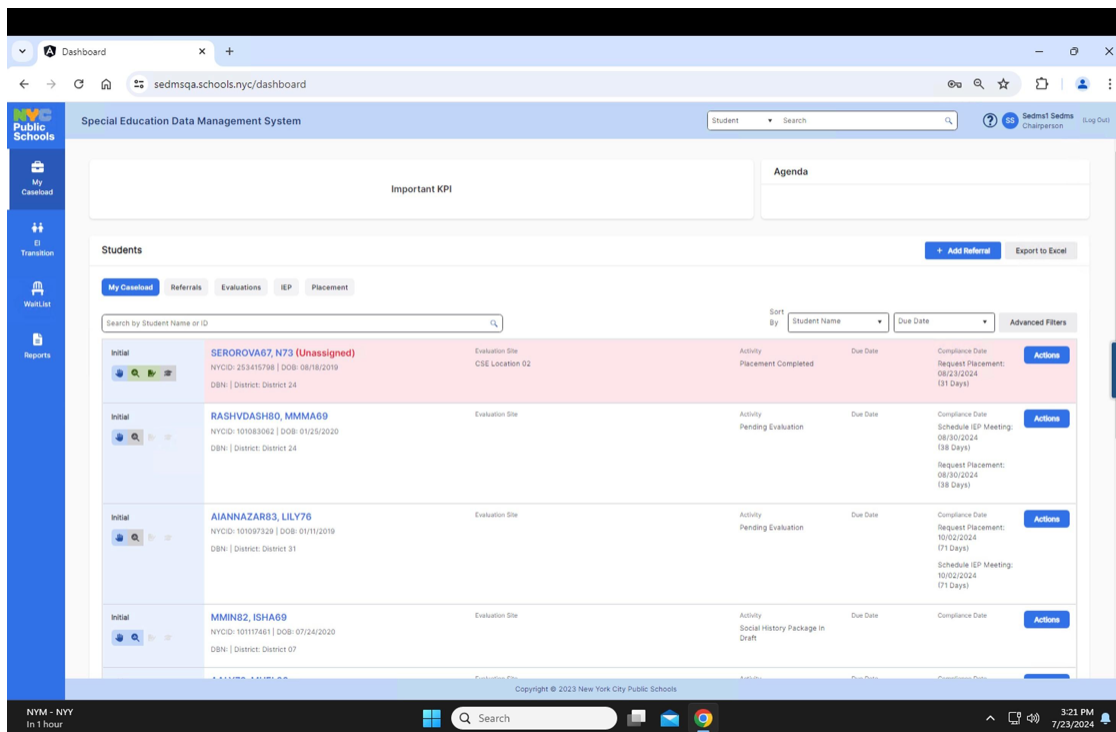


# How to Schedule an Assessment

This guide provides step-by-step instructions on how to schedule an assessment using ATLAS. It includes information on how to navigate the dashboard, find the student you want to schedule for, and complete the necessary fields for scheduling the upload

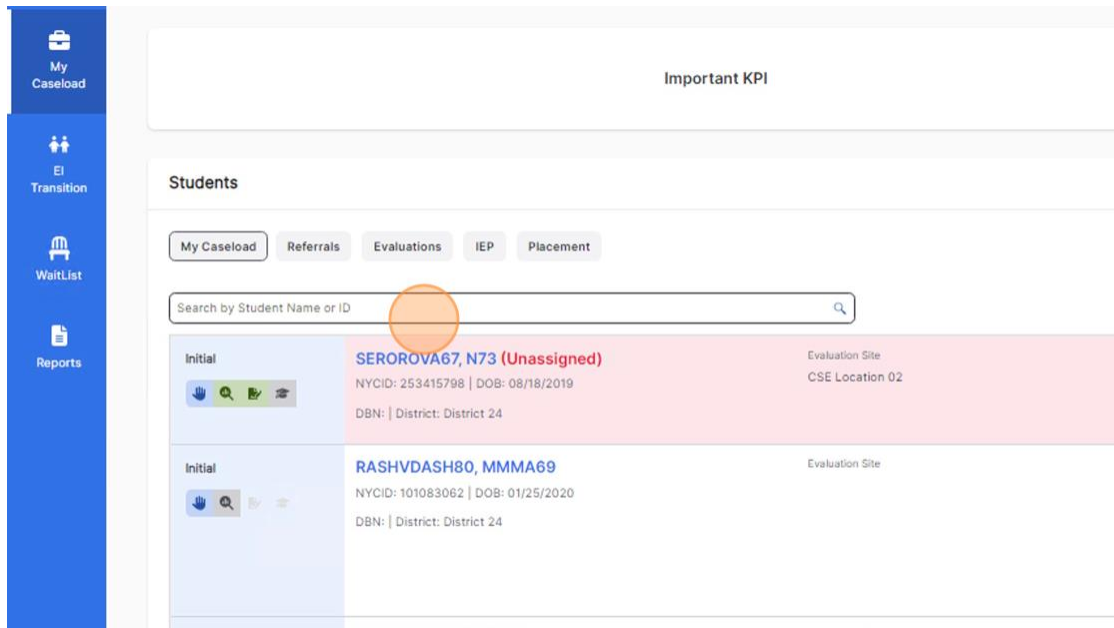
**Note:** Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

1. After you log into ATLAS, you will be directed to your dashboard.



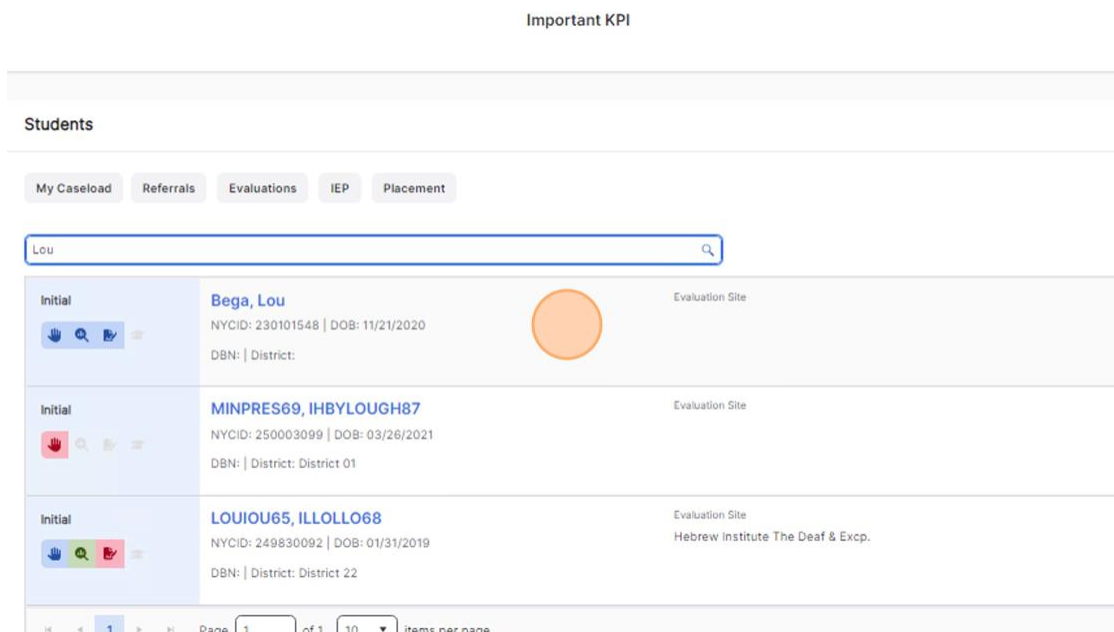
2. From your dashboard, search for the student for whom you wish to schedule an assessment. You can search utilizing the search bar, as shown below, or filter the dashboard by **Evaluations** or other relevant advanced filters.

*For more information about advanced filters please review the “QRG 1.2 How to Navigate the Dashboard”.*



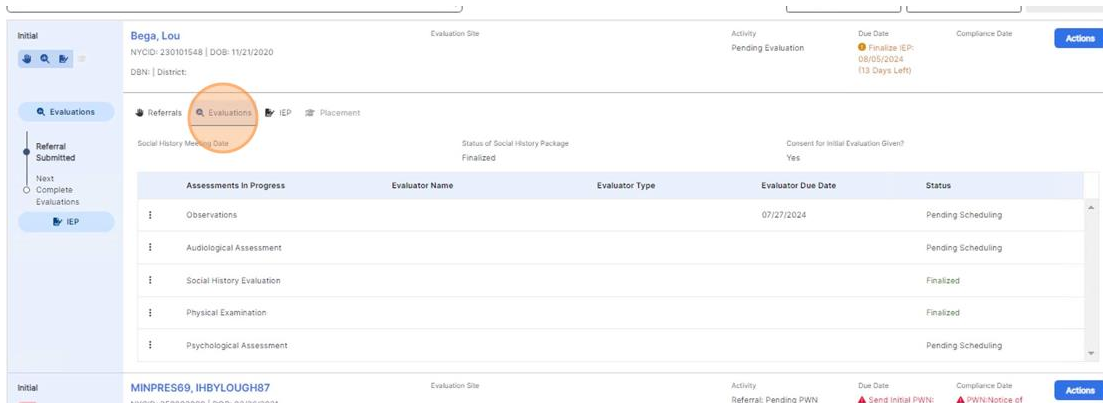
3. Once you have located the relevant student, click on the row to expand it.

**Note:** If you click on the student’s name in blue, it will take you to their student profile. To see the expansion of their row, you must click anywhere else on the row within the dashboard.



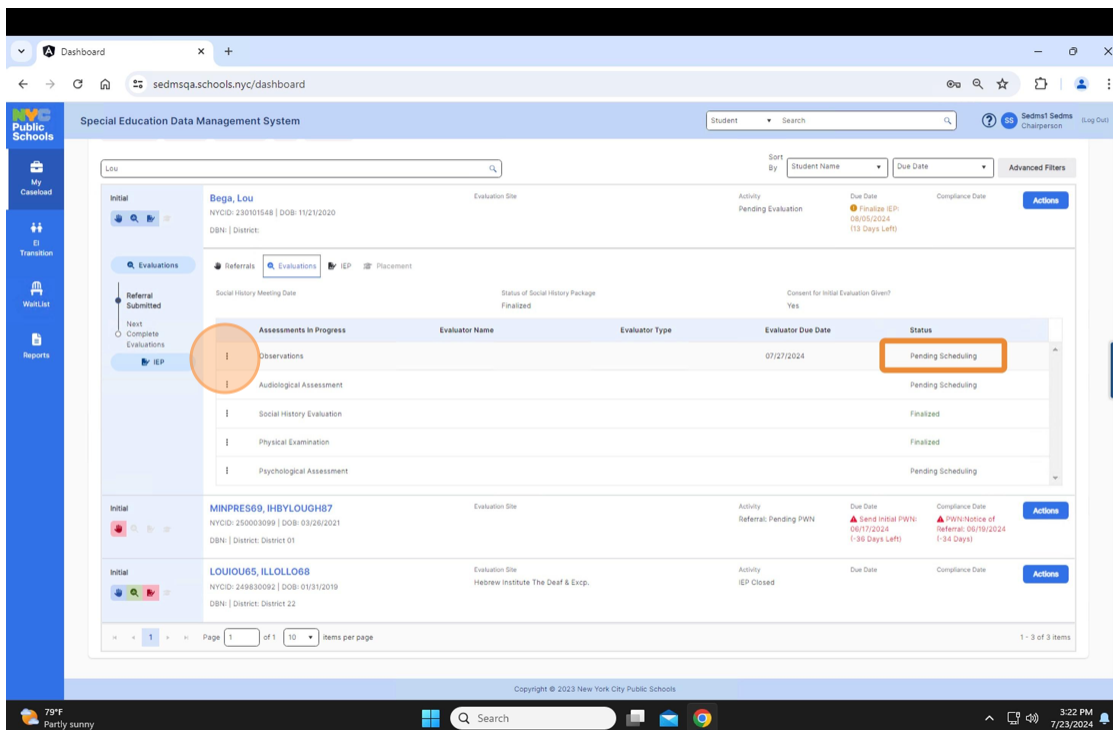
4. Once you have expanded the student row, you will be able to see more information about each process phase. To see the assessment planning page and view all

evaluations assigned to a student, ensure that the second tab **Evaluations** is selected.

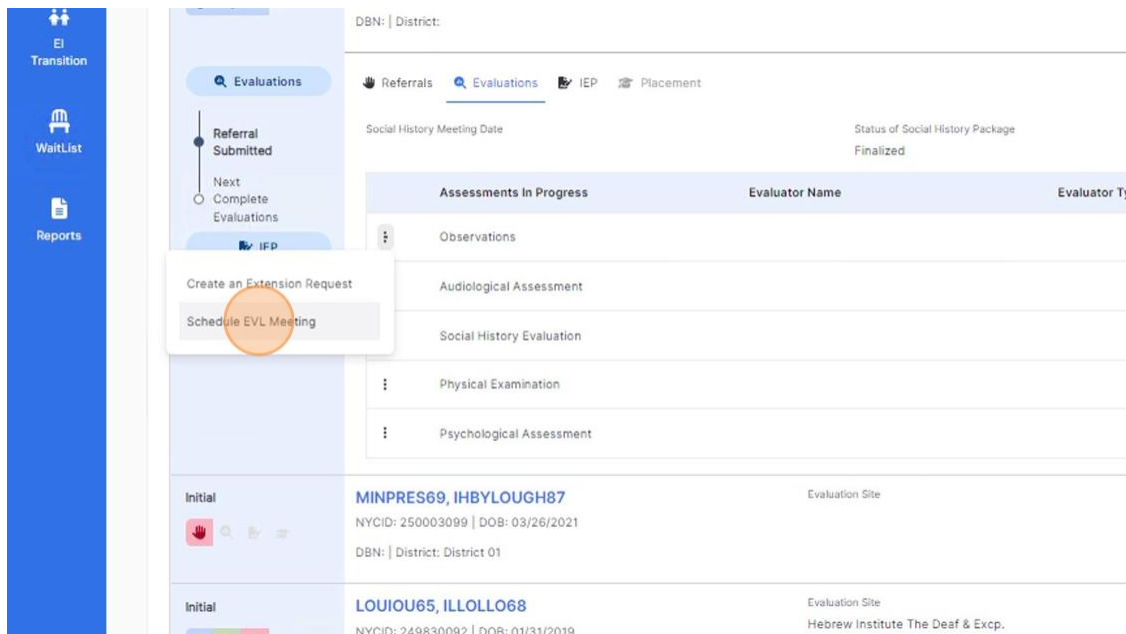


- In the Assessment Planning grid, click on the three vertical dots to the left of the assessment that you wish to schedule. Review QRG 5.2 How to Navigate Assessment Planning for more information about the Assessment Planning grid.

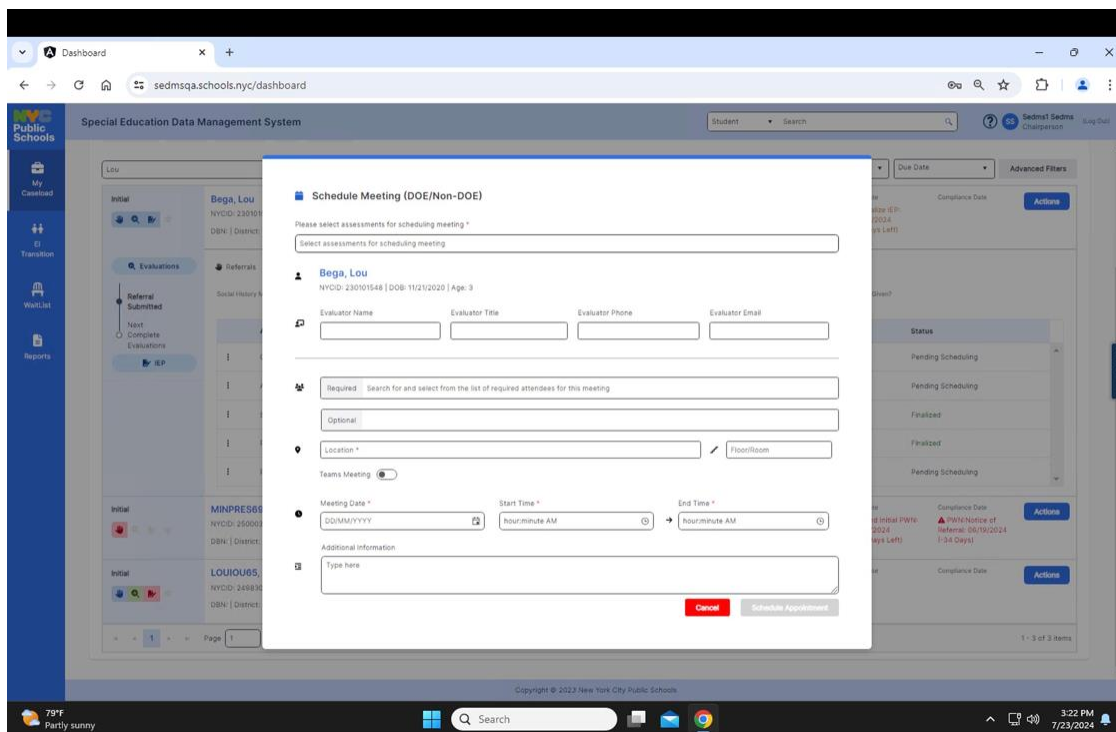
All assessments that have not been scheduled yet will display “Pending Scheduling” under the Status column.



- After you click the three vertical dots, a pop up will appear. Select the option **Schedule EVL Meeting** to schedule the assessment.



7. After clicking **Schedule EVL Meeting** the schedule meeting pop up will appear.



8. Click on the top bar and select the assessment(s) that you would like to schedule. You can select more than one assessment to schedule for this meeting.

### Schedule Meeting (DOE/Non-DOE)

Please select assessments for scheduling meeting \*

Observations | x

Observations

Audiological Assessment

Psychological Assessment

Evaluator Name	Evaluator Title	Evaluator Phone	Evaluator Email
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

---

**Required**

**Optional**

**Location \***  ↗

Teams Meeting

**Meeting Date \***

**Start Time \***

**End Time \***

**Additional Information**

Cancel
Schedule Appointment

9. Complete the *Evaluator* information (Name, Title, Phone, Email).

**Schedule Meeting (DOE/Non-DOE)**

Please select assessments for scheduling meeting \*

Observations ✕ Psychological Assessment ✕ Audiological Assessment ✕ ✕

**Bega, Lou**  
NYCID: 230101548 | DOB: 11/21/2020 | Age: 3

Evaluator Name	Evaluator Title	Evaluator Phone	Evaluator Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Required Search for and select from the list of required attendees for this meeting

Optional

Location \*

Teams Meeting

Meeting Date \*  Start Time \*  → End Time \*

Additional Information

**Cancel** Schedule Appointment

10. Then complete the remaining fields with the evaluation scheduling details (found below Evaluator Information).

Include required attendees, the meeting *Date* and *Time*, and the *Location* of the meeting. You can indicate that the meeting will be held virtually by clicking the **Teams Meeting** toggle.

11. After you have completed all required fields, the blue **Schedule Appointment** button will become enabled. Click **Schedule Appointment** to confirm . Click **Cancel** to returned to the dashboard , all previously entered information will be deleted.

12. After you have clicked **Schedule Appointment**, you will be redirected to the dashboard. Follow steps 1- 4 to navigate back to the desired student.

The status of the assessments that were indicated in the Schedule Meeting pop-up will now display as Scheduled.

Attendees who were selected on the Schedule Meeting pop up will receive notification of the evaluation meeting. The parent will be notified of the scheduled evaluations via the Parent Portal.

The screenshot shows the 'Students' interface with a search bar containing 'Lou'. The main content area displays details for 'Bega, Lou' (NYCID: 230101548, DOB: 11/21/2020). The activity is 'Pending Evaluation' with a due date of 08/05/2024 (13 Days Left). A table lists various assessments with their statuses:

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

Below the table, another student entry is visible: 'MINPRES69, IHBVIOUSGH87' with a status of 'Referral: Denial-Initial DMTI' and a due date of 08/05/2024.