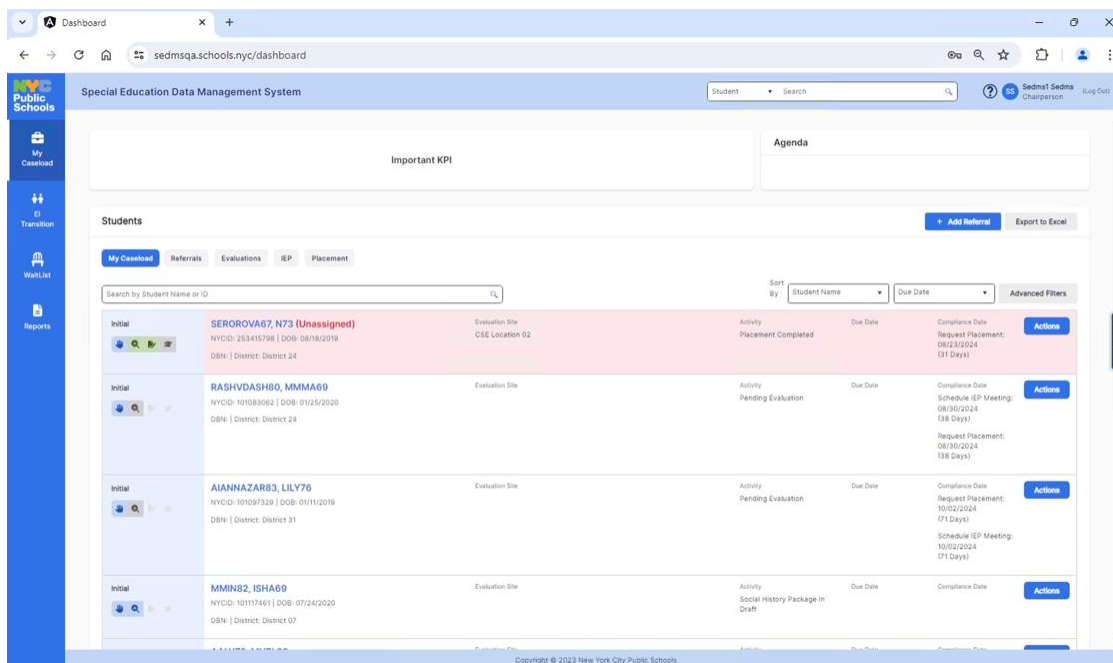


How to Complete an Assessment

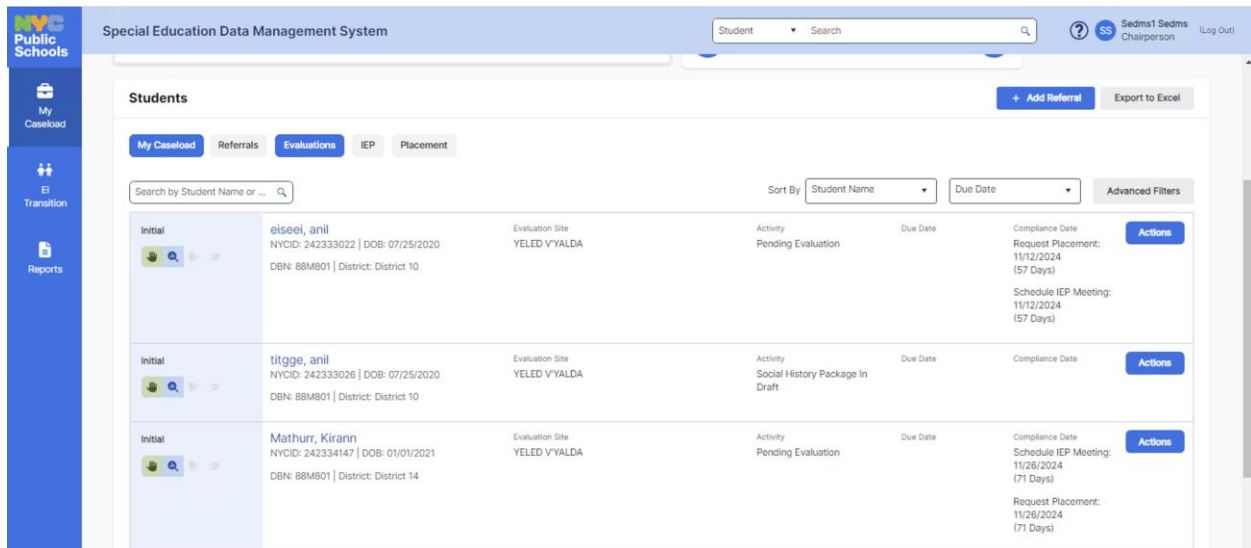
This guide provides step-by-step instructions on how to complete an Assessment in ATLAS. It explains how to navigate the dashboard, find the student, edit the assessment, upload the completed document, and submit it.

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 the **My Caseload** dashboard.



2. From your dashboard, search for the student for whom you wish to complete an Assessment. You can search utilizing the search bar as shown below or filter the dashboard by **Evaluations** or other relevant advanced filters. See “QRG 1.2 How to Navigate the Dashboard” for more information on how to use advanced filters.



Special Education Data Management System

Student Search

Students + Add Referral Export to Excel

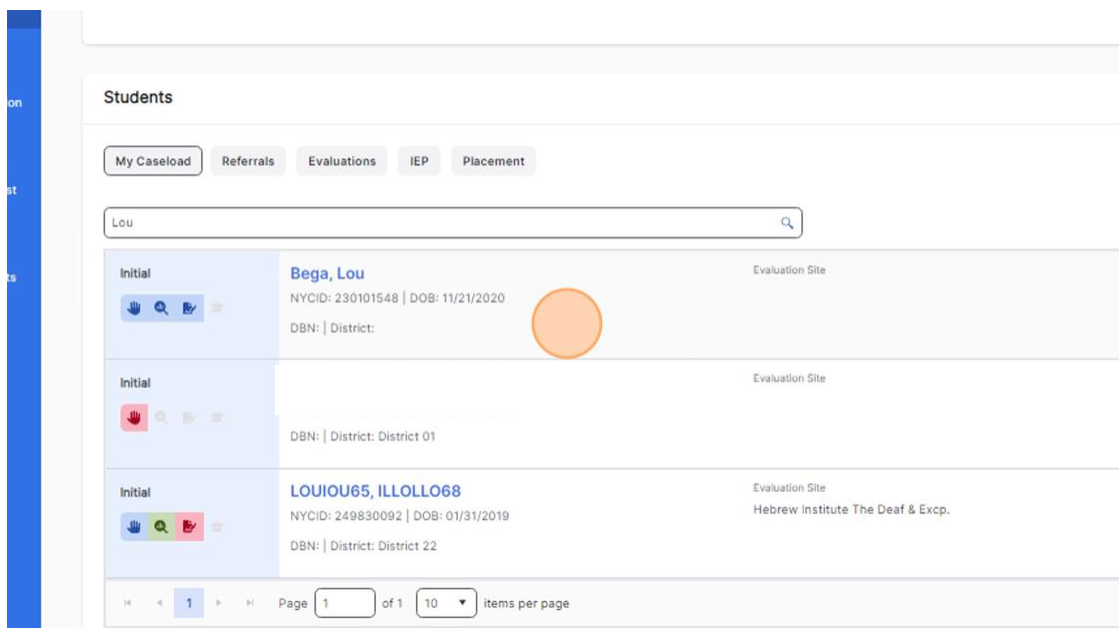
My Caseload Referrals **Evaluations** IEP Placement

Search by Student Name or ... Sort By Student Name Due Date Advanced Filters

Initial	Student Name	NYCID	DOB	DBN	District	Evaluation Site	Activity	Due Date	Compliance Date	Actions
	eiseel, anil	242333022	07/25/2020	88M801	District 10	YELED V'YALDA	Pending Evaluation		Request Placement: 11/12/2024 (57 Days) Schedule IEP Meeting: 11/12/2024 (57 Days)	Actions
	titgge, anil	242333026	07/25/2020	88M801	District 10	YELED V'YALDA	Social History Package In Draft			Actions
	Mathurr, Kirann	242334147	01/01/2021	88M801	District 14	YELED V'YALDA	Pending Evaluation		Schedule IEP Meeting: 11/26/2024 (71 Days) Request Placement: 11/26/2024 (71 Days)	Actions

- Once you have found the student for whom you would like to complete an assessment, 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 instead of expanding the row.



Students

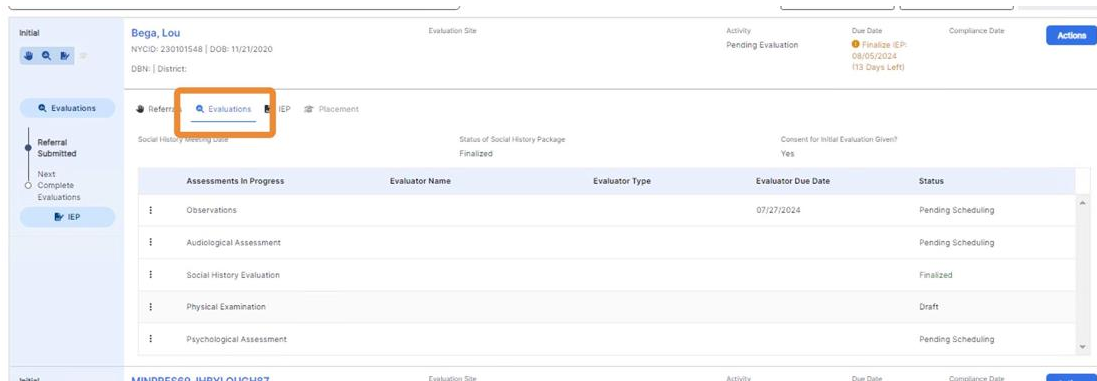
My Caseload Referrals Evaluations **IEP** Placement

Lou

Initial	Student Name	NYCID	DOB	DBN	District	Evaluation Site
	Bega, Lou	230101548	11/21/2020			
					District 01	
	LOUIOU65, ILLLOLO68	249830092	01/31/2019		District 22	Hebrew Institute The Deaf & Excp.

Page 1 of 1 10 items per page

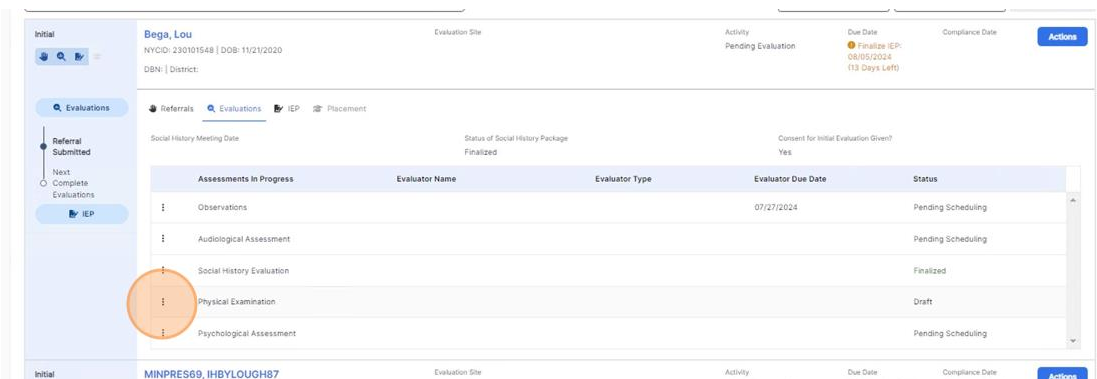
- Once you have expanded the student's row, you will be able to see more information about each process phase. To see the assessment planning page and view all evaluations assigned to a student, ensure that the second tab **Evaluations** is selected.



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				Draft
Psychological Assessment				Pending Scheduling

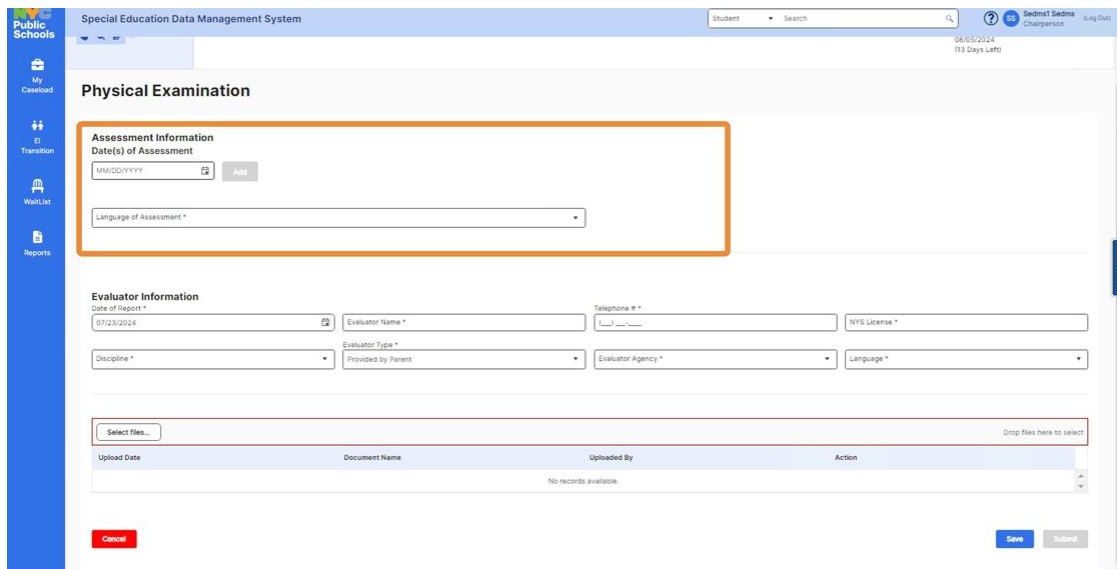
5. Find the assessment that you wish to complete for the student from the Assessments Planning grid. All assessments assigned to the child will be shown in the grid under the **Assessments in Progress**.

6. Click on the vertical three dots to the left of the assessment title to review the **Action Menu**. From the pop-up click **Edit**.



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				Draft
Psychological Assessment				Pending Scheduling

7. This will open the assessment page in edit mode. Complete all required fields within the Assessment Information section. Indicate the date of the assessment by using the date picker. After you select a date, you must click **Add** to add the date of the assessment. You will not be able to submit the assessment unless you have added a date of assessment.



Physical Examination

Assessment Information

Date(s) of Assessment

MM/DD/YYYY

Language of Assessment *

Evaluator Information

Date of Report *

Evaluator Name *

Telephone # *

NYS License *

Discipline *

Evaluator Type *

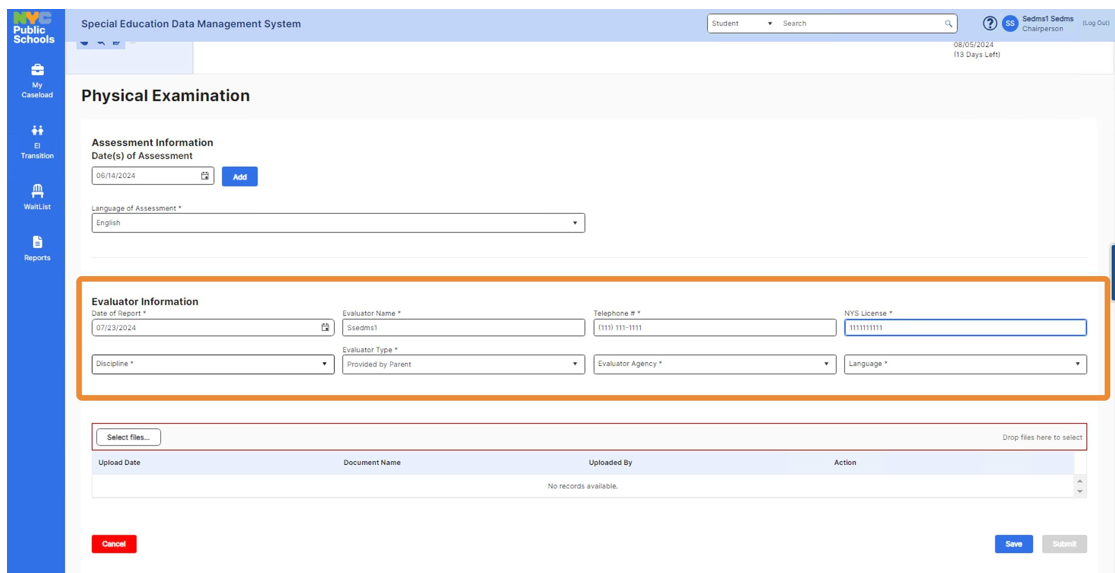
Evaluator Agency *

Language *

Drop files here to select

Upload Date	Document Name	Uploaded By	Action
No records available.			

8. Complete all evaluator information within the *Evaluation Information* section.



Physical Examination

Assessment Information

Date(s) of Assessment

06/14/2024

Language of Assessment *

English

Evaluator Information

Date of Report *

Evaluator Name *

Telephone # *

NYS License *

Discipline *

Evaluator Type *

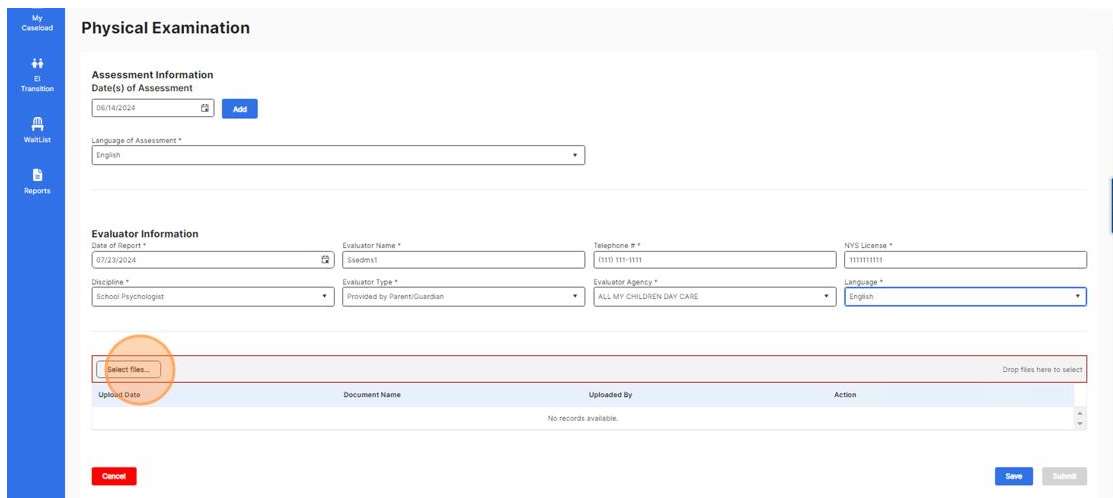
Evaluator Agency *

Language *

Drop files here to select

Upload Date	Document Name	Uploaded By	Action
No records available.			

9. Upload a completed assessment by clicking the **Select Files** button below the *Evaluator Information* section. This will allow you to select a file from your computer and upload it into the system.



Physical Examination

Assessment Information
 Date(s) of Assessment: 06/14/2024 [Add]
 Language of Assessment: English

Evaluator Information
 Date of Report: 07/23/2024
 Evaluator Name: Seedm1
 Telephone #: (111) 111-1111
 NYS License #: 1111111111
 Discipline: School Psychologist
 Evaluator Type: Provided by Parent/Guardian
 Evaluator Agency: ALL MY CHILDREN DAY CARE
 Language: English

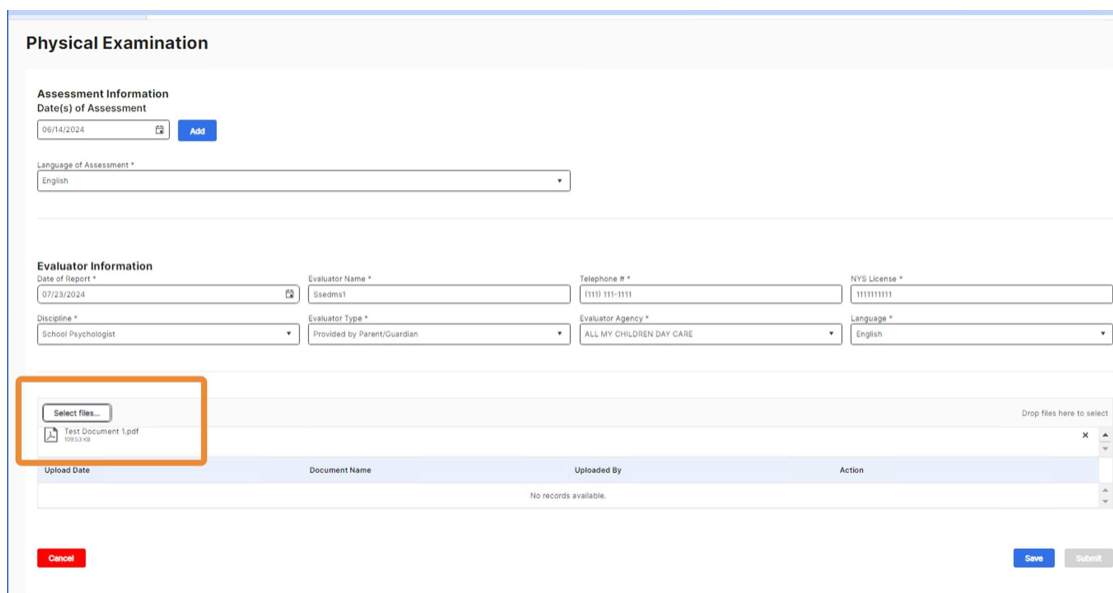
Select Files (circled in orange)

Drop files here to select

Upload Date	Document Name	Uploaded By	Action
No records available.			

Buttons: Cancel, Save, Submit

10. Once you have uploaded a document, it will appear beneath the **Select Files** button.



Physical Examination

Assessment Information
 Date(s) of Assessment: 06/14/2024 [Add]
 Language of Assessment: English

Evaluator Information
 Date of Report: 07/23/2024
 Evaluator Name: Seedm1
 Telephone #: (111) 111-1111
 NYS License #: 1111111111
 Discipline: School Psychologist
 Evaluator Type: Provided by Parent/Guardian
 Evaluator Agency: ALL MY CHILDREN DAY CARE
 Language: English

Select Files (highlighted with an orange box)

Test Document 1.pdf
100.13 KB

Drop files here to select

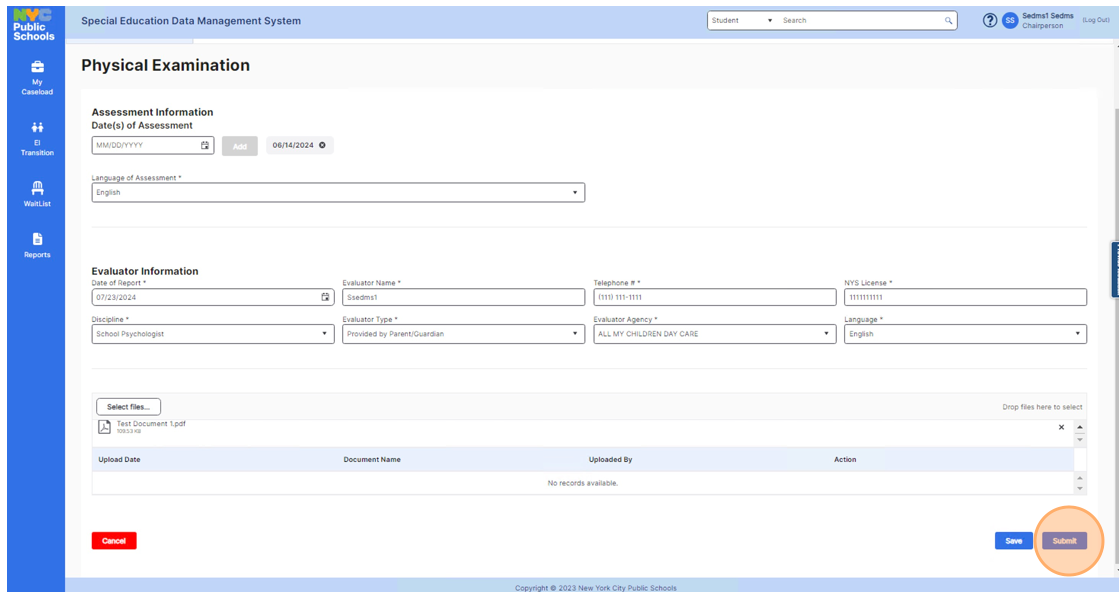
Upload Date	Document Name	Uploaded By	Action
No records available.			

Buttons: Cancel, Save, Submit

11. To finalize the assessment click the blue **Submit** button located in the bottom right corner of the screen.

12. If you wish to save and return, click the blue **Save** button at the bottom right corner of the screen.

If you wish to cancel, which will delete all unsaved data, click the red **Cancel** button at the bottom left corner of the screen.



Special Education Data Management System

Physical Examination

Assessment Information

Date(s) of Assessment: MM/DD/YYYY Add: 06/14/2024

Language of Assessment: English

Evaluator Information

Date of Report: 07/23/2024 Evaluator Name: Seedmst Telephone #: (111) 111-1111 NYS License #: 111111111

Discipline: School Psychologist Evaluator Type: Provided by Parent/Guardian Evaluator Agency: ALL NY CHILDREN DAY CARE Language: English

Select files... Drop files here to select

Text Document 1.pdf 10/13/18

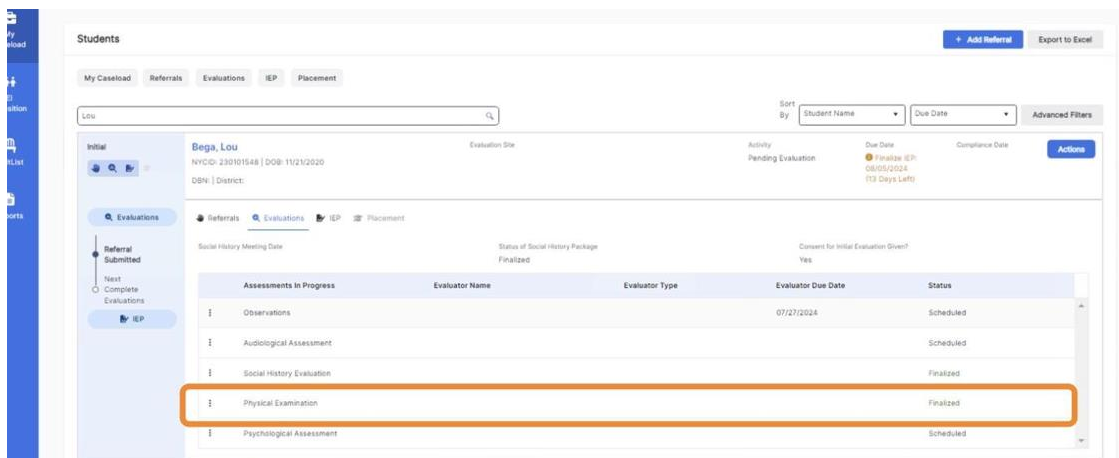
Upload Date	Document Name	Uploaded By	Action
No records available.			

Cancel Save **Submit**

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13. After you have clicked **Submit** you will be directed back to the dashboard.

14. Follow steps 1-4 to navigate back to the desired student. The status of the assessment will now show as Finalized.



Students

My Caseload Referrals Evaluations IEP Placement

Search: LCU Sort By: Student Name Due Date Advanced Filters

Bega, Lou Evaluation Site: NYCID-230101548 | DOB: 11/21/2020
DBN: District:

Activity: Pending Evaluation Due Date: 08/05/2024 (13 Days Left) Compliance Date: **Finalize IEP**

Evaluations

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