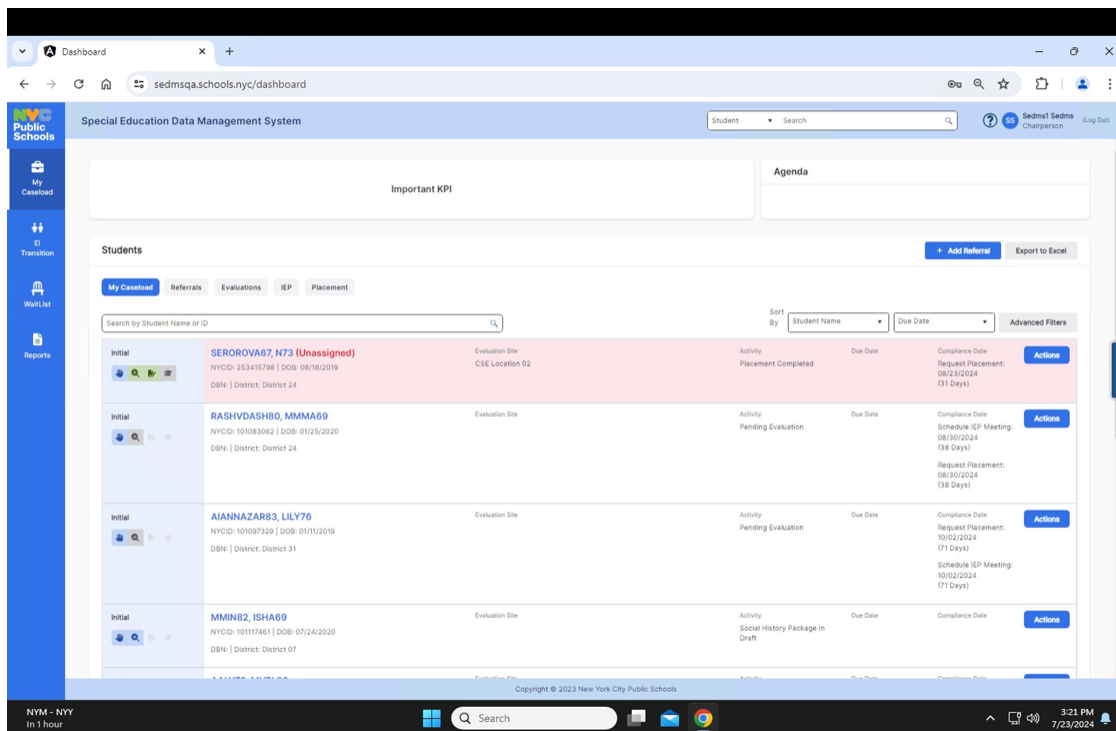


How to Navigate Assessment Planning

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.

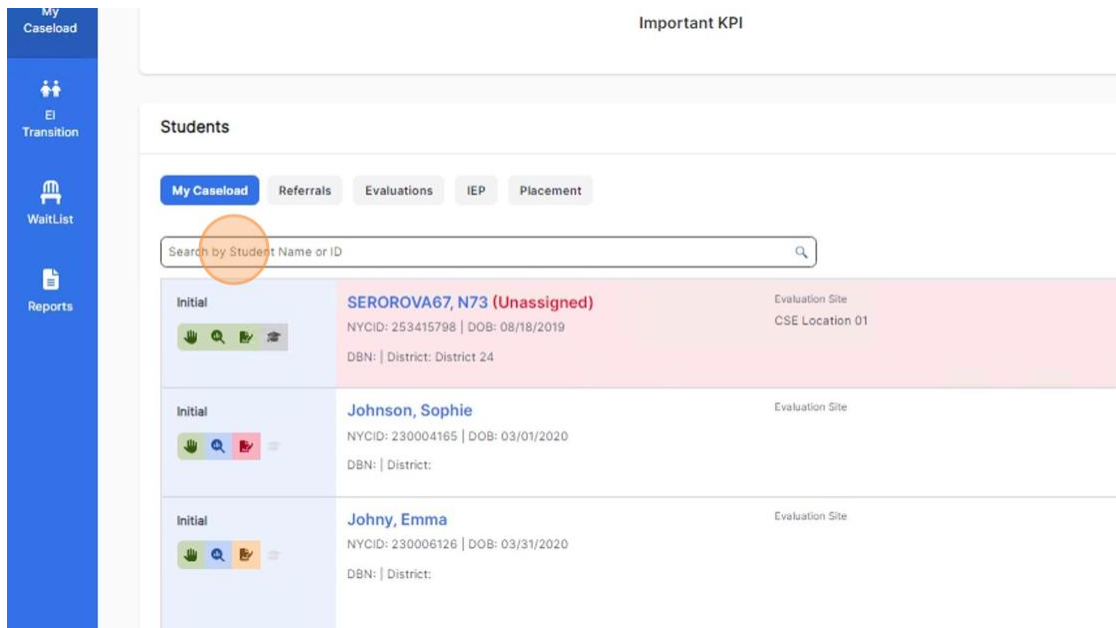
Note: Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

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

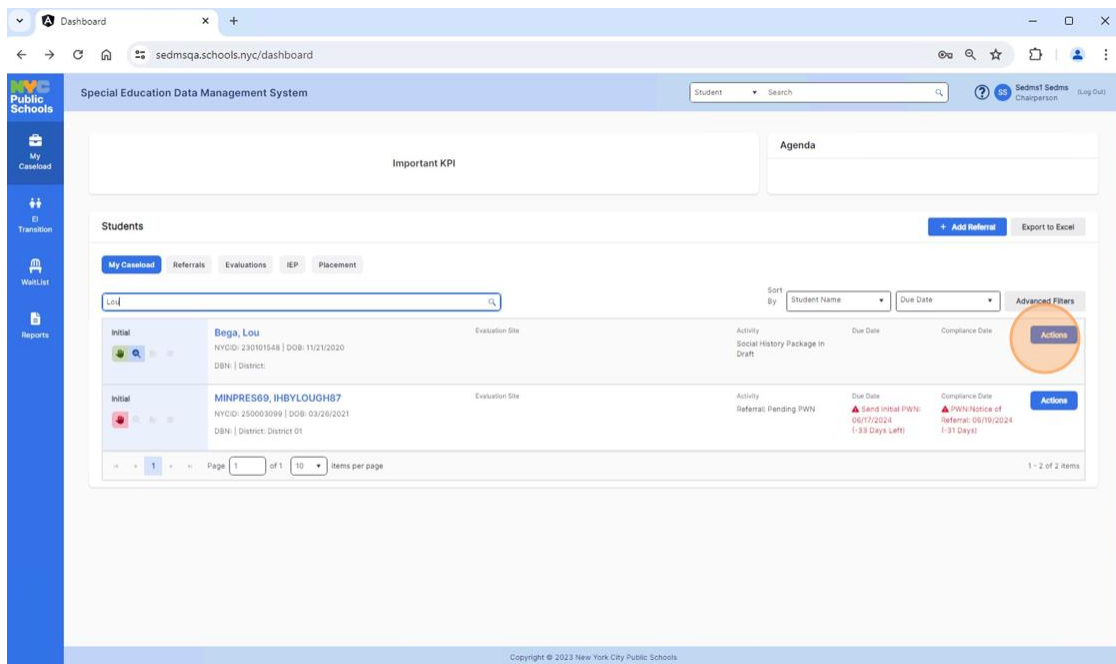


2. From your dashboard, search for the student for whom you wish to schedule an assessment. You can search using the search bar, as shown below, or filter the dashboard by **Evaluations** or other relevant advanced filters.

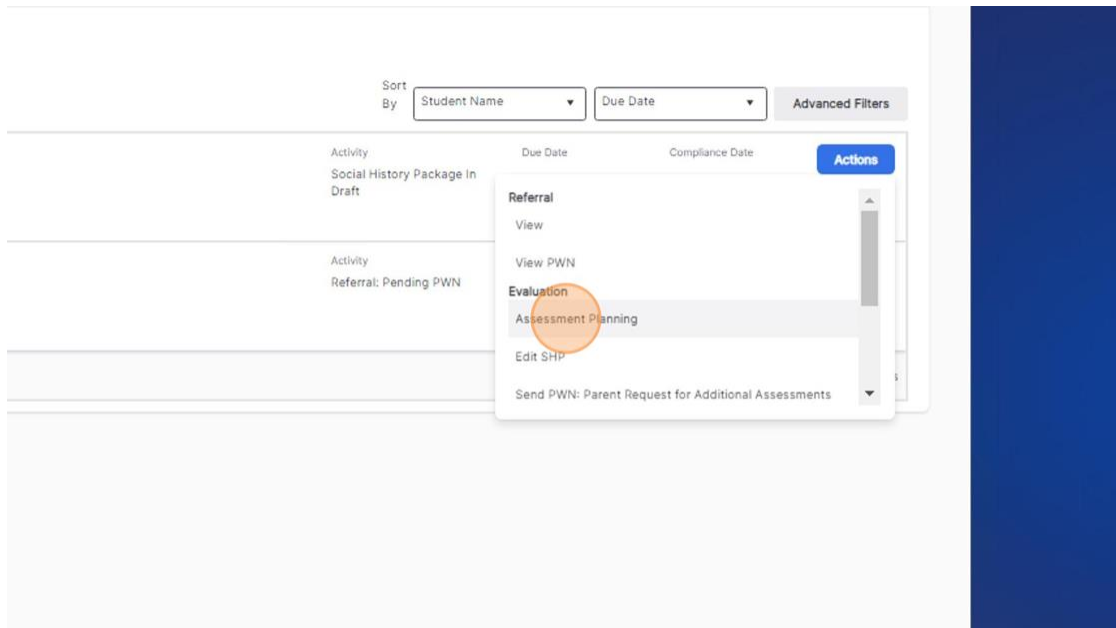
For more information about advanced filters please review “QRG 1.2 How to Navigate the Dashboard”.



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**.

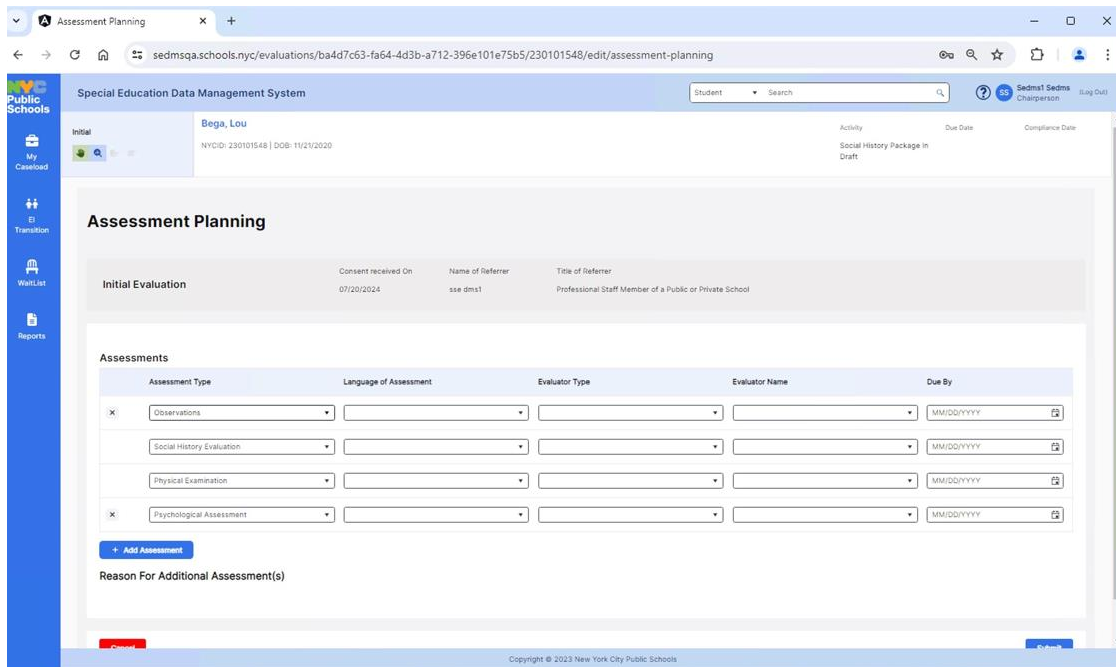


5. This will launch the *Assessment Planning* panel in edit mode. If the student is an initial referral, as displayed below, the required assessments for students will automatically be populated. Assessment Planning can only be modified once the Consent for Initial Evaluation has been obtained.

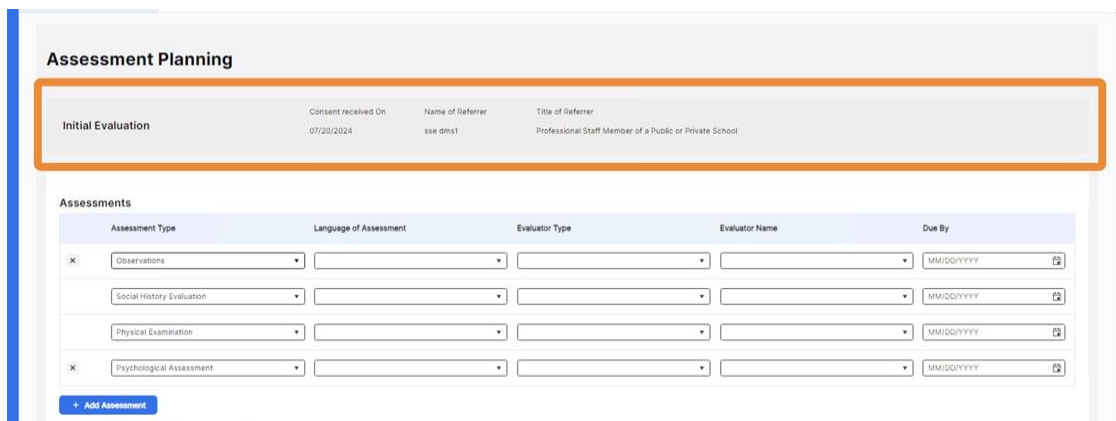
From this page, users can add information about Assessments such as Assessment Type, Language of Assessment, Evaluator Type, Evaluator Name, and Due By date.

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.



- 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.



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

Assessment Type	Language of Assessment	Evaluator Type	Evaluator Name	Due By
Observations				MM/DD/YYYY
Social History Evaluation				MM/DD/YYYY
Physical Examination				MM/DD/YYYY
Psychological Assessment				MM/DD/YYYY

+ Add Assessment

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

+ Add Assessment

Reason For Additional Assessment(s)

Cancel

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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**.

Assessment Type	Language of Assessment	Evaluator Type	Evaluator Name	Due By
Observations	English	Internal Assignment		07/27/2024
Social History Evaluation				MM/DD/YYYY
Physical Examination				MM/DD/YYYY
Psychological Assessment				MM/DD/YYYY
		Provided by Parent		MM/DD/YYYY

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.

Special Education Data Management System

Assessment Planning

Initial Evaluation

Consent received On	Name of Referrer	Title of Referrer
07/20/2024	sse.dms1	Professional Staff Member of a Public or Private School

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Evaluator Name	Due By
Observations	English	Internal Assignment		07/27/2024
Social History Evaluation				MM/DD/YYYY
Physical Examination				MM/DD/YYYY
Psychological Assessment				MM/DD/YYYY
Audiological Assessment	English	Provided by Parent		MM/DD/YYYY

Reason For Additional Assessment(s)

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

EI Transition

WaitList

Reports

Important KPI

Students

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ID

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

Students

My Caseload Referrals Evaluations IEP Placement

Lou

Initial	Bega, Lou NYCID: 230101548 DOB: 11/21/2020 DBN: District:	Evaluation Site
Initial	MINPRES69, IHBYLOUGH87 NYCID: 250003099 DOB: 03/26/2021 DBN: District: District 01	Evaluation Site
Initial	LOUIOU65, ILLOLLO68 NYCID: 249830092 DOB: 01/31/2019 DBN: District: District 22	Evaluation Site Hebrew Institute The Deaf & Excp.

Page 1 of 1 10 items per page

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.

Initial **Bega, Lou** Evaluation Site Activity Pending Evaluation Due Date Finalize IEP: 08/05/2024 (13 Days Left) Compliance Date Actions

NYCID: 230101548 | DOB: 11/21/2020
DBN: | District:

Referrals Evaluations IEP Placement

Social History Meeting Date Finalized Status of Social History Package Finalized Consent for Initial Evaluation Given? Yes

Assessments In Progress	Evaluator Name	Evaluator Type	Evaluator Due Date	Status
Observations			07/27/2024	Pending Scheduling
Audiological Assessment				Pending Scheduling
Social History Evaluation				Finalized
Physical Examination				Finalized
Psychological Assessment				Pending Scheduling

Initial **MINPRES69_IHBYLOUGH87** Evaluation Site Activity Referral: Pending PWN Due Date Send Initial PWN: Compliance Date PWN/Notice of Actions