FAQ: ATLAS Navigation

This FAQ provides answers to common questions about navigating the

What can I do from the dashboard in ATLAS?

The dashboard is your main workspace in ATLAS. You can view all students on your caseload, handle most student actions, and filter and sort students by various criteria.

How do I log into the dashboard in ATLAS?

After logging into ATLAS, you'll go straight to the dashboard. You do not need to log in separately to the dashboard, it will be the first page you see.

What is the "Students in Compliance" metric and where is it located?

The *Students in Compliance* metric is displayed in the top left corner of the dashboard. It shows the compliance status of all students assigned to you. Click on a bar in the *Students in Compliance* chart to filter the dashboard below based on the selected compliance status.

How do I toggle between viewing my caseload and all students I have access to?

Click the **My Caseload** button at the top of the dashboard. It's blue when selected and shows all students assigned to you. The **My Caseload** button is activated by default. Click it again to deselect it (it will turn gray) to see all students you have access to, not just your caseload.

How can I filter students by process stage?

Use the icons on the top left of the dashboard to filter by process stage. For example, clicking the **Referrals** button show all students in the Referrals stage on your caseload.

How do I sort the dashboard alphabetically or by due date?

Utilize the toggles in the top right corner of the dashboard to sort alphabetically by Student Name or by Due Date.

How do I export the dashboard data to Excel?

Select the **Export to Excel** button in the top right corner of the dashboard. Depending on your browser, you may need to allow the system to download files. The downloaded file will appear in your Downloads folder.

How can I view the students assigned to my caseload in ATLAS?

When you log in to ATLAS, your dashboard automatically shows the students currently assigned to your caseload. The **My Caseload** button is automatically selected and appears in blue. To see all students, including those not on your caseload, click **My Caseload** to deselect the view; the **My Caseload** button will now appear grey.

How do I view all students within my user access designation? (For example, all students at your school, or all students viewable by your user type)

Deselect the **My Caseload** button to view all students you have access to based on your role, e.g., all students in your school or by user type. Students assigned to you will be in white rows, while unassigned students will appear in pink rows.

How can I search for a specific student within my caseload?

Use the *Search by Student Name or ID* box to find a specific student within your caseload.

Who can assign students in ATLAS?

All staff can assign students in ATLAS.

When students need to be reassigned from one admin to another, how does that work?

In ATLAS, an Admin can manually 'Reassign' to another Admin/CPSE Staff. This follows the same process as assigning, which is covered in QRG 1.4 "How to assign a student to a caseload."

Whose responsibility is it to assign unassigned students?

For guidance on who should be responsible for assigning students in your CPSE districts, please ask your chair.

How do I search for a student in ATLAS?

There are two ways to search for a student from the dashboard. You can use the search box directly below the **My Caseload** button to search by first name, last name, or student ID. The search box in the blue banner at the top of the page lets you search by student ID, or first name, last name, and DBN. Users may search for students using either. Type in the search criteria and click enter. A list of students matching the search criteria will appear. It is best practice to include the Student ID for the most accurate results in case there are students who share the same name.

What information can I use to search for a student?

You can search for a student using their first name, last name, and DBN, or Student ID.

What do I do after finding the student in the search results?

Click on the student's name in the search results to go to their student profile.

What if the student I am searching for is not returned in the search results?

If the student is not in your caseload, try turning off the **My Caseload** button. If it's on, you are only searching within your caseload. Also, make sure you didn't inadvertently apply filters. You can clear all filters by using the **Advanced Filters** function on the top right corner of the dashboard.

When I use the ATS search, the three dots next to the student's name are greyed out, why?

If you use the universal search function, school-age students will show up with the 3 dots next to their names greyed out. School-aged students aren't currently in ATLAS so no action can be taken on them.

Is a DBN mandatory to search for a student?

DBN is not mandatory, you can search by any combination of the three fields. We recommend searching with the student ID number and/or as many fields as possible to identify the correct student.

Can I search for a student by date of birth?

When you search ATS, you can only search by Student ID, First Name, Last Name, or DBN. DOB is shown in the search results.

When you use the dashboard search, you can use an advanced filter to search students by DOB. Additionally, DOB is shown in the search results, on each student's tile.