

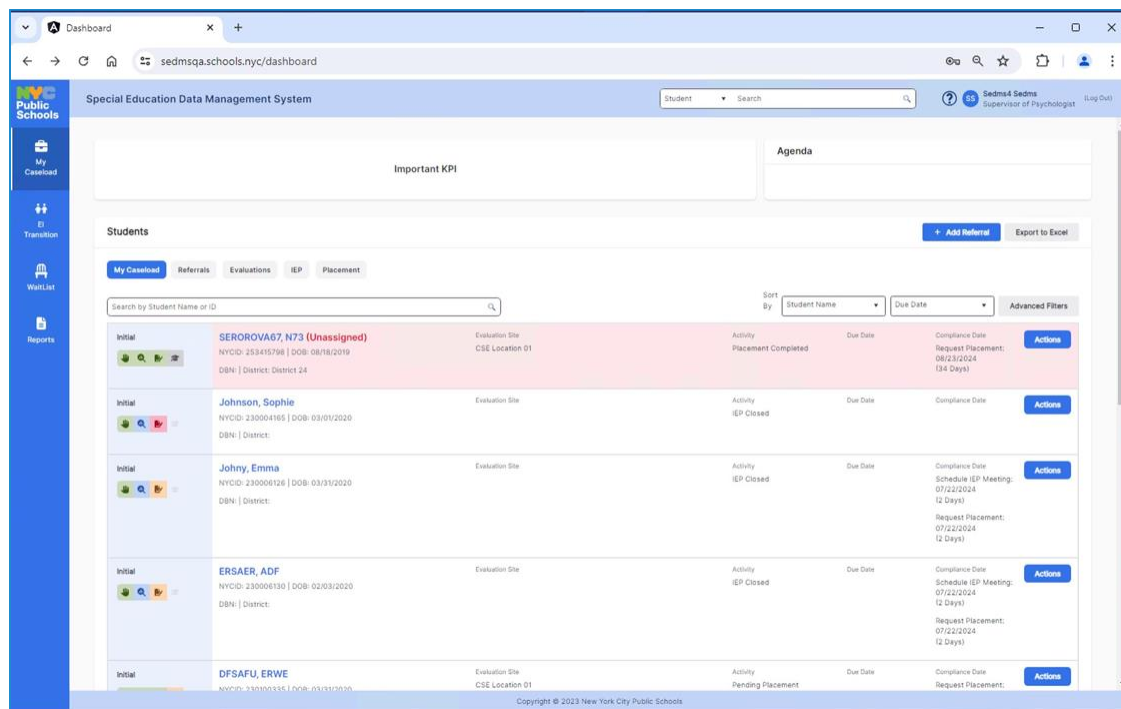
# How to Complete the Social History Package

This guide provides clear, step-by-step instructions for completing the CPSE Package in ATLAS. It covers how to navigate each section, fill out required forms, and upload necessary documents, culminating in finalizing and sending the package.

**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.

**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.

1. Log in to ATLAS. You will be directed to your dashboard.



2. Search for the student using the search bar under **My Caseload** to search by Student Name or Student ID. It is best practice to confirm a match via Student ID, since students may have similar or the same names.

Important KPI

Students

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ID

Initial	Student Name	Evaluation Site
	<b>SEROROVA67, N73 (Unassigned)</b> NYCID: 253415798   DOB: 08/18/2019 DBN:   District: District 24	Evaluation Site CSE Location 01
	<b>Johnson, Sophie</b> NYCID: 230004165   DOB: 03/01/2020 DBN:   District:	Evaluation Site
	<b>Johny, Emma</b> NYCID: 230006126   DOB: 03/31/2020 DBN:   District:	Evaluation Site

**Note:** Students assigned to you will appear when **My Caseload** is selected (in blue). If your search does not return the student you are looking for, deselect **My Caseload** (will now appear grey) to see all student records you have access to.

3. After locating the student, click the blue **Actions** button on the right side of the row.

Students

+ Add Referral Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student Na... Sort By Student Name Activity Due Date Advanced Filters

Initial	Student Name	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	<b>DevWebSLNkBsyp, DevWebSFNgxwpezV</b> Student ID: 242305965   DOB: 06/02/2020 DBN: 88M801   District: District 02	YELED VYALDA	Social History Package In Draft			
	<b>DevWebSLNFFzvt, DevWebSFNxbpWPyT</b> Student ID: 242311417   DOB: 06/02/2020 DBN: 88M801   District: District 02	YELED VYALDA	Social History Package In Draft			
	<b>DevWebSLNebxth, DevWebSFNVhZFRpl</b> Student ID: 242311954   DOB: 06/02/2020 DBN: 88M801   District: District 02	YELED VYALDA	Social History Package In Draft			
	<b>DevWebSLNFQEN, DevWebSFNGXyslwc</b> Student ID: 242313581   DOB: 06/02/2020 DBN: 88M801   District: District 02	YELED VYALDA	Pending IEP	Finalize IEP: 11/14/2024 (9 Days Left)	Request Placement: 12/12/2024 (37 Days)	
	<b>DevWebSLNOwOkD, DevWebSFNcFDHjeB</b> Student ID: 242315214   DOB: 06/02/2020 DBN: 88M801   District: District 02		Pending Placement		Request Placement: 12/12/2024 (37 Days)	

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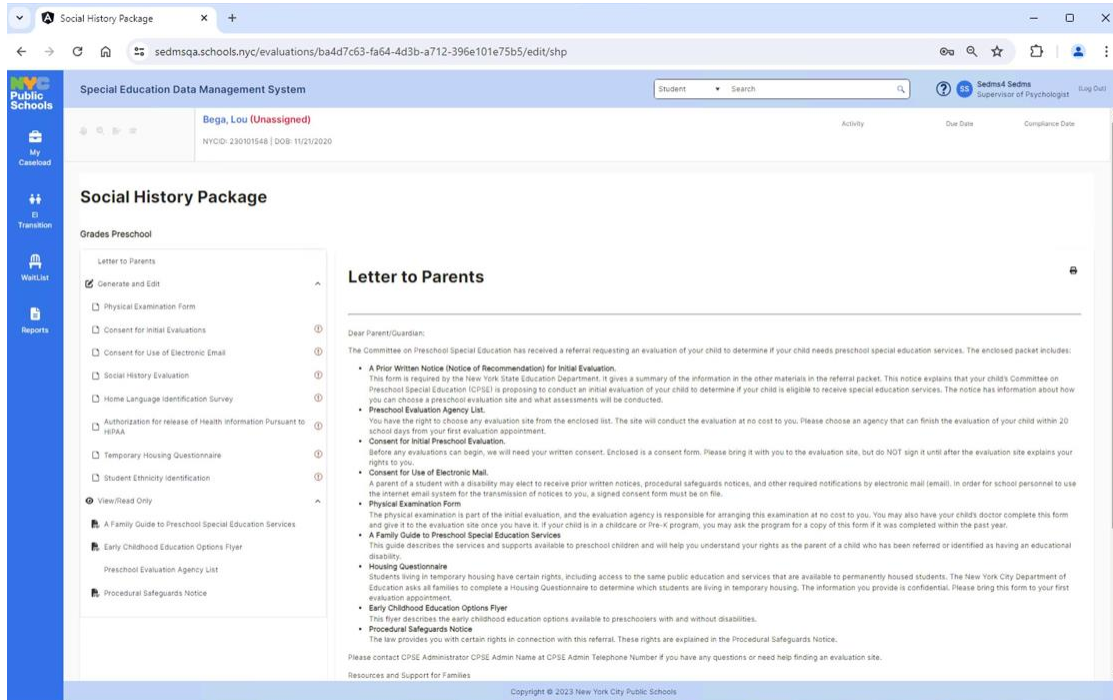
4. In the Actions pop up, scroll to the evaluations section and click on **Edit SHP**. Note

Sort By Student Name Due Date Advanced Filters

Activity	Due Date	Compliance Date	Actions
Social History Package In Draft			<ul style="list-style-type: none"><li>Evaluation<ul style="list-style-type: none"><li>Assessment Planning</li><li>Cancel Meetings</li><li><b>Edit SHP</b></li><li>Send PWN: Parent Request for Additional Assessments</li></ul></li><li>Student<ul style="list-style-type: none"><li>Request to Share Personally Identifiable Information</li></ul></li></ul>
Referral: Pending PWN			
IEP Closed			

1 - 3 of 3 items

5. After you click **Edit SHP**, you will be directed to the Social History Package.



6. The navigation menu on the left side of the screen contains every section of the CPSE Package.

If the section has been completed, it will have a green check mark next to it which you can view in Step 12. If the section has not been completed, it will have a red circle with an exclamation point. The screenshot below shows an incomplete social history package with many incomplete icons.

**Grades Preschool**

Letter to Parents

Generate and Edit

- Physical Examination Form
- Consent for Initial Evaluations
- Consent for Use of Electronic Email
- Social History Evaluation
- Home Language Identification Survey
- Authorization for release of Health Information Pursuant to HIPAA
- Temporary Housing Questionnaire
- Student Ethnicity Identification

**View/Read Only**

- A Family Guide to Preschool Special Education Services
- Early Childhood Education Options Flyer
- Preschool Evaluation Agency List
- Procedural Safeguards Notice

## Letter to Parents

Dear Parent/Guardian:

The Committee on Preschool Special Education (CPSE) is pleased to have your child in our school.

- A Prior Written Notice (N**  
This form is required by Preschool Special Education. you can choose a preschool.
- Preschool Evaluation Agreement**  
You have the right to choose school days from your first school year.
- Consent for Initial Preschool**  
Before any evaluations can be done, you must give us your consent.
- Consent for Use of Electronic Mail**  
A parent of a student with a disability can use the internet email system.
- Physical Examination Form**  
The physical examination form must be completed and given to the evaluator.
- A Family Guide to Preschool Special Education**  
This guide describes the disability.
- Housing Questionnaire**  
Students living in temporary housing with the Department of Education asks all families to complete this questionnaire at the evaluation appointment.
- Early Childhood Education Options Flyer**  
This flyer describes the options available to you.
- Procedural Safeguards Notice**  
The law provides you with the right to participate in your child's education.

Please contact CPSE Administrator for more information.

At the bottom of the Social History Package document, there is a list of files that are *View/Read* only. These are attachments to the CPSE Package that will be sent once completed and finalized for example, the “Procedural Safeguards Notice”. You do not need to complete information about the attachments.

The screenshot displays the NYC Public Schools portal interface. On the left is a blue navigation sidebar with icons for 'EI Transition', 'WaitList', and 'Reports'. The main content area is titled 'Grades Preschool' and contains a list of documents. The 'Letter to Parents' document is highlighted with an orange border. To the right of this list is a preview of the 'Letter to Parents' document, which includes a salutation 'Dear Parent/Guardian:' and a list of required forms and notices.

**Grades Preschool**

Letter to Parents

- Generate and Edit
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- Authorization for release of Health Information Pursuant to HIPAA
- Temporary Housing Questionnaire
- Student Ethnicity Identification
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- Early Childhood Education Options Flyer
- Preschool Evaluation Agency List
- Procedural Safeguards Notice

## Letter to Parents

Dear Parent/Guardian:

The Committee on Preschool Special Education (CPSE) is pleased to have your child in our program. We are providing you with the following information to help you understand the process and your rights.

- A Prior Written Notice (APWN)**  
This form is required by the Department of Education (DOE) for all children who are referred to Preschool Special Education. You can choose a preschool for your child.
- Preschool Evaluation Agreement**  
You have the right to choose the preschool for your child. You can choose a preschool that is not a DOE preschool.
- Consent for Initial Preschool Evaluation**  
Before any evaluations can be conducted, you must give your consent. You have the right to choose the preschool for your child.
- Consent for Use of Electronic Mail**  
A parent of a student with a disability who is using the internet email system must give their consent.
- Physical Examination Form**  
The physical examination form is required for all children who are referred to Preschool Special Education. You must give it to the evaluator.
- A Family Guide to Preschool Special Education**  
This guide describes the process of Preschool Special Education and the rights of parents and children.
- Housing Questionnaire**  
Students living in temporary housing with the Department of Social Services (DSS) are asked to complete this questionnaire at their evaluation appointment.
- Early Childhood Education Options Flyer**  
This flyer describes the options for early childhood education.
- Procedural Safeguards Notice**  
The law provides you with the right to participate in the development of your child's Individualized Education Program (IEP).

Please contact CPSE Administrator for more information.

7. Click on the title of the section you wish to complete.

8. Complete the required sections of each form. Required fields are marked with an asterisk (\*).

If you click **Save** without completing the required fields, the fields will turn red. Once saved, you will be able to navigate to other sections of the CPSE package and return to previous work.

9. Click **Select Files** to upload additional relevant documentation, such as a hard copy of parental consent.

**Consent for Initial Evaluations**

Did the Parent/Guardian consent?

Parent/Guardian provided consent.  
 No, Parent/Guardian did not provide consent.

Pursuant to: 07/19/2024 Relationship \* Primary Printed Name \* Louella Bega

Evaluator Agency: X303: I.S. X303 Leadership & Community Service Site NYC Code #

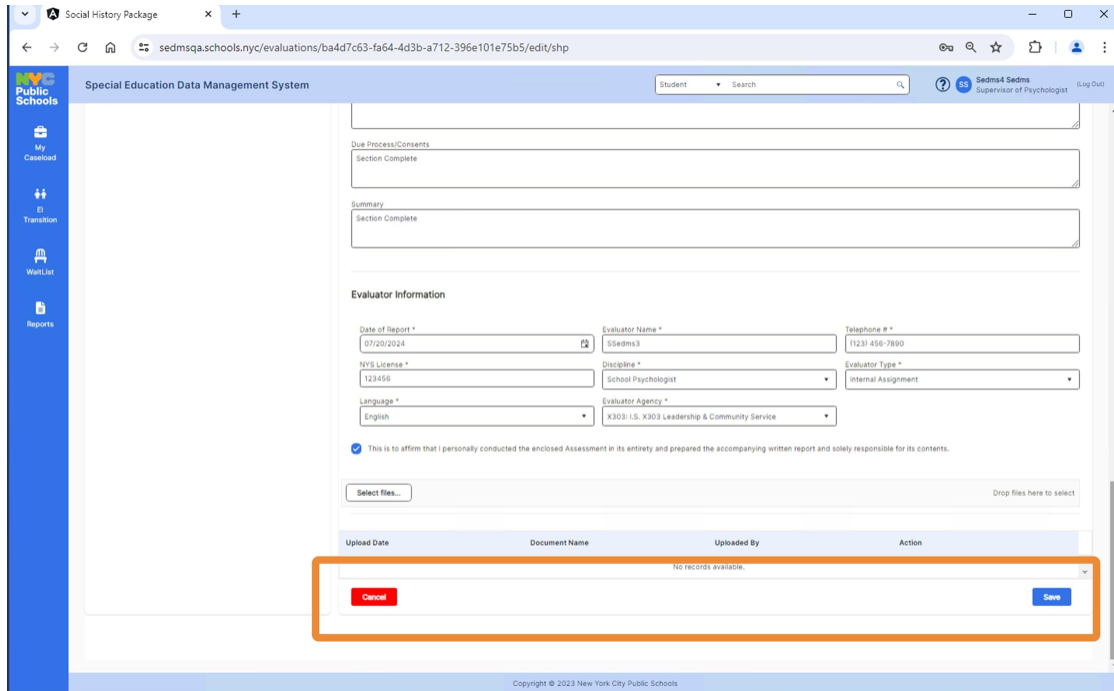
Site Telephone Number: ( ) - - - - Site Email Address

Select files...

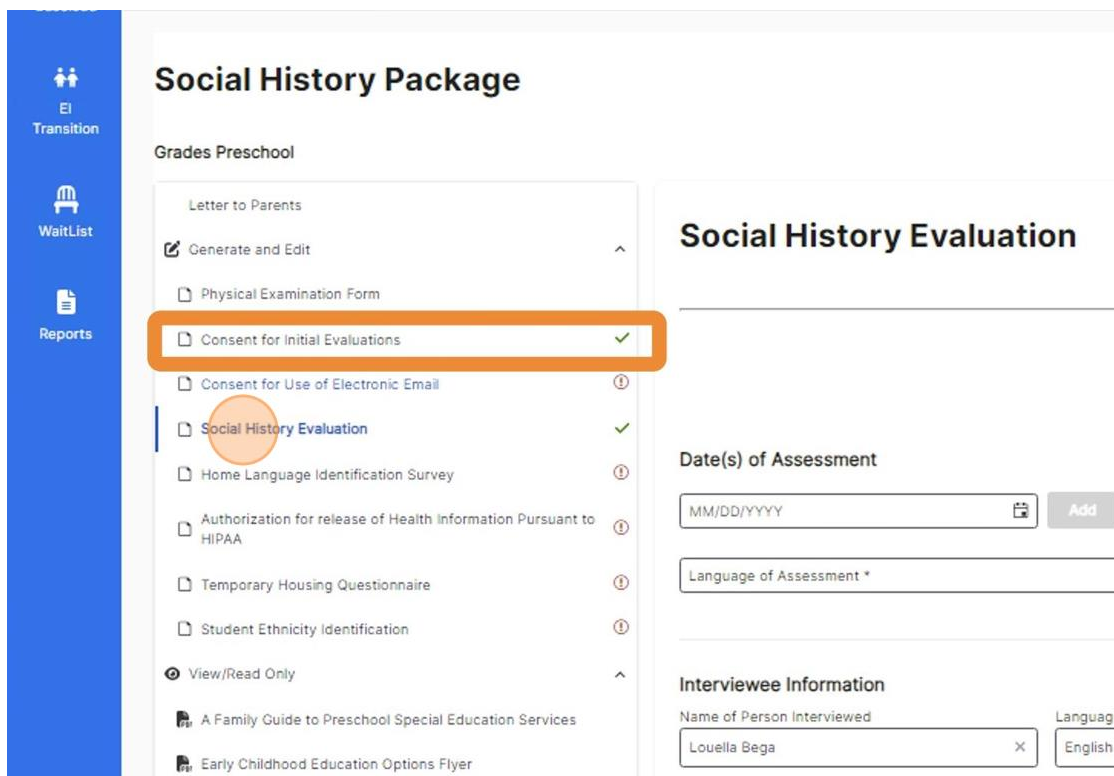
10. After you have completed all required fields of the form, click the blue **Save** button at the bottom right to save the form. Once completed, a green check mark will appear by the section title in the navigation menu.

Click the red **Cancel** button in the bottom left to cancel the changes. All previously entered work will be deleted and the icon will remain a red circle with an exclamation point.





11. Once you have completed the section, a green check will appear next to the section title in the left navigation. Move to the next section that you wish to complete by clicking on the corresponding title.



12. Once you have completed and saved the required sections, they will all have green check marks. The **Finalize** button in the bottom right corner will then become enabled.

- Click **Finalize** if you are ready to finalize and send the CPSE Package.
- Click **Save** to complete the section and continue editing the CPSE Package.
- Click **Cancel** to cancel the section. If you click cancel, any work in this section that was not previously saved will be discarded.

The screenshot shows the 'Special Education Data Management System' interface. The main content area is titled 'Social History Package' and 'Student Ethnicity Identification'. The form includes the following fields and options:

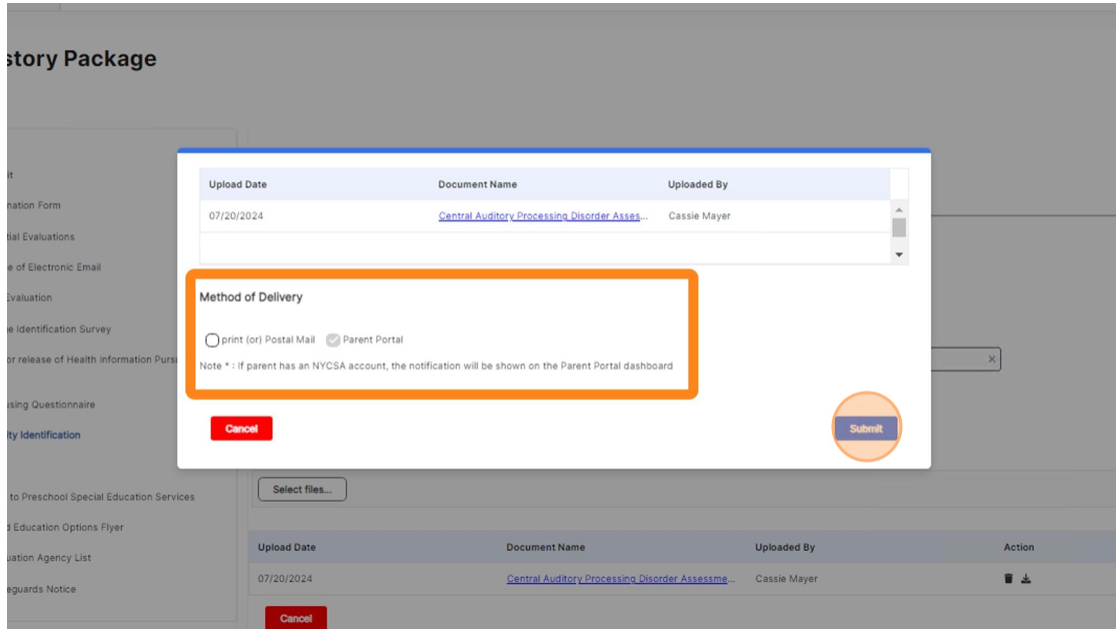
- Grades Preschool** (selected)
- Letter to Parents**
- Generate and Edit** (checked)
- Physical Examination Form**
- Consent for Initial Evaluations**
- Consent for Use of Electronic Email**
- Social History Evaluation**
- Home Language Identification Survey**
- Authorization for release of Health Information Pursuant to HIPAA**
- Temporary Housing Questionnaire**
- Student Ethnicity Identification** (selected)
- View/Read Only**
- A Family Guide to Preschool Special Education Services**
- Early Childhood Education Options Flyer**
- Preschool Evaluation Agency List**
- Procedural Safeguards Notice**

The 'Student Ethnicity Identification' form contains the following information:

- CONFIDENTIALITY PROCEDURES AND REGULATIONS:** This form will be filed in the student's cumulative record folder as confidential information.
- Date Received:** 07/20/2024
- Relationship:** Primary
- Printed Name:** Luwella Bega
- Ethnicity:** Black

At the bottom of the form, there are three buttons: **Cancel**, **Save**, and **Finalize**. The **Finalize** button is highlighted with an orange box, indicating it is enabled.

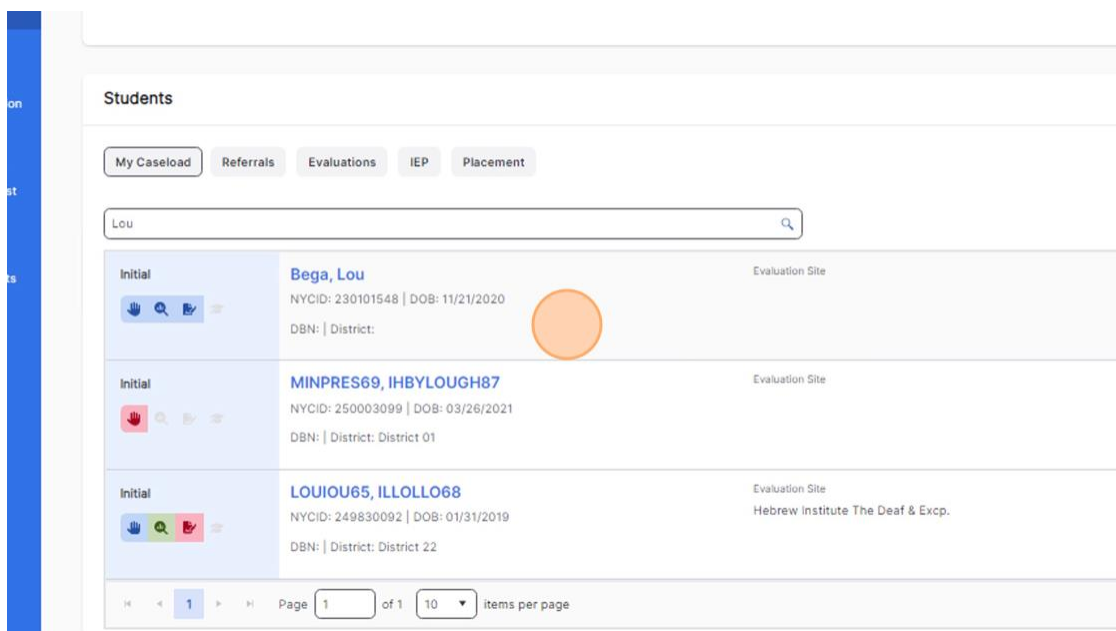
13. After clicking **Finalize**, a pop up will appear listing all uploads attached to the CPSE Package. You will then need to select a Method of Delivery and click **Submit**. If you choose Print or Postal Mail your computer will print the CPSE package upon clicking submit. Once printed, you must mail the CPSE package. After selecting the delivery method, click Submit to complete the process and return to your dashboard.



14. To see where the Finalized status for the Social History Package is listed, return to the dashboard and search for the student whose social history package you just completed.

Click anywhere on the student's row (except their name in blue) to expand the row and view additional details.

**Note:** Clicking the student's name will take you to their profile.



15. Once the row is expanded, you can 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. The status for Consent for Initial Evaluation will be displayed above the Assessment Planning grid.

Within the assessment planning grid, the Social History Evaluation will display as Finalized.

The screenshot shows the 'Evaluations' tab for student Lou Bega. The interface includes a header with student information (NYCID: 230101548, DOB: 11/21/2020) and activity status (Pending Evaluation). Below the header, there are navigation tabs: 'Referrals', 'Evaluations' (selected), 'IEP', and 'Placement'. A 'Consent for Initial Evaluation Given?' box is highlighted with an orange border, showing 'Yes'. Below this is a table of assessments:

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