

How to View and Log Events

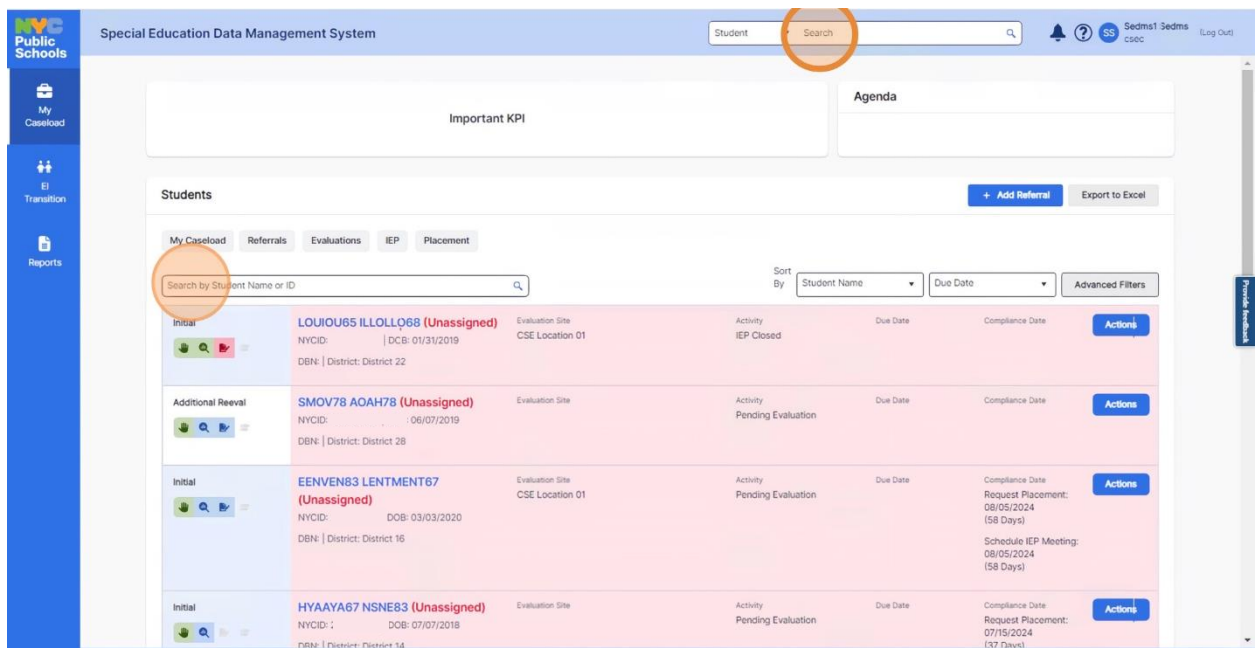
This guide provides step-by-step instructions on how to view and log interactions in ATLAS.

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.



Special Education Data Management System

Student Search

Important KPI

Agenda

Students

+ Add Referral Export to Excel

My Caseload Referrals Evaluations IEP Placement

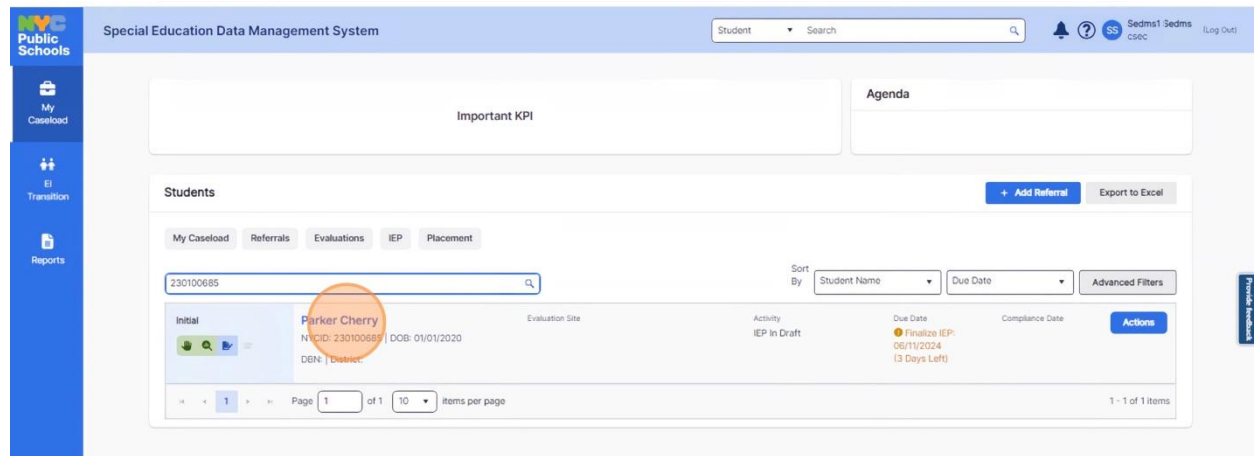
Search by Student Name or ID

Sort By Student Name Due Date Advanced Filters

Initial	NYCID	DOB	DBN	District	Evaluation Site	Activity	Due Date	Compliance Date	Actions
Initial	LOUIOU65 ILLOLLQ68 (Unassigned)	DOB: 01/31/2019	DBN: District: District 22		CSE Location 01	IEP Closed			Actions
Additional Reeval	SMOV78 AOA78 (Unassigned)	DOB: 06/07/2019	DBN: District: District 28			Pending Evaluation			Actions
Initial	EENVEN83 LENTMENT67 (Unassigned)	DOB: 03/03/2020	DBN: District: District 16		CSE Location 01	Pending Evaluation		Request Placement: 08/05/2024 (58 Days) Schedule IEP Meeting: 08/05/2024 (58 Days)	Actions
Initial	HYAAY67 NSNE83 (Unassigned)	DOB: 07/07/2018	DBN: District: District 14			Pending Evaluation		Request Placement: 07/15/2024 (37 Days)	Actions

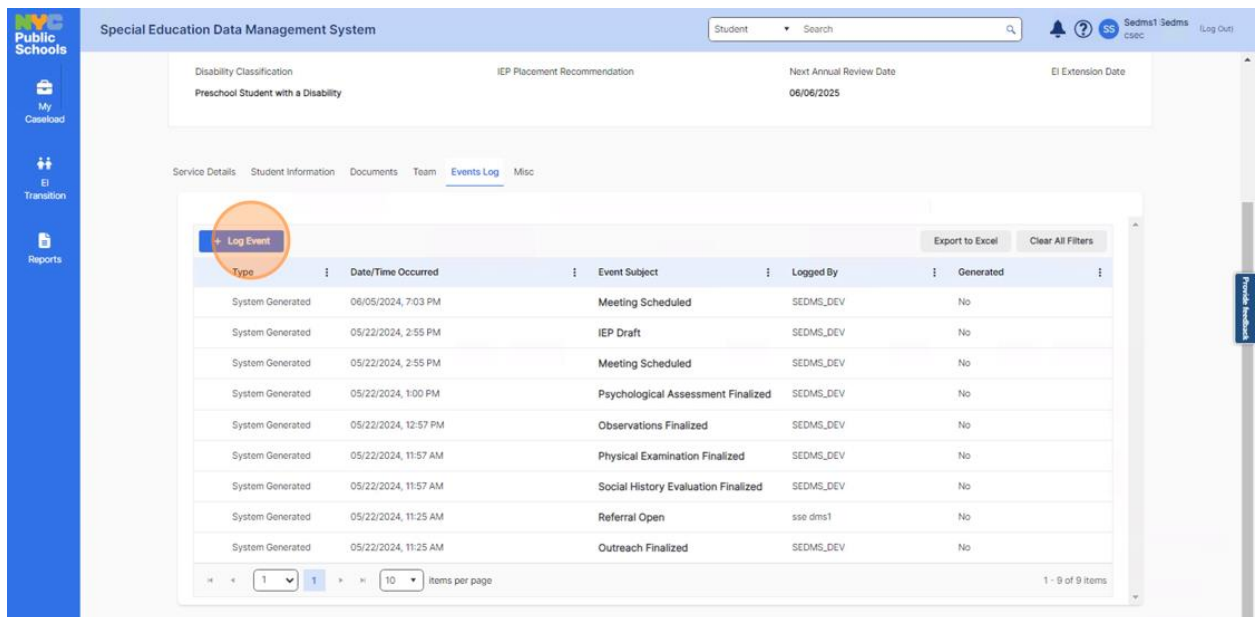
Tip: If the student doesn't appear in your search, try unchecking the **My Caseload** button at the top of the grid. The button will be blue when it is enabled and gray when it is disabled. Some users can only see students assigned to their caseload. In that case, unchecking **My Caseload** would not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

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



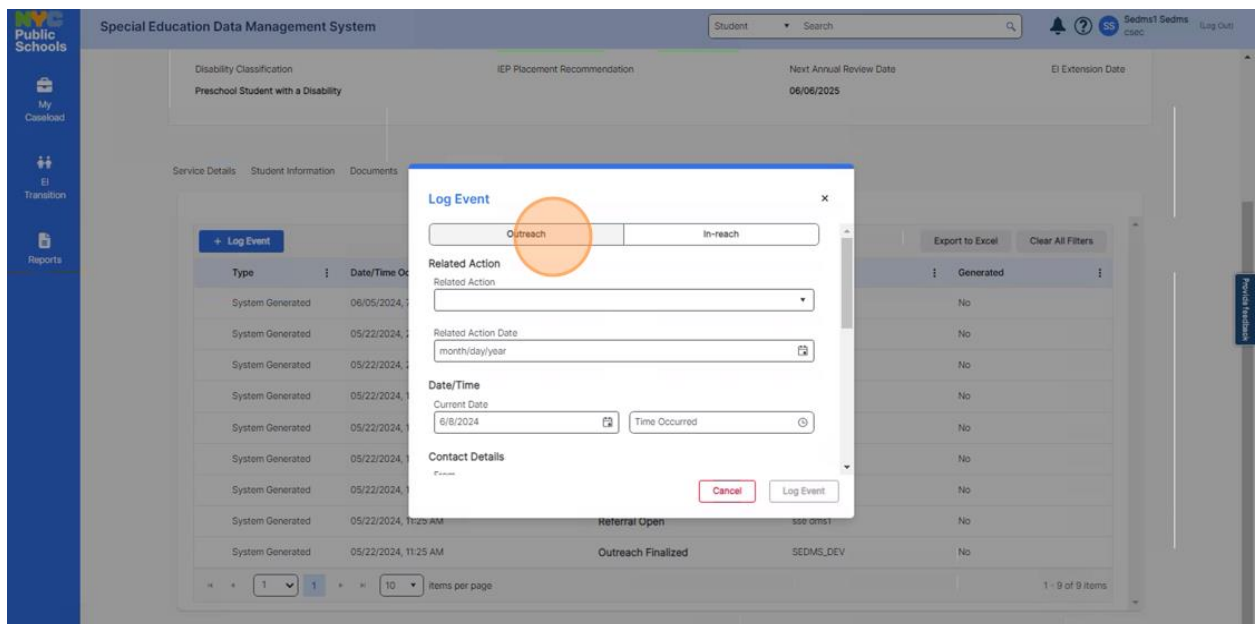
- Once you are on the Student Profile, click on the **Events Log** tab. This log shows both user-logged interactions and system generated events. System generated events are automatically logged by ATLAS when key actions are initiated or finalized. For example, when a referral is opened, or when an initial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

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



Type	Date/Time Occurred	Event Subject	Logged By	Generated
System Generated	06/05/2024, 7:03 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	IEP Draft	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 1:00 PM	Psychological Assessment Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 12:57 PM	Observations Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Physical Examination Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Social History Evaluation Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:25 AM	Referral Open	see dms1	No
System Generated	05/22/2024, 11:25 AM	Outreach Finalized	SEDMS_DEV	No

- 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).



Log Event

☒ Outreach
 ☐ In-reach

Related Action

Related Action Date

Date/Time

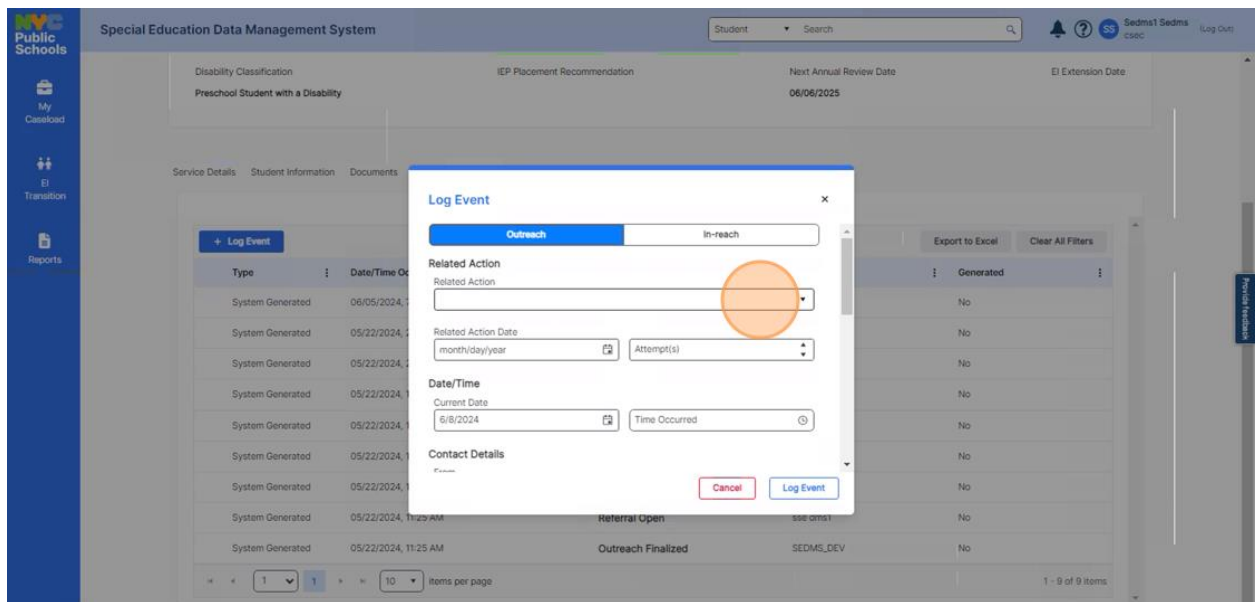
Current Date: 6/8/2024

Time Occurred

Contact Details

Cancel Log Event

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



Special Education Data Management System

Disability Classification: Preschool Student with a Disability

IEP Placement Recommendation

Next Annual Review Date: 06/06/2025

Log Event

Outreach | In-reach

Related Action

Related Action Date: month/day/year

Attempt(s)

Date/Time

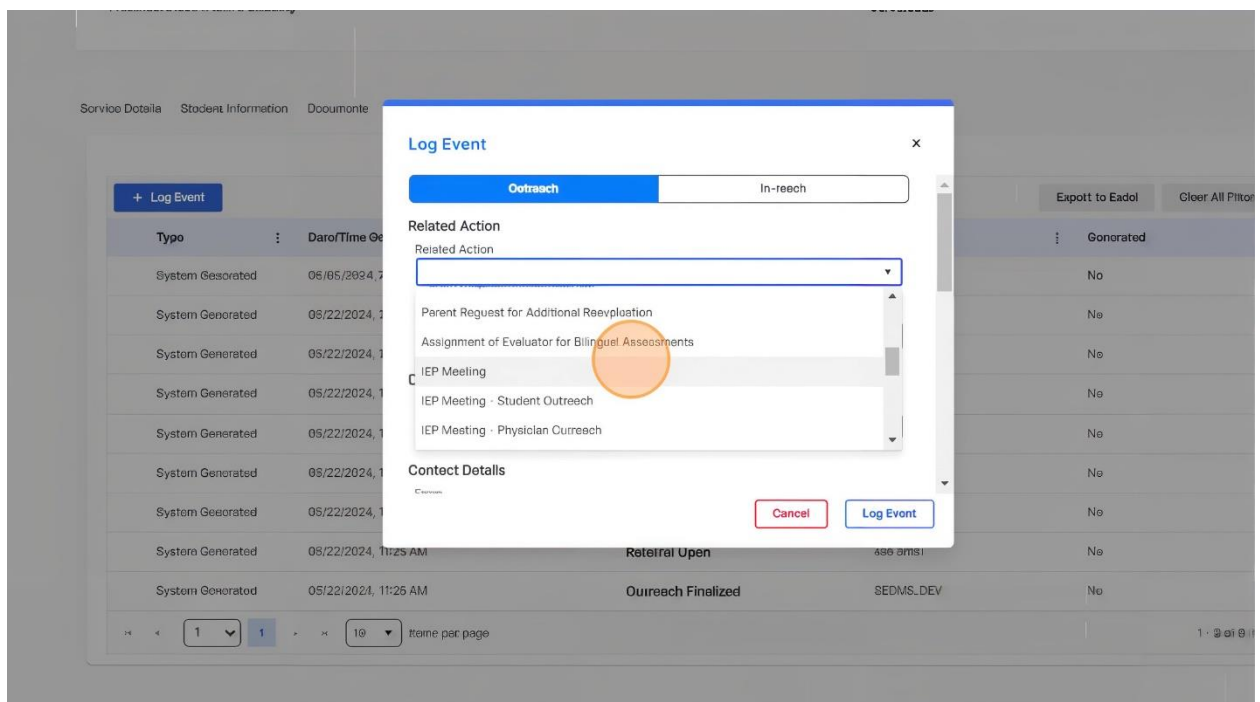
Current Date: 6/8/2024

Time Occurred

Contact Details

Cancel | Log Event

- 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.



Log Event

Outreach | In-reach

Related Action

Related Action

Parent Request for Additional Reevaluation

Assignment of Evaluator for Bilingual Assessments

IEP Meeting

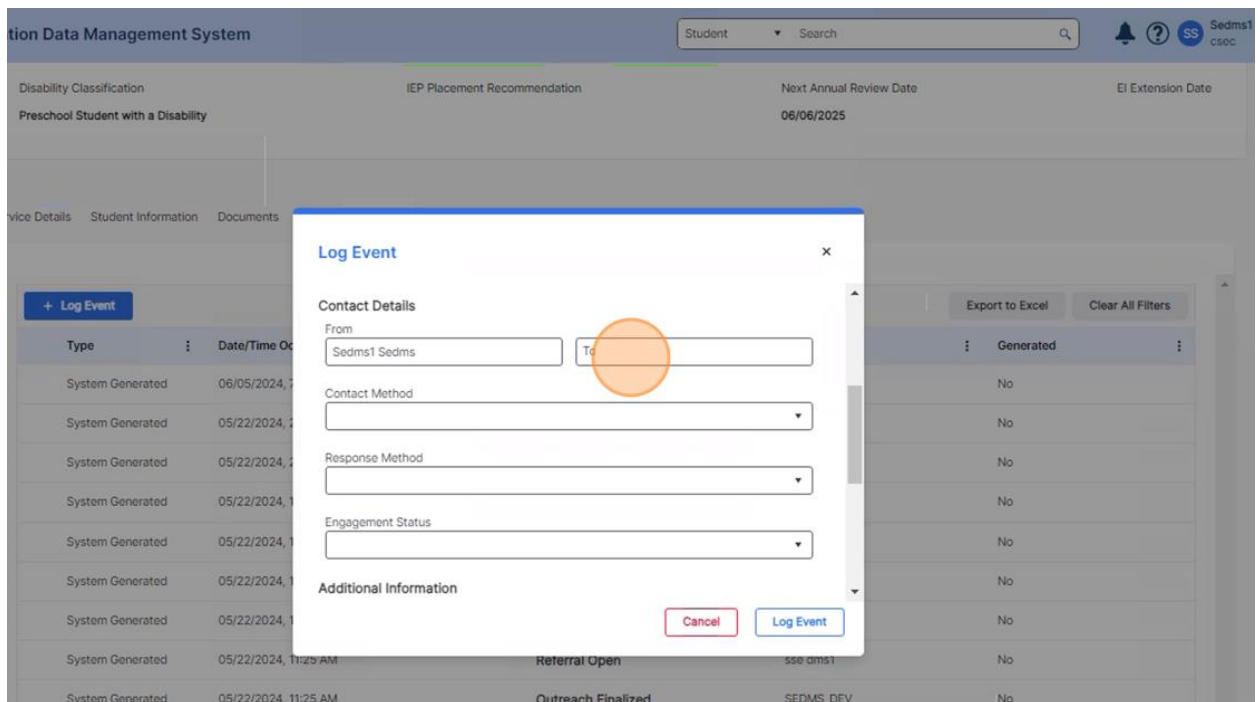
IEP Meeting - Student Outreach

IEP Meeting - Physician Outreach

Contact Details

Cancel | Log Event

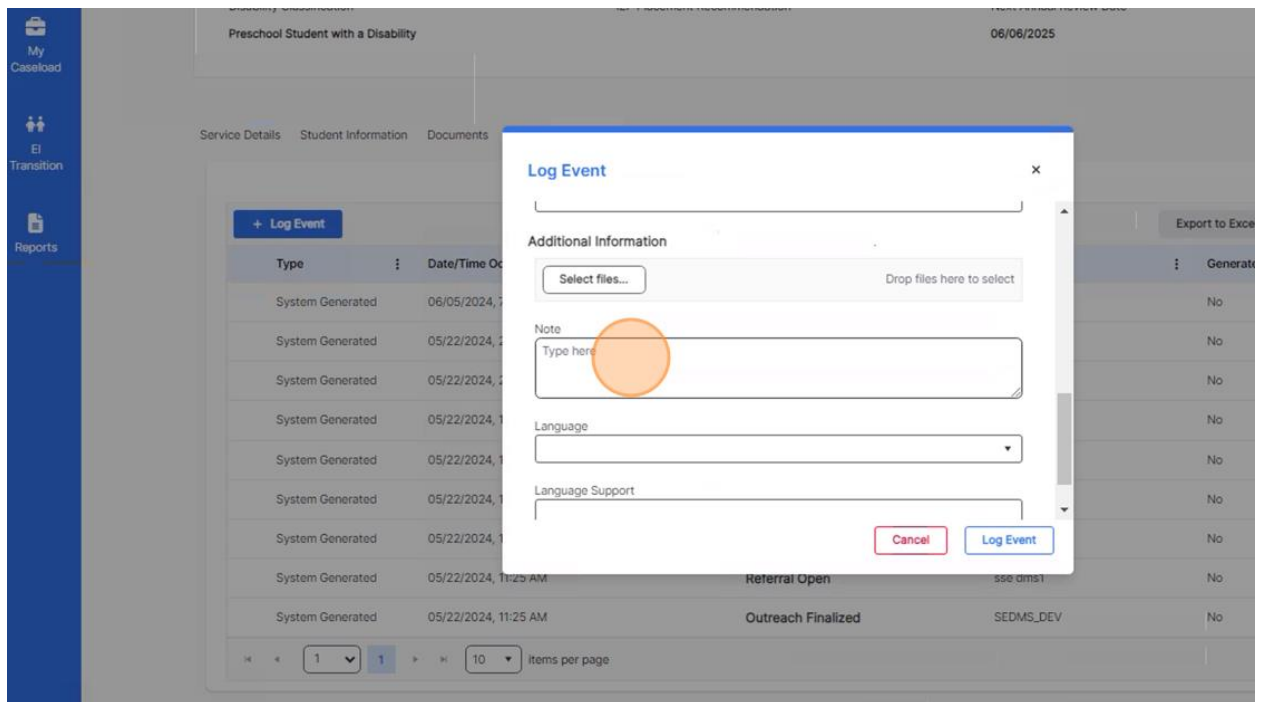
- Your user details will automatically populate in the contact details and cannot be edited. Complete the “To” field and any other necessary information.



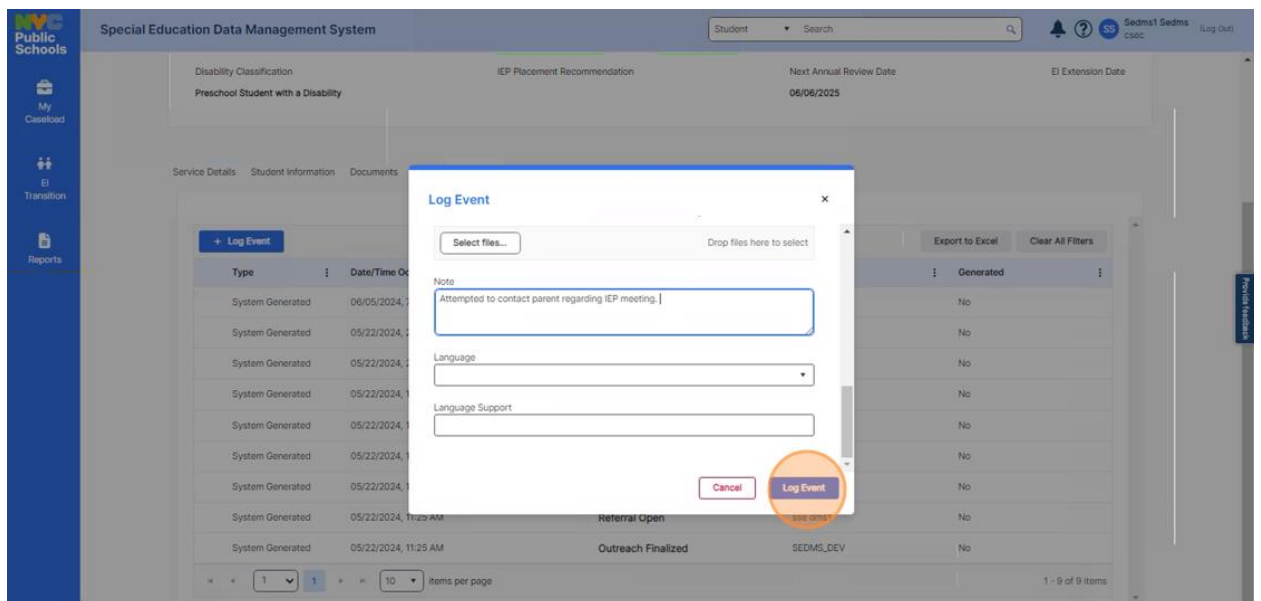
The screenshot shows the 'Student Data Management System' interface. At the top, there's a header with 'Student' and a search bar. Below the header, there are tabs for 'Disability Classification', 'IEP Placement Recommendation', 'Next Annual Review Date', and 'EI Extension Date'. The 'Disability Classification' tab is active, showing 'Preschool Student with a Disability'. Below this, there are tabs for 'Service Details', 'Student Information', and 'Documents'. A '+ Log Event' button is visible. A modal form titled 'Log Event' is open, showing fields for 'Contact Details' (From, To, Contact Method, Response Method, Engagement Status) and 'Additional Information'. A red circle highlights the 'To' field. The background shows a table with columns for 'Type', 'Date/Time Occurred', and 'Generated'.

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.

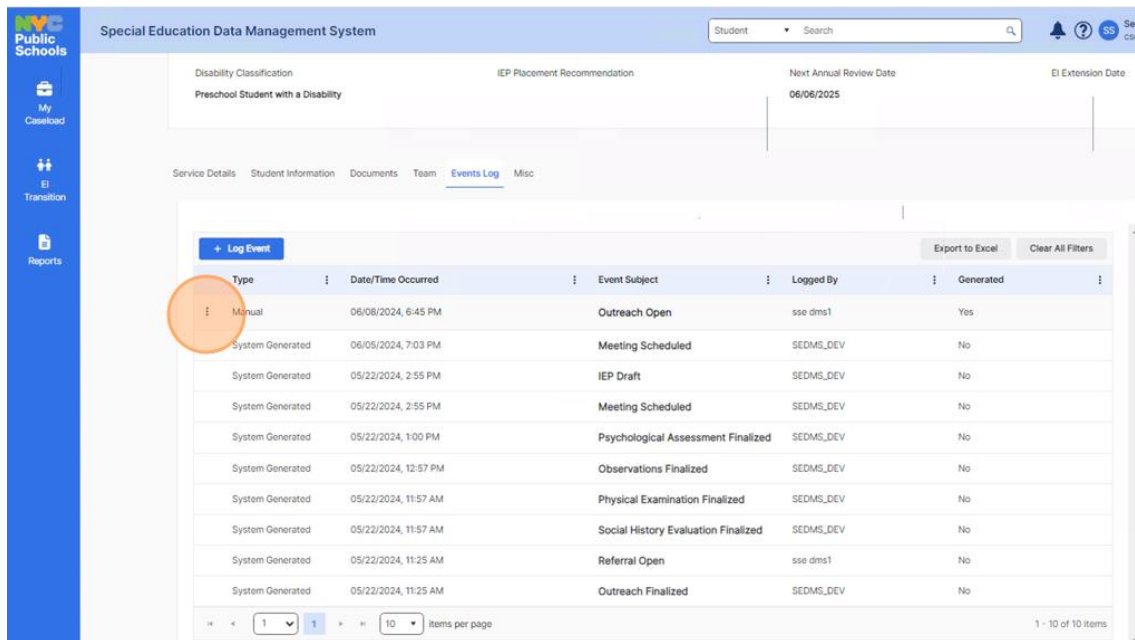
Note: You can upload supporting documents such as a PDF of an email, or a scanned copy of a letter that was sent, but **do not** use this field to upload a student's forms, documents related to workflows, or anything other than supporting documents that provide evidence of an interaction.



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.



Special Education Data Management System

Student Search

Disability Classification: Preschool Student with a Disability

IEP Placement Recommendation:

Next Annual Review Date: 06/06/2025

EI Extension Date:

Service Details Student Information Documents Team **Events Log** Misc

+ Log Event Export to Excel Clear All Filters

Type	Date/Time Occurred	Event Subject	Logged By	Generated
Manual	06/08/2024, 6:45 PM	Outreach Open	sse dms1	Yes
System Generated	06/05/2024, 7:03 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	IEP Draft	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 1:00 PM	Psychological Assessment Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 12:57 PM	Observations Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Physical Examination Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Social History Evaluation Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:25 AM	Referral Open	sse dms1	No
System Generated	05/22/2024, 11:25 AM	Outreach Finalized	SEDMS_DEV	No

1 - 10 of 10 items

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**.

ACHARANCH75's

Disability Classification: IEP Placement Recommendation: Next Annual Review Date: 06/22/2024

Service Details Student Information Documents Team **Events Log** Misc

+ Log Event Export to Excel Clear All Filters

Type	Date/Time Occurred	Event Subject	Logged By	Generated
Manual	10/01/2024, 8:46 PM	Outreach Open	sse dms2	Yes
View User Event	09/27/2024, 10:49 AM	Consent Finalized	SEDMS_DEV	No
Edit User Event	07/30/2024, 2:00 PM	Initial Social History Finalized	SEDMS_DEV	No
Delete User Event	07/30/2024, 2:00 PM	Initial Social History Finalized	SEDMS_DEV	No
System Generated	07/30/2024, 2:00 PM	Psychological Assessment Finalized	SEDMS_DEV	No
System Generated	07/30/2024, 2:00 PM	Medical examination Finalized	SEDMS_DEV	No
System Generated	07/30/2024, 2:00 PM	Psychological Assessment Finalized	SEDMS_DEV	No
System Generated	07/30/2024, 2:00 PM	Initial Social History Finalized	SEDMS_DEV	No
System Generated	07/29/2024, 11:14 PM	Placement Finalized	SEDMS_DEV	No

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Then

ACHARANCH75's

Disability Classification: IEP Placement Recommendation: Next Annual Review Date: 06/22/2024

Service Details Student Information Documents Team **Events Log** Misc

+ Log Event Export to Excel Clear All Filters

Log Event

Outreach In-reach

Related Action: Notice of Social History Meeting

Related Action Date: 10/01/2024 Attempt(s): 1.00

Date/Time: Current Date: 10/01/2024 Time Occurred: 9:00 AM

Contact Details

Cancel Delete Log Event

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14. To view additional details about the interaction, click **View User Event** and continue to the next step.

EI Transition

Reports

Service Details

Student Information

Documents

Team

Events Log

Misc

+ Log Event

Type	Date/Time Occurred	Event Subject
Manual	06/08/2024, 6:45 PM	Outreach Open
View User Event	06/05/2024, 7:03 PM	Meeting Scheduled
Edit User Event	05/22/2024, 2:55 PM	IEP Draft
Delete User Event	05/22/2024, 2:55 PM	Meeting Scheduled
System Generated	05/22/2024, 1:00 PM	Psychological Assessment Fi
System Generated	05/22/2024, 12:57 PM	Observations Finalized
System Generated	05/22/2024, 11:57 AM	Physical Examination Finalize
System Generated	05/22/2024, 11:57 AM	Social History Evaluation Fini

15. 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.

Student Profile

sedmsqa.schools.nyc/student/230100685

Special Education Data Management System

Student Search

Disability Classification: Preschool Student with a Disability

IEP Placement Recommendation

Next Annual Review Date: 06/06/2025

EI Extension Date

My Caseload

EI Transition

Reports

Service Details

Student Information

Documents

+ Log Event

Type	Date/Time Occurred	Event Subject
Manual	06/08/2024, 6:45 PM	Outreach Open
View User Event	06/05/2024, 7:03 PM	Meeting Scheduled
Edit User Event	05/22/2024, 2:55 PM	IEP Draft
Delete User Event	05/22/2024, 2:55 PM	Meeting Scheduled
System Generated	05/22/2024, 1:00 PM	Psychological Assessment Fi
System Generated	05/22/2024, 12:57 PM	Observations Finalized
System Generated	05/22/2024, 11:57 AM	Physical Examination Finalize
System Generated	05/22/2024, 11:57 AM	Social History Evaluation Fini

Log Event

Outreach

In-reach

Related Action

Related Action Date

Attempt(s)

Date/Time

Current Date

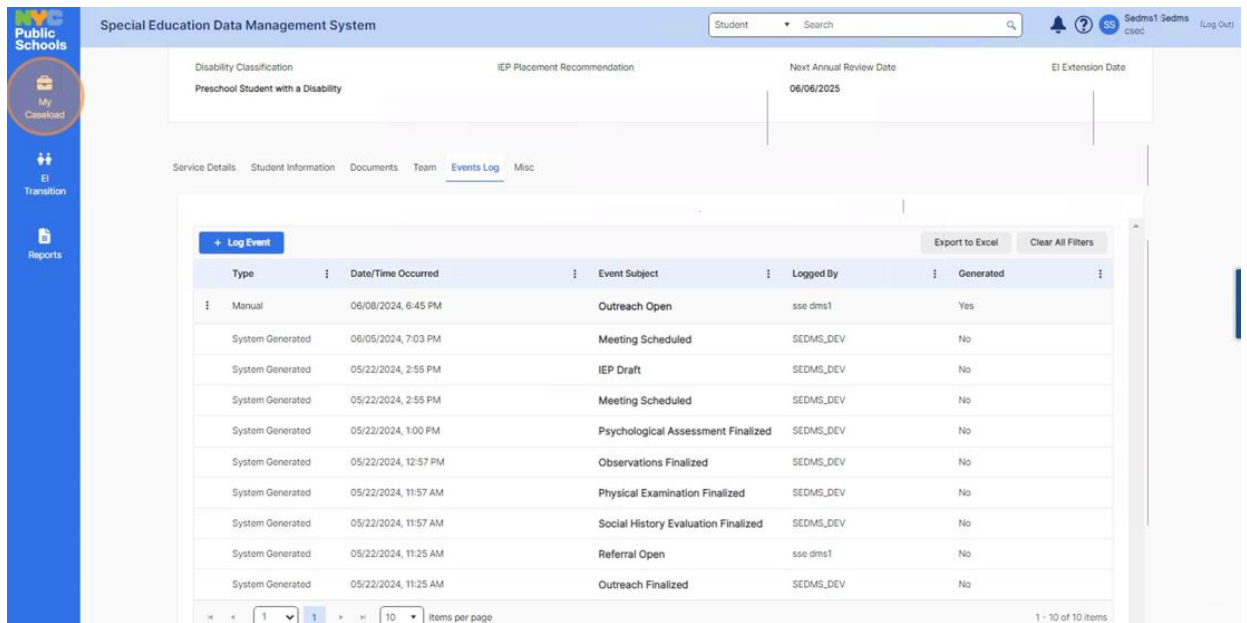
Time Occurred

Contact Details

Cancel

Log Event

16. 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.



The screenshot shows the 'Special Education Data Management System' interface. On the left sidebar, the 'My Caseload' button (briefcase icon) is highlighted. The main content area displays student information for 'Preschool Student with a Disability' and a table of events.

Type	Date/Time Occurred	Event Subject	Logged By	Generated
Manual	06/08/2024, 6:45 PM	Outreach Open	sse dms1	Yes
System Generated	06/05/2024, 7:03 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	IEP Draft	SEDMS_DEV	No
System Generated	05/22/2024, 2:55 PM	Meeting Scheduled	SEDMS_DEV	No
System Generated	05/22/2024, 1:00 PM	Psychological Assessment Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 12:57 PM	Observations Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Physical Examination Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:57 AM	Social History Evaluation Finalized	SEDMS_DEV	No
System Generated	05/22/2024, 11:25 AM	Referral Open	sse dms1	No
System Generated	05/22/2024, 11:25 AM	Outreach Finalized	SEDMS_DEV	No