

ATLAS Navigation Reference Guide

Overview

This reference guide provides an overview of essential functions in the Accessible Tool for Learning (ATLAS) to help you get started and manage your caseload effectively. It covers how to log in to the system, navigate the dashboard, and access key features. You will learn how to view students assigned to your caseload, add new students, and search for specific students. Each section includes step-by-step instructions. To quickly access a specific section, simply click the section title.

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

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

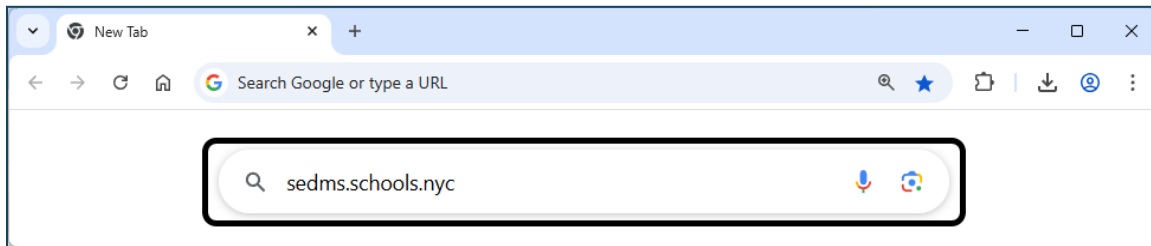
Contents

How to Log in to ATLAS.....	1
How to Navigate the Dashboard.....	5
How to View, Filter and Sort Students on Your Dashboard.....	8
How to Add a Student to a Caseload.....	19
How to Search for a Student.....	22

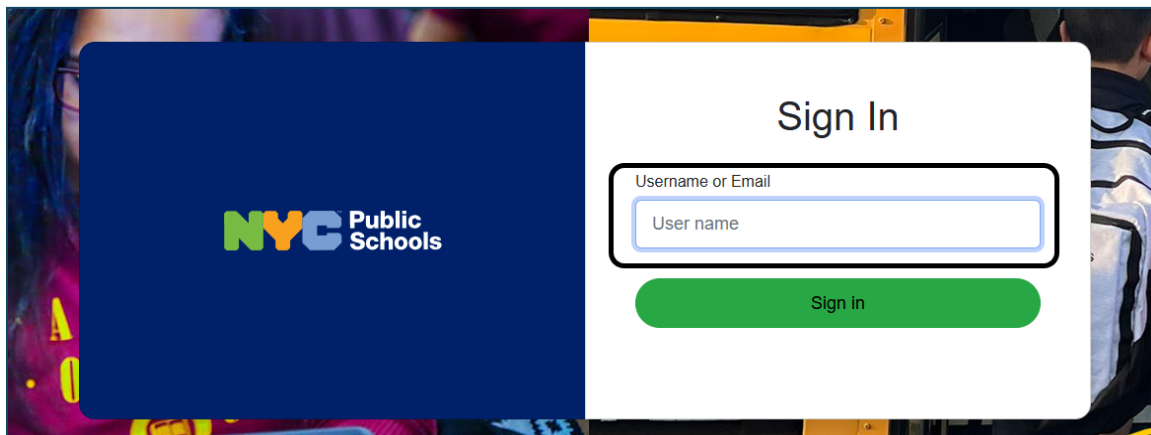
How to Log in to ATLAS

This section provides step-by-step instructions for logging in to ATLAS, including accessing the login page, entering your credentials, and opening your dashboard.

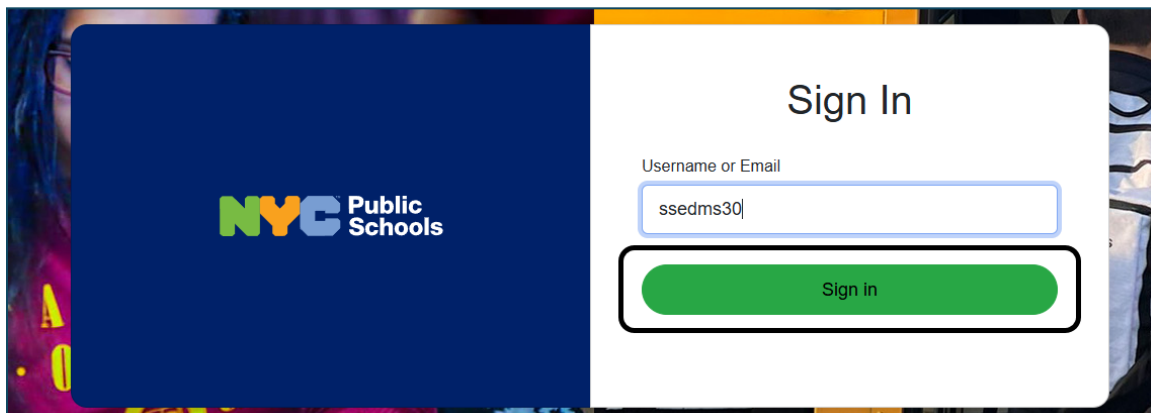
1. Open your browser and type [SEDMS.schools.nyc](https://sedms.schools.nyc) in the search bar (Google Chrome is used in this example), and press **Enter** on the keyboard.



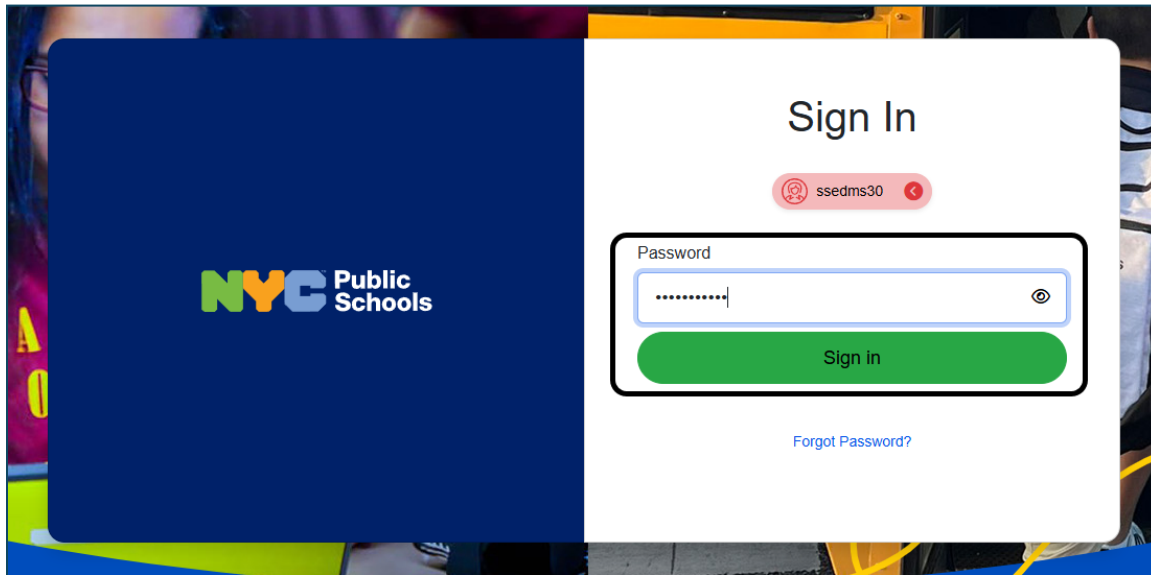
2. On the login page, enter your NYCPS **Username** or **Email** (the same credentials you use to sign in to other NYCPS applications).



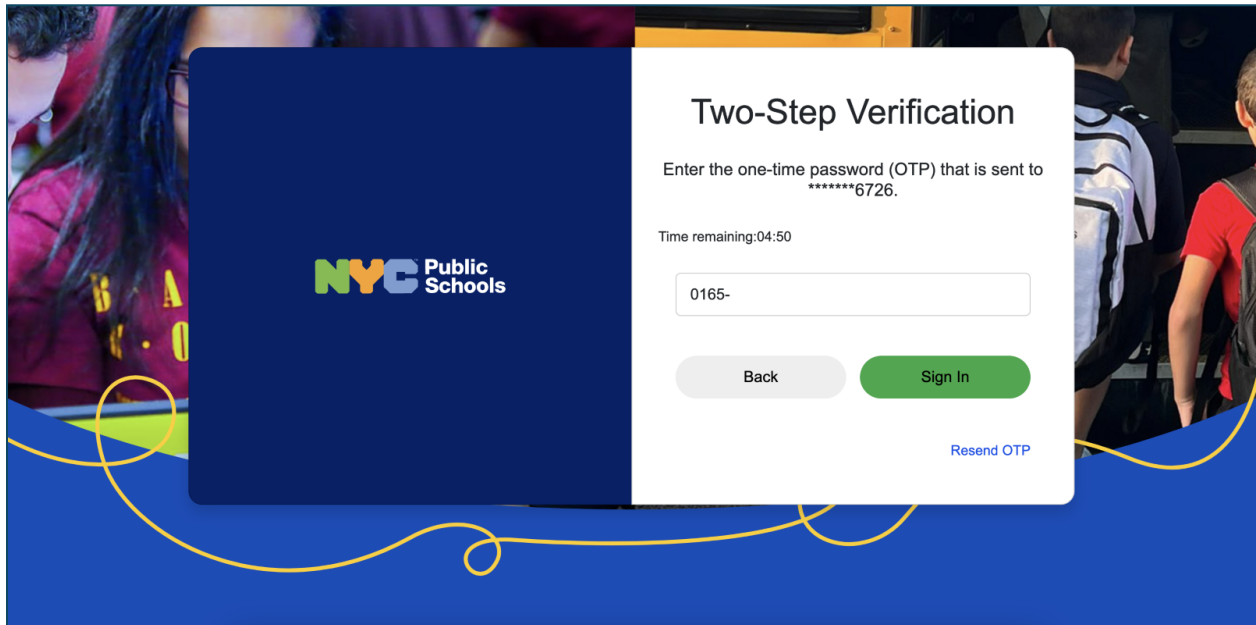
3. Click **Sign in**.



4. Enter your **Password**.
5. Click **Sign In** to access the system.



Note: After clicking *Sign In*, you may need to complete Multi-Factor Authentication (MFA) either through an app, email, or a text message, depending on your account settings. Follow the prompts and click *Sign In* again.



After signing in, you will be directed to your dashboard, which is customized based on your role. The example below is for a CSE/CPSE Administrator; your view may be different.

Welcome!
Sedms30 Sedms's Caseload (CSE CPSE Administrator)

Quick Links

- View MDE/PRAC Global Waitlist
- View Waitlist
- Review Requests from Parent Portal
- Administration

Students

+ Add Referral | Export to Excel

My Caseload | Referrals | Evaluations | IEP | Placement

Search by Student Name or ... | Sort By: Student Name | Activity Due Date | Advanced Filters

Initial	Student ID	DOB	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	F74ER7478, AO67O6784	04/08/2020		CSE Location 01	Pending Evaluation	Finalize IEP: 01/09/2025 (-76 Days Left)	Request Placement: 02/06/2025 (-48 Days)	
	Nku, Ke're	09/11/2020		CSE Location 01	Pending Evaluation	Schedule IEP Meeting: 03/27/2025 (1 Day)	Request Placement: 04/18/2025 (23 Days)	

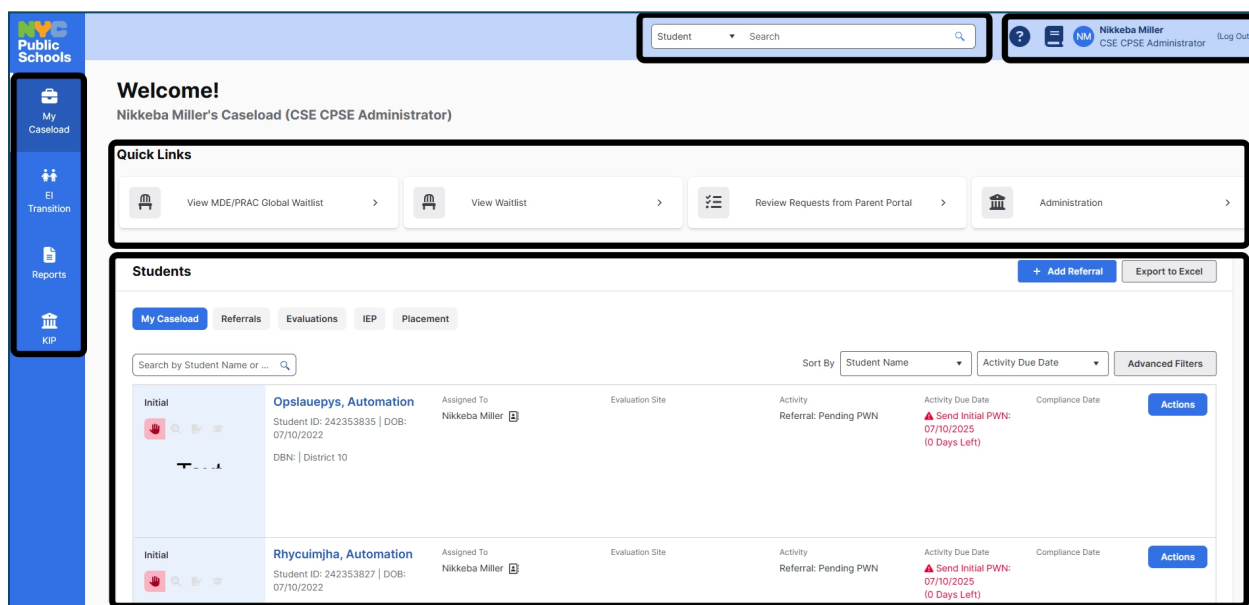
6. To log out of ATLAS, click **Log Out** in the top right corner of the screen next to your name.

Search | ? | Menu | SS | Sedms30 Sedms CSE CPSE Administrator | (Log Out)

How to Navigate the Dashboard

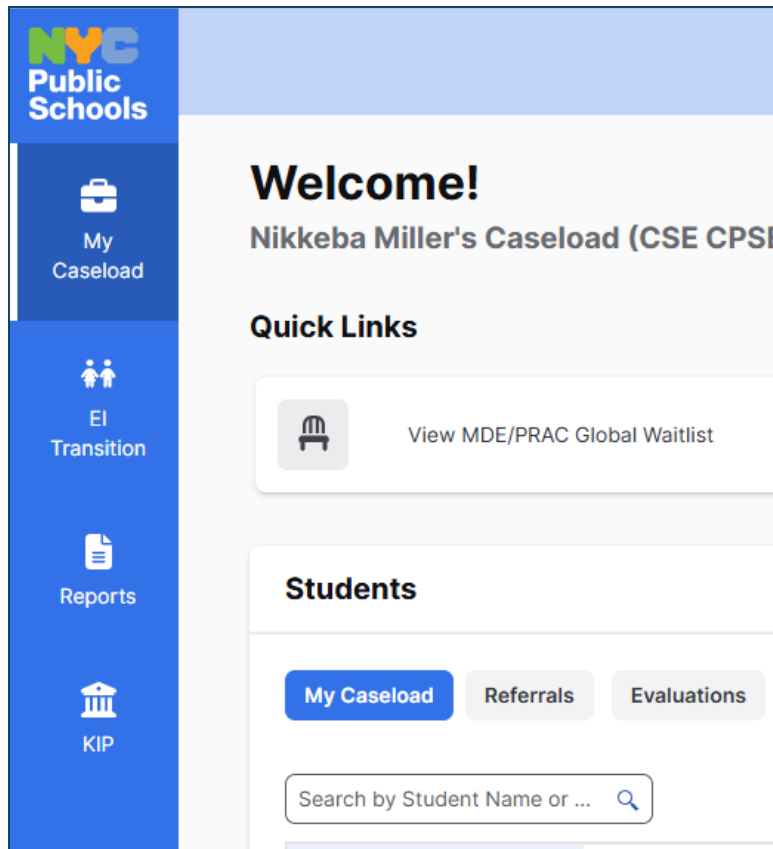
The ATLAS Dashboard is your main workspace; it shows all the students on your caseload and is where you will begin most of the work you do in ATLAS. This section provides a brief overview of how to navigate the dashboard. Additional, more detailed information is provided in subsequent sections of this guide. The image below shows four sections of the dashboard: Left side (dark blue), Top row (light blue), Quick Links, and Students.

Note: The options and functionality available are based on your role, so your dashboard may look different.



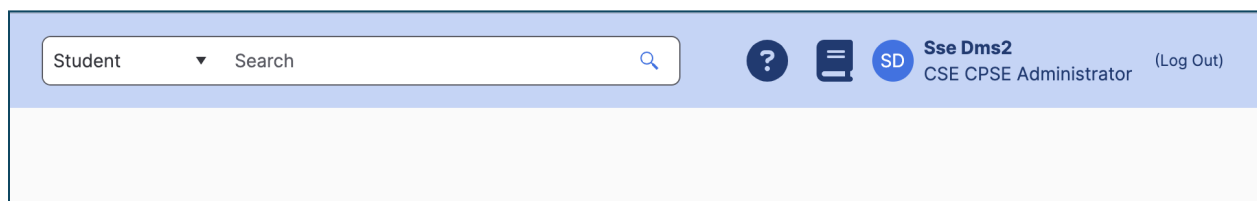
Left Side

There are links to some functions (*My Caseload*, *EI Transition*, *Reports*, and *KIP*) available from the blue vertical menu on the left side of your screen which you can use to navigate to other pages within ATLAS.



- *NYC Public Schools* logo – Click the logo to navigate to your dashboard.
- *My Caseload* – Clicking “My Caseload” brings you to your dashboard.
- *EI Transition* – View detailed information for EI children; sort and filter, export data to Excel, view child documents uploaded by the Department of Health and Mental Hygiene (DOHMH).
- *Reports* – ATLAS reports are designed to provide real-time or periodic insights into timeliness of referrals, evaluations, IEP creation, and placement.
- *KIP* – Search Kindergarten IEP Process (KIP) students and view documents.

Top row

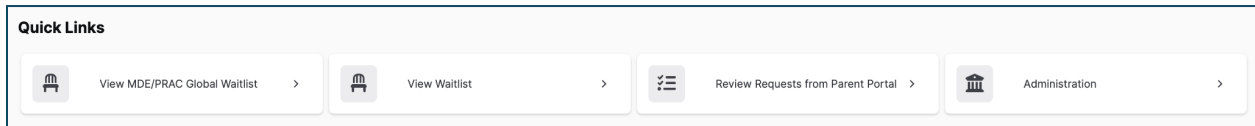


- *Search box* - Search for students in ATS.
- *Help link (Question Mark icon)* - This will open a list of NYCPS Resources to help you navigate the special education process.
- *Release Notes link (Book icon)* - This will open a document that details the latest ATLAS updates.

- Username and title.
- Log out.

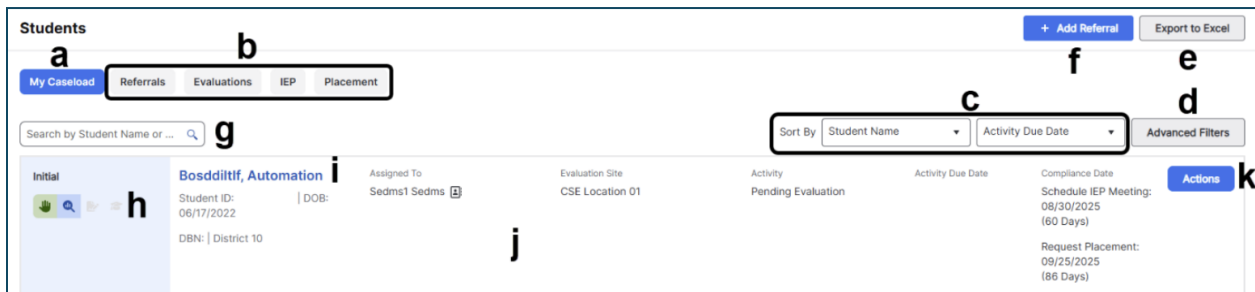
Quick Links

The Quick Links section is located near the top of your dashboard.



- View MDE/PRAC Global Waitlist* – This is a global list of students awaiting assignment to any Multi-Disciplinary Evaluation (MDE) or Preschool Regional Assessment Center (PRAC).
- View Waitlist* – This is an MDE or PRAC specific list of students awaiting an appointment with the evaluation team with which you are associated. For example, if you are associated with CPSE 1, you will only see students awaiting an evaluation appointment with CPSE 1.
- Review Request from Parent Portal* – This is a list of requests that have been submitted through the Parent Portal, such as request for additional assessment or request for re-evaluation.
- Administration* – This button directs you to the MDE Agency List page where you can view all MDE agencies and how many students are on each of their waitlists.

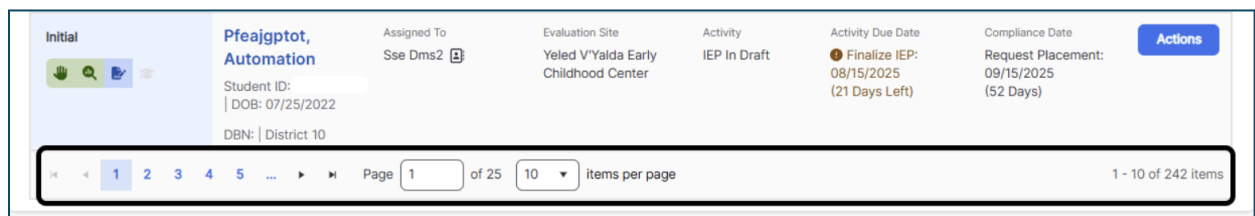
Students



- My Caseload* – Select *My Caseload* (blue) to view students assigned to you. Deselect *My Caseload* (gray) to view all students to which you have access.
- Filter by Process* – Click one of the process buttons (*Referral*, *Evaluations*, *IEP*, or *Placement*) to filter by that process type.
- Sort by Student Name* or *Activity* – Sort by name or due date. *Activity Due Date* is the date by which the student must be placed.
- Advanced Filters* – Use advanced filters for a more detailed search.
- Export to Excel* – Export data (with filters if applicable) to Excel.
- Add Referral* – Add an initial referral for a student or create a request for a reevaluation.
- Search Students* in ATLAS.

- h. *Status Icons* indicate where the student is in the special education process in ATLAS. The colors and icons will change accordingly as the student moves through the process.
- i. *Student Name* – Click the student’s name to navigate to their profile which includes Service Details, Student Information, Documents, and the Events Log.
- j. *Student’s Tile* – Provides information regarding the student’s case. Click anywhere on the student’s row to expand the tile and view details about the student’s process.
- k. *Actions button* – Click to view actions available based on your role and where the student is in their case.

Students may appear on multiple pages, to view additional students, scroll to the bottom of the dashboard and click on the page numbers to navigate through the pages. You can also click the left/right arrow icons or manually enter a page number. Change the number of items (student rows) per page using the drop-down menu on the right. The total number of students will be shown on the bottom right of the page.

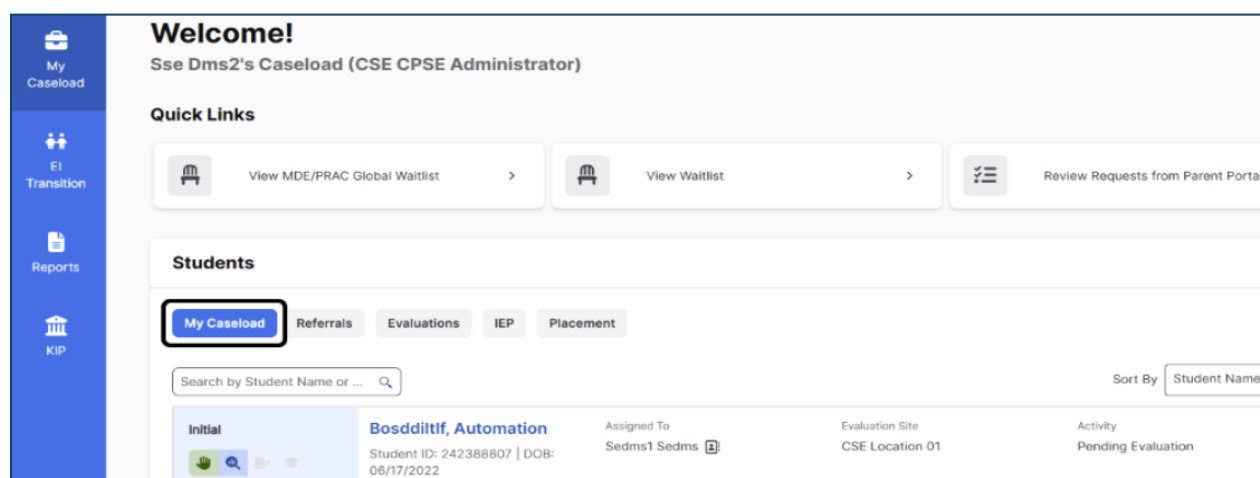


How to View, Filter and Sort Students on Your Dashboard

This section provides instructions for viewing students on your dashboard in ATLAS. You will find guidance on how to filter, sort and export students to Excel so you can easily access information to ensure accurate tracking and support. In addition, the information below explains the status icons and how to access the student's profile.

My Caseload

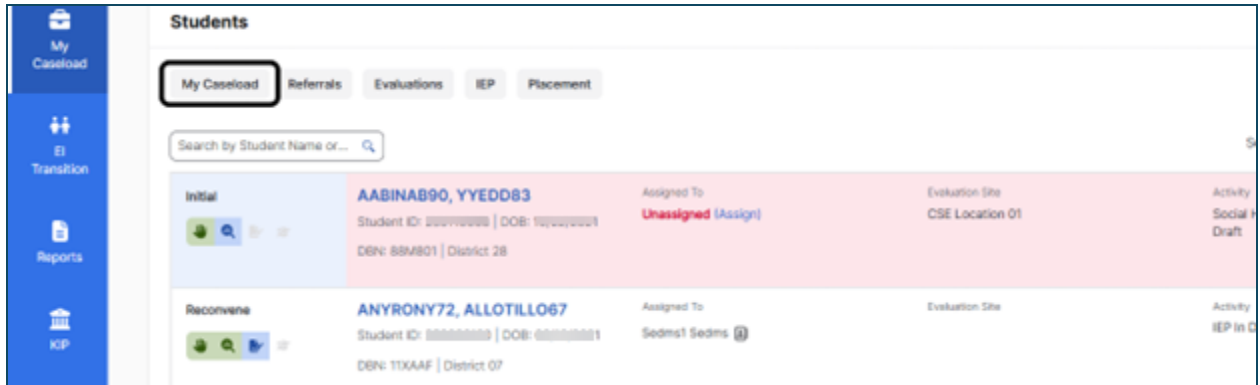
When you log in to ATLAS, on your dashboard the **My Caseload** button is selected (blue) by default and will show all students assigned to you, regardless of where they are in the process, based on your role in their special education administration.



If you click the **My Caseload** button to deselect it (it will turn gray). This will show all students you have access to.

- *School-based Users:* You will see all the students in your school's DBN (or multiple DBNs if you are assigned to more than one location).
- *CSE/CPSE Users:* You will see all students within your CSE.

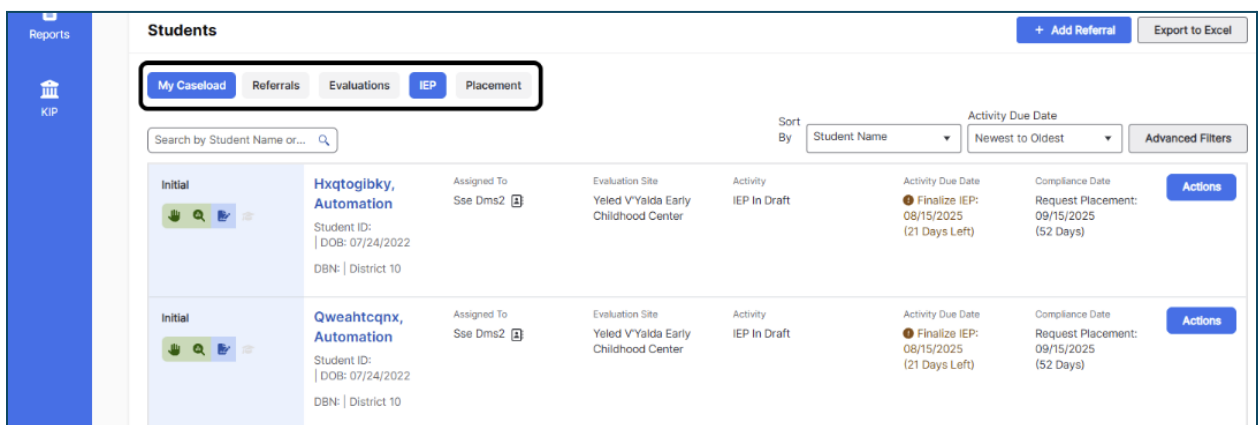
Depending on your access, you may see student records assigned to you, assigned to other staff, or unassigned. Assigned student records are displayed in white rows, unassigned records appear in pink rows.



Filter by Process

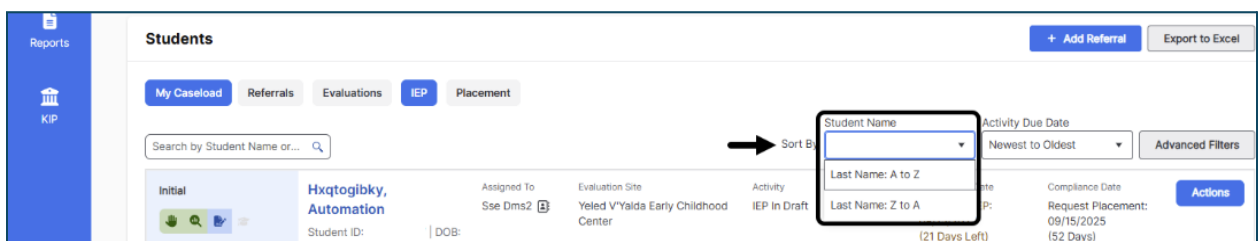
Click one of the process buttons (*Referral*, *Evaluations*, *IEP*, or *Placement*) at the top left of the dashboard to filter by that process stage. The selected buttons are blue, and the deselected buttons are gray.

For example, in the image below, both the *My Caseload* and *IEP* buttons are selected to filter all students on the *Caseload* who are currently in the *IEP* phase of the special education process.

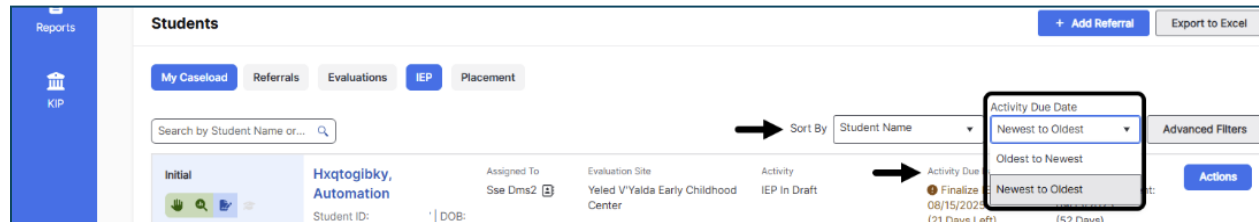


Sort by Student Name and/or Activity Due Date

Use the drop-down menus in the top right corner of the dashboard to sort students. You can sort alphabetically by *Student Name*.

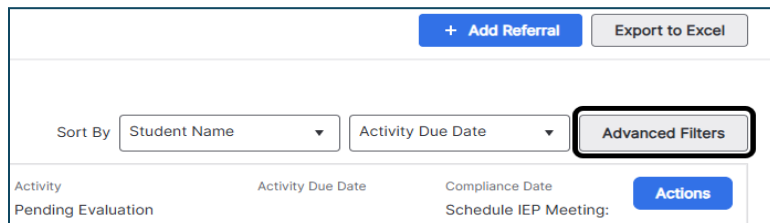


You can sort by *Activity Due Date*. The due date indicates the date by which the student must be placed (for initial cases it's typically 60 days from the date consent for initial evaluation was received).



Advanced Filters

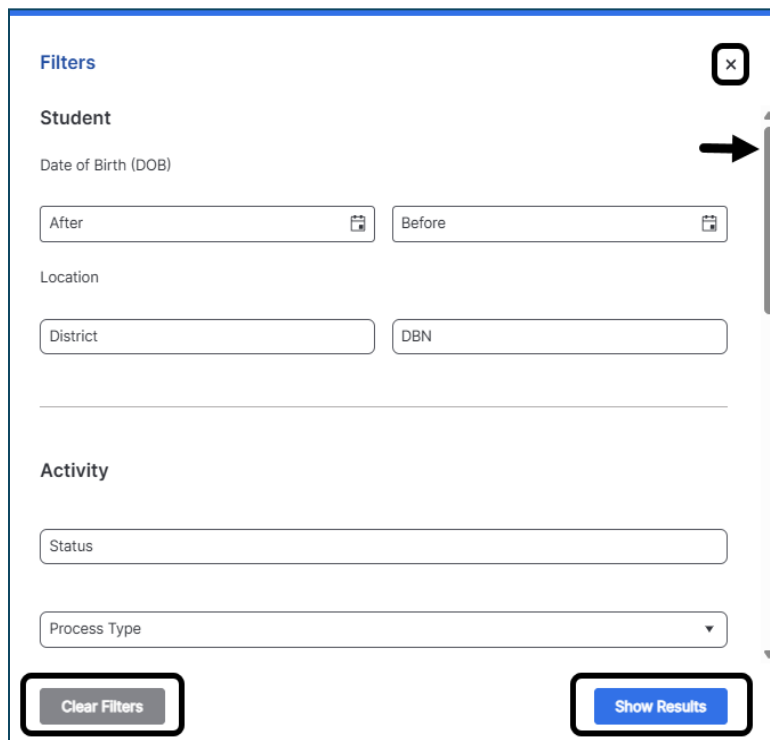
For more detailed search options, click *Advanced Filters* on the top right of the dashboard.



The screenshot shows the top section of a dashboard. At the top right, there are two buttons: '+ Add Referral' (blue) and 'Export to Excel' (grey). Below these, there are two dropdown menus: 'Sort By' with 'Student Name' selected, and 'Activity Due Date'. To the right of these dropdowns is a button labeled 'Advanced Filters', which is highlighted with a black rectangular box. Below the dropdowns, there is a table header with columns: 'Activity', 'Activity Due Date', 'Compliance Date', and 'Actions'. The first row of the table shows 'Pending Evaluation' under 'Activity' and 'Schedule IEP Meeting:' under 'Compliance Date'.

A pop-up titled *Filters* will open with options available to select from the following categories: *Student*, *Activity*, *Compliance*, *Evaluations* and *Placement*. Scroll up or down in the pop-up to select your filter(s).

- Click **Show Results** in the bottom right corner of the pop-up to apply the filters and view students.
- To clear all filters, click **Clear Filters** in the bottom left of the pop-up, and then click **Show Results**.
- To close the *Filters* pop-up saving changes, click the **x** in the top right.



The screenshot shows a 'Filters' pop-up window. At the top left is the title 'Filters' and at the top right is a close button (x). The pop-up is divided into two main sections: 'Student' and 'Activity'. The 'Student' section includes a 'Date of Birth (DOB)' field with 'After' and 'Before' date pickers, and a 'Location' field with 'District' and 'DBN' dropdowns. The 'Activity' section includes a 'Status' text input field and a 'Process Type' dropdown menu. At the bottom left is a 'Clear Filters' button, and at the bottom right is a 'Show Results' button. A vertical scrollbar is visible on the right side of the pop-up.

In the *Activity* category, you can filter by *Status*. This allows you to filter by specific statuses, such as *Pending Evaluation* or *IEP in Draft*.

Filters [X]

Activity

Status

Pending Evaluation ←

Pending IEP

IEP In Draft ←

IEP Closed

Pending Placement

Use the *Process Type* dropdown to filter by the process type. For example, selecting *Annual Review* will show all students with a *Process Type* of *Annual Review*.

Status

Process Type ←

Annual Review

Initial

Reevaluation

Additional Reevaluation

Mandated 3-Year

Annual Review ←

Reevaluate

You can also filter the dashboard by student *Date of Birth*, *Location*, *Compliance* status and *Evaluation* criteria.

Reminder: You will need to deselect *My Caseload* (gray) if you want to view all students to which you have access.

Export to Excel

You can export the entire dashboard to Excel by clicking the *Export to Excel* button in the top right corner of the dashboard. Any sort and/or filter criteria will be reflected in the exported Excel file.

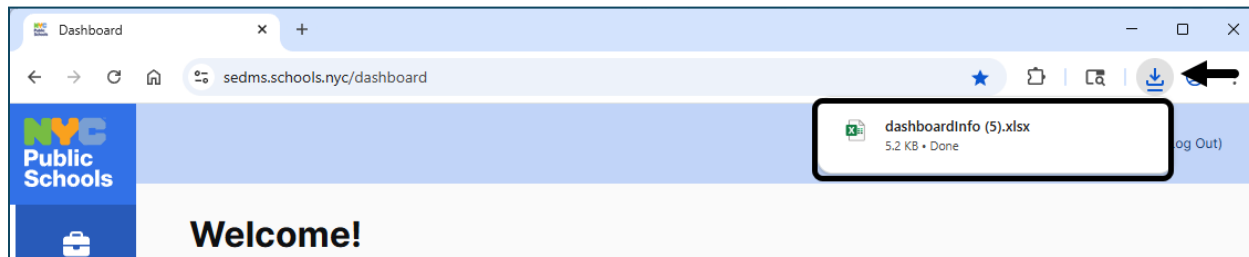
+ Add Referral

Export to Excel

Sort By Student Name Activity Due Date Advanced Filters

Activity	Activity Due Date	Compliance Date	Actions
Pending Evaluation		Schedule IEP Meeting: 08/30/2025 (60 Days)	

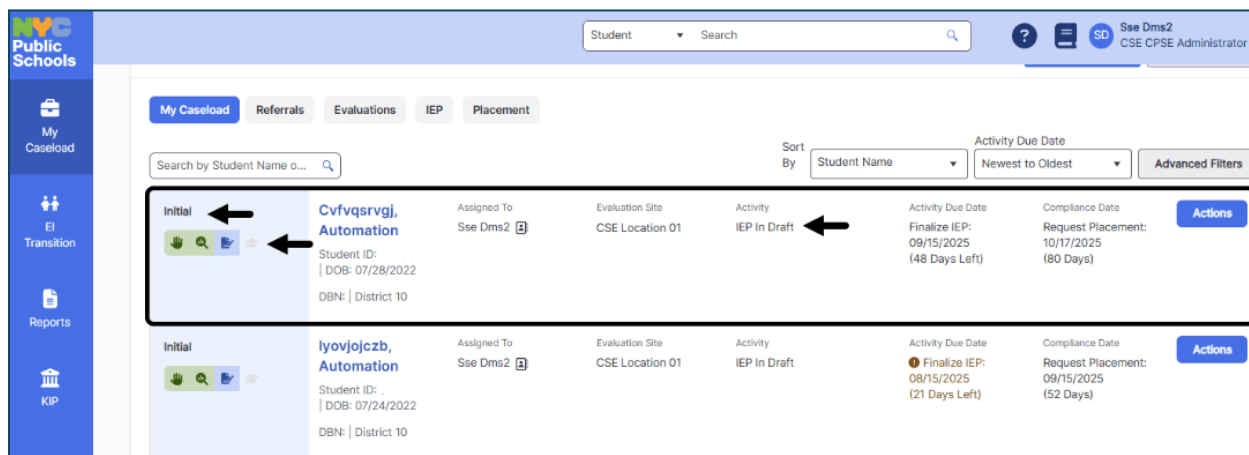
Navigate to your Download folder and click the document to open it. The example image below is from Google Chrome; your computer may look different.



Student's Tile

In the image below, the student is in the *Initial* process, completed evaluations, and the *Activity* status is *IEP in Draft*.

Click anywhere on the student's row to expand the tile and view additional details about the student's current process. Note, click again to collapse the tile.



You can click each icon to toggle between the process steps. For example, click *Referrals* or *IEP* to see more information about the student's progress through those stages.

The screenshot shows the 'My Caseload' interface. At the top, there are tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. Below the tabs is a search bar labeled 'Search by Student Name or...'. The main area displays a student's profile for 'Cvfvqsrvgj, Automation'. The profile includes fields for 'Student ID: 07/28/2022', 'DOB: [redacted]', 'Assigned To: Sse Dms2', 'Evaluation Site: CSE Location 01', 'Activity: IEP In Draft', 'Activity Due Date: Finalize IEP: 09/15/2025 (48 Days Left)', and 'Compliance Date: Request Placement: 10/17/2025 (80 Days)'. Below the profile, there is a table of 'Assessments In Progress' with columns for 'Assessments In Progress', 'Agency Name', 'Evaluator Name', 'Evaluator Type', 'Evaluation Due Date', and 'Status'. The table lists four assessments: 'Observations', 'Physical Examination', 'Psychological Assessment', and 'Social History Evaluation', all with a status of 'Finalized'.

Status Icons

Icons on the left side of the tile indicate the status of where the student is in the special education process. When the student's panel is expanded, you will see the completed steps and the next step in the process. For example, in the image below, the next step says, "Next Complete IEP."

The screenshot shows the 'My Caseload' interface. At the top, there are tabs for 'My Caseload', 'Referrals', 'Evaluations', 'IEP', and 'Placement'. Below the tabs is a search bar labeled 'Search by Student Name or...'. The main area displays a student's profile for 'Cvfvqsrvgj, Automation'. The profile includes fields for 'Student ID: 07/28/2022', 'DOB: [redacted]', 'Assigned To: Sse Dms2', 'Evaluation Site: CSE Location 01', 'Activity: IEP In Draft', 'Activity Due Date: Finalize IEP: 09/15/2025 (48 Days Left)', and 'Compliance Date: Request Placement: 10/17/2025 (80 Days)'. Below the profile, there is a table of 'Assessments In Progress' with columns for 'Assessments In Progress', 'Agency Name', and 'Evaluator Name'. The table lists one assessment: 'Observations', with a status of 'Finalized'.

The colors and icons will change accordingly as the student moves through the process. There are four icons representing stages in the special education process. Place your cursor over an icon to see hover text with the process stage it represents.

- **Referrals:** a hand icon
- **Evaluations:** a magnifying glass
- **IEP:** a document
- **Placement:** a graduation cap

Review the legend below for more information about dashboard colors and icons.

Note / Number

1

Color Legend

For the initial, reevaluation, annual, and triennial stages:

Initial

Reevaluation

Annual

Triennial

Note / Number

2

Color Legend (cont)

For the process stages (referral, evals, etc.) and their statuses:

Referrals
 Evaluations
 IEP
 Placement
 Provider Management
 Encountering

Complete
 Out of Compliance
 At Risk
 Reason for Delay
 In Progress
 Inactive

Note / Number

3

Due Date Legend

For the due dates, there are different colors and icons associated.

In progress, in compliance

Out of Compliance

At Risk

Reason for Delay

Note: *Provider Management* and *Encountering* are not yet active in ATLAS but their icons are displayed in the legend.

The image below shows two students with a hand icon which indicates they are in the *Referrals* stage. The row with the blue hand is *In Progress*, while the red hand is *Out of Compliance*.

Students						
My Caseload Referrals Evaluations IEP Placement Search by Student Name o... Sort Student Name By Last Name: Z to A Activity Due D Newest to C						
Initial Hand Speech Hand Hand	Hrricqbxty, Automation Student ID: DOB: 07/28/2022 DBN: District 10	Assigned To Sse Dms2	Evaluation Site	Activity Referral: Pending PWN	Activity Due Date Send Initial PWN: 07/30/2025 (2 Days Left)	
	Euabcfojwa, Automation Student ID: DOB: 07/25/2022 DBN: District 10	Assigned To Sse Dms2	Evaluation Site	Activity Referral: Pending PWN	Activity Due Date Send Initial PWN: 07/25/2025 (0 Days Left)	

Students' Profile

To view a student's profile, click on their name (in blue).

Students				
My Caseload Referrals Evaluations IEP Placement Search by Student Name or I				
Initial Hand Speech Hand Hand	Nkfqeywzr, Automation Student ID: 230026527 DOB: 07/25/2022 DBN: District 10	Assigned To Sse Dms2	Evaluation Site CSE Location 01	Activity IEP In Draft

The *Student Profile* page will open.

Public Schools

Student ID: Nkfgeeywzr, Automation
DOB: 07/25/2022
Assigned To: See Dms2
Evaluation Site: CSE Location 01
Activity: IEP In Draft
Activity Due Date: Finalize IEP: 08/15/2025 (21 Days Left)
Compliance Date: Request Placement: 08/15/2025 (52 Days)

Student Profile
Automation'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

Supplementary Aids and Services
No Supplementary Aids and Services to show

Assistive Technology
No Assistive Technology to show

Medical **Transportation**

Manage Student

At the top of the *Student Profile* is student information which includes *Disability Classification*, *IEP Placement Recommendation*, *Next Annual Review Date*, and *EI Extension Date*.

The *Manage Student* button is available on the top right to *Edit Student Information* and *Case Close*.

There are six sections of the profile, click the label of the section you want to view. For example, click *Documents* if you want to view the student's documents.

Student Profile
Automation's

Manage Student

Disability Classification IEP Placement Recommendation Next Annual Review Date EI Extension Date

a **b** **c** **d** **e** **f**

Service Details Student Information Documents Team Events Log Misc

Programs
No Programs to show

Related Services
No Related Services to show

Supplementary Aids and Services
No Supplementary Aids and Services to show

Assistive Technology
No Assistive Technology to show

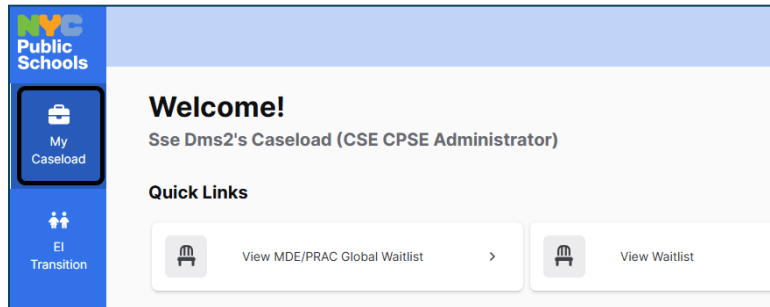
Medical **Transportation**

Copyright © 2025 New York City Public Schools

- Service Details*: This section displays *Programs*, *Related Services*, *Supplementary Aids and Services*, *Assistive Technology*, *Medical*, and *Transportation*.
- Student Information*: *Contact Information*, *Identity*, *Enrollment*, and *Housing*.

- c. *Documents* – The students’ documents are listed by *School Year* and organized into folders by IEP process stage (Referral, Evaluations, IEP, and Placement).
- d. *Team* – Lists the IEP Team.
- e. *Events Log*: View or log events, add/clear filters for viewing, Export to Excel.
- f. *Misc* – Miscellaneous form such as *Request to Share Personally Identifiable Information* and *Create Educational Benefit Review Process*.

To return to the dashboard, click the *My Caseload* button in the blue vertical menu on the left side of your screen.



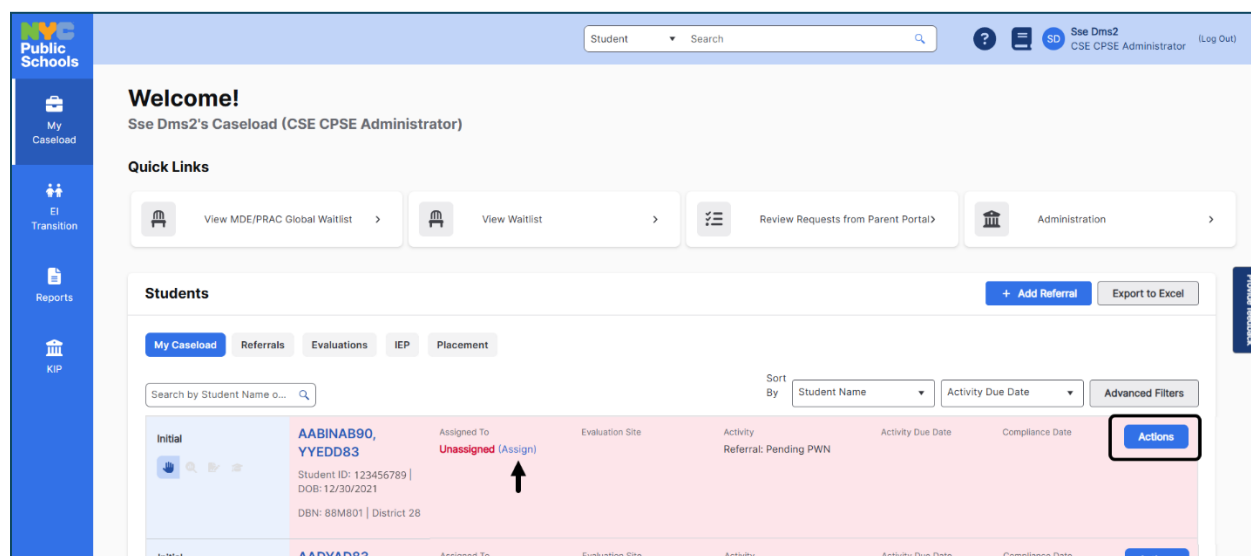
How to Add a Student to a Caseload

Some Central roles such as a CPSE Administrator or CSE Chairperson can assign students to staff (including self-assign), which is reflected (added) in the *My Caseload* view on the dashboard. For Central roles, when you log into ATLAS, the *My Caseload* button will be blue (selected) and your dashboard will display both students assigned to you, and unassigned students associated with your location. Assigned student records are displayed in white rows. Unassigned records appear in pink rows at the top of the *Students* dashboard regardless of whether the *My Caseload* button is selected.

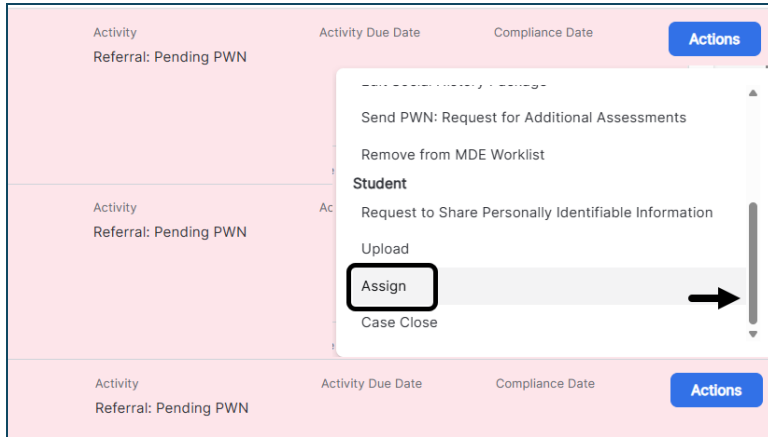
MDE staff do not use the *Assign* function to add students to a staff's caseload. They utilize the Assessment Planning in ATLAS to assign assessments to staff, and their *My Caseload* dashboard will display students for whom they have an assessment assigned. MDE Supervisors will have a comprehensive view of all students assigned to their agency through the MDE Selection functionality.

Follow the steps below to add (assign) a student to a caseload.

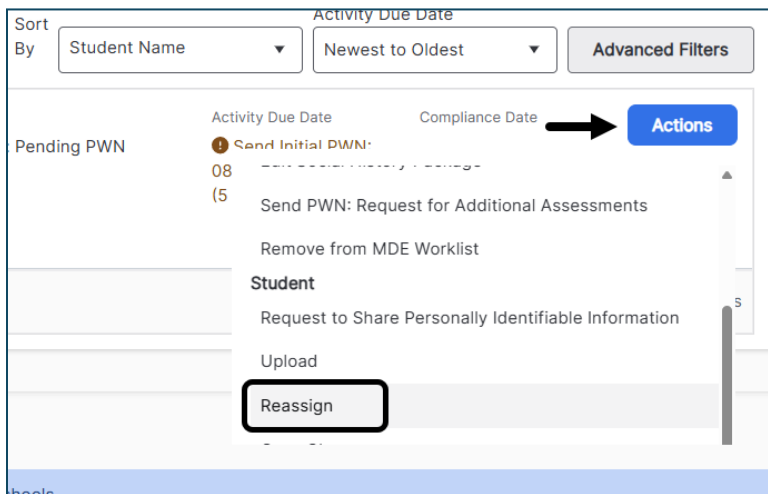
1. Click the **Actions** button. Alternatively, you can click *Assign* from the student's tile and advance to step 3.



2. Scroll down and click **Assign** from the fly-out menu.



Note: if the student is already assigned, click *Reassign*.



3. A pop up will appear, enter the *Staff First Name*, *Last Name* and/or *ID* and click **Search**.

Assign

4. Results will appear based on your search criteria and may include multiple staff members. Click **Select** next to the name of the person you are assigning.

Assign

Staff First Name Staff Last Name Staff ID

Staff ID	Staff Name	Title	Location	Actions
ATest	A TEST	TEACHER SPECIAL ...	BRONX	Select

5. Click **Submit**.

Assign

Staff First Name Staff Last Name Staff ID

Selected Staff

Full Name Phone

Email Address

6. You will be returned to your dashboard, the student record will change to white, and the student will be assigned to the selected staff.

Students

My Caseload Referrals Evaluations IEP Placement

Search

Sort By Activity Due Date

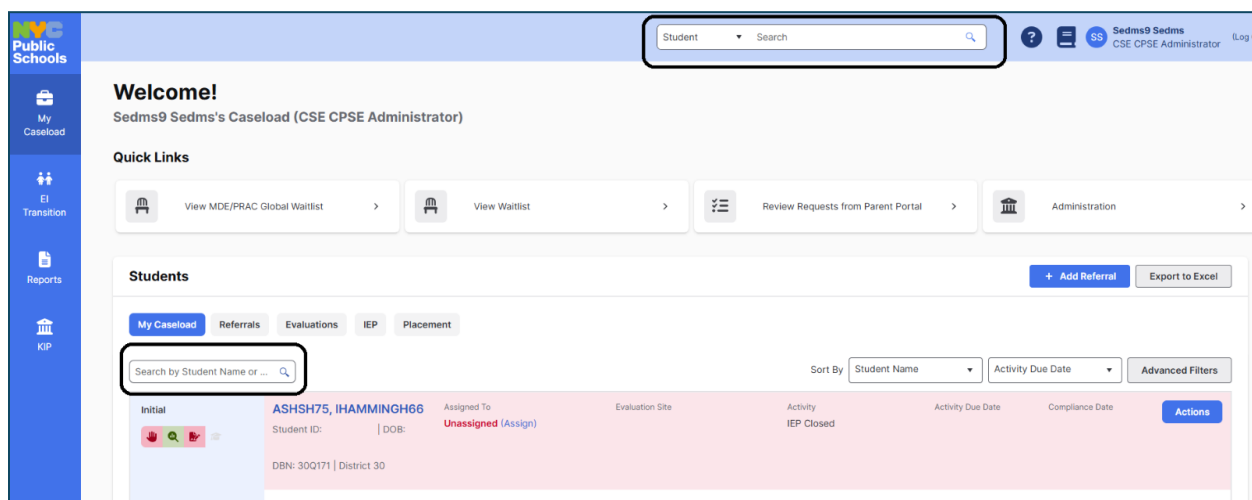
Initial	Referred, Just	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	Student ID: DOB: 12/30/2021 DBN: District 13	A TEST		Referral: Pending PWN	Send Initial PWN: 08/05/2025 (5 Days Left)		Actions

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

Note: A student can only be assigned to one staff member at a time.

How to Search for a Student

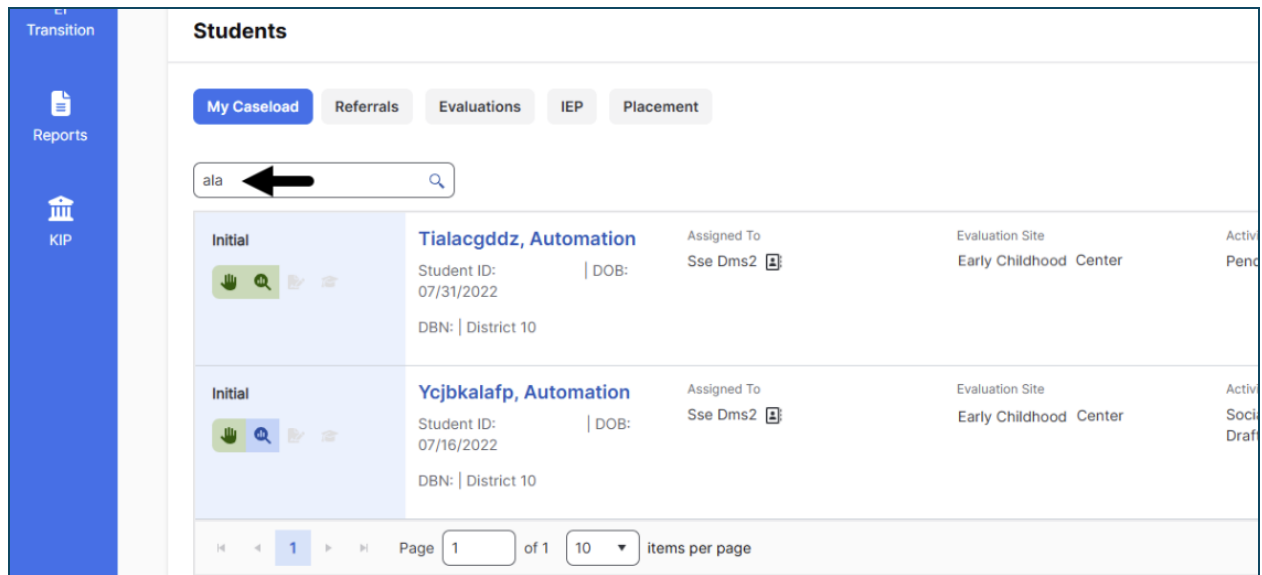
This section provides steps to search for a student. Depending on your role, you will see either one or two ways to search for a student. All staff will see a search box under the *My Caseload* button, which allows you to search all students for which you have access in ATLAS. In addition, some roles, such as CPSE Administrators, can search for students in ATS.



Search Students in ATLAS

Reminder: Select *My Caseload* (blue) to search students on your caseload. Deselect *My Caseload* (gray) to search all student for which you have access.

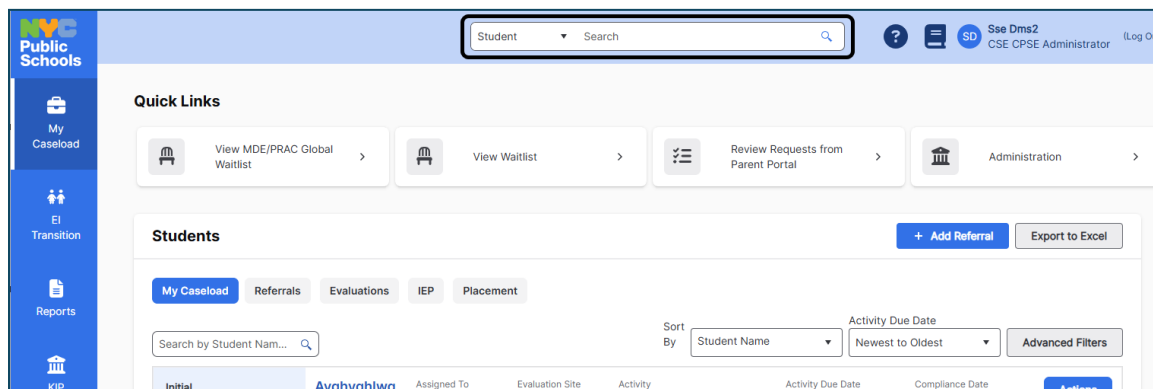
1. In the search box below *My Caseload*, type the **student ID** (recommended), **first name** or **last name** in the search box.
2. Press **Enter** on your keyboard. Depending on the search criteria you may return one or multiple students. In this example image, "ala" was entered, and two students were returned whose names include "ala."



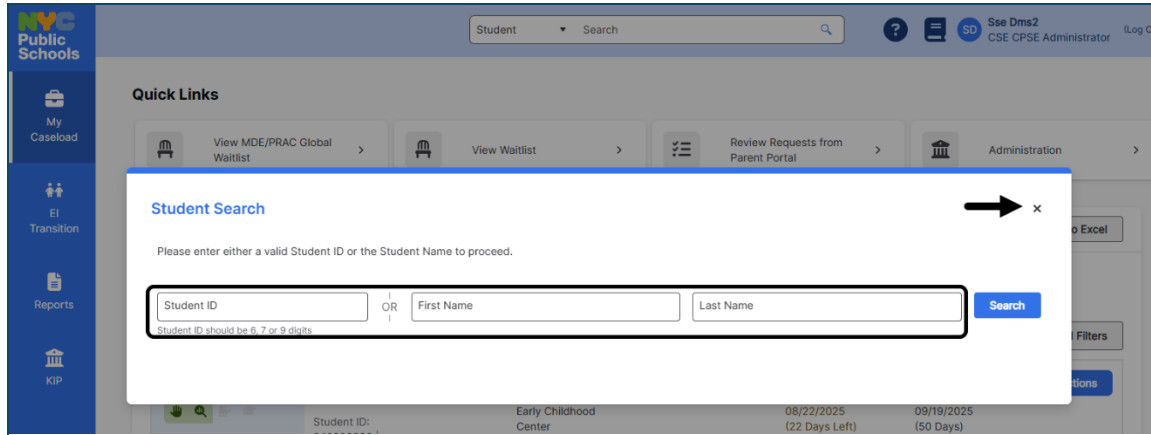
Search Students in ATS

The search box in the top row blue banner allows you to search all students in ATS and may return search results for students who are not in ATLAS. Access to the ATS search box is role-based, and it is not visible to all staff.

1. Click anywhere in the **Student Search** box in the top row blue banner.



2. The *Student Search* pop-up window will open. Type the **Student ID** (recommended), or **First Name** and/or **Last Name** in the search box.



Note: Click the x in the upper right of the pop-up if you want to close the window.

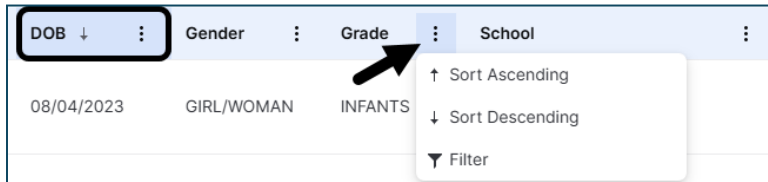
3. Click **Search**.

4. The results display in the *Student Search* window.

Student	DOB	Gender	Grade	School
TEST, ABA ATIS Active	11/15/2023	GIRL/WOMAN	INFANTS	
TEST, ADDA ATIS Active	07/05/2022	GIRL/WOMAN		
TEST, AN	03/22/2022	BOY/MAN	PRE-KINDERGAR...	

Note: The + *Create New Student* button is used to create a new student ID. This will create a student in ATS who users can then initiate a referral for in ATLAS.

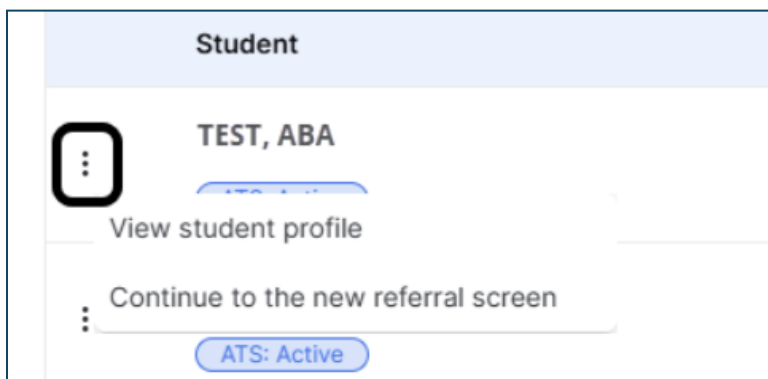
5. Click a column head to sort the column in ascending order, click again to sort descending, click a third time to remove the sort.
6. Click any three dots next to a header to sort or filter that column.



The screenshot shows a table header with columns: DOB, Gender, Grade, and School. The 'DOB' column header is highlighted with a black box. The 'Grade' column header has a three-dot menu icon next to it, which is open, showing options: 'Sort Ascending', 'Sort Descending', and 'Filter'. An arrow points to the 'Sort Ascending' option.

DOB ↓ ⋮	Gender ⋮	Grade ⋮	School ⋮
08/04/2023	GIRL/WOMAN	INFANTS	

7. Click the three dots next to the student's name to view the student's profile or add a referral in ATLAS.



The screenshot shows a 'Student' profile card for 'TEST, ABA'. To the left of the name is a three-dot menu icon, which is highlighted with a black box. Below the name are two buttons: 'View student profile' and 'Continue to the new referral screen'. At the bottom of the card is a blue button labeled 'ATS: Active'.

Student

⋮

TEST, ABA

View student profile

Continue to the new referral screen

ATS: Active