

Evaluation Reference Guide

Overview

This guide provides step-by-step instructions for completing each key phase of the evaluation process in ATLAS. It walks users through how to assign students to evaluation sites, schedule social history meetings, assign evaluators to assessments, complete and submit assessments, add additional assessments as needed, submit the STAC-5 form, and complete the Preschool Evaluation Summary.

However, some steps may vary slightly based on the user's role and permissions within ATLAS. For example, when a CPSE Administrator submits an assessment, the status automatically updates to *Finalize*, whereas if an evaluator submits it, the status changes to *Pending Review*. Additionally, CPSE Administrators have the ability to change agency assignments for individual assessments, a function not available to other user roles.

Note: All student and related data in this guide is entirely fictional.

To quickly access a specific section, simply click the section title.

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How to Assign Evaluation Site

This section provides step-by-step instructions for assigning students to an evaluation site. CPSE Administrators can place students on the waitlists of up to three (3) agencies. MDE/PRAC users can also add students directly to their own waitlists. Once a student has been added—either by a CPSE Administrator or by the MDE/PRAC—the MDE/PRAC will then move the student from their waitlist to their workload.

Adding a student to MDE/PRAC waitlist

1. From the dashboard, click **View MDE/PRAC waitlist**.

The screenshot shows the MDE/PRAC dashboard. At the top, there's a 'Welcome!' message and a 'Quick Links' section. The 'View MDE/PRAC Global Waitlist' link is highlighted with a red box and an arrow. Below this, the 'Students' section is visible, showing a table of students with columns for Initial, Name, Student ID, DOB, Assigned To, Evaluation Site, Activity, Referral, Pending PWN, Activity Due Date, Compliance Date, and Actions.

Initial	Name	Student ID	DOB	Assigned To	Evaluation Site	Activity	Referral	Pending PWN	Activity Due Date	Compliance Date	Actions
Initial	Opslauepys, Automation	242353835	07/10/2022			Referral: Pending PWN			Activity Due Date: 07/10/2025 (0 Days Left)		Actions
Initial	Rhycumjha, Automation	242353827	07/10/2022			Referral: Pending PWN			Activity Due Date: 07/10/2025 (0 Days Left)		Actions
Initial	Cwccpurax, Automation	242354277	07/16/2022			Referral: Pending PWN			Activity Due Date: 07/16/2025 (0 Days Left)		Actions
Initial	Esewvvdpm, Automation	242354233	07/16/2022			Referral: Pending PWN			Activity Due Date: 07/16/2025 (0 Days Left)		Actions

2. From the MDE/PRAC Waitlist page, search for the student using their name or student ID.

MDE/PRAC Waitlist
Preschool

Global Worklist (584)

Search Student Name or ID 0 Selected [Assign to Agency](#)

Student	Parent/Guardian Information	Parent/Guardian Availability
☐ Automation Yacvpxdxjt Student ID: 242294025 DOB: 08/02/2022 Home District: 10	Builder, Bob	N/A
☐ Automation Esleaixayd Student ID: 242300049 DOB: 08/21/2022 Home District: 10	Builder, Bob	N/A
☐ Automation Gvgcugpmhn Student ID: 242300056 DOB: 08/21/2022 Home District: 10	Builder, Bob	N/A

Printable Worksheet

- Once you have located the student, click the check box to the left of the student's name. This will enable the *Assign to Agency* button.

MDE/PRAC Waitlist
Preschool

Global Worklist (2)

sza 1 Selected [Assign to Agency](#)

Student	Parent/Guardian Information	Parent/Guardian Availability
☐ Automation Qqbtbtasza Student ID: 242388559 DOB: 06/16/2022 Home District: 10	Builder, Bob	N/A
☒ Sza Lamb Student ID: 242300591 DOB: 09/11/2020 Home District: 7	Lamb, Sza	N/A

1 - 2 of 2 items

Printable Worksheet

- Click **Assign to Agency**.

1 Selected [Assign to Agency](#)

- A pop-up window titled **Assign Student(s) to Agencies** will appear.
- Note: You can assign a student to the waitlist of up to three (3) agencies.*

Assign Student(s) to Agencies

Please select one or more agencies to assign the selected students to.

Selected 0 agencies (3 max)
Clear All

List of Evaluation Sites
Filter

Search Site Name or Evaluation ID

0 on waitlist

[QAKF] Jackson Developmental Center Annex
88-23 31 AVENUE, NY, QUEENS, District 30
Queens
Spanish
Select Contact View Website

0 on waitlist

6. Search using the **Site Name or Evaluation ID**.

List of Evaluation Sites
Filter

Search Site Name or Evaluation ID

0 on waitlist

[QAKF] Jackson Developmental Center Annex

Note: To further refine your search, click the **Filter** button. A pop-up window will appear with additional options.

Filters

Agency Name

District

Location Code

Borough

Language(s) Supported

Number on Waitlist

0 50 100 150 200

Apply Filters

7. Once you have located the evaluation site(s) you'd like to assign the student, click **Select**.

List of Evaluation Sites

Filter

3 on waitlist

[KCDF] Yeled V'Yalda Early Childhood Center

1312 38th Street, NY, BROOKLYN, District 15

Bronx, Brooklyn, Manhattan, Queens, Staten Island

Hebrew, Yiddish

Select

Contact

View Website

Total Sites: 1

- Selected agencies will appear on the left side of the pop-up; remove one by clicking the *red trash can*, or remove all by selecting *Clear All*.

Assign Student(s) to Agencies

×

Please select one or more agencies to assign the selected students to.

Selected 3 agencies (3 max)

Clear All

3 on waitlist

Yeled V'Yalda Early Childhood Center

More Details

0 on waitlist

Jackson Developmental Center Annex

More Details

0 on waitlist

Jackson Developmental Center

More Details

List of Evaluation Sites

Filter

0 on waitlist

[QAKF] Jackson Developmental Center Annex

88-23 31 AVENUE, NY, QUEENS, District 30

Queens

Spanish

Select

Contact

View Website

0 on waitlist

[QAYN] Jackson Developmental Center

31-36 88 Street, NY, Queens, District 30

Queens

Spanish

Select

Contact

View Website

0 on waitlist

- Once you make your selections, click the **Assign to Selected Agencies** button.

Assign to Selected Agencies

- ATLAS confirms when your submission is successful.

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✓ Submitted Successfully

Adding a student to MDE/PRAC worklist

1. From the dashboard, click **View Waitlist**.

Welcome!
Sse Dms2's Caseload (CSE CPSE Administrator)

Quick Links

 View MDE/PRAC Global Waitlist >  **View Waitlist** >  Review Requests from Parent Portal

Students

My Caseload Referrals Evaluations IEP Placement

Search by Student Na... 

Sort By **Student Name**

Initial 	Fqsygcbpzg, Automation Student ID: 242354400 DOB: 07/16/2022 DBN: District 10	Assigned To Sse Dms2 	Evaluation Site	Activity Referral: Pending PWN
--	--	---	-----------------	-----------------------------------

2. From the MDE/PRAC's waitlist page, search using the student's name or ID.

MDE/PRAC Waitlist
CSE Location 01

Evaluation Site Waitlist (11) [+ Add Student to Waitlist](#)

Search Student Name or ID  0 Selected

☐ Student	Parent/Guardian Information	Parent/Guardian Availability
☐ Automation Yacvpxdxjt (2) Student ID: 242294025 DOB: 08/02/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Esleajxayd (3) Student ID: 242300049 DOB: 08/21/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Gvgcugpmhn (4) Student ID: 242300056 DOB: 08/21/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Srgkrgduqn (5) Student ID: 242293395 DOB: 07/22/2022 Home District: District 10	Builder, Bob	N/A
☐ automation xdpk (6) Student ID: 242300074 DOB: 02/02/2022 Home District: District 10	Im, Im	N/A
☐ Automation Atefimtqcl (7) Student ID: 242293979 DOB: 08/02/2022 Home District: District 10	Builder, Bob	N/A

- Once you locate the student, click the check box to the left of their name. Two buttons will then appear: *Add to Worklist* and *Release from Waitlist*.

MDE/PRAC Waitlist
CSE Location 01

Evaluation Site Waitlist (1)

Search: Sza

1 Selected

Add to Worklist **Release from Waitlist**

Student	Parent/Guardian Information	Parent/Guardian Availability
☒ Sza Lamb (1) Student ID: 242300591 DOB: 09/11/2020 Home District: District 07	Lamb, Sza	N/A

1 - 1 of 1 items

- Click **Add to Worklist**.

Note: To remove the student from the MDE/PRAC's waitlist, click *Release from Waitlist*.

1 Selected

Add to Worklist **Release from Waitlist**

- ATLAS confirms when your submission is successful.

✓ Submitted Successfully

Adding a student directly to the MDE/PRAC waitlist

- From the dashboard, click **View Waitlist**.

Welcome!
Sse Dms2's Caseload (CSE CPSE Administrator)

Quick Links

View MDE/PRAC Global Waitlist > **View Waitlist** > Review Requests from Parent Portal

Students

My Caseload Referrals Evaluations IEP Placement

- From the MDE/PRAC's Waitlist page, click **+ Add Student to Waitlist**.

MDE/PRAC Waitlist
CSE Location 01

Evaluation Site Waitlist (10) + Add Student to Waitlist

Search Student Name or ID 0 Selected

Student	Parent/Guardian Information	Parent/Guardian Availability
☐ Automation Yacvpxdxt (1) Student ID: 242294025 DOB: 08/02/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Esleajxayd (2) Student ID: 242300049 DOB: 08/21/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Gvgcugpmhn (3) Student ID: 242300056 DOB: 08/21/2022 Home District: District 10	Builder, Bob	N/A
☐ Automation Srgkrquqn (4) Student ID: 242293395 DOB: 07/22/2022 Home District: District 10	Builder, Bob	N/A
☐ automation xdpk (5) Student ID: 242300074 DOB: 02/02/2022 Home District: District 10	Im, Im	N/A

Provide feedback

- A pop-up will appear for you to complete all required fields.

Note: To add a student directly to MDE/PRAC's waitlist, you must have the student's **First Name, Last Name, ID, and Date of Birth**.

Add Student to Waitlist ×

Please enter the student's first name, last name, Student ID, and date of birth to proceed.

Student First Name * Student Last Name * Student ID * Date of Birth * Search

Student ID should be 9 digits

- Once all fields are complete, click **Search**.

Add Student to Waitlist ×

Please enter the student's first name, last name, Student ID, and date of birth to proceed.

Student First Name * Student Last Name * Student ID * Date of Birth * Search

Student ID should be 9 digits

- Once your student appears in the search results, use the dropdown to select the **Site Name**.

Add Student to Waitlist

×

Please enter the student's first name, last name, Student ID, and date of birth to proceed.

Student First Name *

Sza

Student Last Name *

Lamb

Student ID *

242300591

Student ID should be 9 digits

Date of Birth *

09/11/2020

Search

Please review the following students and select the student you would like to add to your waitlist.

Student	DOB	Activity	Site Name	
Sza Lamb	09/11/2020		CSE Location 01	Add

6. Click, **Add**.

Add Student to Waitlist

×

Please enter the student's first name, last name, Student ID, and date of birth to proceed.

Student First Name *

Sza

Student Last Name *

Lamb

Student ID *

242300591

Student ID should be 9 digits

Date of Birth *

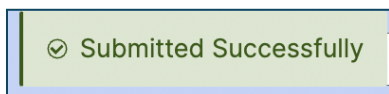
09/11/2020

Search

Please review the following students and select the student you would like to add to your waitlist.

Student	DOB	Activity	Site Name	
Sza Lamb	09/11/2020		CSE Location 01	Add

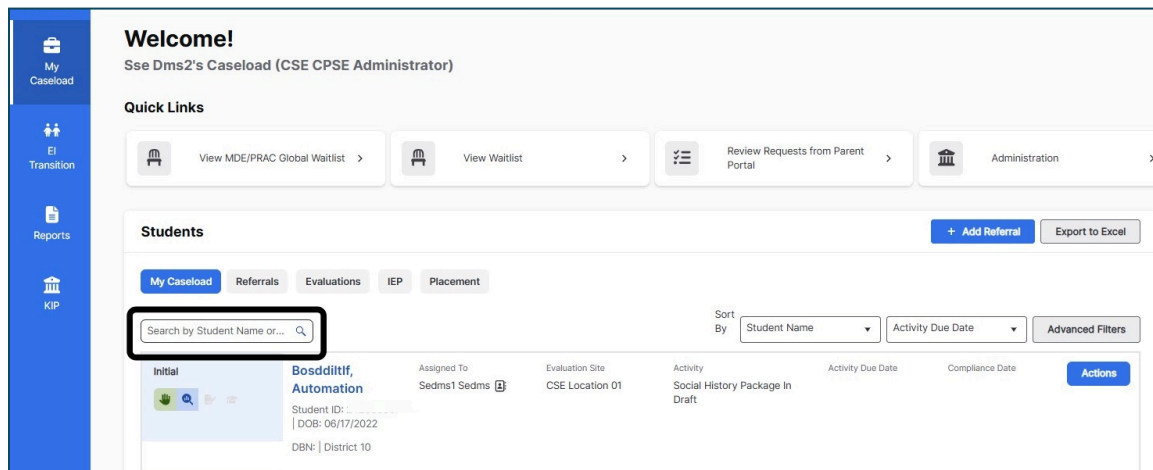
7. ATLAS confirms when your submission is successful, and the student will now appear on MDE/PRAC's waitlist. To add the student to a worklist, see *Adding Student to MDE/PRAC Worklist*.



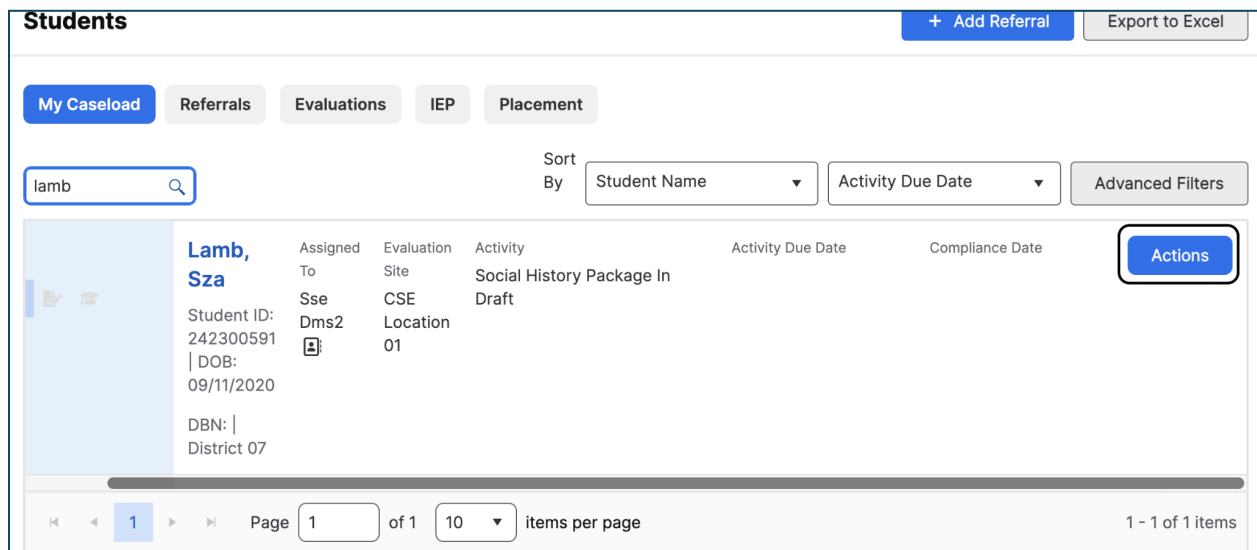
How to Schedule the Social History Meeting

This section provides step-by-step instructions for capturing the social history meeting in ATLAS. Once the meeting has been scheduled, ATLAS automatically generates a *Notice of Meeting* within the student's documents, which users can print and share with attendees.

1. Search for the student for whom you'd like to add to schedule the social history meeting.



2. Click **Actions**.



3. From the dropdown, select **Schedule Social History Meeting**.

Referral

View

Schedule Social History Meeting

View PWN

Evaluation

- A **Schedule Meeting** pop-up window will appear. Complete all required sections.

Schedule Meeting

Initial

Lamb, Sza

Student ID: 242300591 |
DOB: 09/11/2020
DBN: | District 07

Assigned To

Sse Dms2

Evaluation Site

CSE Location 01

Activity

Social History Package
In Draft

Activity Due Date

Compliance Date

Schedule Social History Meeting

Contact Details

Contact Name *

Sse Dms2

Contact Phone *

() - -

Contact Email Address *

Delivery Method *

☐ Postal Mail
☐ Parent Portal

Recipient *

(PRIMARY) Sza Lamb

Recipient Email Address

Meeting Location

Address *

Floor-Room

Schedule

Cancel

Meeting Time

SHM Due Date

Meeting Date *

Start Time *

- Complete the **Contact Details** section.

Contact Details

Contact Name *

Sse Dms2

Contact Phone *

(111) 111-1111

Contact Email Address *

email@email.com

- Complete the **Delivery Method** section.

Delivery Method *

☒ Postal Mail
 ☐ Parent Portal

Recipient *
 (PRIMARY) Sza Lamb ▼

Recipient Email Address

- Complete the **Meeting Location** section.

Meeting Location

Address *
 333 7th ave ×

Floor-Room

- Complete the **Meeting Time** section by using the calendar icon to select the date or typing it manually, and the clock icon to select the time or typing it manually.

Meeting Time

SHM Due Date
 Meeting Date *
 08/28/2025

Start Time *
 8:00 AM

Note: If you select a date less than 7 days from today, a pop-up will appear asking you to confirm that the date is within 7 days before the required start date. Do you wish to continue?

Please confirm

You have selected a date that is within 7 days before the required start date. Do you wish to continue?

- Once all required sections are complete, click ***Schedule*** to schedule the social history meeting, or click ***Cancel*** to discard all previously entered information.

Schedule Meeting

Initial

Lamb, Sza

Student ID: 242300591 |
 DOB: 09/11/2020
 DBN: | District 07

Assigned To

Sse Dms2

Evaluation Site

CSE Location 01

Activity

Social History Package
In Draft

Activity Due Date

Compliance Date

Schedule Social History Meeting

Contact Details

Contact Name *
 Sse Dms2

Contact Phone *
 (111) 111-1111

Contact Email Address *
 email@email.com

Delivery Method *

☒ Postal Mail
 ☐ Parent Portal

Recipient *

(PRIMARY) Sza Lamb

Recipient Email Address

Meeting Location

Address *

333 7th ave

Floor-Room

Schedule

Cancel

Meeting Time

SHM Due Date

Meeting Date *

08/27/2025

Start Time *

8:00 AM

10. ATLAS confirms when your submission is successful.

A green rectangular notification box with a white border. On the left side, there is a green checkmark icon. To the right of the icon, the text "Submitted Successfully" is written in a green, sans-serif font.

11. The **Notice of Meeting** will be generated within the student's documents for you to share with attendees.

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How to Navigate Assessment Planning

This section provides step-by-step instructions for navigating the Assessment Planning process in ATLAS. Users can use this feature to assign evaluators to assessments, add assessments provided by parents, and include the Educational Evaluation Report assessment. Additionally, CPSE Administrator users have the ability to change the agency assignment for individual assessments. This section also guides users on how to view assessment information from the student's expanded row.

Opening the Assessment Planning Grid

1. Search for the student for whom you wish to navigate the assessment planning.

Students

My Caseload

Referrals

Evaluations

IEP

Placement

Search by Student Name or ID

Sort By Student Name

Initial 	Fqsypcbpzg, Automation Student ID: 242354400 DOB: 07/16/2022 DBN: District 10	Assigned To Sse Dms2	Evaluation Site	Activity Referral: Pending PWN
Initial 	Hfztyobetk, Automation Student ID: 242354320 DOB: 07/16/2022	Assigned To Sse Dms2	Evaluation Site	Activity Referral: Pending PWN

2. Click Actions.

My Caseload

Referrals

Evaluations

IEP

Placement

Lux

Sort By Student Name Activity Due Date

Advanced Filters

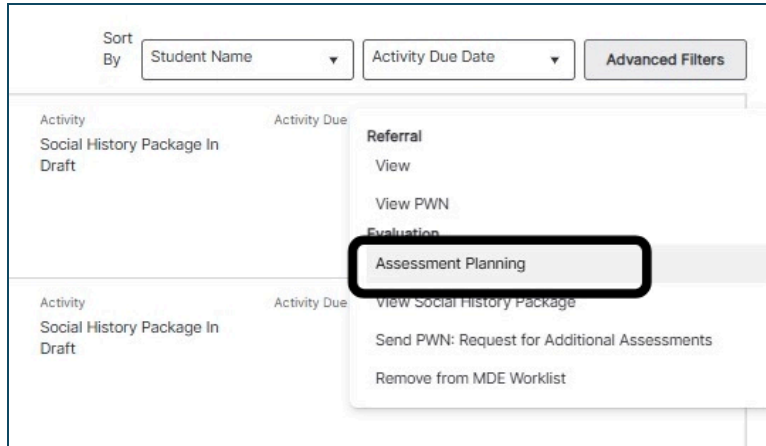
Initial 	lluxdjgops, Automation Student ID: 242294119 DOB: 08/02/2022 DBN: District 10	Assigned To Sse Dms2	Evaluation Site Yeled V'Yalda Early Childhood Center	Activity Social History Package In Draft	Activity Due Date	Compliance Date	Actions
Initial 	Lux, Luca Student ID: 242300830 DOB: 09/11/2021 DBN: District 07	Assigned To Sse Dms2	Evaluation Site CSE Location 01	Activity Social History Package In Draft	Activity Due Date	Compliance Date	Actions

1

Page 1 of 10 items per page

1 - 2 of 2 items

3. From the dropdown, click **Assessment Planning**.



- This will take you to the Assessment Planning page, where all assessments assigned to the student are displayed. (In the example shown, the student is in the Initial Referral stage, so the required assessments are shown.)

Note: If consent has not been received or uploaded in ATLAS, a red warning will appear above the grid, and the grid will display with a pink background. Users can begin drafting assessments, but consent must be uploaded to finalize and submit them.

Assessment Planning

Initial Evaluation		Consent Received On	Name of Referrer	Title of Referrer
		▲ Not Received	Sse Dms2	CSE Chairperson

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On	Consent Received On	Due By
Observations	English	Internal Assign...	CSE Location 01		09/04/2025	▲ Not Received	
Physical Exami...	English	Internal Assign...	CSE Location 01		09/04/2025	▲ Not Received	
Psychological ...	English	Internal Assign...	CSE Location 01		09/04/2025	▲ Not Received	
Social History ...	English	Internal Assign...	CSE Location 01		09/04/2025	▲ Not Received	

+ Add New Assessment

Activate Windows
Go to Settings to activate Windows.

- From this page, users can add assessment details such as **Assessment Type, Language of Assessment, Evaluator Type, Agency, and Evaluator Name**. Users can also view information about each assessment, including the date the PWN was sent, whether consent has been received, and the due date.

Note: Users can click the X next to an assessment to remove it, but some assessments are mandatory and cannot be removed:

- Initial K–12:** Social History, Physical, Psychoeducational, and Classroom Observation

- **Preschool: Social History, Physical, and Psychological Observation**

Assessment Planning

Initial Evaluation

Consent Received On

▲ Not Received

Name of Referrer

Sse Dms2

Title of Referrer

CSE Chairperson

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On	Consent Received On	Due By
Observations	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
Physical Examinati...	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
Psychological Ass...	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
Social History Eval...	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
x		Provided by Parent					

+ Add New Assessment

Activate Window
Go to Settings to acti...

- Assessments will automatically be assigned to the primary agency. To assign an assessment to a different (secondary) agency, use the **Agency** column dropdown and search for the agency you'd like to assign.

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On	Consent Received On	Due By
Observations	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
Physical Examinati...	English	Internal Assignment	CSE Location 01		09/04/2025	▲ Not Received	
Psychological Ass...	English	Internal Assignment			09/04/2025	▲ Not Received	
Social History Eval...	English	Internal Assignment			09/04/2025	▲ Not Received	
x		Provided by Parent					

+ Add New Assessment

Once assessments have been finalized, they can no longer be edited here.

Happy Dragon of ...

H

Happy Dragon of New York, Inc - Queens
Sunshine Developmental School, Inc.
Brooklyn United Children, Inc.

- Once consent has been uploaded, the date will appear at the top and next to the assessment, and the grid will no longer be highlighted in pink.

Assessment Planning

Initial Evaluation

Consent Received On

07/07/2025

Name of Referrer

Nuzi Noo

Title of Referrer

Primary Parent/Guardian

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On	Consent Received On	Due By
Observations	English	Internal Assignment	Yeled V'Yalda Earl...		07/08/2025	07/07/2025	08/04/2025
Physical Examinat...	English	Internal Assignment	Yeled V'Yalda Earl...		07/08/2025	07/07/2025	08/04/2025
Psychological Ass...	English	Internal Assignment	Yeled V'Yalda Earl...		07/08/2025	07/07/2025	08/04/2025
Social History Eva...	English	Internal Assignment	Yeled V'Yalda Earl...		07/08/2025	07/07/2025	08/04/2025

+ Add New Assessment

- The gray box above the assessment grid displays detailed information about the student's evaluation status, including the date consent was received, the referrer's name, their relationship to the student, and the student's current stage.

Assessment Planning

Initial Evaluation

Consent Received On

07/07/2025

Name of Referrer

Nuzi Noo

Title of Referrer

Primary Parent/Guardian

- Use the dropdowns to complete the required information for each assessment. Fill in the columns to specify the *Assessment Type*, *Language of Assessment*, *Evaluator Name*, and *Due By* date.

Assessments

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On	Consent Received On	Due By
Observations					07/08/2025	07/07/2025	08/04/2025
Physical Examinat...					07/08/2025	07/07/2025	08/04/2025
Psychological Ass...					07/08/2025	07/07/2025	08/04/2025
Social History Eva...					07/08/2025	07/07/2025	08/04/2025

- To add a new assessment, click the **+ Add New Assessment** button in the bottom left corner of the Assessment Planning grid.

11. A new row will appear for you to complete the required information. The evaluator type will be read only and display *Provided by Parent*.

Note: The **+ Add New Assessment** button will only enable you to add an assessment that has been provided by the parent. To add additional assessments, please refer to section *How to Add Additional Assessments*.

Assessment Type	Language of Assessment	Evaluator Type	Agency	Evaluator Name	PWN Sent On
Observations	English	Internal Assignment	Yeled V'Yalda EarL...	Abadi Suzy	07/08/2025
Physical Examinat...	English	Internal Assignment	Yeled V'Yalda EarL...	Abadi Suzy	07/08/2025
Psychological Ass...	English	Internal Assignment	Yeled V'Yalda EarL...	Abadi Suzy	07/08/2025
Social History Eva...	English	Internal Assignment	Yeled V'Yalda EarL...	Abadi Suzy	07/08/2025
x	English	Provided by Parent			

12. After completing the Assessment Planning grid, click **Submit** to save your information, or click **Cancel** to return to the dashboard and discard all previously entered data.

Note: You can return to edit the Assessment Planning grid if changes are needed. Once assessments have been finalized, they can no longer be edited here.

How to View Assessments in Progress from the Expanded Row

1. To view *Assessments in Progress*, click anywhere on the student's row (except the Student's name—this is a hyperlink and will navigate you to the student's profile).

My Caseload Referrals Evaluations IEP Placement

Luca

Sort By Student Name Activity Due Date Advanced Filters

Initial **Lux, Luca** Assigned To Sse Dms2 Evaluation Site CSE Location 01 Activity Social History Package In Draft Activity Due Date Compliance Date **Actions**

Student ID: 242300830 | DOB: 09/11/2021 DBN: | District 07

Page 1 of 10 items per page 1 - 1 of 1 items

- This will expand the student's row and provide a snapshot of the student's progress within the *Evaluation* stage.

Note: You can navigate to different stages using the tabs at the top of the expanded section, if the tab is not greyed out.

Luca

Sort By Student Name Activity Due Date Advanced Filters

Initial **Lux, Luca** Assigned To Sse Dms2 Evaluation Site CSE Location 01 Activity Social History Package In Draft Activity Due Date Compliance Date **Actions**

Student ID: 242300830 | DOB: 09/11/2021 DBN: | District 07

Evaluations Referrals Evaluations IEP Placement

Social History Meeting Date Status of Social History Package Draft Consent for Initial Evaluation Given? Not Received

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Observations	CSE Location 01		Internal Assignment		Draft
Physical Examination			Provided by Parent		Draft
Psychological Assessment	Happy Dragon of New York, Inc - Queens		Internal Assignment		Draft
Social History Evaluation	CSE Location 01		Internal Assignment		Draft

Page 1 of 10 items per page 1 - 1 of 1 items

- From this expanded view under the *Evaluations* tab, you can see assessments in progress, agency assignment, evaluator's name, evaluator type, evaluation due date, and assessment status.

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package
Draft

Consent for Initial Evaluation Given?
Not Received

	Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
:	Observations	CSE Location 01		Internal Assignment		Draft
:	Physical Examination			Provided by Parent		Draft
:	Psychological Assessment	Happy Dragon of New York, Inc - Queens		Internal Assignment		Draft
:	Social History Evaluation	CSE Location 01		Internal Assignment		Draft

4. You can also view the *Social History Meeting Date*, the status of the social history package, and whether consent for the initial evaluation has been given.

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package

Draft

Consent for Initial Evaluation Given?

Not Received

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
⋮ Observations	CSE Location 01		Internal Assignment		Draft

5. To collapse the student's row, click anywhere on the row as you did to expand it.

Initial

Evaluations

Evaluation Site Assigned

Next

Submit

Evaluations

Lux, Luca

Student ID: 242300830 | DOB: 09/11/2021

DBN: | District 07

Assigned To

Sse Dms2

Evaluation Site

CSE Location 01

Activity

Social History Package In Draft

Activity Due Date

Compliance Date

Actions

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package

Draft

Consent for Initial Evaluation Given?

Not Received

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
⋮ Observations	CSE Location 01	Alago Martinita	Internal Assignment		Draft
⋮ Physical Examination			Provided by Parent		Draft
⋮ Psychological Assessment	Happy Dragon of New York, Inc - Queens	Agliata Gabriella	Internal Assignment		Draft
⋮ Social History Evaluation	CSE Location 01	Abreu Alexis	Internal Assignment		Draft

6. This will return the student's row to its original view.

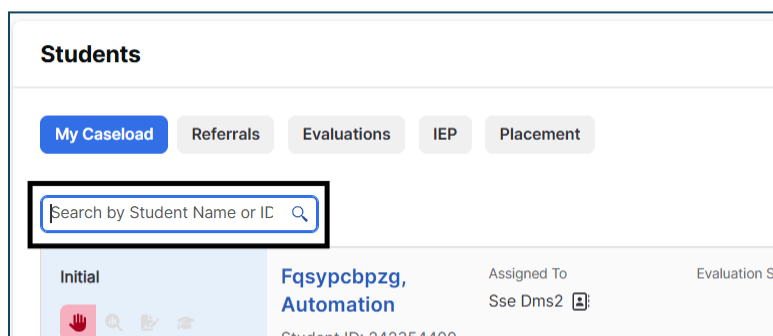
Initial 	Lux, Luca Student ID: 242300830 DOB: 09/11/2021 DBN: District 07	Assigned To Sse Dms2 	Evaluation Site CSE Location 01	Activity Social History Package In Draft	Activity Due Date	Compliance Date	Actions
« « 1 » » Page 1 of 1 10 items per page 1 - 1 of 1 items							

How to Complete the Social History Package

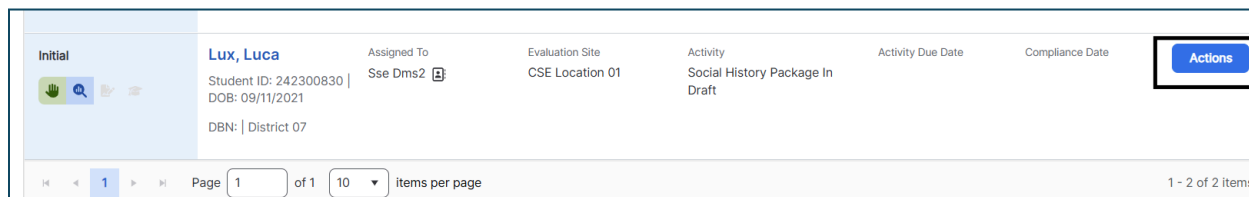
This section provides step-by-step instructions for completing the Social History Package in ATLAS. Users will learn how to navigate through each part of the package, complete all required fields, and upload any necessary documents. It is important to pay attention to date validation prompts to ensure data accuracy and reduce errors—particularly when entering the Consent for Initial Evaluation information. This date determines compliance timelines and is required for users to proceed.

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.

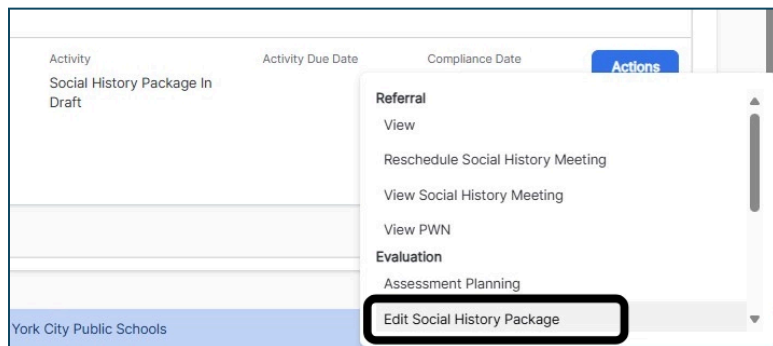
1. Search for the student for whom you'd like to complete the Social History Package.



2. Click **Actions**.



3. From the dropdown, section **Edit Social History Package**.



4. You will be directed to the Social History Package page.

Social History Package
Preschool

Letter to Parents

Generate and Edit

Physical Examination Form

Consent for Initial Evaluations

Consent for Use of Electronic Mail

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

Letter to Parents

Dear Parent/Guardian:

The Committee on Preschool Special Education has received a referral requesting an evaluation of your child to determine if your child needs preschool special education services. The enclosed packet includes:

- A Prior Written Notice (Notice of Recommendation) for Initial Evaluation.**
This form is required by the New York State Education Department. It gives a summary of the information in the other materials in the referral packet. This notice explains that your child's Committee on Preschool Special Education (CPSE) is proposing to conduct an initial evaluation of your child to determine if your child is eligible to receive special education services. The notice has information about how you can choose a preschool evaluation site and what assessments will be conducted.
- Preschool Evaluation Agency List.**
You have the right to choose any evaluation site from the enclosed list. The site will conduct the evaluation at no cost to you. Please choose an agency that can finish the evaluation of your child within 20 school days from your first evaluation appointment.
- Consent for Initial Preschool Evaluation.**
Before any evaluations can begin, we will need your written consent. Enclosed is a consent form. Please bring it with you to the evaluation site, but do NOT sign it until after the evaluation site explains your rights to you.
- Consent for Use of Electronic Mail.**
A parent of a student with a disability may elect to receive prior written notices, procedural safeguards notices, and other required notifications by electronic mail (email). In order for school personnel to use the internet email system for the transmission of notices to you, a signed consent form must be on file.
- Physical Examination Form**

5. The navigation menu on the left side of the screen contains all sections of the Social History Package. Completed sections display a green check mark, while incomplete sections show a red circle with an exclamation point. The screenshot below illustrates an incomplete social history package with several incomplete icons.

Note: Unlike other sections that display a green check mark for completed sections and a red exclamation point for incomplete ones, the Physical Examination Form section does not show completion status but still requires you to enter information.

Social History Package
Preschool

Letter to Parents

Generate and Edit

Physical Examination Form

Consent for Initial Evaluations

Consent for Use of Electronic Mail

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

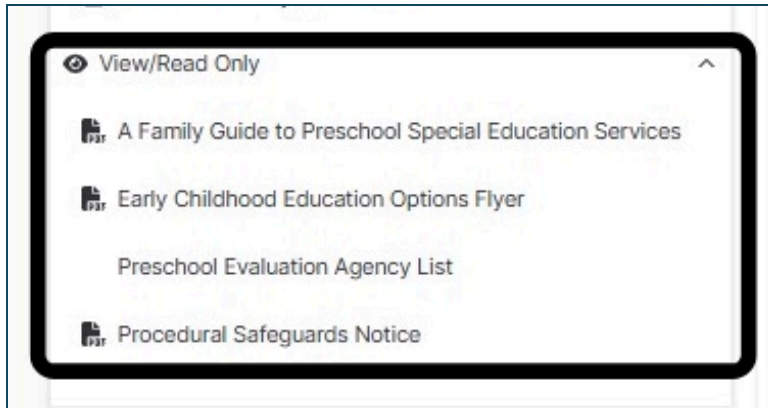
A Family Guide to Preschool Special Education Services

Early Childhood Education Options Flyer

Preschool Evaluation Agency List

Procedural Safeguards Notice

6. At the bottom of the Social History Package, *View/Read Only* attachments (e.g., *Procedural Safeguards Notice*) are listed. They will be sent with the package once it is finalized.



- To complete a section, click on the title of the section you wish to complete.

- The form will appear on the right side of the screen, where you can complete all required fields and attach any relevant documents.

Note: Required fields are marked with an asterisk (*).

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

Consent for Initial Evaluations

Select files...

Drop files here to select

Referral QA.docx

175.38 KB

x

▲

▼

Document Name	Upload Date	Uploaded By	Action

- Once all required fields have been completed, click **Save** to save your work and continue with other sections of the package, or click **Cancel** to return to the dashboard and discard all previously entered information.

Note: 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/or return to previous work.

Consent for Initial Evaluations

Select files...

Drop files here to select

ATLAS Test - Copy.docx

12.99 KB

x

▲

▼

Document Name	Upload Date	Uploaded By	Action
No records available.			

Did the Parent/Guardian consent?

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

Consent Date *

09/04/2025

Relationship *

Primary

Printed Name *

Luca Lux

Evaluator Agency

CSE Location 01

Site NYC Code #

Site Telephone Number

() - -

Site Email Address

Cancel

Save

- Once you have completed and saved the section, a green check will appear next to its title in the left navigation. Click the title of the next section you wish to complete to move forward.

Generate and Edit

- Physical Examination Form
- Consent for Initial Evaluations** ✓
- Consent for Use of Electronic Email !
- Social History Evaluation !

12. On some forms, you may be required to enter a date (as shown below). You can select a date using the calendar icon or enter it manually. You **must** click **Add** to ensure the date is captured on the form.

Social History Evaluation

Note: Please fill mandatory fields in order to submit the form.

Date(s) of Assessment *

09/04/2025 [Calendar Icon] **Add**

Error: Field is required

Language of Assessment *

English

13. After you click **Add**, the date will reflect to the right of the field.

Note: Please fill mandatory fields in order to submit the form.

Date(s) of Assessment *

MM/DD/YYYY [Calendar Icon] **Add** **09/04/2025** [Close Icon]

Language of Assessment *

English

14. Once all required sections are completed and saved, green check marks will appear next to them, and the **Finalize** button in the bottom-right corner will become enabled:
- Click **Finalize** to finalize and send the Social History Package.
 - Click **Save** to complete the section and continue editing the package.

- Click **Cancel** to exit the section. Any unsaved work in this section will be discarded.

Social History Package
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

Temporary Housing Questionnaire

Date Received * 07/01/2025 Relationship * Primary Printed Name * BOB BUILDER

Housing Questionnaire Choice *

- ☒ Doubled Up - With another family or other person because of loss of housing or as a result of economic hardship
- ☐ Shelter - Emergency or transitional shelter
- ☐ Hotel/Motel - Living in what is NOT an emergency or transitional shelter and involves payment
- ☐ Other Temporary Living Situation - Trailer park, campground, car, park, public places, abandoned building, street, or any other inadequate living space
- ☒ Permanent Housing - Student who is living in a fixed, regular, and adequate housing situation

If the student is NOT living in permanent housing, also indicate if the below applies:

- ☐ Unaccompanied Youth - Youth who is not in the physical custody of a parent or guardian

Select files... Drop files here to select

Document Name	Upload Date	Uploaded By	Action
No records available.			

Cancel Save Finalize

- After clicking *Finalize*, a pop-up will appear listing all uploads attached to the package. Select a Method of Delivery and click **Submit**.

Note: If you choose *Print* or *Postal Mail*, your computer will open the print window so you can print the Social History Package, which must then be mailed manually.

Document Name Upload Date Uploaded By

Referral QA.docx	07/01/2025	ssedms2
Referral QA.docx	07/01/2025	ssedms2

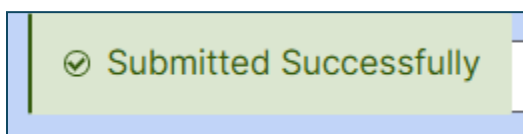
Method of Delivery

☒ Print (or) Postal Mail ☐ Parent Portal

Note *: If parent has an NYCSA account, the notification will be shown on the Parent Portal dashboard

Cancel Submit

- Once submitted, ATLAS will confirm that your submission was successful and you will be directed back to the dashboard.



- Expand the student's row to see that the package status is marked *Finalized* and to view information on whether Consent for Initial Evaluation was provided.

Note: Assessments completed within the Social History Package (e.g., Social History Evaluation) will display as *Pending Approval* or *Finalized*, depending on the user who submitted them. In the image below, the assessments were submitted by CPSE Administrator.

The screenshot displays the ATLAS Infohub interface for a student named Luca. The top section shows student details: Student ID: 242300830, DOB: 09/11/2021, DIBN: District 07. The 'Assigned To' field shows 'Sse Dms2'. The 'Evaluation Site' is 'CSE Location 01'. The 'Activity' is 'Pending Evaluation'. The 'Activity Due Date' is '11/03/2025 (60 Days)'. The 'Compliance Date' is '12/10/2025 (97 Days)'. The 'Request Placement' is '12/10/2025 (97 Days)'. The 'Status of Social History Package' is 'Finalized' and 'Consent for Initial Evaluation Given?' is 'Yes'. Below this, a table lists assessments in progress:

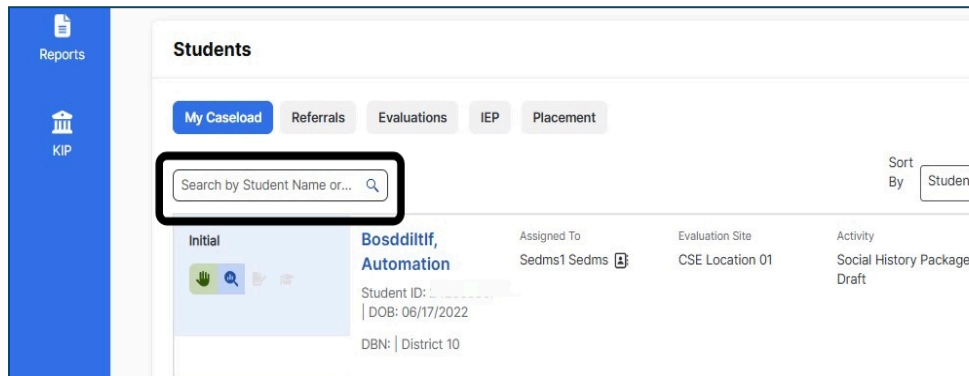
Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Observations	CSE Location 01		Internal Assignment	10/07/2025	Draft
Physical Examination		Dr. Seuss	Provided by Parent		Finalized
Psychological Assessment	Happy Dragon of New York, Inc - Queens		Internal Assignment	10/07/2025	Draft
Social History Evaluation	CSE Location 01		Internal Assignment	10/07/2025	Finalized

- To view the finalized package, navigate to the student's documents. For guidance on locating student documents, see the Navigation Reference Guide.

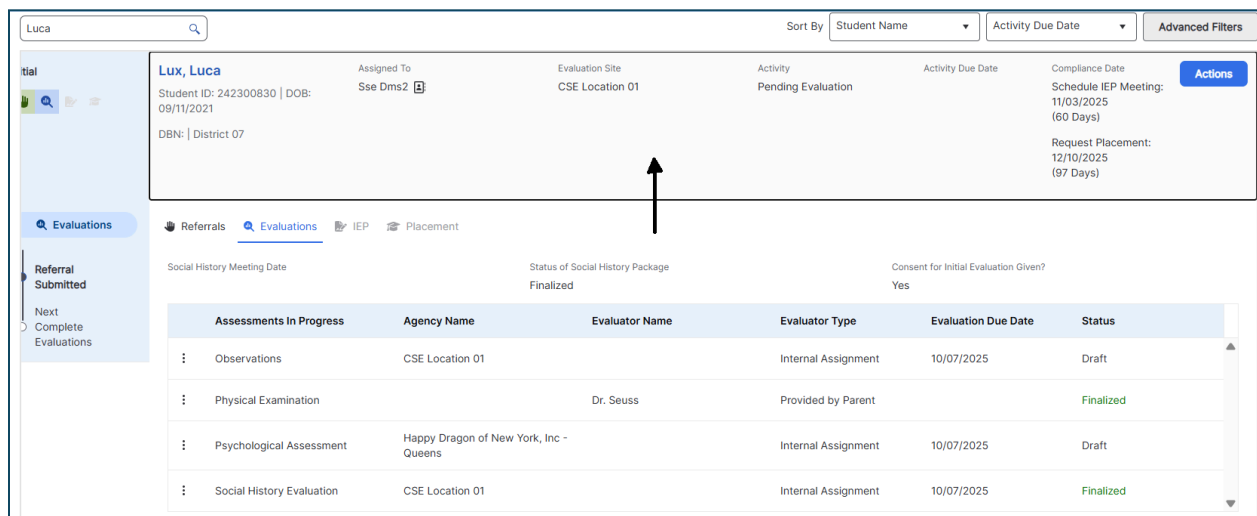
How to Complete an Assessment

This section provides step-by-step instructions for completing an assessment in ATLAS, including navigating the dashboard, locating the student, editing the assessment, uploading the document, and submitting it. Depending on the user's role, an additional layer of review may be required—therefore, some submissions will update directly to *Finalize*, while others will move to *Pending Review*.

1. Search for the student for whom you'd like to complete an assessment.



2. Expand the student's row by clicking anywhere on the row except for the student's name.



3. Ensure the **Evaluations** tab is selected.

1

Assessment Information

2

Assessment Findings

3

Evaluator Information

Assessment Information

Date(s) of Assessment *

MM/DD/YYYY

Calendar icon

Add

Language of Assessment *

Assessment Findings

Findings

Type here

Summary, Conclusions & Recommendations

Prints results

- Indicate the assessment date by using the calendar icon or entering it manually. After selecting a date, click **Add** to save it. You cannot submit the assessment without adding a date.

Assessment Information

Date(s) of Assessment *

MM/DD/YYYY

Calendar icon

Add

09/04/2025

- If you need to upload a document, click **I am uploading a document**.

I am uploading a Document.

Select files...

Drop files here to select

Document Name	Upload Date	Uploaded By	Action
No records available.			

- Select the type of document.

☒ I am uploading a Document.

☐ Other supporting documents

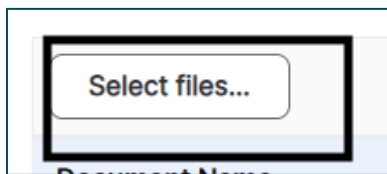
☐ A customized assessment report document

Please select the type of document

Select files...

Document Name	Upload Date	Uplo
---------------	-------------	------

10. Click **Select Files** to upload your document.



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

Select files...

Drop files here to select

ATLAS Test.docx
14.93 KB

Document Name	Upload Date	Uploaded By	Action
No records available.			

12. Once all required fields have been completed, the **Submit** button will become enabled in the bottom right corner:

- To finalize the assessment, click **Submit**.
- If you wish to save and return, click **Save**.
- If you wish to cancel, which will delete all unsaved data, click **Cancel**.

Cancel

Save Submit

13. After you click **Submit**, you will be directed back to the dashboard.

Quick Links


View MDE/PRAC Global Waitlist


View Waitlist


Review Requests from Parent Portal


Administration

Students

+ Add Referral

Export

My Caseload

Referrals

Evaluations

IEP

Placement

luca

Sort By

Student Name

Activity Due Date

Advanced

Initial






Lux, Luca

Student ID: 242300830

DOB: 09/11/2021

DBN: | District 07

Assigned To

Sse Dms2

Evaluation Site

CSE Location 01

Activity

Pending Evaluation

Activity Due Date

Compliance Date

Schedule IEP Meeting:

11/03/2025

(60 Days)

Request Placement:

12/10/2025

(97 Days)

Page 1 of 1

10 items per page

1 -

14. Expand the student's row to see the updated status of the assessment.

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package

Consent for Initial Evaluation Given?

Finalized

Yes

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Observations	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Pending Approval
Psychological Assessment	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Draft

ATLAS Infohub [Internal](#) - [External](#)

September 2025

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How to Review Assessments

Approve

1. Search for the student for whom you need to review an assessment.

The screenshot shows the 'Students' page with tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. A search bar labeled 'Search by Student Name or IC' is highlighted with a red rectangle. Below the search bar, a student card is visible for 'Fqsypcbpzg, Automation'. The card includes a red hand icon, the student's name, 'Assigned To: Sse Dms2', 'Evaluation Site', and 'Activity: Referral: Pending P'. The student ID is 242354400 and the DOB is 07/16/2022.

2. Expand the student's row by clicking anywhere on the row except for the student's name.

The screenshot shows the expanded student row for 'Lux, Luca'. The student's information includes Student ID: 242300830, DOB: 09/11/2021, and DBN: District 07. The 'Assigned To' is 'Sse Dms2' and the 'Evaluation Site' is 'CSE Location 01'. The 'Activity' is 'Pending Evaluation'. The 'Compliance Date' is 'Schedule IEP Meeting: 11/03/2025 (59 Days)' and 'Request Placement: 12/10/2025 (96 Days)'. The 'Actions' button is visible. Below the student information, there is a table of 'Assessments In Progress'.

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Observations	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Pending Approval
Physical Examination		Dr. Seuss	Provided by Parent		Finalized
Psychological Assessment	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Draft
Social History Evaluation	CSE Location 01	Alexis	Internal Assignment	10/07/2025	Finalized

3. Click the **three vertical dots** next to the assessment you want to review.

Note: The assessment must be in *Pending Approval* status to be reviewed.

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package

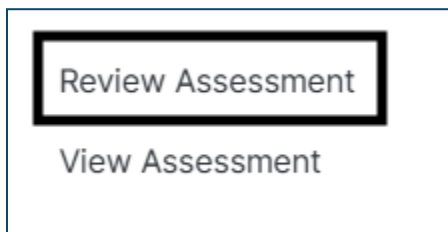
Consent for Initial Evaluation Given?

Finalized

Yes

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
⋮ Observations	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Pending Approval
⋮ Physical Examination		Dr. Seuss	Provided by Parent		Finalized
⋮ Psychological Assessment	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Draft
⋮ Social History Evaluation	CSE Location 01	I Alexis	Internal Assignment	10/07/2025	Finalized

4. From the dropdown, select **Review Assessment**.



5. This will open the assessment in view/read only mode for you to review.

Observation at Child's Natural Setting

Review Assessment

Review Submitted Date
09/05/2025

Review Submitted By
Sse Dms2

Assessment Information

Date(s) of Assessment *

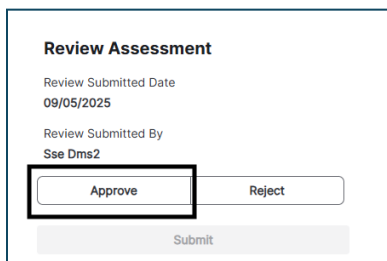
Language of Assessment *

Assessment Findings

Findings

Summary, Conclusions & Recommendations

6. To approve, click **Approve** in the *Review Assessment* panel to the left.



- Click **Submit**.

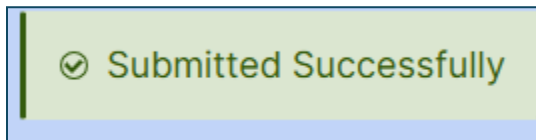
Review Assessment
Review Submitted Date
09/05/2025
Review Submitted By
Sse Dms2

Approve

Reject

Submit

- You will be directed back to the dashboard, and ATLAS will confirm that the submission was successful.



- Expand the student's row to see the updated status of the assessment.

DBN: | District 07

Request Placement:
12/10/2025
(96 Days)

Referrals

Evaluations

IEP

Placement

Social History Meeting Date

Status of Social History Package
Finalized

Consent for Initial Evaluation Given?
Yes

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
⋮ Observations	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Finalized
⋮ Physical Examination		Dr. Seuss	Provided by Parent		Finalized

Reject

- Complete steps 1–5 of How to Approve an Assessment.
- To reject, click **Reject** in the *Review Assessment* panel to the left.

Review Assessment
Review Submitted Date
09/05/2025
Review Submitted By
Sse Dms2

Approve

Reject

Submit

3. An additional required field will appear for you to make a selection.

Review Assessment

Review Submitted Date
09/05/2025

Review Submitted By
Sse Dms2

Reason for Rejection

4. Depending on the selection, an additional text field may appear.

Review Assessment

Review Submitted Date
09/05/2025

Review Submitted By
Sse Dms2

Reason for Rejection

Additional Information

5. Once all required fields are complete, click **Submit**.

Review Assessment

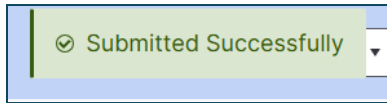
Review Submitted Date
09/05/2025

Review Submitted By
Sse Dms2

Reason for Rejection

Additional Information

6. You will be directed back to the dashboard, and ATLAS will confirm that the submission was successful.



7. Expand the student's row to see the updated status of the assessment on the right under "Status".

Referrals Evaluations IEP Placement					
Social History Meeting Date		Status of Social History Package Finalized		Consent for Initial Evaluation Given? Yes	
⋮	Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date
⋮	Observations	Yeled V"Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025
⋮	Physical Examination		Dr. Seuss	Provided by Parent	
⋮	Psychological Assessment	Yeled V"Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025
⋮	Social History Evaluation	CSE Location 01	Alexis	Internal Assignment	10/07/2025
					Status
					Finalized
					Finalized
					Draft
					Finalized

How to Add an Additional Assessment

This section provides step-by-step instructions for adding an additional assessment through the *PWN: Request for Additional Assessment* in ATLAS. The ability to complete this action depends on the user's permissions within the system; if you believe you need access, please contact your chairperson. Once the PWN is completed, approved, and finalized, ATLAS will automatically generate the PWN and the corresponding consent form within the student's documents for the user to send home to the parent.

Users will also learn how to upload the signed consent form and should pay attention to the date validation prompt to ensure data accuracy and reduce errors, as the *Consent for Additional Assessments* date informs compliance timelines. Once approved, the assessment(s) will appear in the Assessment Planning grid. For guidance on assigning and completing evaluations, refer to the *How to Navigate Assessment Planning* section of this reference guide.

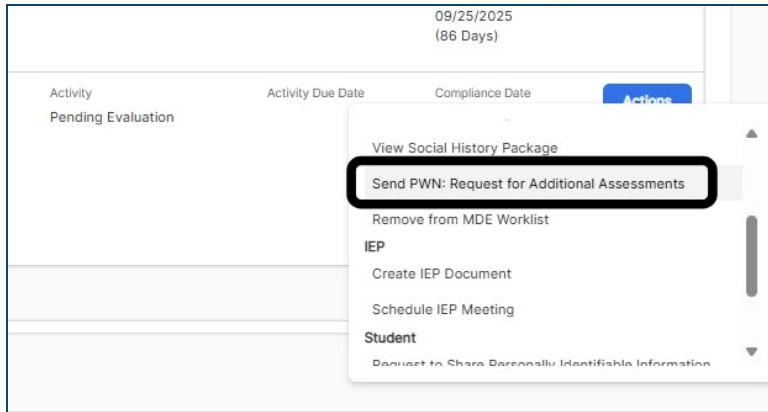
1. Search for the student for whom you'd like to add additional assessments.

The screenshot shows the 'Students' page in the ATLAS system. At the top, there are tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. A search bar labeled 'Search by Student Name o...' is highlighted with a red box. Below the search bar, there is a table of student records. The table has columns for 'Initial', 'Student Name', 'Student ID', 'DOB', 'Assigned To', 'Evaluation Site', 'Activity', 'Activity Due Date', 'Compliance Date', and 'Actions'. Two student records are visible: 'Bosddilif, Automation' and 'Bulun, Parsi'. The 'Actions' column for each record contains a blue button labeled 'Actions'.

2. Click **Actions**.

This screenshot shows a closer view of the student record for 'Lux, Luca'. The 'Actions' button in the 'Actions' column is highlighted with a red box. The table structure is the same as in the previous screenshot, with columns for 'Initial', 'Student Name', 'Student ID', 'DOB', 'Assigned To', 'Evaluation Site', 'Activity', 'Activity Due Date', 'Compliance Date', and 'Actions'. The 'Compliance Date' column shows 'Schedule IEP Meeting: 11/03/2025 (60 Days)' and 'Request Placement: 12/10/2025 (97 Days)'.

3. From the dropdown, select **Send PWN: Request for Additional Assessments**.



4. You will be directed to the **PWN: Request for Additional Assessments** page.

Prior Written Notice
 Request for Additional Assessments

Table of Contents <

- Introduction ✓
- Assessment(s) Requested ✓
- Evaluation Description ✓
- Sources ✓
- Additional Information ⚠
- Mail To ⚠

Introduction

Notice Date

Dear Parent or Guardian of **Lucas Lux**,

The purpose of this notice is to inform you, in writing, of the NYC Department of Education's (DOE's) recommendation(s) regarding the identification, evaluation, and provision of special education services to **Lucas Lux**.

Subject of this notice:
 Request for Additional Assessment(s)

Assessment(s) Requested

5. Use the **Table of Contents** to navigate to each section within the PWN and complete all required sections.

Note: Sections display a green check mark when completed and a red triangle with an exclamation mark when incomplete.

Table of Contents	
Introduction	✓
Assessment(s) Requested	✓
Evaluation Description	✓
Sources	✓
Additional Information	⚠
Mail To	⚠

- To complete the *Assessment(s) Requested* section, if applicable, click the **+ Add Additional Assessment** button.

Assessment(s) Requested

You have requested that the DOE conduct the following additional assessment(s)

Assessment Type	Purpose of the Assessment	Rationale	Status
No records available.			

+ Add Additional Assessment

- A new row will appear for you to complete the required fields. Use the dropdowns and text fields to enter the **Assessment Type** and **Rationale**. The **Purpose of Assessment** will auto-populate with selection of *Assessment Type*.

Note: You can repeat steps 6 and 7 as many times as needed to capture all required information.

Assessment Type	Purpose of the Assessment	Rationale
× Occupational Therapy Assess...	This assessment will	test

+ Add Additional Assessment

- To remove an assessment, click the red **X** to the left of the row.

Assessment Type	Purpose of the Assessment	Rationale
 Occupational Therapy Assess...	This assessment will	test
 Audiological Assessment	This is a specialized	test
 Central Auditory Processing Di...	Central auditory	test

[+ Add Additional Assessment](#)

9. To complete the *Explanation of why the action is proposed or refused* section enter information into the text field.

Explanation of why the action is proposed or refused

Upon receipt of your request for additional assessment(s) to be conducted, the DOE reviewed Luca's existing assessments and other materials. Additional explanation of why the action is proposed or refused:

Type here

10. To complete the *Evaluation Description* section, click **+ Add Decision Reason** button.

Evaluation Description

Description of each evaluation procedure, assessment, record, or report used in the decision to propose or refuse the action

Decision Reason	Description	Date
No records available.		

[+ Add Decision Reason](#)

11. A new row will appear for you to complete the required fields. Use the dropdowns and text fields to enter the **Decision Reason**, **Description**, and **Date**.

Note: You can repeat steps 10 and 11 as many times as needed to capture all required information.

Decision Reason	Description	Date
☐ Classroom Work	test	09/05/2025

[+ Add Decision Reason](#)

12. To remove a reason, click the red **X** to the left of the row.

Decision Reason	Description	Date
☐ Classroom Work	test	09/05/2025
☐ Teacher Reports	test	09/05/2025
☐ Documented Interventions	test	09/05/2025

13. Indicate if there is Additional Information by selecting the **Yes** or **No** buttons in the Additional Information section.

[includenyc.org](https://www.includenyc.org)

Additional Information

Any Additional Information? *

☐ Yes
☐ No

Note: If you select **Yes**, an additional required text field will appear for you to complete.

Additional Information

Any Additional Information? *

☒ Yes
☐ No

Type here *

Error: Field is required

14. Ensure that the correct recipient is displayed in the *Mail To* section. This information will be auto-populated based on the primary contact information associated with the student.

Mail To

Recipient

Recipient Contact * Name * Email Address

Primary Big Bird

Street Address * Street Address 2

501 courtlandt ave

City * State * Zip *

BRONX New York 10451

Method of Delivery *

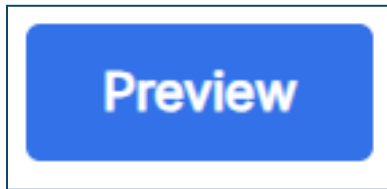
15. Select the *Method of Delivery* by choosing **Postal Mail** or **Parent Portal**.

Method of Delivery *

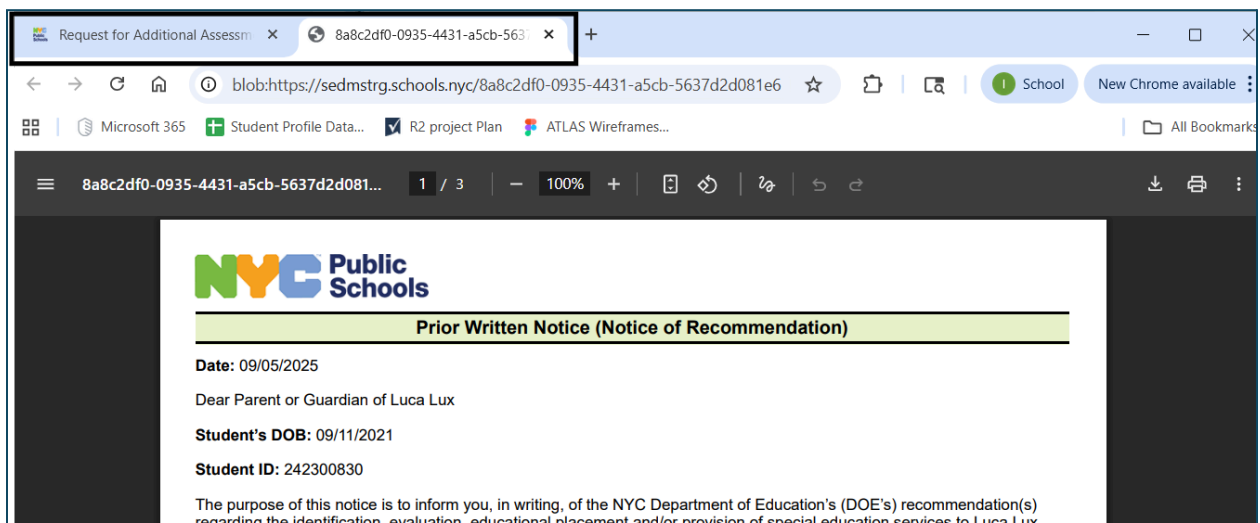
Please indicate how you intend to send the document to the recipient.

☐ Postal Mail ☐ Parent Portal

16. Once all required sections are complete, click **Preview** to review for accuracy.



17. The Preview will open as a PDF in a new browser tab. Review the document, then return to ATLAS by closing the Preview tab or clicking back on the ATLAS tab.

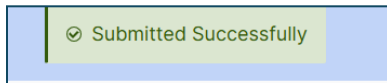


18. Once all sections are complete, green check marks will appear next to each section of the PWN in the Table of Contents. The **Submit** button will then be enabled at the bottom of the screen, along with **Cancel**, **Preview**, and **Save**.

- Click **Cancel** to discard your work and return to the dashboard.
- Click **Save** to save your progress and return later.
- Click **Preview** to review the document for accuracy.
- Click **Submit** to submit the document for review.



19. You will be directed back to the dashboard, and ATLAS will confirm that the submission was successful.



How to Review the PWN: Request for Additional Assessments

Approving Additional Assessments

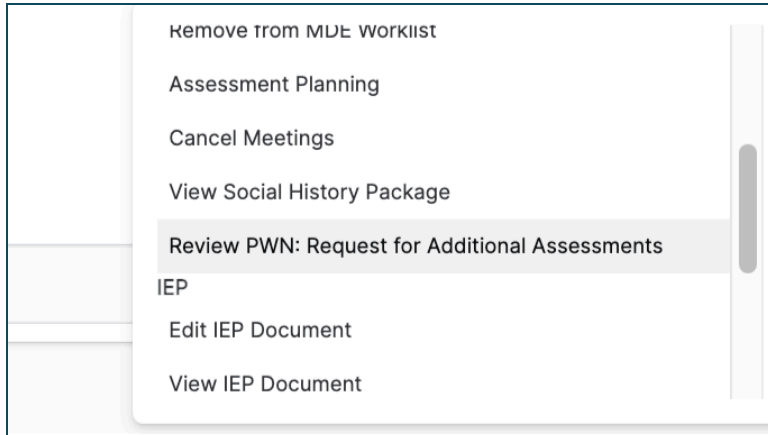
1. Search for the student for whom you'd like to review the PWN: Request for Additional Assessments.

The screenshot shows the 'Students' interface with tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. A search bar labeled 'Search by Student Name o...' is highlighted with a red box. Below the search bar, there are two student entries. The first entry is for 'Bosdditlf, Automation' with Student ID: 242388807, DOB: 06/17/2022, and DBN: District 10. The second entry is for 'Bulun, Parsi' with Student ID: 242353807, DOB: 12/20/2022, and DBN: District 13. Both entries show 'Assigned To' as 'Sedms1 Sedms' and 'Sse Dms2', 'Evaluation Site' as 'CSE Location 01', 'Activity' as 'Pending Evaluation', and 'Activity Due Date'. The 'Compliance Date' section shows 'Schedule IEP Meeting' and 'Request Placement' dates and durations. An 'Actions' button is visible for each entry.

2. Click **Actions**.

The screenshot shows the 'Students' interface with a search bar containing 'luca'. The 'Actions' button is highlighted with a red box. Below the search bar, there is a student entry for 'Lux, Luca' with Student ID: 242300830, DOB: 09/11/2021, and DBN: District 07. The entry shows 'Assigned To' as 'Sse Dms2', 'Evaluation Site' as 'CSE Location 01', 'Activity' as 'Pending Evaluation', and 'Activity Due Date'. The 'Compliance Date' section shows 'Schedule IEP Meeting' and 'Request Placement' dates and durations. An 'Actions' button is visible for this entry.

3. From the dropdown, select **Review PWN: Request for Additional Assessments**.



- You will be directed to the **PWN: Request for Additional Assessments** page. Complete all required sections.

Prior Written Notice

Request for Additional Assessments

Table of Contents

- Introduction ✓
- Assessment(s) Requested ⚠
- Evaluation Description ✓
- Contacts ⚠
- Sources ✓
- Additional Information ✓
- Mail To ✓

Introduction

Notice Date

09/05/2025

Dear Parent or Guardian of **Lucas Lux**,

The purpose of this notice is to inform you, in writing, of the NYC Department of Education's (DOE's) recommendation(s) regarding the identification, evaluation, provision of special education services to **Lucas Lux**.

Subject of this notice:
Request for Additional Assessment(s)

Assessment(s) Requested

You have requested that the DOE conduct the following additional assessment(s)

Assessment Type	Purpose of the Assessment	Rationale	Status
Assistive Technology Assessment	This is an assessment	test	Approve

- To complete the *Assessment(s) Requested* section, review and click **Approve**.

Note: The approved additional assessments will appear in the student's *Assessment Planning* once the PWN is finalized.

Assessment(s) Requested

You have requested that the DOE conduct the following additional assessment(s)

	Assessment Type	Purpose of the Assessment	Rationale	Status
☐	Assistive Technology Assessment	This is an assessment	test	Approve Reject
☐	Audiological Assessment	This is a specialized hearing	test	Approve Reject
☐	Occupational Therapy Assessment	This assessment will look at	test	Approve Reject

- Review the **Explanation of why the action is proposed or refused** and **Evaluation Description** sections.
- Complete the *Contacts* section by searching for *Staff First Name*, *Staff Last Name*, or *Staff ID* in the *Assistance Contact* and *Staff Contact* rows. After you have searched for a staff member, click **Select** to add them to the row.

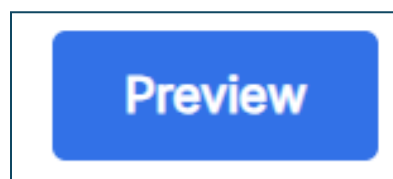
Contacts

Assistance Contact

Sources you may contact to obtain assistance in understanding the special education process:

Staff Contact

- Once all required sections are complete, click **Preview** to review for accuracy.



- The Preview will open as a PDF in a new browser tab. Review the document, then return to ATLAS by closing the Preview tab or clicking back on the ATLAS tab.

NYC Public Schools

Prior Written Notice (Notice of Recommendation)

Date: 09/05/2025

Dear Parent or Guardian of Luca Lux

Student's DOB: 09/11/2021

Student ID: 242300830

The purpose of this notice is to inform you, in writing, of the NYC Department of Education's (DOE's) recommendation(s) regarding the identification, evaluation, educational placement and/or provision of special education services to Luca Lux.

SUBJECT OF THIS NOTICE: Request for Authorization to Administer Additional Assessment(s) - Initial Only

DESCRIPTION OF ACTION PROPOSED OR REFUSED:

You have requested that the DOE conduct the following additional assessment(s)

EXPLANATION OF WHY THE ACTION IS PROPOSED OR REFUSED:

10. Once all sections are complete, green check marks will appear next to each section of the PWN in the Table of Contents. The **Finalize and View** button will then be enabled at the bottom of the screen, along with **Cancel**, **Preview**, and **Save**.

- Click **Cancel** to discard your work and return to the dashboard.
- Click **Save** to save your progress and return later.
- Click **Preview** to review the document for accuracy.
- Click **Finalize and View** to finalize the document.

Cancel Preview Save Finalize and View

11. You will be directed back to the dashboard, and ATLAS will confirm that the submission was successful. The finalized version of the document will also open in a new tab for your view and can also be found in the student's documents.

✓ Submitted Successfully

12. Upon finalization of the PWN, ATLAS automatically generates the **Consent for Additional Assessments**. This consent form must be attached to the finalized PWN and sent to the parent/guardian for signature **before any assessments are administered**.

Note: For details on how to access and navigate student documents, refer to the *Navigation Reference Guide*.

Service Details	Student Information	Documents	Team	Events Log	Misc
-----------------	---------------------	-----------	------	------------	------

School Year: 2025-2026

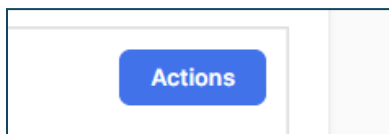
Referral

Evaluations

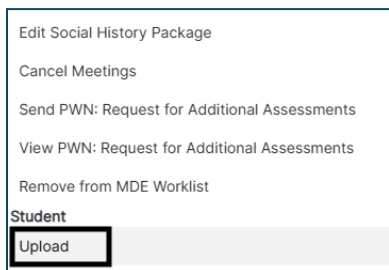
Date Created	Document Name	Document Type	Uploaded By	Action
09/05/2025	RequestforAdditionalAssessments Consent: 24...	Consent for Additional Assessments	SEDMS_App	 
09/05/2025	RequestforAdditionalAssessments PWN: 24230...	Request for Additional Assessments	SEDMS_App	 
09/05/2025	Social History Package: 242300834	Social History Package	SEDMS_App	 

Upload the Signed Consent for Additional Assessments

1. Click **Actions**.



2. From the dropdown, select **Upload**.



3. A pop-up will appear for you to complete all required fields.

Upload Documents [X]

Document Type *

Select files... Drop files here to select

Date	Details
No records available.	

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

Relationship Printed Name

Save

4. From the *Document Type* dropdown, select **Consent for Additional Assessments**.

Document Type *

Consent for Additional Assessments

STAC

Partially Served Notice

Variance

Consent for Waiver of IEP Meeting

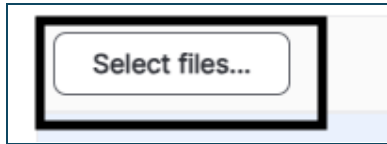
Consent for Additional Assessments

5. From the *Request* dropdown, choose the PWN request associated with the consent.

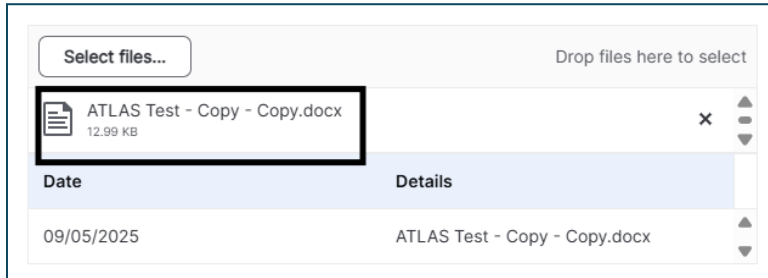
Request *

Request on 9/5/2025 1:28 PM: Assistive Technology Assessment, Audiological Assessment, Occupational Therapy Assessment

6. Click **Select files** to upload the signed Consent for Additional Assessments.



7. The uploaded document will reflect under the *Select files* button.



8. Select whether or not the parent/guardian provided consent.

☐ Yes, Parent/Guardian provided consent.

☐ No, Parent/Guardian did not provide consent.

9. Enter the date that consent was signed by the parent/guardian.

Date Signed*

MM/DD/YYYY 

10. Complete the Relationship field.

Relationship  Printed Name

11. Once all required fields are completed, click **Save**.

Upload Documents

12.99 KB

Date	Details
09/05/2025	ATLAS Test - Copy - Copy.docx

☒ Yes, Parent/Guardian provided consent.
 ☐ No, Parent/Guardian did not provide consent.

Date Signed*

Relationship

Printed Name

Save

12. A confirmation pop-up will appear for you to verify: *Are you sure you want to continue with [date] as the date **parental consent was provided**?* Click **Yes**, to confirm or **No** to go back and make corrections.

Note: It is imperative that you verify the date as this action is irreversible and compliance timelines will be calculated from this date upon confirmation.

Confirm Parental Consent

Are you sure you want to continue with **09/05/2025** as the date **parental consent was provided**?

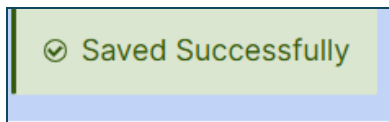
⚠ This action is irreversible.

Compliance timelines will be calculated from this date upon confirmation.

No, Go Back

Yes, Confirm

13. Upon confirmation, you will be directed back to the dashboard and ATLAS lets you know it was saved successfully.



Rejecting Additional Assessments

1. Complete steps 1-4 of *Approving Additional Assessments*.
2. To complete the *Assessment(s) Requested* section, review and click **Reject**.

Assessment(s) Requested

You have requested that the DOE conduct the following additional assessment(s)

Assessment Type	Purpose of the Assessment	Rationale	Status
 Central Auditory Processing Disorder A...	Central auditory processing	test	Approve Reject

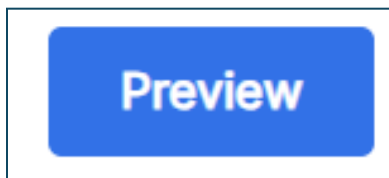
[+ Add Additional Assessment](#)

3. An additional field will appear for you to enter the **Reason for Rejection**.

Assessment Type	Purpose of the Assessment	Rationale	Status
 Central Auditory Processing Disorder A...	Central auditory processing	test	Approve Reject

Reason for Rejection

4. Review and complete remaining required sections of the PWN. Click **Preview** to review for accuracy.



5. The Preview will open as a PDF in a new browser tab. Review the document, then return to ATLAS by closing the Preview tab or clicking back on the ATLAS tab.

NYC Public Schools

Prior Written Notice (Notice of Recommendation)

Date: 09/05/2025

Dear Parent or Guardian of Lucas Lux

Student's DOB: 09/11/2021

Student ID: 242300834

The purpose of this notice is to inform you, in writing, of the NYC Department of Education's (DOE's) recommendation(s) regarding the identification, evaluation, educational placement and/or provision of special education services to Lucas Lux.

SUBJECT OF THIS NOTICE: Request for Authorization to Administer Additional Assessment(s) - Initial Only

DESCRIPTION OF ACTION PROPOSED OR REFUSED:

You have requested that the DOE conduct the following additional assessment(s)

The DOE does not agree to conduct the following assessment(s):

Assessment(s) Requested - Denied	DOE Action
Central Auditory Processing Disorder Assessment:	Reject

EXPLANATION OF WHY THE ACTION IS PROPOSED OR REFUSED:

Upon receipt of your request for additional assessment(s) to be conducted, the DOE reviewed Lucas's existing assessments and other materials.

Based on these materials, the DOE has determined that the additional assessment(s) specified above are not needed as a part of this evaluation because:

Activate Windows
Go to Settings to activate Windows.

6. Once all sections are complete, green check marks will appear next to each section of the PWN in the Table of Contents. The **Finalize and View** button will then be enabled at the bottom of the screen, along with **Cancel**, **Preview**, and **Save**.

- Click **Cancel** to discard your work and return to the dashboard.
- Click **Save** to save your progress and return later.
- Click **Preview** to review the document for accuracy.
- Click **Finalize and View** to finalize the document.

Cancel Preview Save Finalize and View

7. You will be directed back to the dashboard, and ATLAS will confirm that the submission was successful. The finalized version of the document will also open in a new tab for your view.

✓ Submitted Successfully

8. Upon finalization, ATLAS generates the finalized PWN which can be found in the student's documents.

Note: Rejected assessment(s) will not appear in the student's *Assessment Planning*.

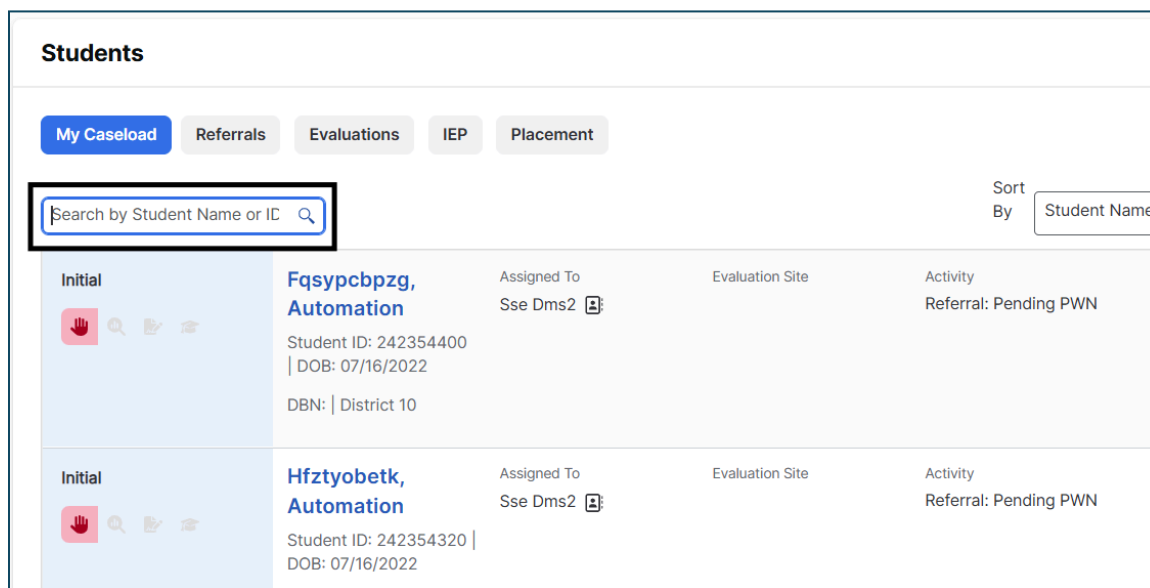
School Year: 2025-2026				
Referral				
Evaluations				
Date Created	Document Name	Document Type	Uploaded By	Action
09/05/2025	RequestforAdditionalAssessments Consent: 24...	Consent for Additional Assessments	SEDMS_App	 
09/05/2025	RequestforAdditionalAssessments PWN: 24230...	Request for Additional Assessments	SEDMS_App	 
09/05/2025	RequestforAdditionalAssessments Consent: 24...	Consent for Additional Assessments	SEDMS_App	 
09/05/2025	RequestforAdditionalAssessments PWN: 24230...	Request for Additional Assessments	SEDMS_App	 
09/05/2025	Social History Package: 242300834	Social History Package	SEDMS_App	 

How to Submit the STAC-5

This section provides step-by-step instructions for MDE Agencies on how to submit the **STAC-5**. Users must ensure that all STACs are submitted before a case is closed, as submissions cannot be completed afterward.

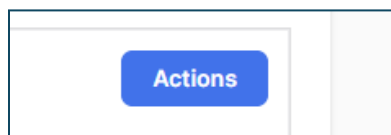
Note: This section does not apply to PRAC users.

1. Search for the student for whom you'd like to submit the STAC-5.



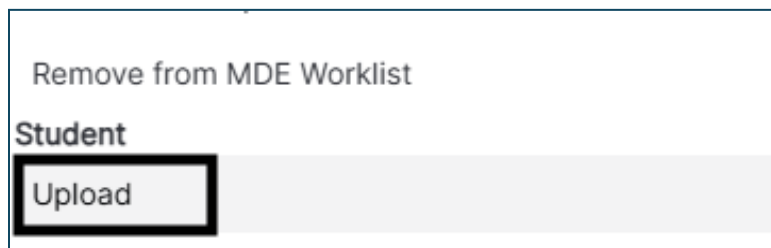
The screenshot shows the 'Students' interface. At the top, there are tabs: 'My Caseload' (selected), 'Referrals', 'Evaluations', 'IEP', and 'Placement'. Below the tabs is a search bar labeled 'Search by Student Name or ID' with a magnifying glass icon. To the right of the search bar is a 'Sort By' dropdown menu set to 'Student Name'. Below the search bar is a table with two rows of student data. Each row has an 'Initial' column with a red hand icon and three small icons (speech bubble, document, and a person). The first row is for 'Fqsyypcbpzig, Automation' with Student ID: 242354400, DOB: 07/16/2022, DBN: District 10, Assigned To: Sse Dms2, Evaluation Site, and Activity: Referral: Pending PWN. The second row is for 'Hfztyobatk, Automation' with Student ID: 242354320, DOB: 07/16/2022, Assigned To: Sse Dms2, Evaluation Site, and Activity: Referral: Pending PWN.

2. Click **Actions**.



The screenshot shows a blue button labeled 'Actions' with a white hand icon.

3. From the dropdown, click **Upload**.



The screenshot shows a dropdown menu with the text 'Remove from MDE Worklist' at the top. Below it is the word 'Student'. At the bottom of the dropdown is a button labeled 'Upload'.

4. The document upload pop-up will appear.

Upload Documents [X]

Document Type *

Select files... Drop files here to select

Date	Details
No records available.	

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

Relationship Printed Name

5. From the Document Type dropdown, select **STAC**.

Document Type *

- Consent for Initial Provision of Services
- Preschool Acceptance Letter
- DEP 1
- STAC**
- Partially Served Notice

6. Click **Select files** to upload the STAC.

Select files...

7. The attached document will appear. Click **Save**.

Select files...

Drop files here to select

ATLAS Test - Copy - Copy.docx

12.99 KB

✕

Date

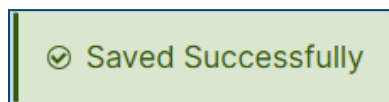
Details

09/05/2025

ATLAS Test - Copy - Copy.docx

Save

8. ATLAS lets you know it was saved successfully.



9. The document will now appear in the student's documents.

Service Details

Student Information

Documents

Team

Events Log

Misc

School Year:

2024-2025

Student

Evaluations

Date Created	Document Name	Document Type	Uploaded By	Action
01/07/2025	STAC.pdf	STAC		
12/27/2024	Initial Evaluations Packet.pdf	Occupational Therapy Assessment		
12/27/2024	Initial Evaluations Packet.pdf	Speech and Language Assessment		
12/27/2024	Speech and Language Assessment.	Speech and Language Assessment	SEDMS_App	

10. Navigate back the student and expand the student's row.

Referrals Evaluations IEP Placement Social History Meeting Date Status of Social History Package Consent for Initial Evaluation Given?						
Finalized Yes						
Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status	
⋮ Observations	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	STAC Submitted	
⋮ Psychological Assessment	Yeled V'Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	Draft	

15. There are no further actions for the MDE agency. The CPSE Chairperson or CPSE Administrator must approve the submitted STAC-5.

How to Approve the STAC-5

This section provides step-by-step instructions for approving the STAC-5. Users must ensure that all STACs are reviewed before a case is closed. Only CPSE Chairpersons and Administrators can complete this task. All other users should contact their Chairperson for assistance.

1. Search for the student for whom you'd like to review/approve the STAC.

Students

My Caseload

Referrals

Evaluations

IEP

Placement

Search by Student Name or ID

Sort By Student Name

Initial	Fqsypcbpzzg, Automation Student ID: 242354400 DOB: 07/16/2022 DBN: District 10	Assigned To See Dms2	Evaluation Site	Activity Referral: Pending PWN
Initial	Hfztyobetk, Automation Student ID: 242354320 DOB: 07/16/2022	Assigned To See Dms2	Evaluation Site	Activity Referral: Pending PWN

2. Click the student's **name** to navigate to their profile.

luca

Sort By Student Name Activity Due Date

Initial	Lux, Luca Student ID: 242300830 DOB: 09/11/2021 DBN:	Assigned To Sse Dms2	Evaluation Site CSE Location 01	Activity Pending Evaluation	Activity Due Date	Compliance Schedule IE 11/03/2025 (59 Days) Request Pla 12/10/2025 (96 Days)
---------	--	-------------------------	------------------------------------	--------------------------------	-------------------	--

3. Click **Documents**.

Student Profile

Luca's

Disability Classification

IEP Placement Recommendation

Next Annual Review Date

EI Extension Date

Service Details

Student Information

Documents

Team

Events Log

Misc

Programs

No Programs to show

Related Services

No Related Services to show

4. Click to expand the *Evaluations* folder and open the **STAC** document to review.

Service Details	Student Information	Documents	Team	Events Log	Misc
-----------------	---------------------	-----------	------	------------	------

School Year: 2025-2026

Referral

Evaluations

Date Created	Document Name	Document Type	Uploaded By	Action
09/05/2025	ATLAS Test - Copy - Copy.docx	STAC	in2@doeexternal.nyc	
09/05/2025	Observations: 242300830	Custom Observation Assessment	SEDMS_App	
09/04/2025	Social History Evaluation: 242300830	Social History Evaluation Assessment	SEDMS_App	
09/04/2025	ATLAS Test - Copy - Copy.docx	Other Assessment	ssedms2	
09/04/2025	ATLAS Test - Copy - Copy.docx	Use of Electronic Mail	ssedms2	
09/04/2025	ATLAS Test - Copy - Copy.docx	Physical Examination	ssedms2	

- Once the STAC upload has been reviewed, navigate back to the student and expand the student's row.

Lux, Luca Student ID: 242300830 DOB: 09/11/2021 DBN: District 07		Assigned To Sse Dms2	Evaluation Site CSE Location 01	Activity Pending Evaluation	Activity Due Date	Compliance Date Schedule IEP Meeting: 11/03/2025 (59 Days) Request Placement: 12/10/2025 (96 Days)
---	--	-------------------------	------------------------------------	--------------------------------	-------------------	--

Referrals Evaluations IEP Placement

Social History Meeting Date	Status of Social History Package Finalized	Consent for Initial Evaluation Given? Yes
-----------------------------	---	--

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
⋮ Observations	Yeled V'Yalda Early Childhood Center	aklein2 SEDMS	Internal Assignment	10/07/2025	STAC Submitted
⋮ Psychological Assessment	Yeled V'Yalda Early Childhood Center	aklein2 SEDMS	Internal Assignment	10/07/2025	Draft

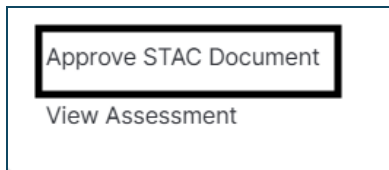
- Click the three vertical dots next to the assessment of the STAC you just reviewed.

Referrals Evaluations IEP Placement

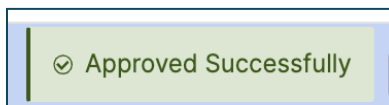
Social History Meeting Date	Status of Social History Package Finalized	Consent for Initial Evaluation Given? Yes
-----------------------------	---	--

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date
⋮ Observations	Yeled V'Yalda Early Childhood Center	aklein2 SEDMS	Internal Assignment	10/07/2025
⋮ Psychological Assessment	Yeled V'Yalda Early Childhood Center	aklein2 SEDMS	Internal Assignment	10/07/2025

- From the dropdown, click **Approve STAC Document**.



8. ATLAS lets you know it's been approved successfully.



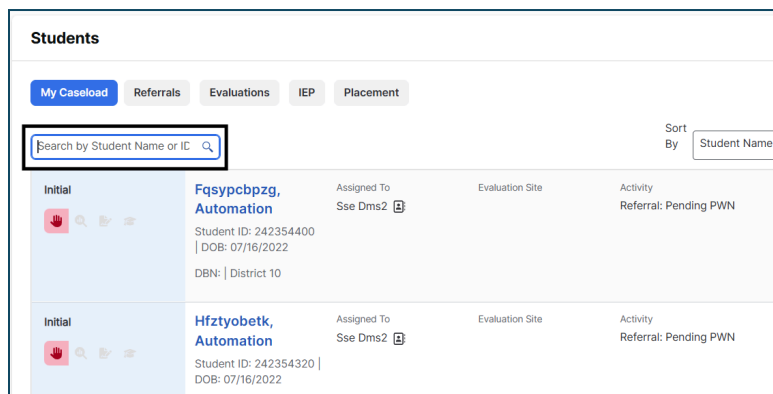
9. The status of the assessment will reflect **STAC Approved**.

Referrals Evaluations IEP Placement					
Social History Meeting Date		Status of Social History Package Finalized		Consent for Initial Evaluation Given? Yes	
Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Observations	Yeled V"Yalda Early Childhood Center	SEDMS	Internal Assignment	10/07/2025	STAC Approved
Physical Examination		Dr. Seuss	Provided by Parent		Finalized

How to Complete the Preschool Evaluation Summary

This section provides step-by-step instructions for completing the Preschool Evaluation Summary in ATLAS, including navigating the dashboard, locating the student, editing the document, and submitting it.

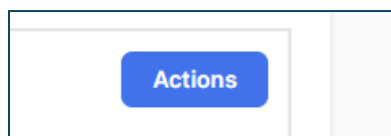
1. Search for the student for whom you wish to create the Preschool Evaluation Summary Report.



The screenshot shows the 'Students' dashboard in ATLAS. At the top, there are tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. Below these is a search bar labeled 'Search by Student Name or ID' with a magnifying glass icon. To the right of the search bar is a 'Sort By' dropdown menu currently set to 'Student Name'. Below the search bar is a table with two rows of student data. Each row includes an 'Initial' column with a red hand icon, a name column, an 'Assigned To' column, an 'Evaluation Site' column, and an 'Activity' column.

Initial	Name	Assigned To	Evaluation Site	Activity
	Fqsypcbpzzg, Automation Student ID: 242354400 DOB: 07/16/2022 DBN: District 10	See Dms2		Referral: Pending PWN
	Hfztyobetk, Automation Student ID: 242354320 DOB: 07/16/2022	See Dms2		Referral: Pending PWN

2. Click **Actions**.



The screenshot shows a blue button labeled 'Actions' with a white outline, set against a light gray background.

3. From the dropdown, select **Create Pre School Summary**.

Note: The *Create Pre School Summary* option will only appear in the dropdown after all evaluations for the student have been finalized.

The sidebar menu is divided into two sections: 'Referral' and 'Evaluation'. Under 'Referral', there are links for 'View' and 'View PWN'. Under 'Evaluation', there are links for 'Create Pre School Summary' (which is highlighted with a black border), 'Assessment Planning', 'View Social History Package', and 'View PWN: Request for Additional Assessments'. A vertical scrollbar is visible on the right side of the menu.

4. You will be directed to the Preschool Evaluations Summary Report. Complete all required sections of the form; including agency information, contact information, summary of findings, and recipient.

The form is titled 'Preschool Evaluation Summary Report'. It contains several sections:

- Date(s) of Assessment:** A list of four items: 'ClassroomObservation - 09/05/2025', 'Physical Examination - 09/04/2025', 'PsychologicalAssessment - 09/05/2025', and 'Social History Evaluation - 09/04/2025'.
- Agency:** A section with a required field 'Agency Name *' containing 'CSE Location 01'.
- Street Address:** A section with 'Street Address' (containing 'ONE FORDHAM PLAZA') and 'Street Address 2' (empty).
- City:** A section with 'City' (containing 'BRONX') and 'State' (empty).
- Zip:** A section with 'Zip' (containing '10458').
- Contact Person:** A section with 'Contact Person Name *' (empty), 'Telephone Number' (empty), 'Country Of Residence' (empty), and 'School District Name' (empty).

5. Once all required fields are completed, the **Submit** button will become enabled.
 - o Click **Cancel** to cancel the form and discard previously input information..
 - o Click **Save** to save your work and return later.
 - o Click **Submit** to submit and finalize.

A horizontal row of three buttons: 'Cancel' (red border), 'Save' (blue border), and 'Submit' (blue border).

6. Once submitted, ATLAS directs you back to the dashboard and lets you know it has been submitted successfully.

