# 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.

1. After you log into ATLAS, you will be directed to your dashboard.
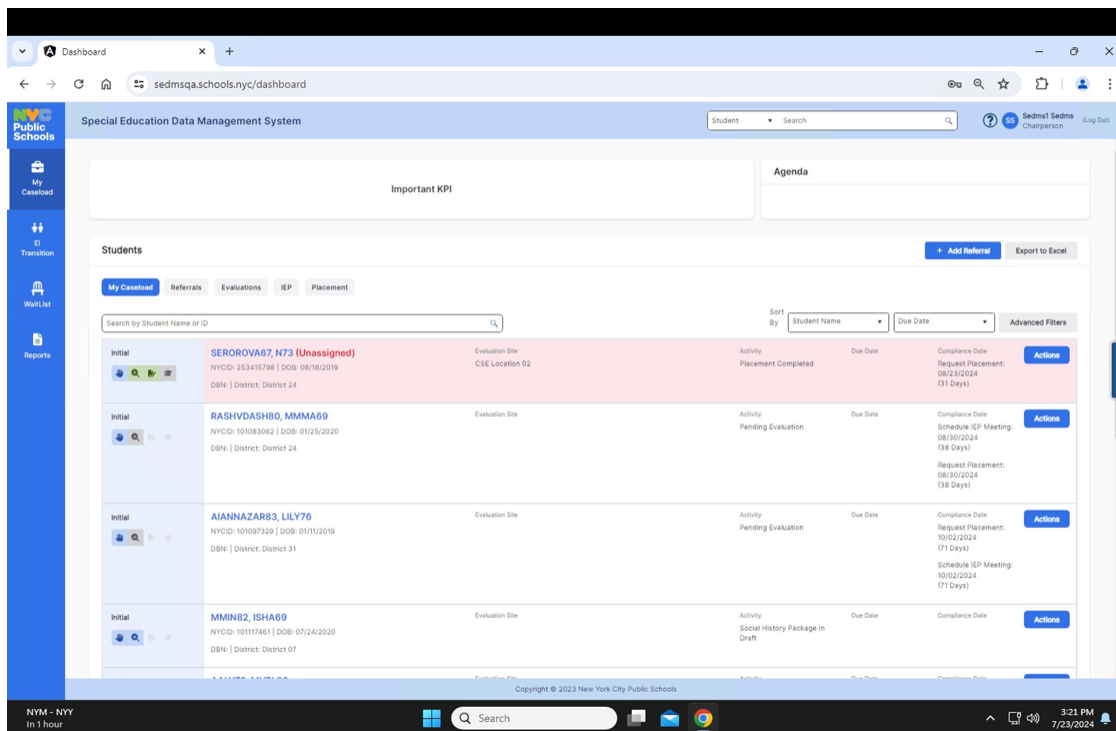
2. From your dashboard, search for the student for whom you wish to schedule an assessment. You can search using the search bar, as shown below, or filter the dashboard by **Evaluations** or other relevant advanced filters.
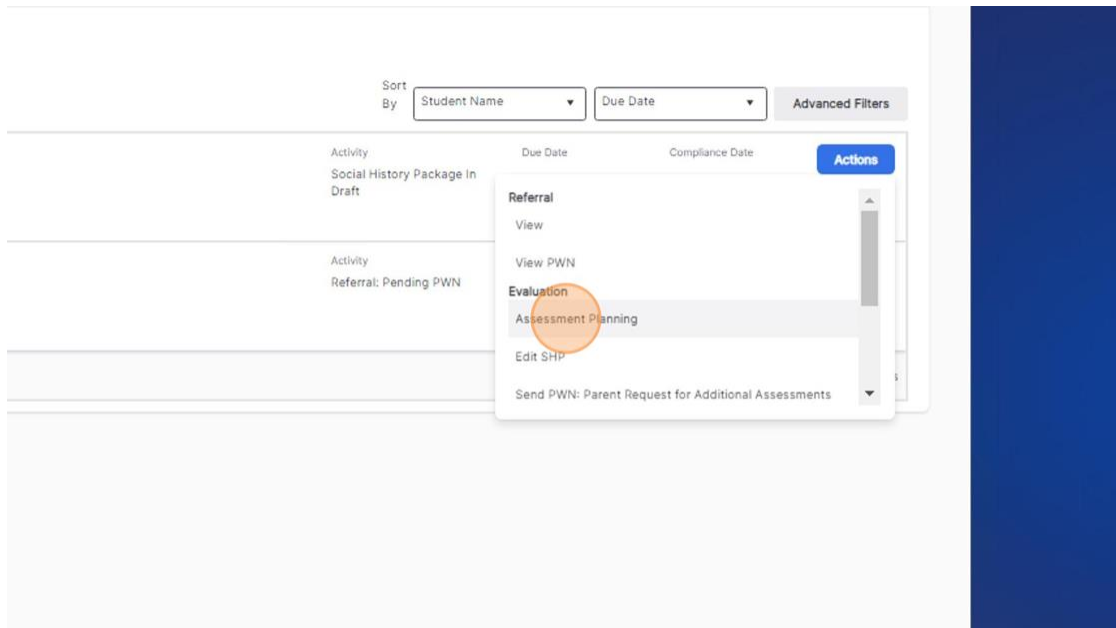
   For more information about advanced filters please review "QRG 1.2 How to Navigate the Dashboard".
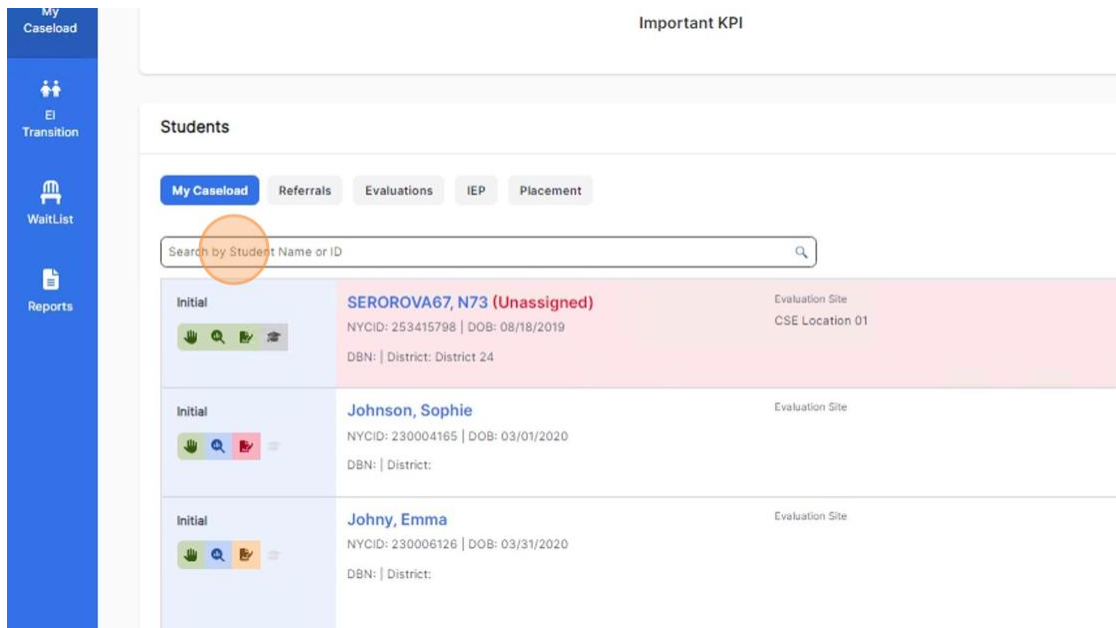
3. Click the blue **Actions** button once you have found the student whose assessments you wish to access.
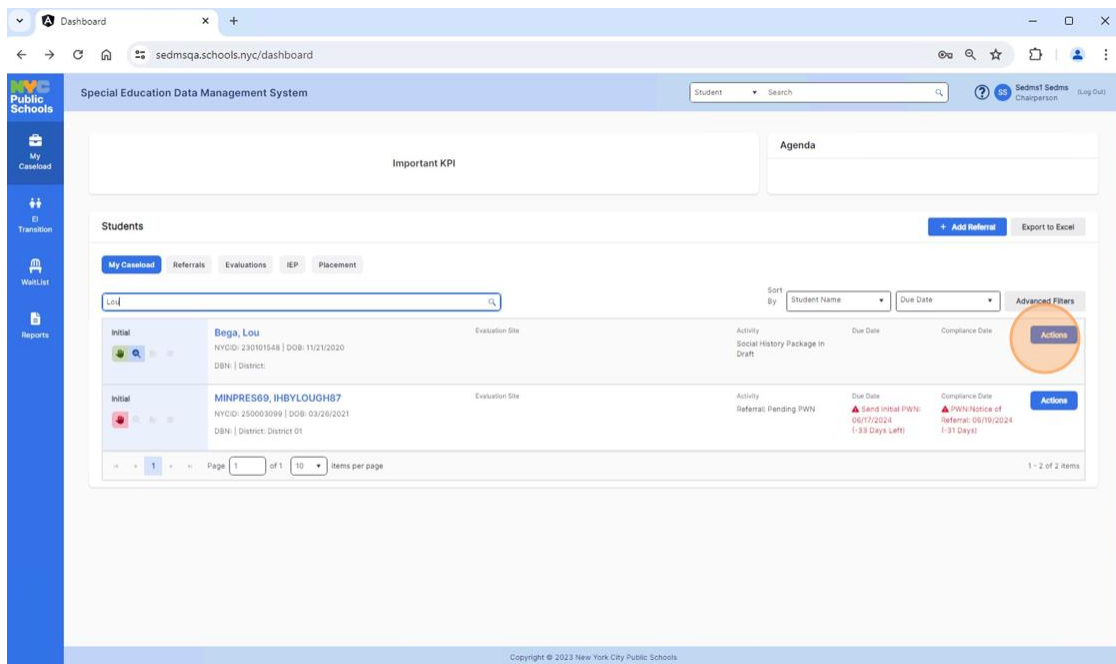
4. Scroll through the Actions pop up to the Evaluation section and click **Assessment Planning**.

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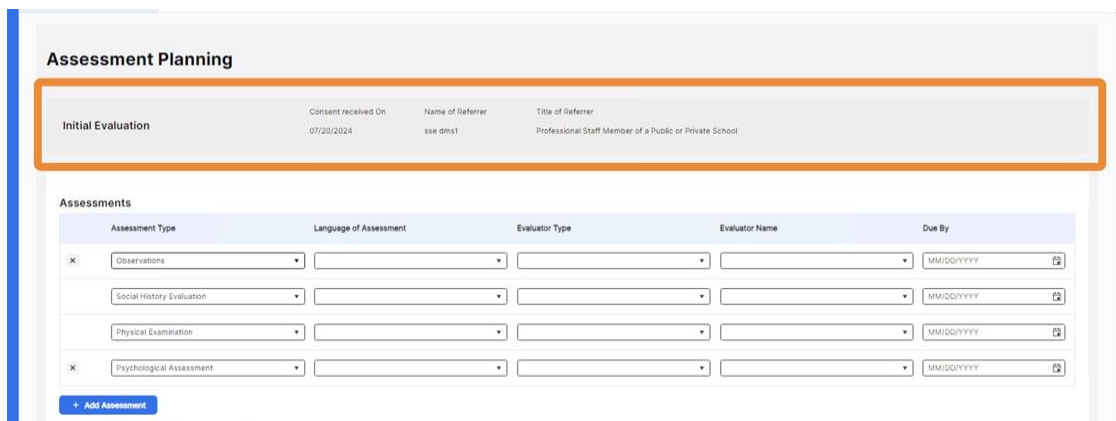
   From this page, users can add information about Assessments such as Assessment Type, Language of Assessment, Evaluator Type, Evaluator Name, and Due By date.

   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.
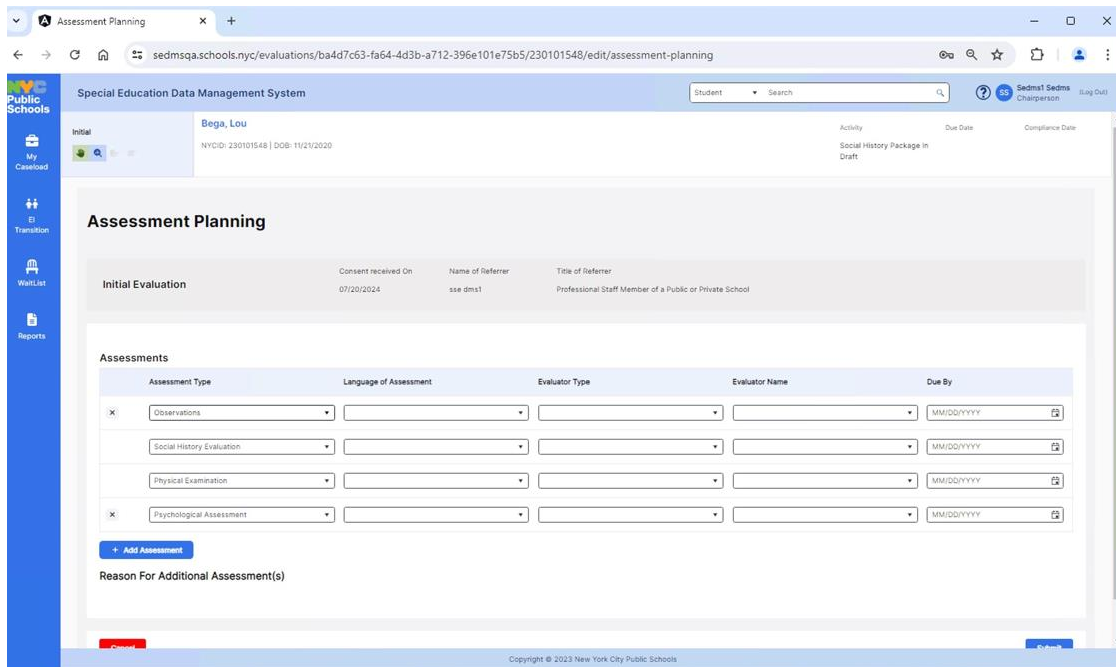
6. The gray box above the assessments grid provides you with more specific information about the student's Evaluation status, including date consent received, the name of referrer, and their relation to the student.

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.

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".*

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.**

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.

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.*

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.

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.