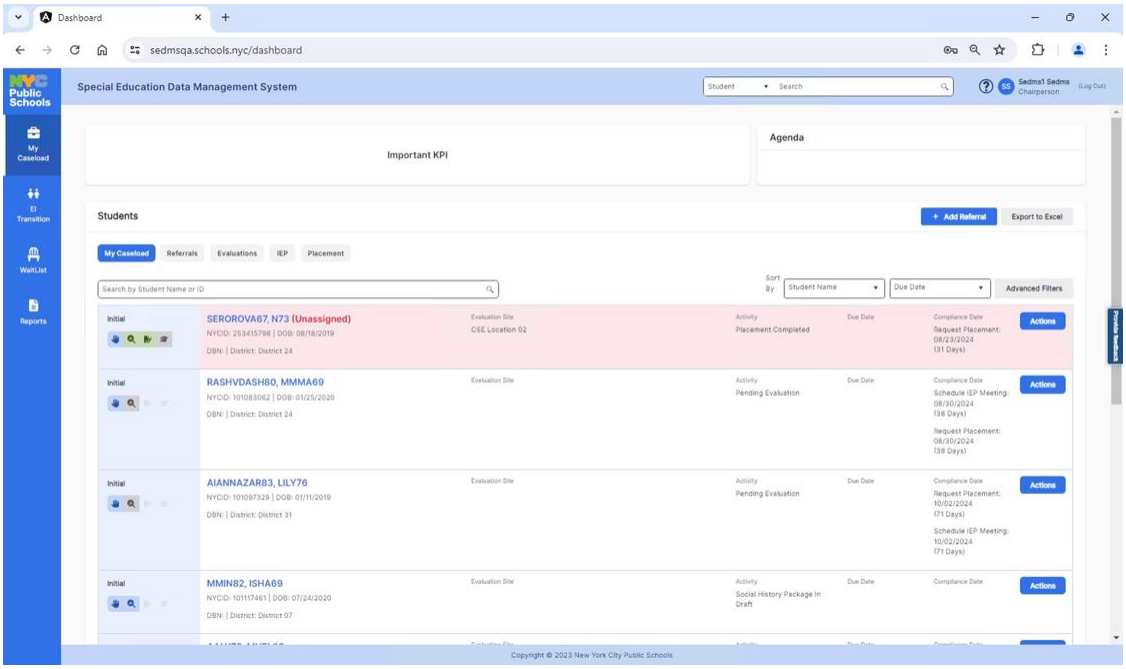
April 2025

How to Complete an Assessment

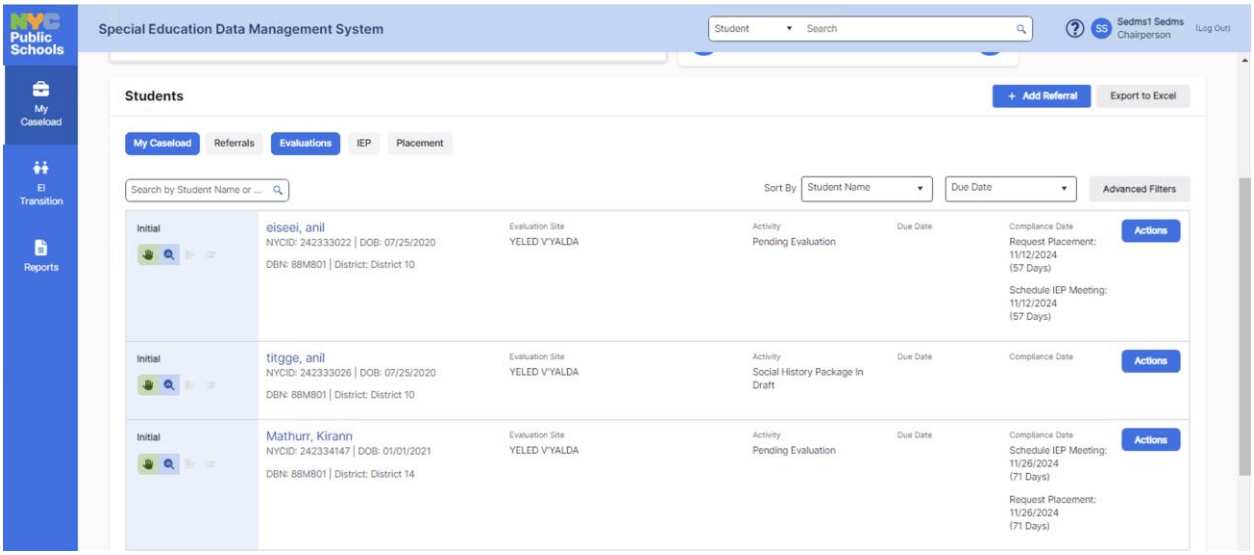
This guide provides step-by-step instructions on how to complete an Assessment in ATLAS. It explains how to navigate the dashboard, find the student, edit the assessment, upload the completed document, and submit it.

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.

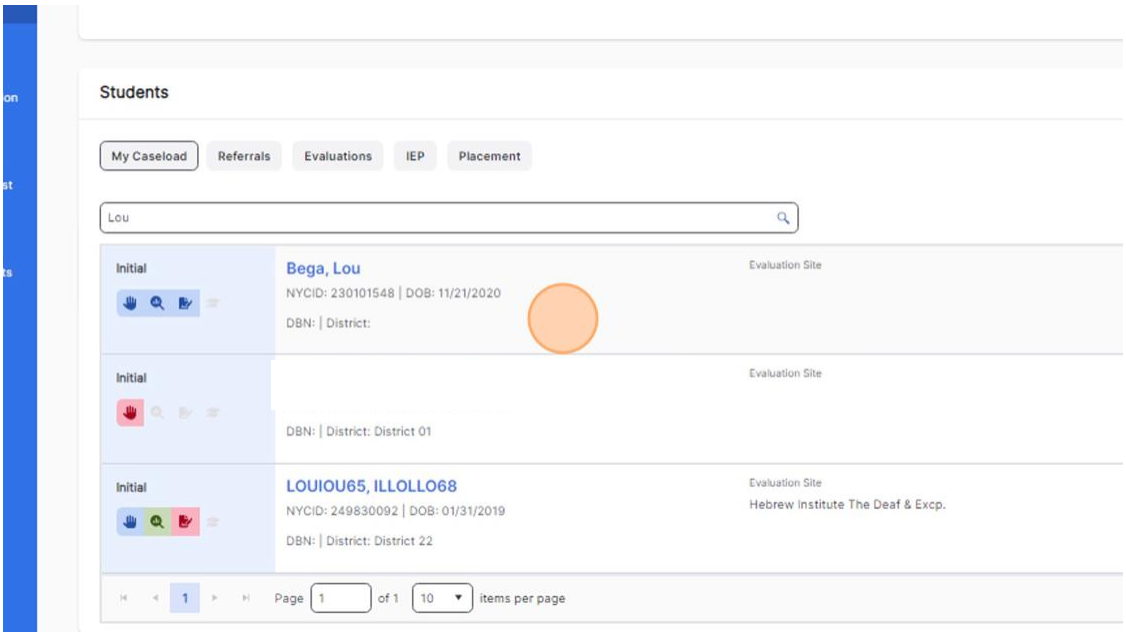


2. From your dashboard, search for the student for whom you wish to complete an Assessment. You can search utilizing the search bar as shown below or filter the dashboard by **Evaluations** or other relevant advanced filters. See “QRG 1.2 How to Navigate the Dashboard” for more information on how to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

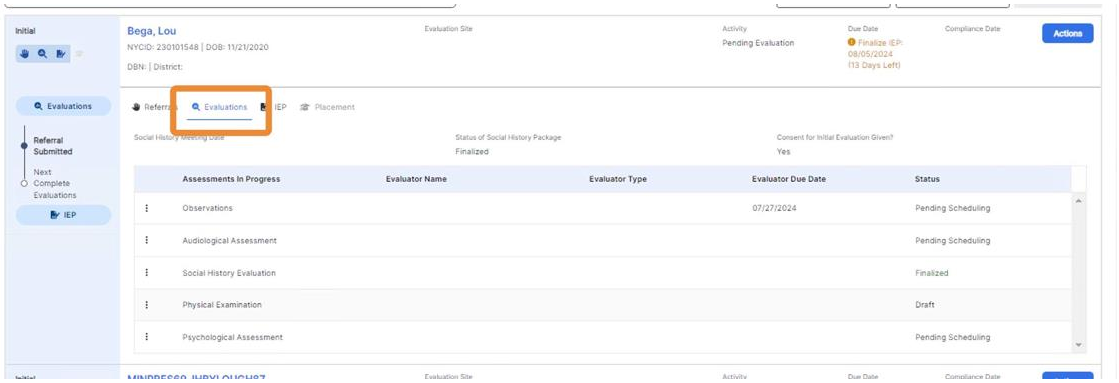


3. Once you have found the student for whom you would like to complete an assessment, click on their row to expand it.

   ***Note**:* If you click on the student's name in blue, it will take you to their student profile instead of expanding the row.

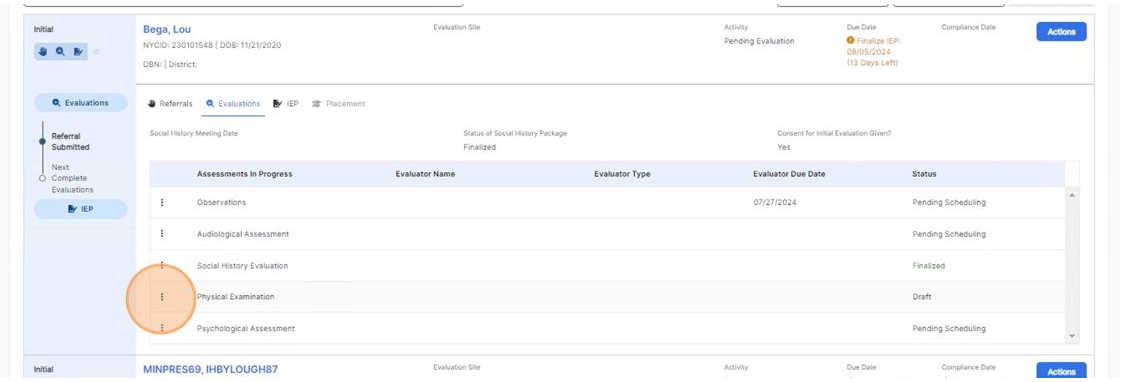


4. Once you have expanded the student's row, you will be able to see more information about each process phase. To see the assessment planning page and view all evaluations assigned to a student, ensure that the second tab **Evaluations** is selected.

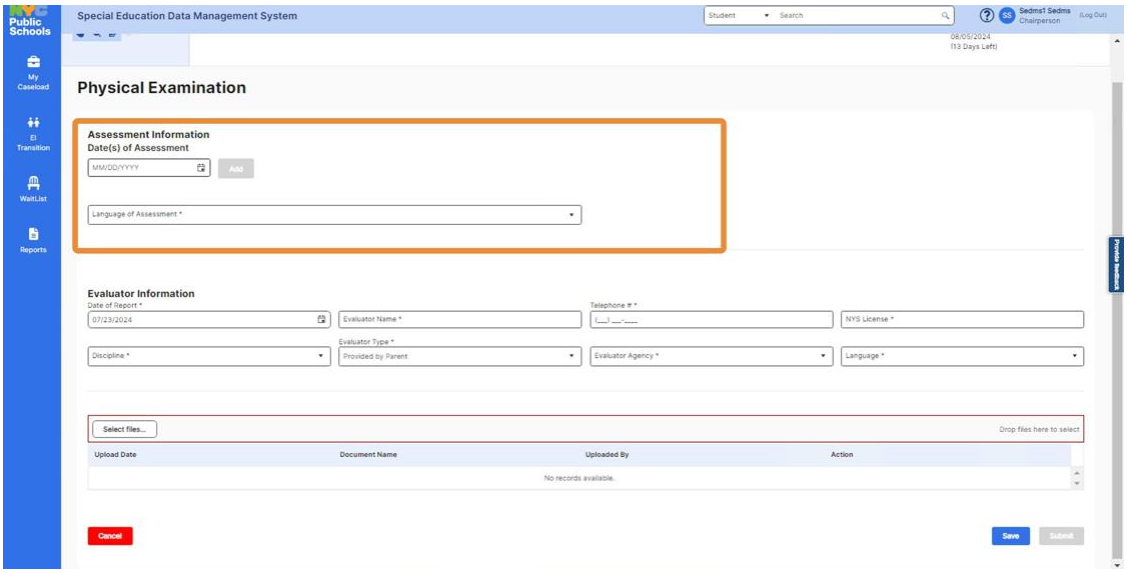


5. Find the assessment that you wish to complete for the student from the Assessments Planning grid. All assessments assigned to the child will be shown in the grid under the **Assessments in Progress**.

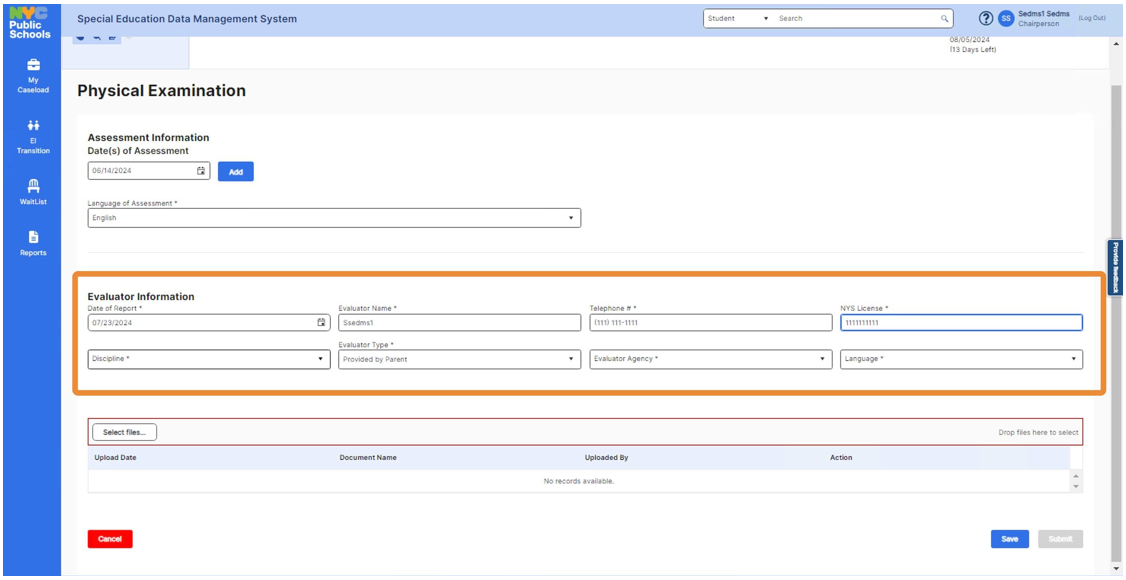
6. Click on the vertical three dots to the left of the assessment title to review the **Action Menu**. From the pop-up click **Edit**.



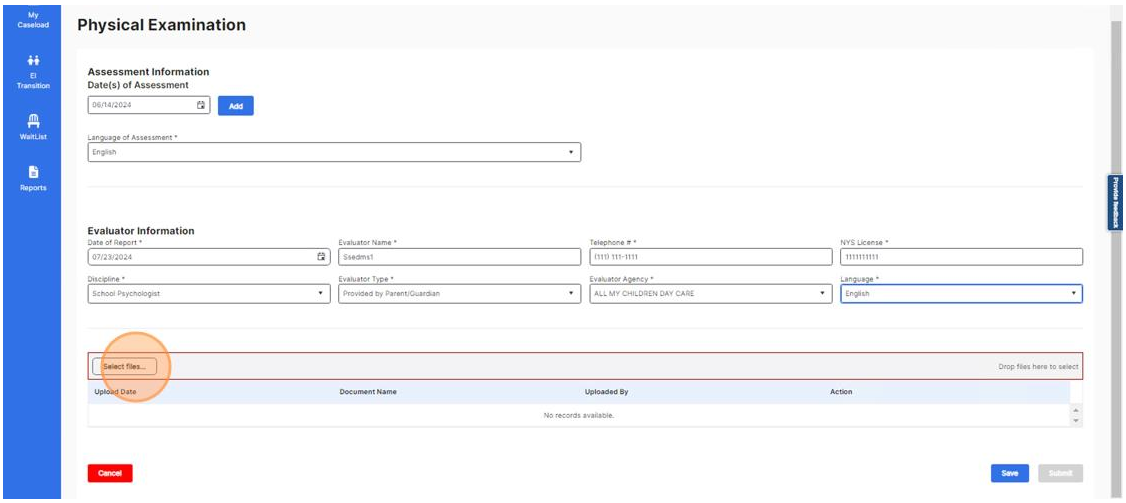
7. This will open the assessment page in edit mode. Complete all required fields within the Assessment Information section. Indicate the date of the assessment by using the date picker. After you select a date, you must click **Add** to add the date of the assessment. You will not be able to submit the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



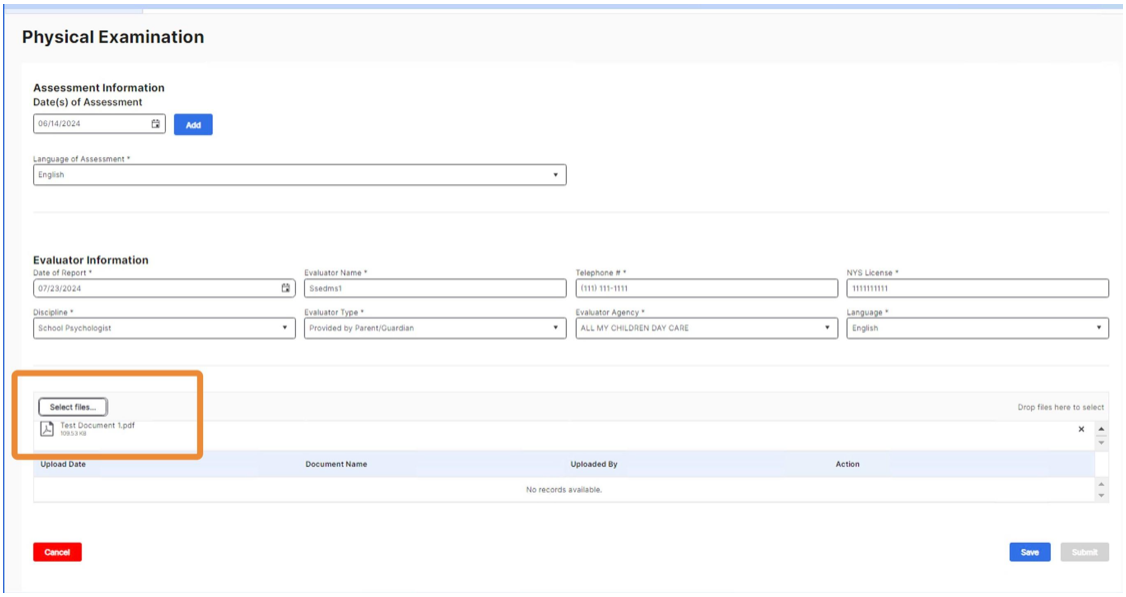
8. Complete all evaluator information within the *Evaluation Information section*.



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.



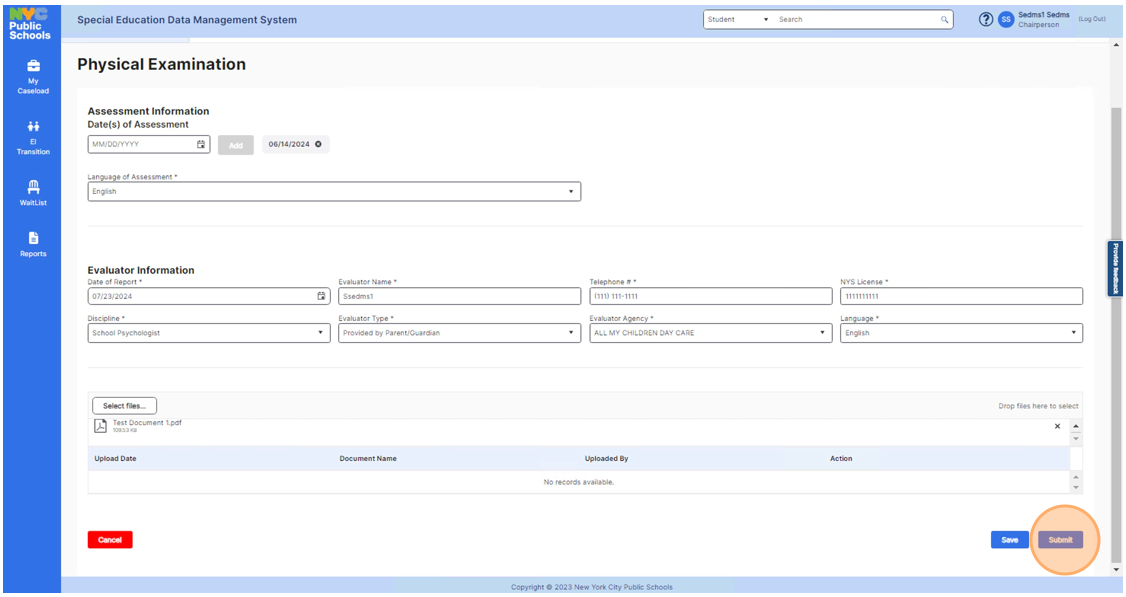
10. Once you have uploaded a document, it will appear beneath the **Select Files** button.

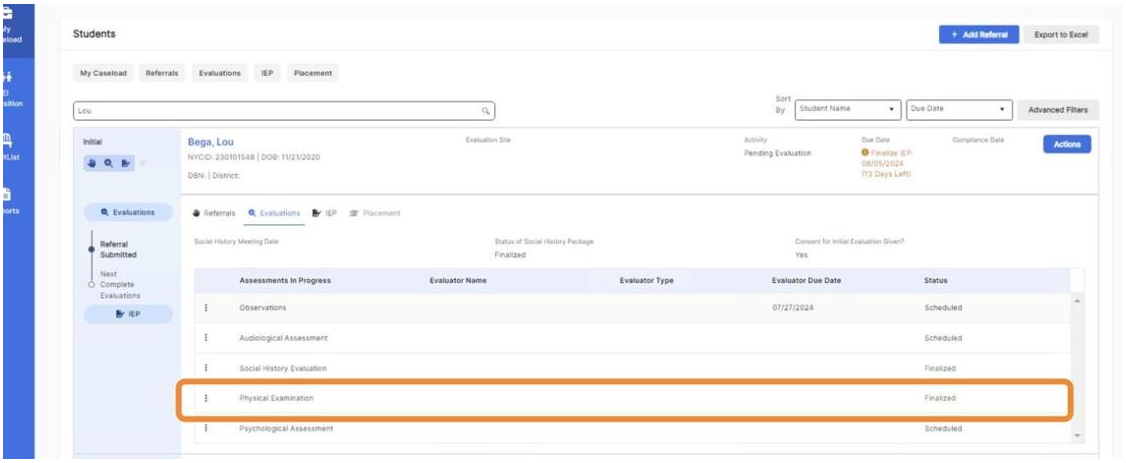


11. To finalize the assessment click the blue **Submit** button located in the bottom right corner of the screen.

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.



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.