

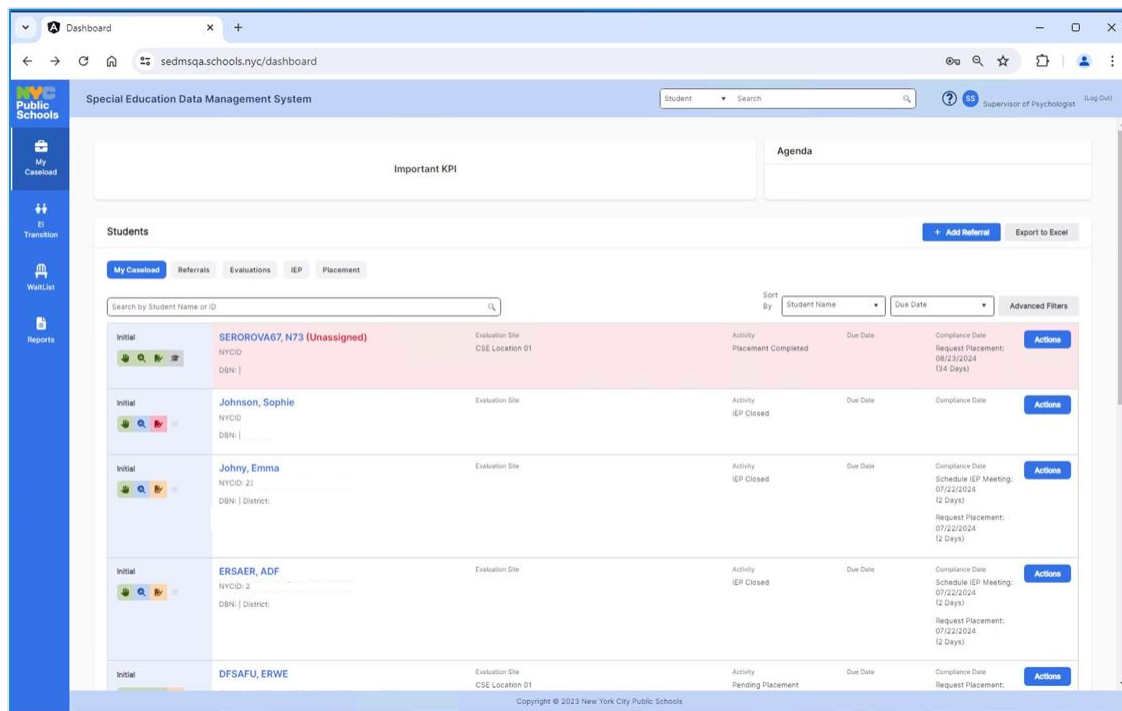
How to Complete the Social History Package

This guide provides clear, step-by-step instructions for completing the CPSE Package in ATLAS. It covers how to navigate each section, fill out required forms, and upload necessary documents, culminating in finalizing and sending the package.

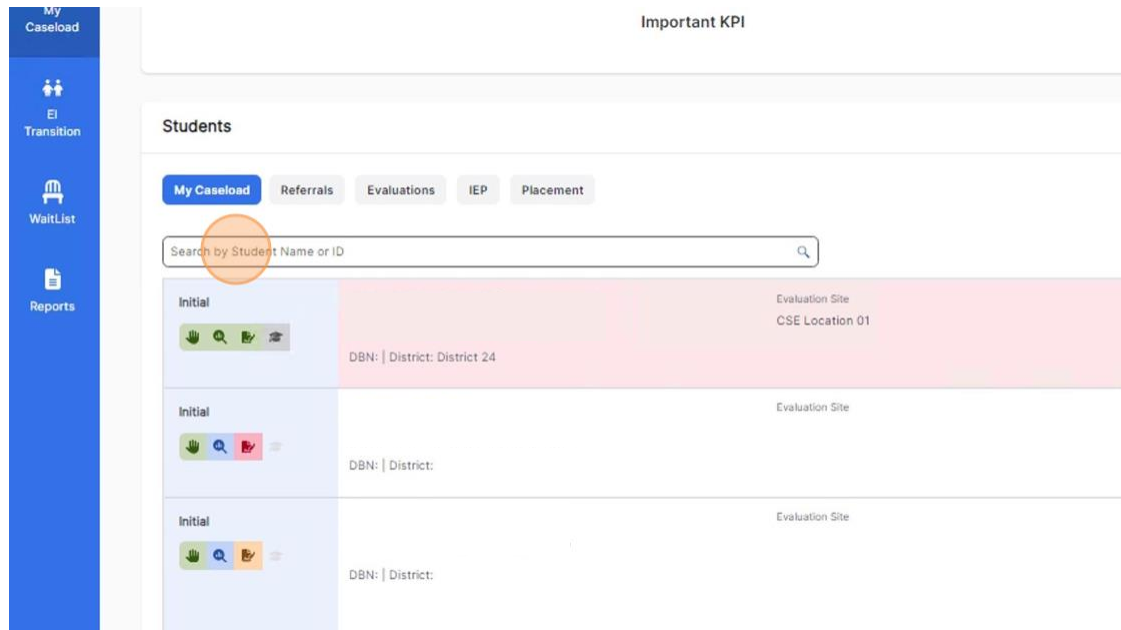
Note: Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

Note: In ATLAS the CPSE Package is called the Social History Package. In the following steps, and within the application, you will see this term being used instead of CPSE Package.

1. Log in to ATLAS. You will be directed to your dashboard.

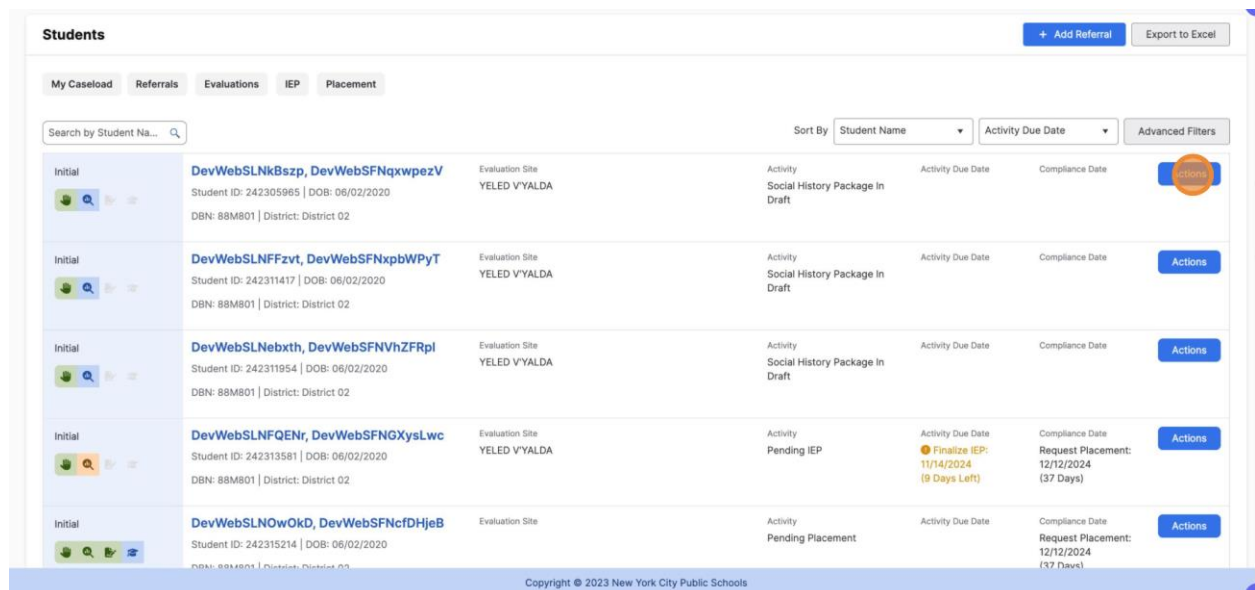


2. Search for the student using the search bar under **My Caseload** to search by Student Name or Student ID. It is best practice to confirm a match via Student ID, since students may have similar or the same names.



Note: Students assigned to you will appear when **My Caseload** is selected (in blue). If your search does not return the student you are looking for, deselect **My Caseload** (will now appear grey) to see all student records you have access to.

3. After locating the student, click the blue **Actions** button on the right side of the row.



4. In the Actions pop up, scroll to the evaluations section and click on **Edit SHP**. Note

Sort By: Student Name Due Date Advanced Filters

| Activity | Due Date | Compliance Date | Actions |
|---------------------------------|----------|-----------------|---|
| Social History Package In Draft | | | <ul style="list-style-type: none"> Evaluation Assessment Planning Cancel Meetings Edit SHP Send PWN: Parent Request for Additional Assessments Student Request to Share Personally Identifiable Information |
| Referral: Pending PWN | | | |
| IEP Closed | | | |

1 - 3 of 3 items

- After you click **Edit SHP**, you will be directed to the Social History Package.

The screenshot shows the 'Social History Package' form for a student named Bega, Lou (Unassigned). The form is part of the Special Education Data Management System. On the left, there is a navigation menu with icons for 'My Casebook', 'Transition', 'Waitlist', and 'Reports'. The main content area is titled 'Social History Package' and 'Grades Preschool'. It contains a list of items to be completed, each with a checkbox and a status icon. The status icons are either a green checkmark (indicating completion) or a red exclamation point (indicating incompleteness). The items listed are:

- Letter to Parents (Completed)
- Generate and Edit (Completed)
- Physical Examination Form (Incomplete)
- Consent for Initial Evaluations (Incomplete)
- Consent for Use of Electronic Mail (Incomplete)
- Social History Evaluation (Incomplete)
- Home Language Identification Survey (Incomplete)
- Authorization for release of Health Information Pursuant to HIPAA (Incomplete)
- Temporary Housing Questionnaire (Incomplete)
- Student Ethnicity Identification (Incomplete)
- View/Read Only (Completed)
- A Family Guide to Preschool Special Education Services (Incomplete)
- Early Childhood Education Options Flyer (Incomplete)
- Preschool Evaluation Agency List (Incomplete)
- Procedural Safeguards Notice (Incomplete)

The 'Letter to Parents' section is expanded, showing a letter addressed to the parent/guardian. The letter explains the purpose of the evaluation and lists the items included in the packet, such as the Prior Written Notice, Consent for Initial Evaluation, Consent for Use of Electronic Mail, Physical Examination Form, Family Guide to Preschool Special Education Services, Early Childhood Education Options Flyer, and Procedural Safeguards Notice. The letter also provides contact information for the CPSE Administrator and the CPSE Admin.

6. The navigation menu on the left side of the screen contains every section of the CPSE Package.

If the section has been completed, it will have a green check mark next to it which you can view in Step 12. If the section has not been completed, it will have a red circle with an exclamation point. The screenshot below shows an incomplete social history package with many incomplete icons.

Letter to Parents

The Committee on Preschool &

- **A Prior Written Notice (N**
This form is required by
Preschool Special Educa
you can choose a presc
- **Preschool Evaluation Ag**
You have the right to chi
school days from your fi
- **Consent for Initial Presc**
Before any evaluations c
rights to you.
- **Consent for Use of Elect**
A parent of a student wi
the internet email syst
- **Physical Examination Fo**
The physical examination
and give it to the evalua
- **A Family Guide to Presc**
This guide describes the
disability.
- **Housing Questionnaire**
Students living in tempo
Education asks all famili
evaluation appointment.
- **Early Childhood Educati**
This flyer describes the
- **Procedural Safeguards**
The law provides you wi

Please contact CPSE Administ

At the bottom of the Social History Package document, there is a list of files that are *View/Read* only. These are attachments to the CPSE Package that will be sent once completed and finalized for example, the “Procedural Safeguards Notice”. You do not need to complete information about the attachments.


El
Transition


WaitList


Reports


Grades Preschool


Letter to Parents


 Generate and Edit ^


 Physical Examination Form


 Consent for Initial Evaluations !


 Consent for Use of Electronic Email !


 Social History Evaluation !


 Home Language Identification Survey !


 Authorization for release of Health Information Pursuant to HIPAA !

 Temporary Housing Questionnaire !


 Student Ethnicity Identification !

 View/Read Only ^

 A Family Guide to Preschool Special Education Services

 Early Childhood Education Options Flyer

Preschool Evaluation Agency List

 Procedural Safeguards Notice

Letter to Parents

Dear Parent/Guardian:

The Committee on Preschool Special Education (CPSE) is pleased to have your child in our program. We are committed to providing a high-quality, individualized education for all children. To ensure we can best serve your child, we need your help in completing several forms and providing information about your child.

- **A Prior Written Notice (N)**
This form is required by the Education Law. It describes the services your child will receive and the reasons for those services. You can choose a preschool that is best for your child.
- **Preschool Evaluation Agreement**
You have the right to choose the school days from your child's schedule.
- **Consent for Initial Preschool Evaluation**
Before any evaluations can begin, we need your consent. This gives us the rights to you.
- **Consent for Use of Electronic Mail**
A parent of a student with a disability can use the internet email system.
- **Physical Examination Form**
The physical examination form is required by the law. Please give it to the evaluator.
- **A Family Guide to Preschool Special Education**
This guide describes the services your child will receive and the reasons for those services.
- **Housing Questionnaire**
Students living in temporary housing are eligible for special education. We ask all families to complete this questionnaire at the evaluation appointment.
- **Early Childhood Education Options Flyer**
This flyer describes the services your child will receive.
- **Procedural Safeguards Notice**
The law provides you with the right to know about the procedures that will be used to evaluate your child.

Please contact CPSE Administrator for more information.

7. Click on the title of the section you wish to complete.

← → ↻ 🏠 🔍 sedmsqa.schools.nyc/evaluations/ba4d7c63-fa64-4d3b-a712-396e101e75b5/edit/shp

NYC Public Schools

Special Education Data Management System

Student

Grades Preschool

Letter to Parents

Generate and Edit

Physical Examination Form

Consent for Initial Evaluations

Consent for Use of Electronic Mail

Social History Evaluation

Home Language Identification Survey

Authorization for release of Health Information Pursuant to HIPAA

Temporary Housing Questionnaire

Student Ethnicity Identification

View/Read Only

Letter to Parents

Dear Parent/Guardian:

The Committee on Preschool Special Education has received a referral requesting an evaluation of

- A Prior Written Notice (Notice of Recommendation) for Initial Evaluation.**
This form is required by the New York State Education Department. It gives a summary of the Preschool Special Education (CPSE) is proposing to conduct an initial evaluation of your child. you can choose a preschool evaluation site and what assessments will be conducted.
- Preschool Evaluation Agency List.**
You have the right to choose any evaluation site from the enclosed list. The site will conduct school days from your first evaluation appointment.
- Consent for Initial Preschool Evaluation.**
Before any evaluations can begin, we will need your written consent. Enclosed is a consent form for your rights to you.
- Consent for Use of Electronic Mail.**
A parent of a student with a disability may elect to receive prior written notices, procedural notices, and the internet email system for the transmission of notices to you, a signed consent form must be received.
- Physical Examination Form**
The physical examination is part of the initial evaluation, and the evaluation agency is responsible for

- Complete the required sections of each form. Required fields are marked with an asterisk (*).

If you click **Save** without completing the required fields, the fields will turn red.

Once saved, you will be able to navigate to other sections of the CPSE package and return to previous work.

Consent for Initial Evaluations

Note: Please fill mandatory fields in order to submit the form.

Did the Parent/Guardian consent?

☐ Parent/Guardian provided consent.

☒ No, Parent/Guardian did not provide consent.

Consent Date * Relationship * Printed Name *

Evaluator Agency Site NYC Code #

X303: I.S. X303 Leadership & Community Service

Site Telephone Number Site Email Address

Select files... Drop files here to select

| Upload Date | Document Name | Uploaded By | Action |
|-----------------------|---------------|-------------|--------|
| No records available. | | | |

Cancel Save

- Click **Select Files** to upload additional relevant documentation, such as a hard copy of parental consent.

Consent for Initial Evaluations

Did the Parent/Guardian consent?

☒ Parent/Guardian provided consent.

☐ No, Parent/Guardian did not provide consent.

Consent Date * Relationship * Printed Name *

07/19/2024 Primary

Evaluator Agency Site NYC Code #

X303: I.S. X303 Leadership & Community Service

Site Telephone Number Site Email Address

Select files...

- After you have completed all required fields of the form, click the blue **Save** button at the bottom right to save the form. Once completed, a green check mark will appear by the section title in the navigation menu.

Click the red **Cancel** button in the bottom left to cancel the changes. All previously entered work will be deleted and the icon will remain a red circle with an exclamation point.

Special Education Data Management System

Student Search

Due Process/Consents
Section Complete

Summary
Section Complete

Evaluator Information

Date of Report * 07/20/2024 Evaluator Name * SSedms3 Telephone # * 11231 450-7890

NYIS License * 123456 Discipline * School Psychologist Evaluator Type * Internal Assignment

Language * English Evaluator Agency * X303: I.S. X303 Leadership & Community Service

☒ 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.

Select files... Drop files here to select

| Upload Date | Document Name | Uploaded By | Action |
|-----------------------|---------------|-------------|--------|
| No records available. | | | |

Cancel Save

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11. Once you have completed the section, a green check will appear next to the section title in the left navigation. Move to the next section that you wish to complete by clicking on the corresponding title.

12. Once you have completed and saved the required sections, they will all have green check marks. The **Finalize** button in the bottom right corner will then become enabled.

- Click **Finalize** if you are ready to finalize and send the CPSE Package.
- Click **Save** to complete the section and continue editing the CPSE Package.
- Click **Cancel** to cancel the section. If you click cancel, any work in this section that was not previously saved will be discarded.

Social History Package

Grades Preschool

- Letter to Parents
- Generate and Edit
- Physical Examination Form
- Consent for Initial Evaluations
- Consent for Use of Electronic Email
- Social History Evaluation
- Home Language Identification Survey
- Authorization for release of Health Information Pursuant to HIPAA
- Temporary Housing Questionnaire
- Student Ethnicity Identification**
- View/Read Only
- A Family Guide to Preschool Special Education Services
- Early Childhood Education Options Flyer
- Preschool Evaluation Agency List
- Procedural Safeguards Notice

Student Ethnicity Identification

CONFIDENTIALITY PROCEDURES AND REGULATIONS
This form will be filed in the student's Cumulative Record folder as confidential information.

Date Received * 07/20/2024 Relationship * Primary Printed Name *

Please review the racial/ethnic definitions below before you respond.
Select the one that best describes your child. Select only ONE category.

Ethnicity * Black

Select files...

| Upload Date | Document Name | Uploaded By | Action |
|-------------|---|--------------|--------|
| 07/20/2024 | Central Auditory Processing Disorder Assessment | Sedms4 Sedms | |

Cancel Save Finalize

13. After clicking **Finalize**, a pop up will appear listing all uploads attached to the CPSE Package. You will then need to select a Method of Delivery and click **Submit**. If you choose Print or Postal Mail your computer will print the CPSE package upon clicking submit. Once printed, you must mail the CPSE package. After selecting the delivery method, click Submit to complete the process and return to your dashboard.

Method of Delivery

| Upload Date | Document Name | Uploaded By |
|-------------|---|--------------|
| 07/20/2024 | Central Auditory Processing Disorder Assessment | Sedms4 Sedms |

☐ Print (or) Postal Mail ☒ Parent Portal

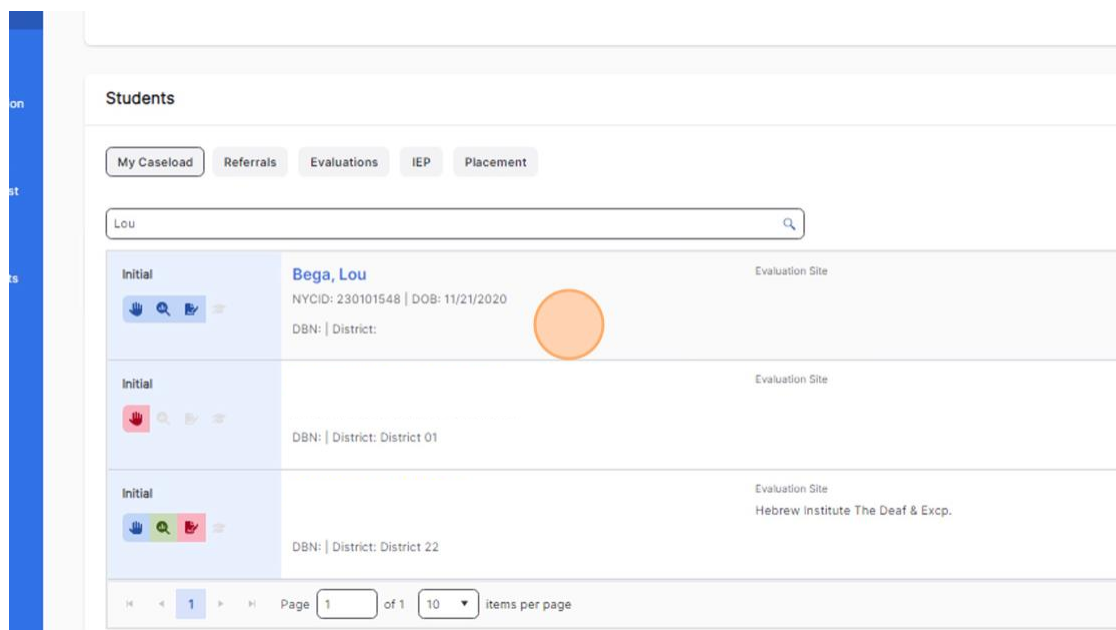
Note * : if parent has an NYCSA account, the notification will be shown on the Parent Portal dashboard

Cancel Submit

14. To see where the Finalized status for the Social History Package is listed, return to the dashboard and search for the student whose social history package you just completed.

Click anywhere on the student's row (except their name in blue) to expand the row and view additional details.

Note: Clicking the student's name will take you to their profile.



15. Once the row is expanded, you can see more information about each process phase.

To see the assessment planning page and view all evaluations assigned to a student, ensure that the second tab **Evaluations** is selected. The status for Consent for Initial Evaluation will be displayed above the Assessment Planning grid.

Within the assessment planning grid, the Social History Evaluation will display as Finalized.

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