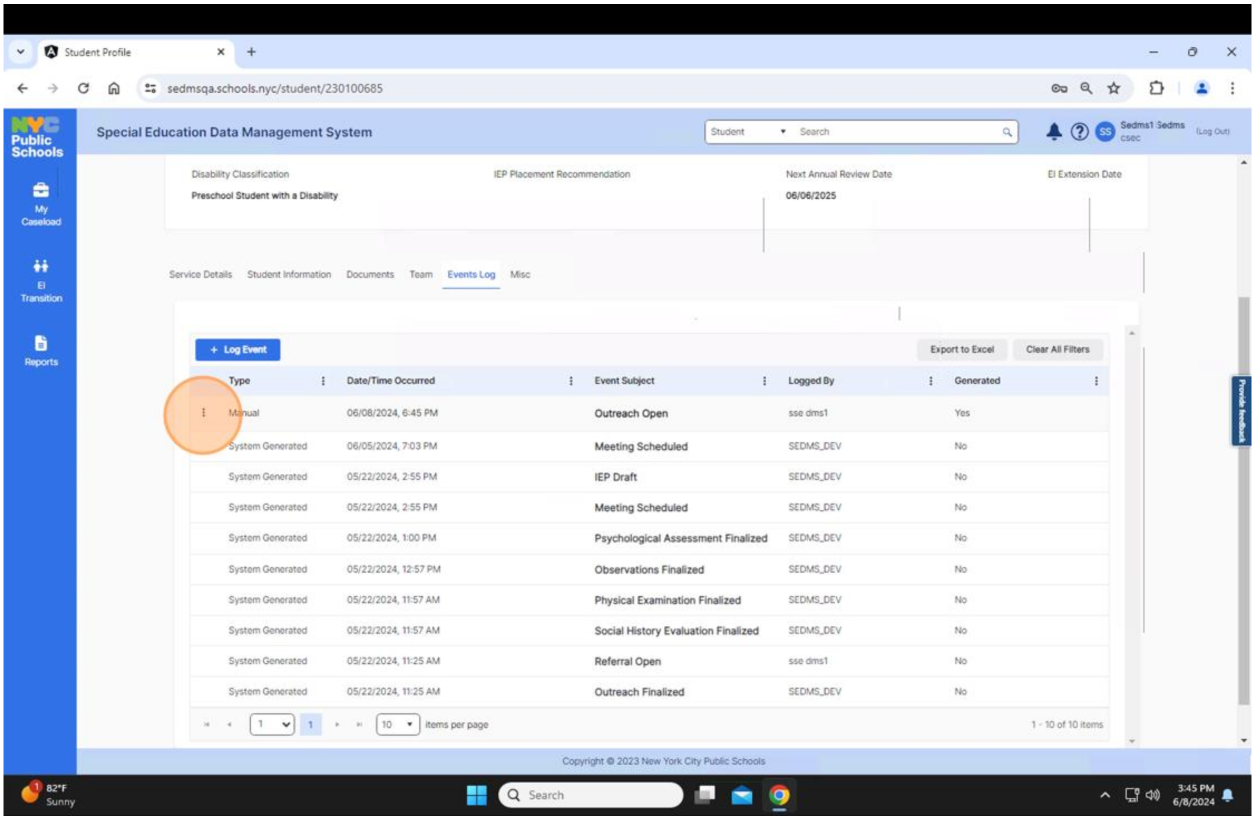
    Note: You can upload supporting documents such as a PDF of an email, or a scanned copy of a letter that was sent, but **do not** use this field to upload a student’s forms, documents related to workflows, or anything other than supporting documents that provide evidence of an interaction.



11. Click the blue **Log Event** button at the bottom right of the pop-up.

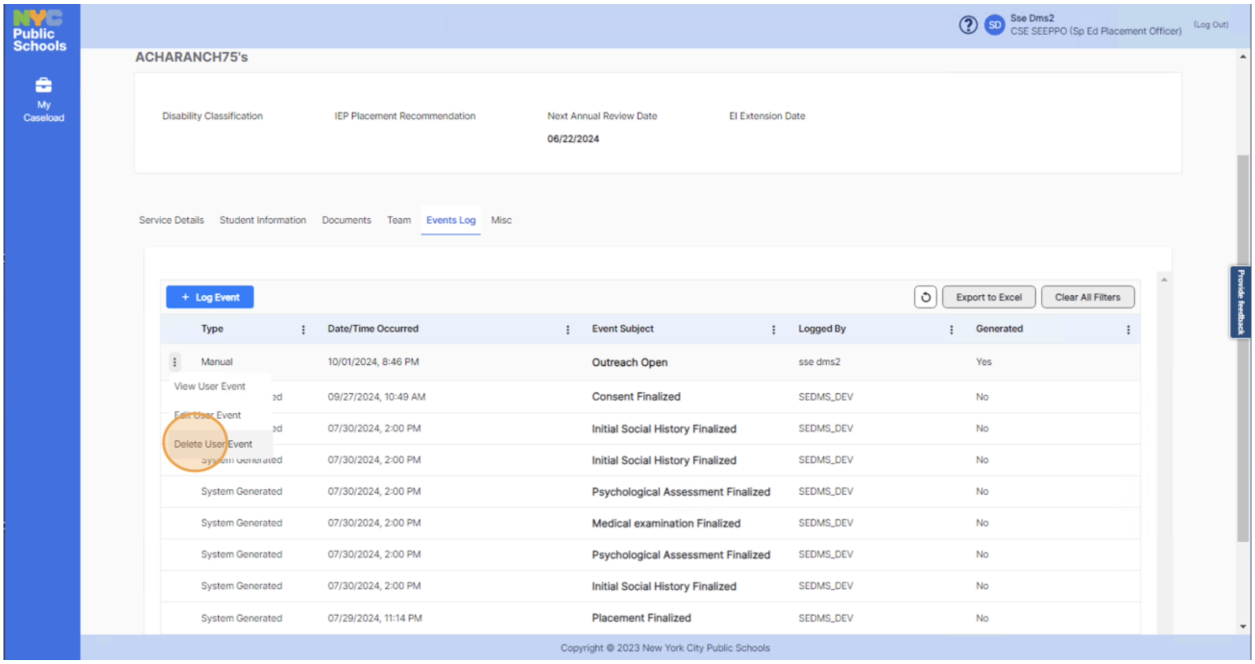


12. After you have finished logging the interaction, you will be redirected to the Events Log screen. To view additional information about user created interactions click the three vertical dots on the left side of the log.

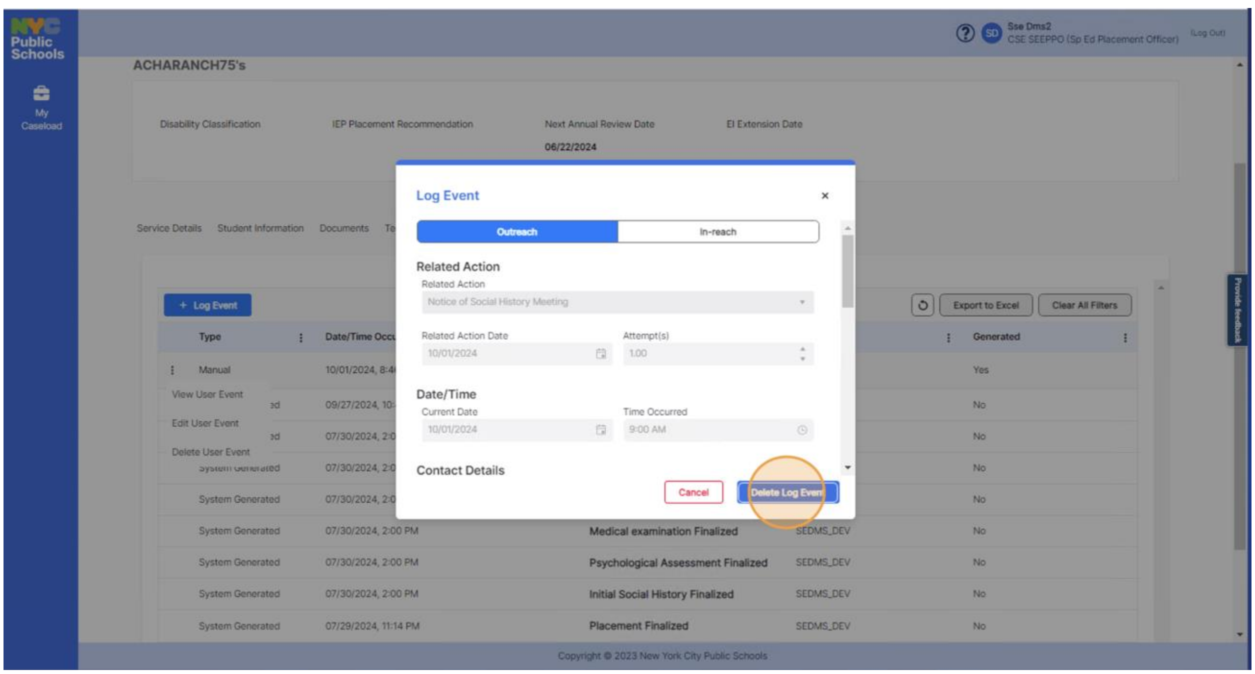


Note: System generated events do not include additional information and cannot be edited or deleted, therefore there is no option to view additional information, edit, or delete them.

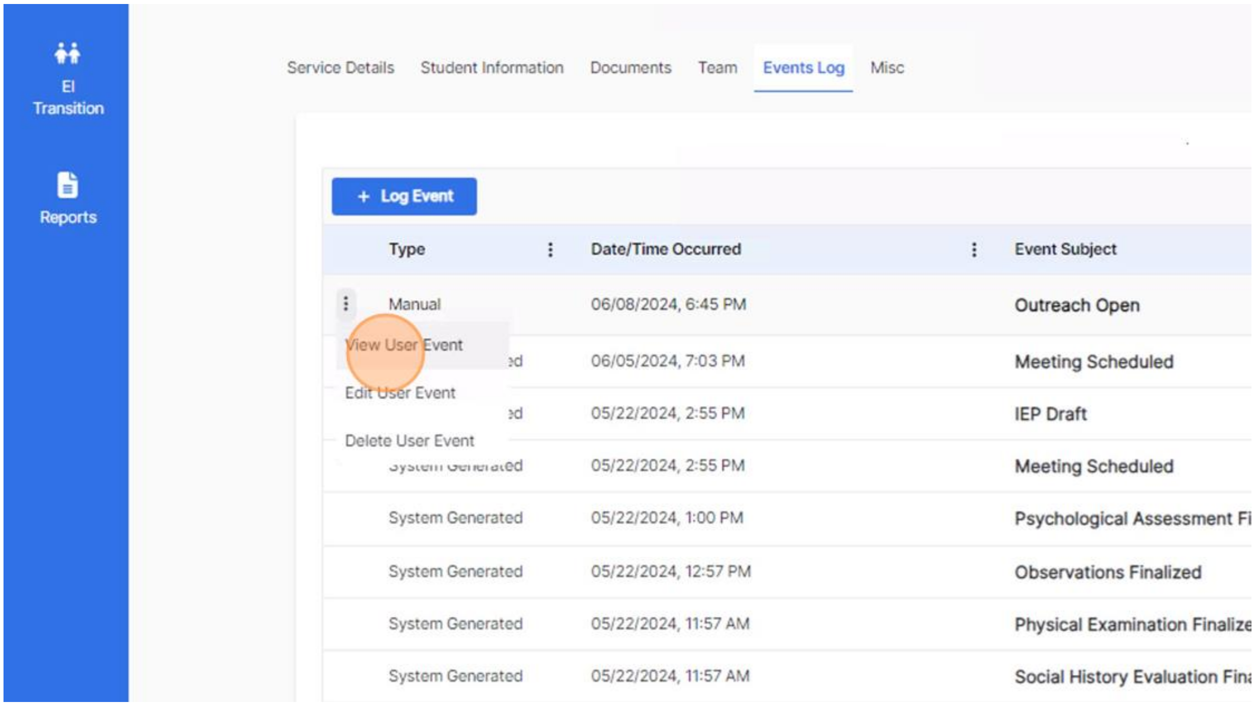
13. To view, edit or delete the logged interaction, click on the three vertical dots and choose one of the options. Users may only edit or delete interactions they created.
    - If you click **Edit User Interaction** you will return to step 7 where you can edit the information you entered previously.
    - If you wish to delete the event, click **Delete User Interaction** and then **Delete Interaction Log.**



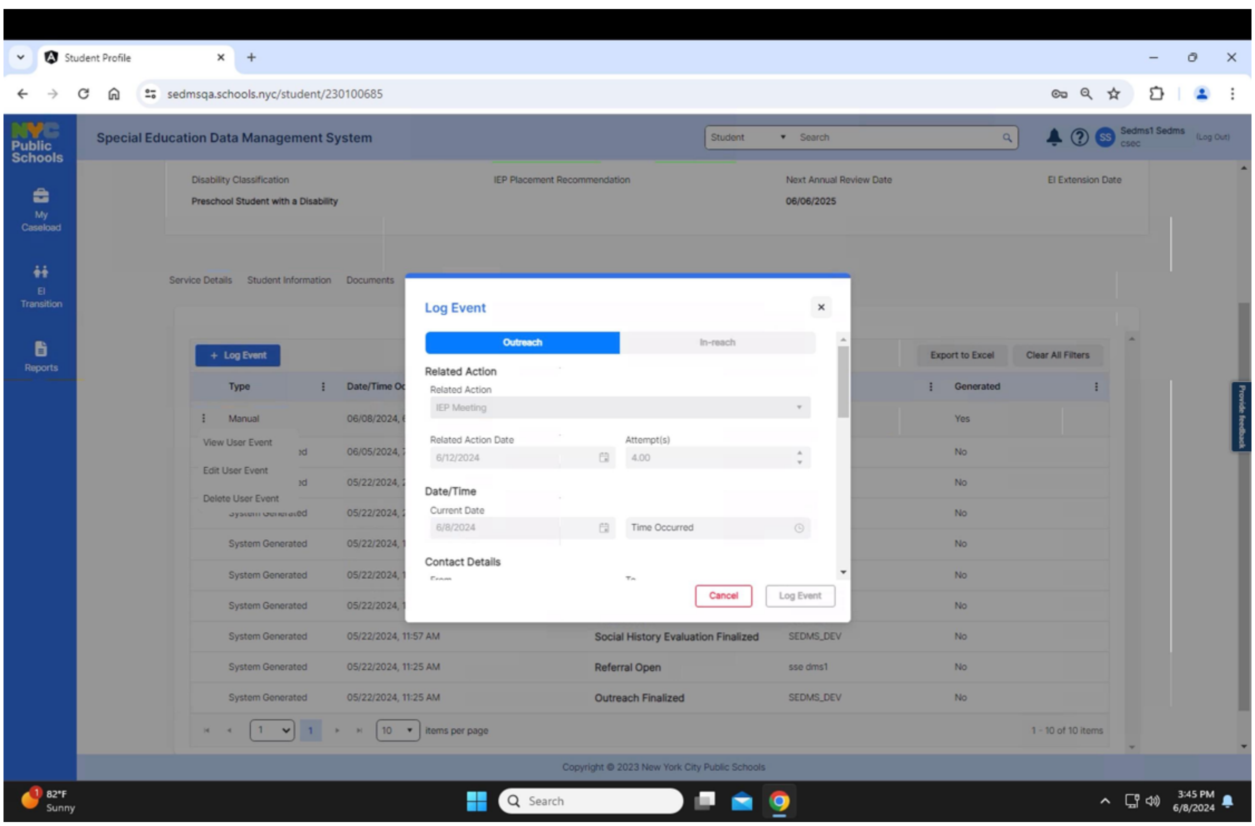
Then



- To view additional details about the interaction, click **View UserEvent** and continue to step 14.



14. When you click **View User Event** the previously logged interaction will appear in a pop-up, and you can scroll through the pop-up to review the interaction information.



15. After logging interactions or reviewing interactions, click **My Caseload** (the briefcase icon) at the top left corner of the screen to return to your caseload.