FAQ: How to Complete the Social History Package

This FAQ covers the processes for completing and submitting the CPSE package in ATLAS, managing assessment planning, scheduling and completing assessments, and handling additional assessments. It also addresses waitlisting and agency involvement, including how students are added to waitlists and assigned to evaluation sites. Additionally, the FAQ explains how to manage evaluation workflows, including how assessments are finalized, documents are uploaded, and the system scheduling and evaluation procedures.

Note: *In ATLAS the CPSE Package is called the Social History Package. In the following steps, and within the application, you will see this term being used instead of CPSE Package.*

CPSE Package

How do I start the process of completing the CPSE package?

Log into ATLAS, then use the search bar on the top of the grid underneath the My Caseload button to find the student by their name or Student ID. Once you have found the desired student, click the blue Actions button on the right side of the student row and select Edit SHP to access the Social History Package (CPSE Package).

How can I tell which sections of the CPSE package have been completed?

In the left navigation menu, a green check mark indicates that a section has been completed, while a red circle with an exclamation point indicates that the section is incomplete.

What should I do if I need to upload additional documentation to the CPSE package?

Use the Select Files button to upload any additional relevant documentation. If the parent has manually provided consent, upload a copy of that consent in this section.

What happens if I press the Cancel button while filling out a section of the CPSE package?

Pressing the Cancel button will delete all previously entered work for that section, and the icon next to the section title in the left navigation menu will remain an exclamation point.

How do I finalize and send the CPSE package once all sections are completed?

After clicking Finalize, a pop-up will appear listing all the documents in the CPSE Package. You will then need to select a Method of Delivery and click Submit. If you choose Print or Postal Mail, you will be prompted to complete your computer's print functions. ATLAS cannot send documents by postal mail; you must mail the printed document yourself.

Assessment Planning

How do I navigate to Assessment Planning for a student in ATLAS?

After logging into ATLAS, use the search bar on your dashboard to find the student by their name or Student ID. Once you have found the student, click the blue Actions button next to their name and select "Assessment Planning."

What should I do if I need to add an additional assessment provided by a parent?

Click the "+ Add Assessment" button in the bottom left corner of the Assessment Planning grid. This will add a new row for the additional assessment, which will be labeled as "Provided by Parent." Complete the required columns such as Assessment Type, Language of Assessment, Evaluator Name, and Due By date.

How can I review the assessment planning grid without making any changes?

To review the assessment planning grid, search for the student using the search bar or by filtering the dashboard by Evaluations or other relevant filters. Click on the student's row to expand their panel, ensuring the Evaluations tab is selected to view all evaluations assigned to that student.

What are the mandatory assessments for initial K-12 and preschool assessments?

For initial K-12 assessments, the mandatory assessments include Social History, Physical, Psychoeducational, and Classroom Observation. For preschool assessments, the mandatory assessments are Social History Evaluation, Physical Examination, and Psychological Evaluation and Observation of Child. These mandatory assessments cannot be removed from the planning grid.

How do I submit the completed assessment planning grid?

After completing all required information in the assessment planning grid, click the blue Submit button in the bottom right corner to submit the grid. If you need to cancel, click the red Cancel button, but note that all previously entered information will be deleted.

Evaluation Scheduling

How do I find the student I want to schedule an assessment for in ATLAS?

After logging into ATLAS, use the search bar on your dashboard to find the student by their name or Student ID. You can also filter the dashboard by Evaluations or other relevant advanced filters. Once you locate the student, click on their row to expand their panel.

How do I schedule an assessment meeting for a student?

In the Assessment Planning grid, click on the three vertical dots next to the assessment you wish to schedule. Select "Schedule EVL Meeting" from the pop-up menu. Complete the Evaluator information and scheduling details, including required attendees, meeting date, time, and location. If the meeting will be held virtually, toggle the Teams Meeting option. Once all fields are completed, click the blue "Schedule Appointment" button to confirm and schedule the assessment.

What information do I need to provide when scheduling an assessment meeting?

You need to provide the Evaluator's Name, Title, Phone, and Email, as well as the meeting details including required attendees, meeting Date and Time, and the Location of the meeting. If applicable, you can indicate that the meeting will be held virtually by sliding the Teams Meeting toggle.

What happens if I press Cancel while scheduling an assessment meeting?

Pressing the Cancel button will delete all previously entered information for that scheduling attempt, and you will be returned to the dashboard without scheduling the appointment.

How can I verify that the assessment meeting has been scheduled?

After scheduling the appointment, return to your dashboard and click on the student's row. The status of the scheduled assessments will now display as "Scheduled." Additionally, attendees indicated in the scheduling process will receive notifications, and, if selected, the parent will be notified via the Parent Portal.

Where can I see the date that the evaluation is due?

After scheduling the appointment, return to your dashboard and click on the student's row. The date the evaluation is due will be displayed in the Evaluation Due Date column, the second column from the right.

Assessment Completion

How do I find the student for whom I need to complete an assessment in ATLAS?

After logging into ATLAS, use the search bar on your dashboard to find the student by their name or Student ID. You can also filter the dashboard by Evaluations or other advanced filters. Once you locate the student, click on their row to expand their panel.

How do I edit and complete an assessment for a student?

In the Assessment Planning grid, find the assessment you need to complete under the "Assessments in Progress" column. Click on the three vertical dots next to the assessment title and select "Edit" from the pop-up menu. Complete all required fields in the Assessment Information and Evaluation Information sections.

How do I upload a completed assessment document?

While on the editable assessment page, click the "Select Files" button at the bottom left of the screen. This will open a file uploader where you can choose the document from your computer. Select the appropriate document and press "Open" to upload it. The uploaded document will appear beneath the "Select Files" button.

What should I do after completing and uploading the assessment document?

To finalize the assessment, press the blue "Submit" button at the bottom right corner of the screen. If you wish to save your work and return later, press the blue "Save" button. To cancel and delete all previously entered data, press the red "Cancel" button. After pressing "Submit," you will be routed back to the dashboard, and the status of the assessment will show as "Finalized."

How can I verify that an assessment has been finalized?

Return to your dashboard and click on the student's row. Ensure that "Evaluations" is selected on the top of the student's panel. The assessment's status will now display as "Finalized" in the Assessment Planning grid.

Waitlisting & Agency Involvement

Where is the information from waitlists coming from?

ATLAS tracks how many students are on the waitlist for an agency. When someone adds the student to the waitlist (CPSE staff, agency staff, or the family), they are added to the overall number of students on the waitlist. When an agency picks up a student from the waitlist and adds them to their worklist, the waitlist is updated.

Can agencies add students directly to their waitlist? Can families contact agencies directly to be added to their waitlist?

Yes, the agency can directly add the child to their waitlist if the parent calls the agency and provides the necessary information.

Can agencies take evaluations directly?

A family can contact an agency outside of ATLAS, but the agency will need to log the evaluation in ATLAS to bill for it.

Why is it that students have to be added to a waitlist, can't they be assigned directly to an agency?

Either the family, CPSE, or an MDE can add a student to a waitlist. The agency must review their waitlist and add a student to their worklist to move them off the waitlist.

Evaluation Scheduling & Workflow

Can we still reach out to agencies directly for scheduling or must all scheduling be done via ATLAS?

CPSE staff may reach out to agencies directly, but the evaluation must be scheduled through ATLAS for the agency to be able to bill for it.

How does the system prevent families from using more than one evaluation site?

When one site accepts the student to their worklist, they are removed from other waitlists. If Agency A adds a student to their worklist, Agency B cannot add the student unless released from Agency A.

Who can assign children to evaluation sites?

Once the parent portal launches, families will be able to select sites through the portal. Until then, either an agency staff member or a CPSE staff member can assign a child to evaluation sites.