

Navigating Student Documents

This guide provides simple step-by-step instructions to help you navigate and access student documents.

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.

 Log in to ATLAS. On the My Caseload dashboard, search for the student by First Name, Last Name, or Student ID. You can use the search box above the student list or the box at the top right of the ATLAS screen.

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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.

2. After the student has been returned by the search, click on the student's name in blue to be directed to their **Student Profile**.



Students				+ Add Referral	Export to Excel
My Caseload Referrals Evaluations IEP Placement					
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3. Once you have navigated to a student's profile, click on the **Documents** tab.

SINE74 BE NYC ID: 2496	ERA67 58493 DOB: 02/18/20	19 Age: 5		hool (4Q700] Universal Pre-I	к С.В.О.	Grade Preschool	/
			View Parent	Guardian Information			
Service Details	Student Information	Documents Team	Events Log				
Programs				Related Servi	ces		
Special Class				Physical Therapy			
English	5 days per week Time(s)	×	05 (11)	Spanish	C 2 Time(s) a Week	X	Group
Special Class I	ntegrated Setting(SCIS)						
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4. 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".



My Caseload	SINE74 BERA67 NYC ID: 249658493 DOB: 0.	2/18/2019 Age: 5	School [24Q700] Univers
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c El Transition	Service Details Student Inform	nation Documents Team	Events Log
E Reports	School Year: 2023-2024	2	
	Evaluations	1	
	Date Created	Document Name	Document Type
	05/22/2024	ddddddddd <u>dppppppp</u>	Feeding Assessment
	05/23/2024	Central Auditory Processin	Central Auditory Processin

5. On the *Documents* tab, click on the triangle to the right of the document category header (for example, *Placement* or *IEP*) to expand the folders and view associated documents for the student.

EI Transition	IILY69's Student Profile		Manage Student
Reports	Disability Classification IEP Placement Recomm Preschool Student with a Disability	endation Next Annual Review Date 19/06/2025	El Extension Date
	Service Details Student Information Documents Team Events Log Misc School Year: 2023-2024 •		Prevent testing
	 Placement EP 		

6. Once expanded, the student's available documents appear in a list. Users can view details such as **Date Created**, **Document Name**, **Document Type**, **Uploaded By**, or **Actions**. **Action** available include **Print**, **Download**, and **Delete**, which are each represented by an icon.



Disability Classification Preschool Student with a Dis		EP Placement Recommendation	Next Annual Review Date 19/06/2025		EI Extension D
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Note: The delete icon will only be available to users with deletion rights.

7. Click on the name of the document in blue under *Document Name* to open the document.

Date Created	Document Name	Document Type	Uploaded
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05/23/2024	Central Auditory Processin	Central Auditory Processin	SEDMS_Ap
05/22/2024	Feeding Assessment: 2496	Feeding Assessment	SEDMS_Ap

8. The finalized document will open as a PDF in a new tab. 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.



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Allow National State Sta	Public	Â
	CapdAssessment	
	Dates of Assessment :	
	Student Name : SINE74 BERA67	
	NYC ID: 249658493	
	Date of Birth: 02/18/2019	
	Grade : INFANTS	
	Language of Assessment : English	
	Sources of testing/interviews and/or other investigative activities	
	Findings	
	Summary and Conclusions	
	Evaluator Information	
	This is to affirm that I personally conducted the enclosed Assessment in its entirety and prepared the accompanying written report and solely responsible for its contents.	

9. The actions available for each document are *Print*, *Download*, and *Delete*, which are each represented by an icon. To print the document, click on the **Print** icon (the first icon, which resembles a printer) under *Action*.

Public Schools	SEDMS	Student	 Search 			edms1 Sedms (Log Out) sec
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	05/23/2024	Central Auditory Processin	Central Auditory Processin	SEDMS_App	⊖ ± €	
	05/22/2024	Feeding Assessment: 2496	Feeding Assessment	SEDMS_App	8 ± 1	

10. 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



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f09158d0-1312-4444-b0	Public	Print	1 sheet of paper	ŧ	÷	
	CapdAssessment Dates of Assessment :	Destination	Adobe PDF *			
	Student Name : GINE74 BERA67 NYC ID : 249655483 Date of Binth : 02/15/2019	Pages	All			
Barten State and	Orade : INF/NTS Language of Assessment : English Sources of testing/interviews and/or other investigative activities	Color	Color *			
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	Summary and Conclusions					
	Evaluator Information This is to affirm that 1 personally conducted the enclosed Assessment in the entirety and prepared the accompanying written report and salely responsible for its contents.					
	Name: Vennon Magauran Telephone #: 111111111 NYS License #: test Deciptine: 2 Provider Type: Internal Assignment					
	Language : English Date of Report : 0523/2024 12:35:24					

Student Profile tab at the top of your browser or simply close the PDF tab.

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

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Public Schools	SEDMS	Student	 Search 		Assessment_ 249658493.pdf 64.6 K8 • Done	.og Cit)
My Caseload	SINE74 BERA67 NYC ID: 249658493 DOI	3: 02/18/2019 Age: 5	School [24Q700] Universa	I Pre-K C.B.O.	Grade Preschool	1
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12. 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.



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13. 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.

My Caseload	SINE74 BERA67 NYC ID: 249658493 DOB:	02/18/2019 Age: 5	School [24Q700] Universal Pre-K C.B.O.		Grade Preschool	1	
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