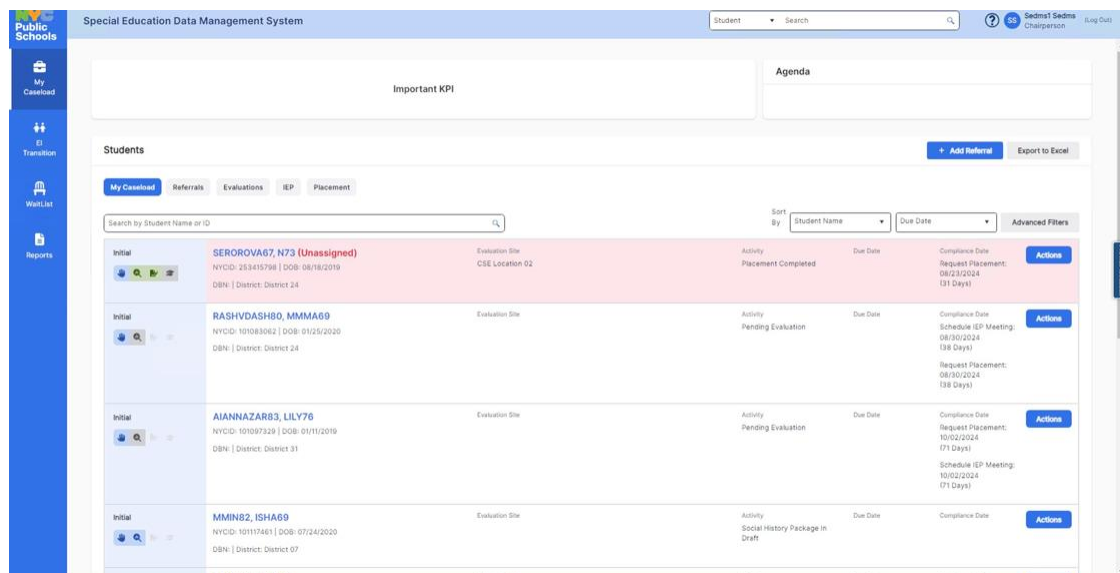


# How to Schedule an Assessment

This guide provides step-by-step instructions on how to schedule an assessment using ATLAS. It includes information on how to navigate the dashboard, find the student you want to schedule for, and complete the necessary fields for scheduling the upload

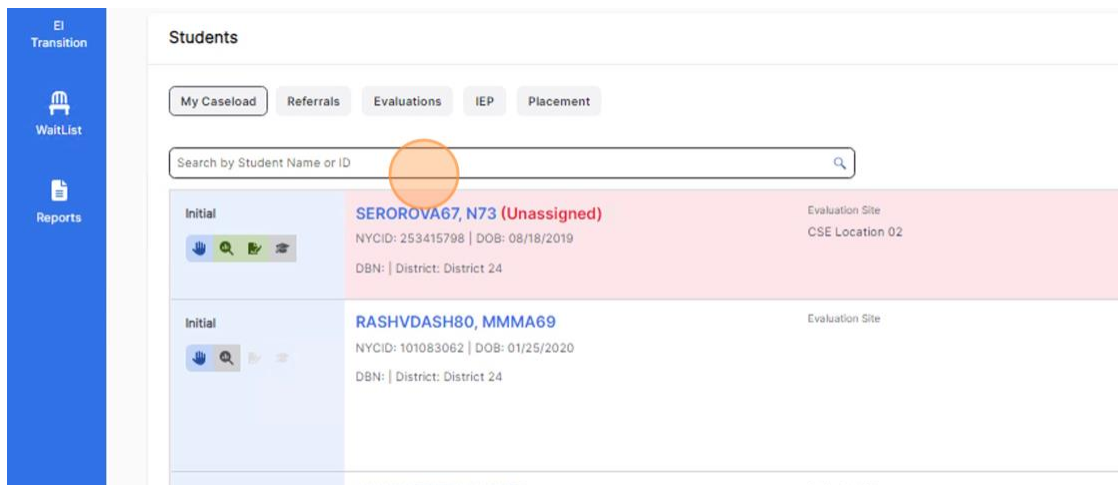
**Note:** Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

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 utilizing 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 the “QRG 1.2 How to Navigate the Dashboard”.*



**Students**

My Caseload Referrals Evaluations IEP Placement

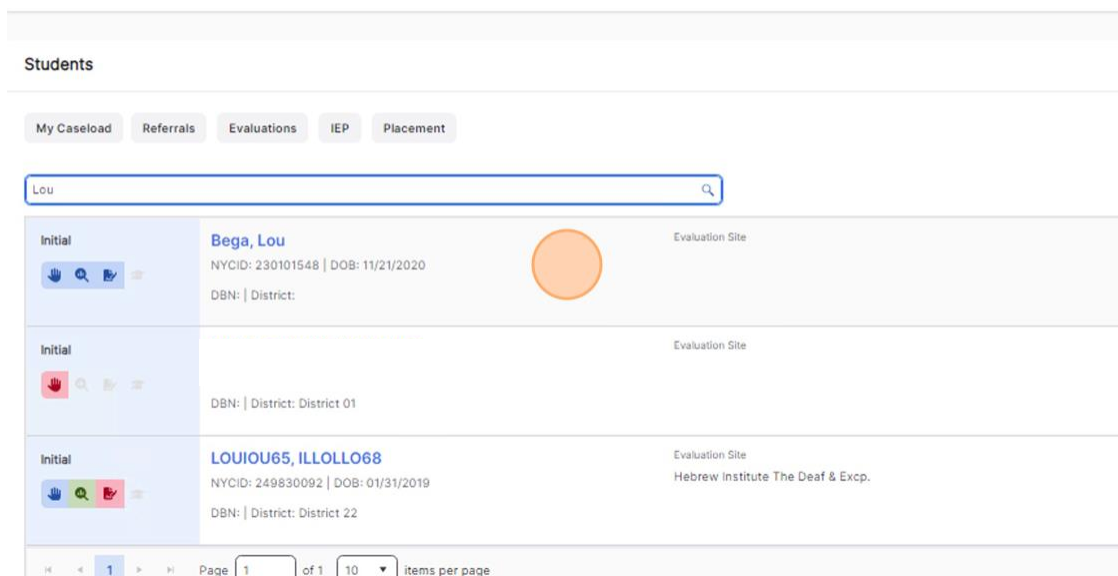
Search by Student Name or ID

Initial	<b>SEROROVA67, N73 (Unassigned)</b> NYCID: 253415798   DOB: 08/18/2019 DBN:   District: District 24	Evaluation Site CSE Location 02
Initial	<b>RASHVDASH80, MMA69</b> NYCID: 101083062   DOB: 01/25/2020 DBN:   District: District 24	Evaluation Site

- Once you have located the relevant student, click on the row to expand it.

**Note:** If you click on the student's name in blue, it will take you to their student profile. To see the expansion of their row, you must click anywhere else on the row within the dashboard.

Important KPI



**Students**

My Caseload Referrals Evaluations IEP Placement

Lou

Initial	<b>Bega, Lou</b> NYCID: 230101548   DOB: 11/21/2020 DBN:   District:	Evaluation Site
Initial	 DBN:   District: District 01	Evaluation Site
Initial	<b>LOUIOU65, ILLOLLO68</b> NYCID: 249830092   DOB: 01/31/2019 DBN:   District: District 22	Evaluation Site Hebrew institute The Deaf & Excp.

Page 1 of 10 items per page

- Once you have expanded the student row, you will be able to 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.

**Initial** **Bega, Lou** NYCID: 230101548 | DOB: 11/21/2020  
DBN: District: Evaluation Site Activity: Pending Evaluation Due Date: Finalize IEP: 08/05/2024 (13 Days Left) Compliance Date: Actions

**Evaluations** Referrals Evaluations IEP Placement

Social History Meeting Date 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

- In the Assessment Planning grid, click on the three vertical dots to the left of the assessment that you wish to schedule. Review QRG 5.2 How to Navigate Assessment Planning for more information about the Assessment Planning grid.

All assessments that have not been scheduled yet will display “Pending Scheduling” under the Status column.

**NYC Public Schools** Special Education Data Management System Student Search Sedms1 Sedms Chairperson Log Out

**Initial** **Bega, Lou** NYCID: 230101548 | DOB: 11/21/2020  
DBN: District: Evaluation Site Activity: Pending Evaluation Due Date: Finalize IEP: 08/05/2024 (13 Days Left) Compliance Date: Actions

**Evaluations** Referrals Evaluations IEP Placement

Social History Meeting Date 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

- After you click the three vertical dots, a pop up will appear. Select the option **Schedule EVL Meeting** to schedule the assessment.

**NYC Public Schools** Special Education Data Management System Student Search Sedms1 Sedms Chairperson Log Out

**Initial** **Bega, Lou** NYCID: 230101548 | DOB: 11/21/2020  
DBN: District: Evaluation Site Activity: Pending Evaluation Due Date: Finalize IEP: 08/05/2024 (13 Days Left) Compliance Date: Actions

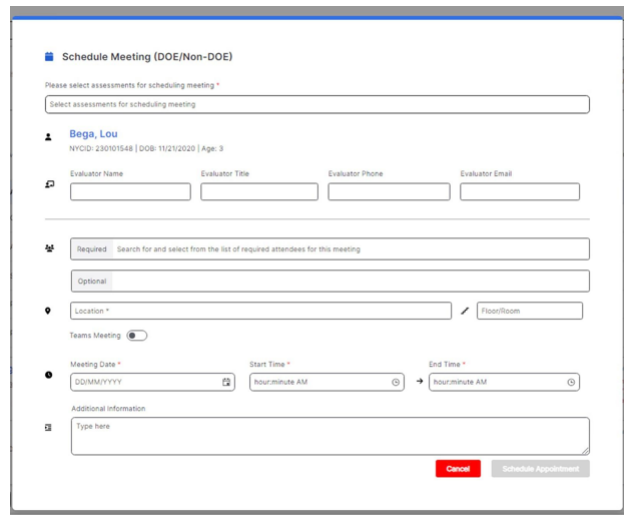
**Evaluations** Referrals Evaluations IEP Placement

Social History Meeting Date Status of Social History Package Finalized

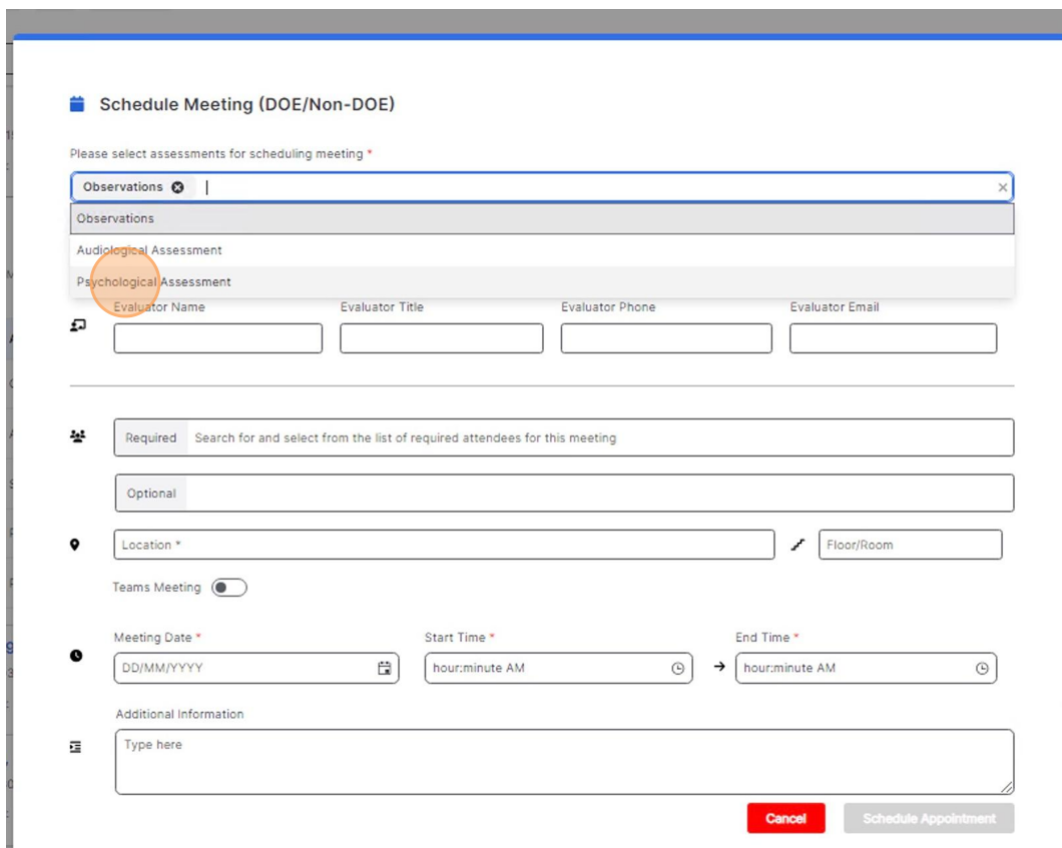
Assessments In Progress	Evaluator Name	Evaluator Type
Observations		
Audiological Assessment		
Social History Evaluation		
Physical Examination		
Psychological Assessment		

Create an Extension Request  
**Schedule EVL Meeting**


7. After clicking **Schedule EVL Meeting** the schedule meeting pop up will appear.



8. Click on the top bar and select the assessment(s) that you would like to schedule. You can select more than one assessment to schedule for this meeting.





9. Complete the *Evaluator* information (Name, Title, Phone, Email).


**Schedule Meeting (DOE/Non-DOE)**

Please select assessments for scheduling meeting \*

Observations
Psychological Assessment
Audiological Assessment


**Bega, Lou**  
NYCID: 230101548 | DOB: 11/21/2020 | Age: 3




Evaluator Name

Evaluator Title

Evaluator Phone


Evaluator Email



Required

Search for and select from the list of required attendees for this meeting

Optional



Location \*

Floor/Room

Teams Meeting

Meeting Date \*


DD/MM/YYYY

Start Time \*

hour:minute AM

End Time \*

hour:minute AM



Additional Information

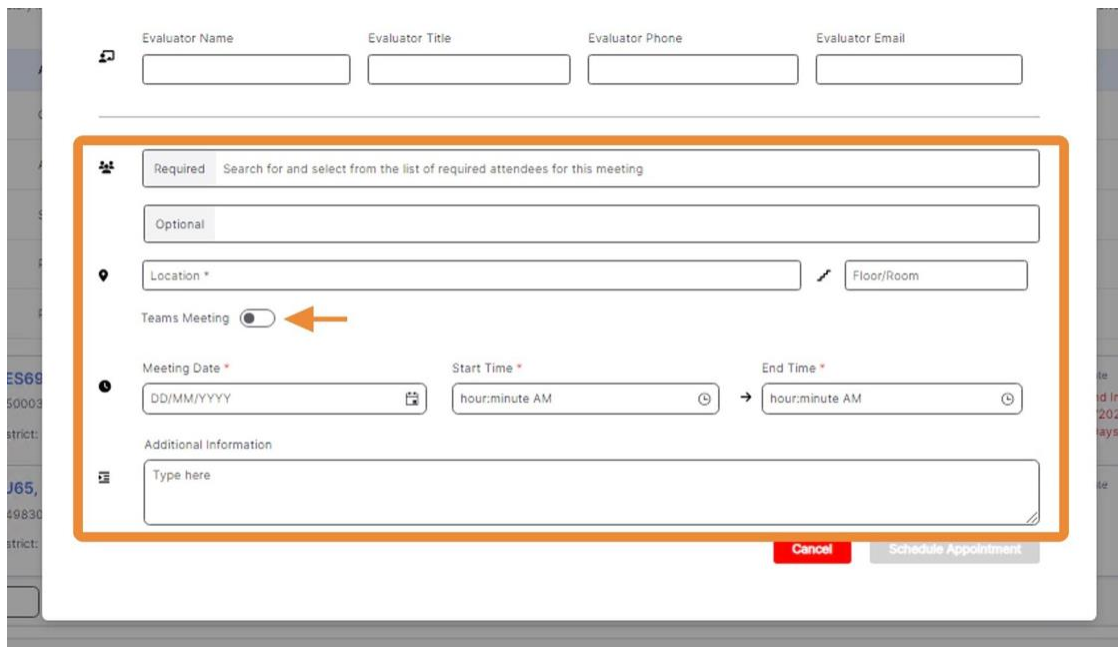
Type here

Cancel

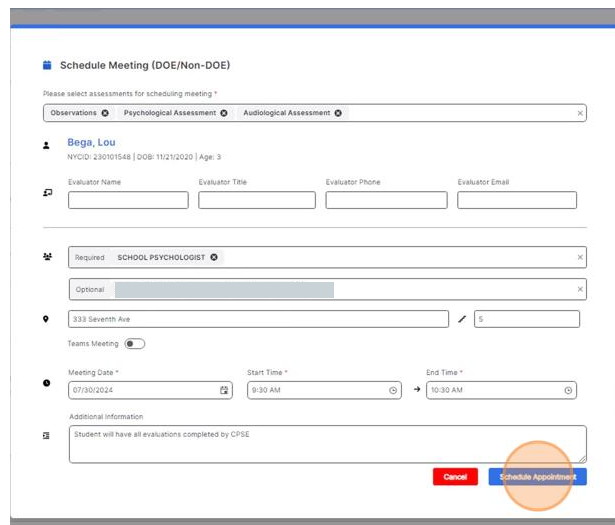
Schedule Appointment

10. Then complete the remaining fields with the evaluation scheduling details (found below Evaluator Information).

Include required attendees, the meeting *Date* and *Time*, and the *Location* of the meeting. You can indicate that the meeting will be held virtually by clicking the **Teams Meeting** toggle.



11. After you have completed all required fields, the blue **Schedule Appointment** button will become enabled. Click **Schedule Appointment** to confirm . Click **Cancel** to returned to the dashboard , all previously entered information will be deleted.



12. After you have clicked **Schedule Appointment**, you will be redirected to the dashboard. Follow steps 1- 4 to navigate back to the desired student.

The status of the assessments that were indicated in the Schedule Meeting pop-up will now display as Scheduled.

Students

[+ Add Referral](#)
[Export to Excel](#)

[My Caseload](#)
[Referrals](#)
[Evaluations](#)
[IEP](#)
[Placement](#)

Sort By

Student Name

Due Date

[Advanced Filters](#)

Initial

Bega, Lou

Evaluation Site

Activity

Pending Evaluation

Due Date

Finalize IEP!

08/05/2024

(13 Days Left)

Compliance Date

[Actions](#)

NYC-D-230101548 | DOB: 11/21/2020

DBN: | District:

[Evaluations](#)

[Referrals](#)
[Evaluations](#)
[IEP](#)
[Placement](#)

Social History Meeting Date

Status of Social History Package

Consent for Initial Evaluation Given?

Finalized

Yes

Assessments in Progress	Evaluator Name	Evaluator Type	Evaluator Due Date	Status
Observations			07/27/2024	Scheduled
Autological Assessment				Scheduled
Social History Evaluation				Finalized
Physical Examination				Finalized
Psychological Assessment				Scheduled

Referral Submitted

Next

Complete Evaluations

[IEP](#)

MINPRES69, IHBYOU87

Evaluation Site

Activity

Referral: Pending Data

Due Date

Finalize IEP!

08/05/2024

(13 Days Left)

Compliance Date

[Actions](#)