

How to Navigate Assessment Planning

This guide provides step-by-step instructions on how to navigate assessment planning in ATLAS. It explains how to search for a student, manage assessments, edit assessment details, add additional assessments, and submit the assessment planning grid.

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.

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My Caseload Referrals Search by Student Name or		٩.	Sort By Student Name	Due Date Advanced Filt
Initial	SEROROVA67, N73 (Unassigned) NYCID: 253415798 DDB: 08/18/2019 DBN: District: District 24	Evaluation Sile CSE Location 02	Activity Du Placement Completed	e Date Compliance Date Action Request Placement: 08/23/2024 (31 Days)
inital	RASHVDASH80, MMMA69 NYCID: 101083062 DOB: 01/25/2020 DBN: District: District 24	Evaluation Sile	Autony Du Pending Evaluation	e Date Compliance Date Action Schedule (IP Meeting: 08/30/2024 (38 Days) Request Placement: 08/30/204 (38 Days)
initial	AJANNAZAR83, LLV76 NYCID: 101097328 DOB: 0/11/2019 DBN: District: District 31	Evaluation Ster	Activity Du Pending Evaluation	e Date Compliance Date Action Request Placement: 10/02/2024 1/1 Days) Schedule IEP Meeting: 10/02/2024 1/1 Days)
Initial	MMIN82, ISHA69 NYCID: 101117461 DOB: 07/24/2020 DBN: District: District 07	Evaluation Site	Activity Du Social History Package In Draft	e Date Compliance Date Action

1. After you log into ATLAS, you will be directed to your dashboard.

2. From your dashboard, search for the student for whom you wish to schedule an assessment. You can search using the search bar, as shown below, or filter the dashboard by **Evaluations** or other relevant advanced filters.

For more information about advanced filters please review "QRG 1.2 How to Navigate the Dashboard".



My Caseload		Im	portant KPI
EI Transition	Students		
MaitList	My Caseload Referral Search by Student Name or		٩
Reports	Initial	SEROROVA67, N73 (Unassigned) NYCID: 253415798 DOB: 08/18/2019 DBN: District: District 24	Evaluation Site CSE Location 01
	Initial	Johnson, Sophie NYCID: 230004165 DOB: 03/01/2020 DBN: District:	Evaluation Site
	Initial	Johny, Emma NYCID: 230006126 DOB: 03/31/2020 DBN: District:	Evaluation Site

3. Click the blue **Actions** button once you have found the student whose assessments you wish to access.

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	Init		MINPRES69, IHBYLOUGH87 NYCID: 250003099 DOB: 03/26/2021 DBN: District: District:01	Evaluation Site	06/1	Date Compliance Date Actions and Initial PW/N: A PWNNAtice of 7/2024 Referrat: 06/19/2024 1-31 Days Left)
		- • 1 • •	Page 1 of 1 10 • items per page			1 - 2 of 2 items
				Copyright @ 2023 New York Ci	ty Public Schools	

4. Scroll through the Actions pop up to the Evaluation section and click **Assessment Planning**.



Activity Social History Package In Draft Draft View View View PWN Referral: Pending PWN Evaluation Activity Referral: Pending PWN Evaluation Assessment Planning Edit SHP
Send PWN: Parent Request for Additional Assessments

5. This will launch the *Assessment Planning* panel in edit mode. If the student is an initial referral, as displayed below, the required assessments for students will automatically be populated. Assessment Planning can only be modified once the Consent for Initial Evaluation has been obtained.

From this page, users can add information about Assessments such as Assessment Type, Language of Assessment, Evaluator Type, Evaluator Name, and Due By date.

Users can remove assessments, but note:

- For initial K-12 assessments, Social History, Physical, Psychoeducational, and Classroom Observation assessments are mandatory and cannot be removed.
- For Preschool assessments, Social History, Physical, and Psychological Observations assessments are mandatory and cannot be removed.



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Reports	Asses	ssments Assessment Type	Language of Assessment	Evaluator Type	Evaluator Name		Due By			
	×	Observations	•	•	•		MM/DD/YYYY		6	
		Social History Evaluation	•	•	•] [•	MM/DO/YYYY		Ci	
		Physical Examination	•	•	•	•	MM/DD/YYYY	-	Ċ.	
	×	Psychological Assessment	•	•	•]	•	MM/DD/YYYY		G	
	-	dd Assessment								
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6. The gray box above the assessments grid provides you with more specific information about the student's Evaluation status, including date consent received, the name of referrer, and their relation to the student.

		Consent received On	Name of Referrer Title of I	Referrer	
initial	Evaluation	07/20/2024	sse dms1 Professi	onal Staff Member of a Public or Private School	
Asses	sments				
	Assessment Type	Language of Assessn	nent Evaluator Typ	e Evaluator Name	Due By
×	Observations	•	•	•	MM/DD/YYYY B
	Social History Evaluation	•]	•	•][• MM/DD/YYYY 🛱
	Physical Examination	•	•	•	• MM/DD/YYYY 🛗

7. Input the required information about the assessment. Complete the columns to specify the Assessment Type, Language of Assessment, Evaluator Name, and Due By date.



×	Observations	•	· [•	MM/DD/YYYY
	Social History Evaluation	•	•	•	• MM/DD/YYYY
	Physical Examination	•	•	•	• MM/DD/YYYY
×	Psychological Assessment	•	•	• [MM/DD/YYYY

9. To add an additional assessment, click the **+ Add Assessment** button in the bottom left corner of the Assessment Planning grid.

Note: The **+ Add Assessment** button will only enable you to add an additional assessment that has been provided by the parent. To add any other kind of additional assessment, go to the action menu for the student and complete the Additional Assessment PWN. For more information, please review reference guide, "5.5 Add an Additional Assessment".

	Social History Evaluation	•	•
	Physical Examination	•	•
×	Psychological Assessment	•	•
	d Assessment		
Reason	Ear Additional Accomment(a)		
Reason	n For Additional Assessment(s)		
iteasor	r for Additional Assessment(s)		
_	_		
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10. After you have clicked on the blue **+ Add Assessment** button, a row will be added to the Assessment Planning grid. The evaluator type will be read only and display *Provided by Parent*. Complete the other columns to specify the **Assessment Type** and **Language of Assessment**.



Social History Evaluation • <th>ť</th> <th>• 07/27/2024</th> <th>•</th> <th>▼</th> <th>English</th> <th>Observations</th> <th>×</th>	ť	• 07/27/2024	•	▼	English	Observations	×
	ť	• MM/DD/YYYY	•	•	•	Social History Evaluation	
Psychological Assessment	ť	MM/DD/YYYY	•	•	•	Physical Examination	
	ť	MM/DD/YYYY	•	•	•	Psychological Assessment	×
Provided by Parent Provided by Parent Provided by Parent	ť	MM/DD/YYYY	 •	Provided by Parent	•		×

11. After you have completed the Assessment Planning grid, press the blue Submit button in the bottom right corner to submit the Assessment Planning grid. Press the red Cancel button in the bottom left corner to cancel the assessment planning grid. Note: if you press Cancel, all unsaved information will be deleted.

You will then be directed back to your dashboard.

F	Asses	sment Planning											
ad Ion	Initial I	Evaluation		Consent received On 07/20/2024	Name of Referrer ase dms1	Title of Referrer Professional Staff Member of a Public or	ir Private S	chool					
iut	Assess	sments											
i l		Assessment Type		Language of Assessment		Evaluator Type		Evaluator Name		Due By			
16	×	Observations	٠	English	•	Internal Assignment	•		•	07/27/2024	3	C2]
		Social History Evaluation	•	[•]		×		×	MM/DD/YY	er:	62	j
		Physical Examination	•		•		•		•	MM/DD/YY	(Y	C.)
	×	Psychological Assessment	•		•		•		•	MM/DD/YY	/Y	G)
	×	Audiological Assessment	•	English	•	Provided by Parent			•	MM/DD/YY	ix.	Ca	1

12. Assessment planning grids can also be viewed from the student dashboard. To do this, use the search bar to find the relevant student.

Note: For more information about searching for students, please review QRG 1.2 How to Navigate the Dashboard.



My Caseload		1	mportant KPI
EI Transition	Students		
MaitList	My Caseload Referre		9
Reports	Initial	SEROROVA67, N73 (Unassigned) NYCID: 253415798 DOB: 08/18/2019 DBN: District: District 24	Evaluation Site CSE Location 02
	Initial	RASHVDASH80, MMMA69 NYCID: 101083062 DOB: 01/25/2020 DBN: District: District 24	Evaluation Site

13. Once you have found the student for whom you wish to view assessment planning info, click on their row to expand it.

Note: If you click on the student's name in blue, it will take you to their student profile. To expand the row, you must click anywhere else in the row except the name.

	Important KPI	
Evaluations IEP Placement		
	٩	
YCID: 230101548 DOB: 11/21/2020	Evaluation Site	
4YCID: 250003099 DOB: 03/26/2021	Evaluation Site	
VYCID: 249830092 DOB: 01/31/2019	Evaluation Site Hebrew Institute The Deaf & Excp.	
	Evaluations IEP Placement Bega, Lou	Bega, Lou Evaluation Site NYCID: 230101548 DOB: 11/21/2020 Evaluation Site DBN: District: Evaluation Site MINPRES69, IHBYLOUGH87 Evaluation Site NYCID: 250003099 DOB: 03/26/2021 Evaluation Site LOUIOU65, ILLOLLO68 Evaluation Site NYCID: 249830092 DOB: 01/31/2019 Evaluation Site



14. Once you have expanded the student row, you will be able to see Assessment Planning info and view all evaluations assigned to that student. Ensure that the second tab **Evaluations** is selected.

nitial S Q By =	Bega, Lou NYCID: 230101548 DOB: 11/21/2020	Evaluation Site		Activity Pending Evaluation	Due Date Finalize (EP: 08/05/2024	Compliance Date	Actions
	DBN: District:				(13 Days Left)		
Q Evaluations	🔹 Referrals 🤷 Evaluations 📴 IEP 🕿 Pla	cement					
Referral Submitted	Social History Meeting Date	Status of Social Histo Finalized	ry Package	Consent for Init Yes	al Evaluation Given?		
Next Complete Evaluations	Assessments in Progress	Evaluator Name	Evaluator Type	Evaluator Due Date	St	atus	
By IEP	i Observations			07/27/2024	Pi	ending Scheduling	^
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	Psychological Assessment				Pi	anding Scheduling	
tial	MINPRES69, IHBYLOUGH87	Evaluation Site		Activity	Due Oate	Compliance Date	Actions