Reporting Reference Guide

Overview

This reporting reference guide offers clear instructions on how to access and navigate the reports function within the system. It explains the different types of reports available and their purposes, helping users understand how to use them effectively for data analysis and decision-making. The guide also covers tips for customizing report filters and exporting data. Overall, it serves as a helpful resource for leveraging reports to monitor student progress, compliance, and program outcomes.

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

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

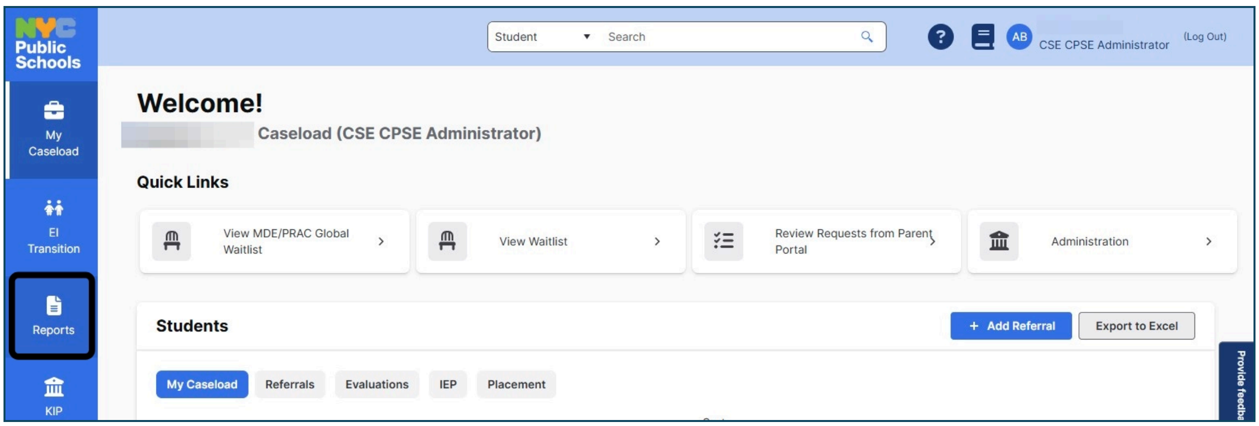
Contents

How to Access Reports

This section instructs users on how to access Reports in ATLAS.

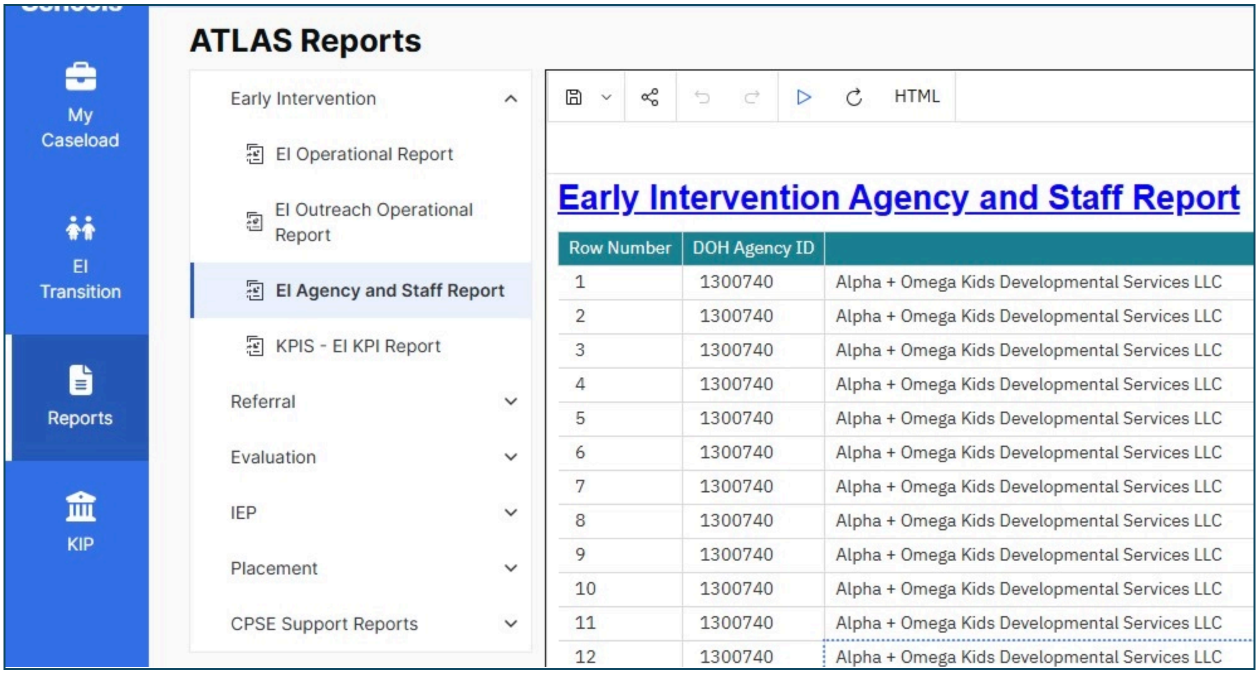
Note: To access Reports in ATLAS, users must enable the pop-up blocker feature on their browser.

1. From the dashboard click on the **Reports** button on the blue vertical menu on the left side of the screen.

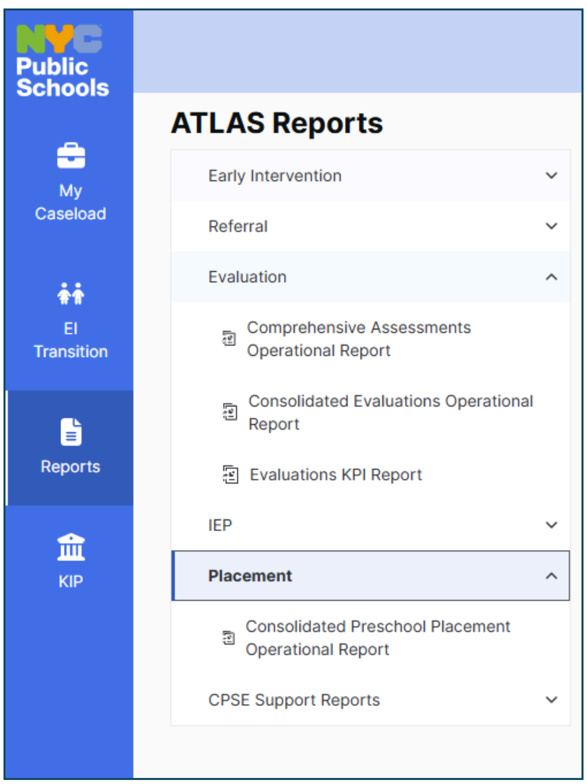


Tip: If the page doesn't load properly, you likely have a pop-up blocker enabled on your browser. Disable the pop-up blocker and reload the page.

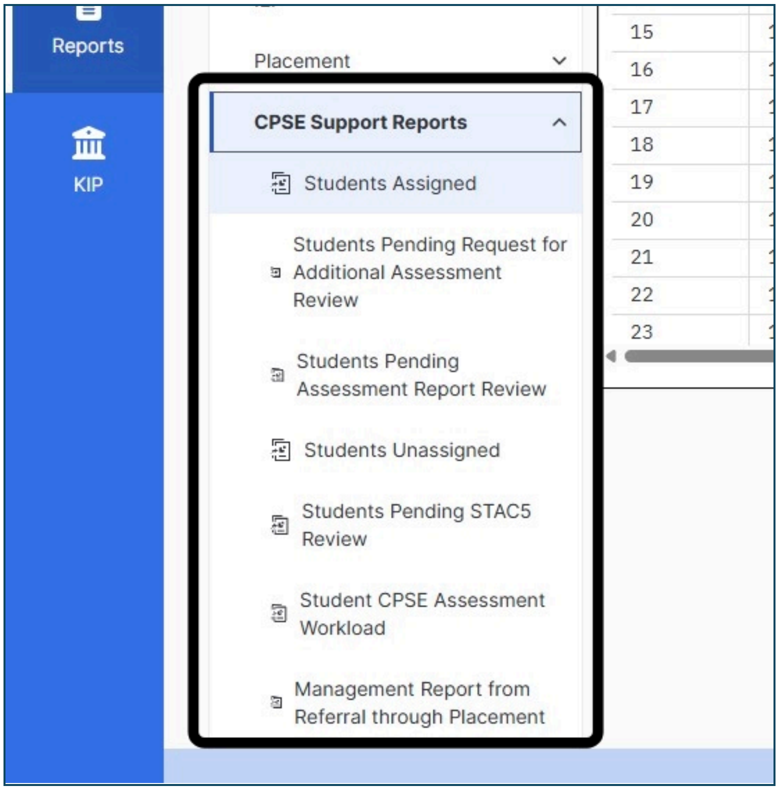
2. You will be directed to *Reports*. All reports are listed by category on the menu on the left. Below is an example of one of the reports that may be available - in this instance, the *EI Agency and Staff Report* is shown.



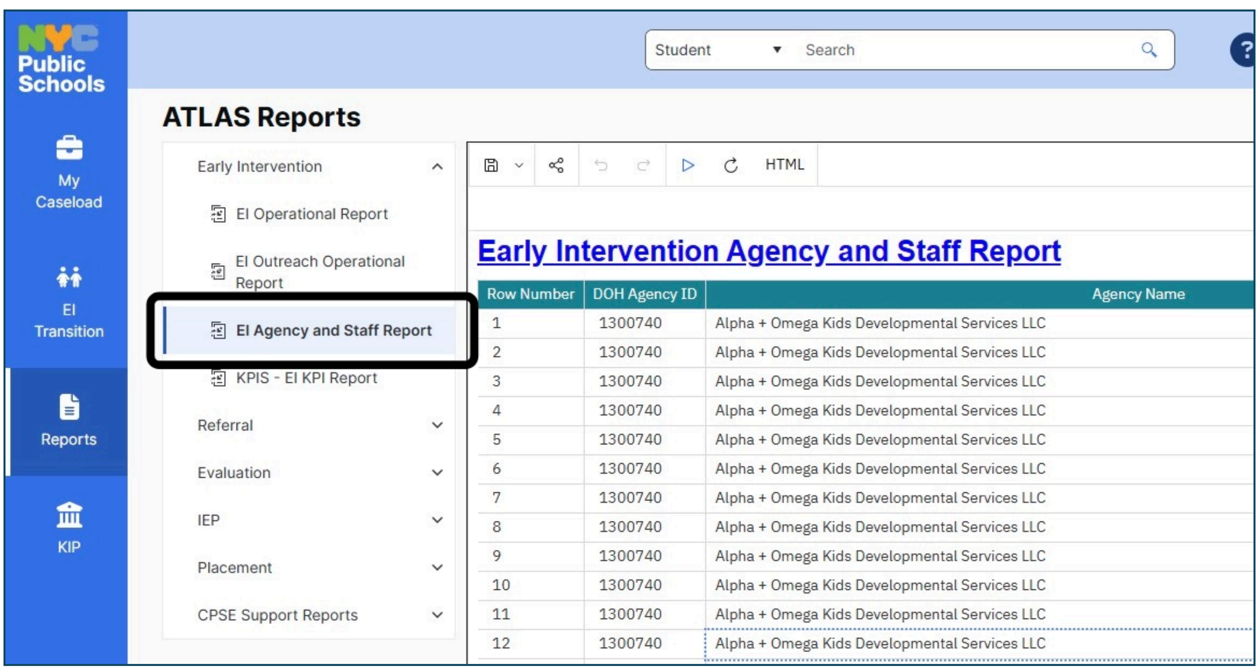
3. Open each category by clicking on the down arrow to see the associated reports.



4. After you click the down arrow, you will be able to see all reports for that category.



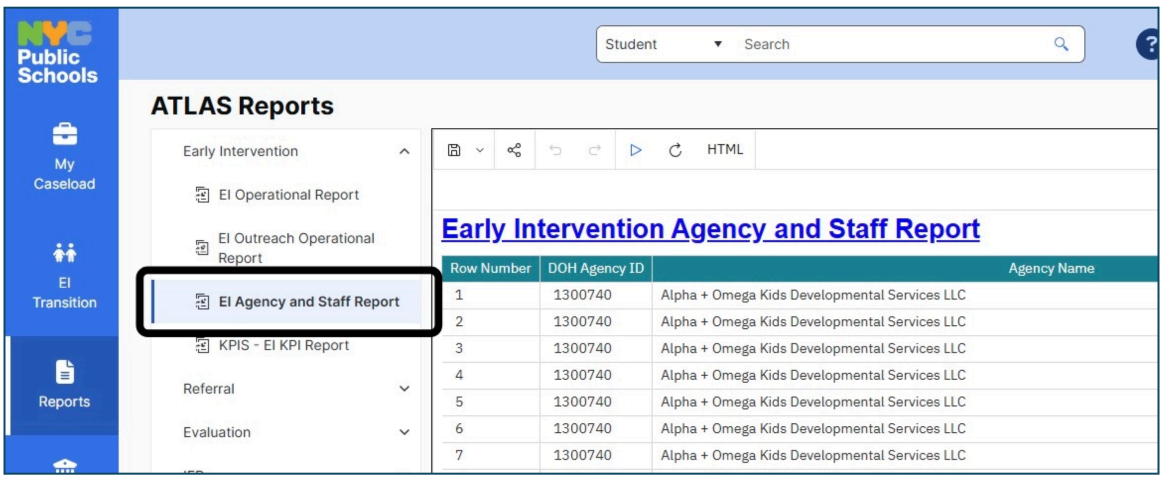
5. Click on the report title to display the report. The information will appear on the screen.



How to Navigate the Reports Function

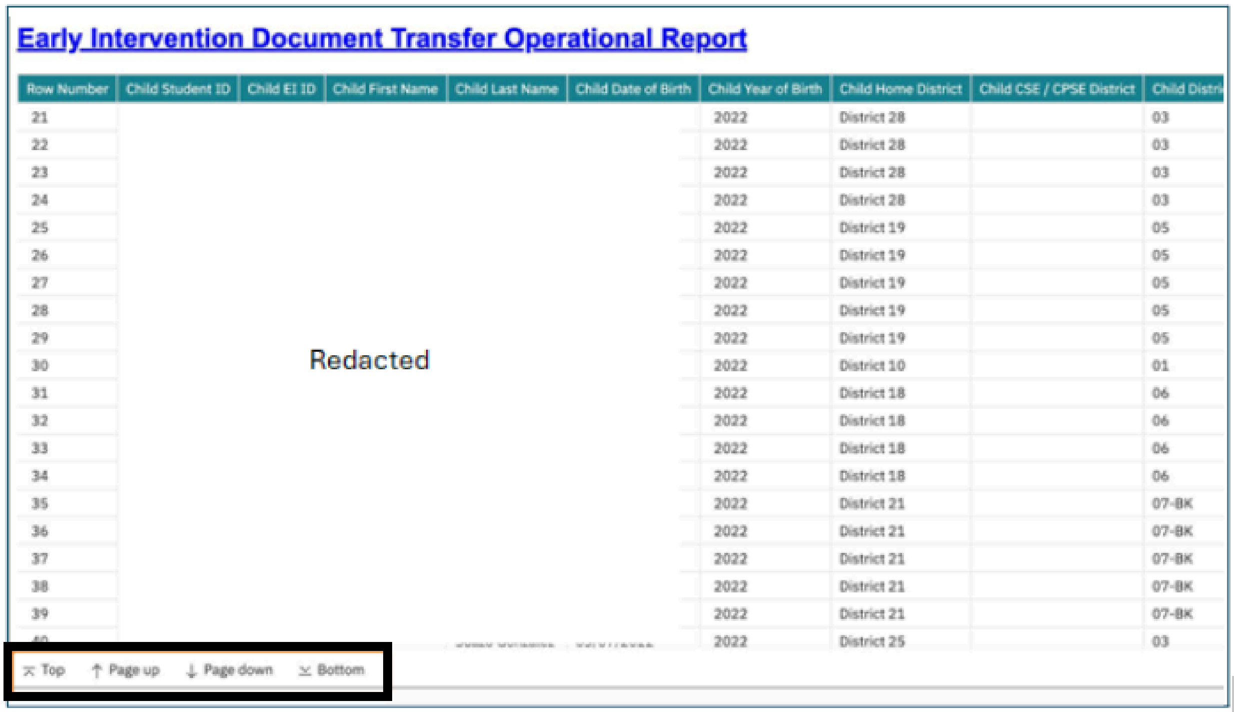
This section explains how to navigate the **Reports** function in ATLAS and highlights how reports can be used to proactively manage caseloads and maintain compliance. Users will learn how to locate and interact with different report types, as well as how to apply filters, sorting options, and summaries to monitor key timelines, track student progress, and identify pending actions. Leveraging these reports helps users stay organized, ensure data accuracy, and make informed decisions to support effective student management.

1. Click on the title of the report and the report information will populate on the screen.



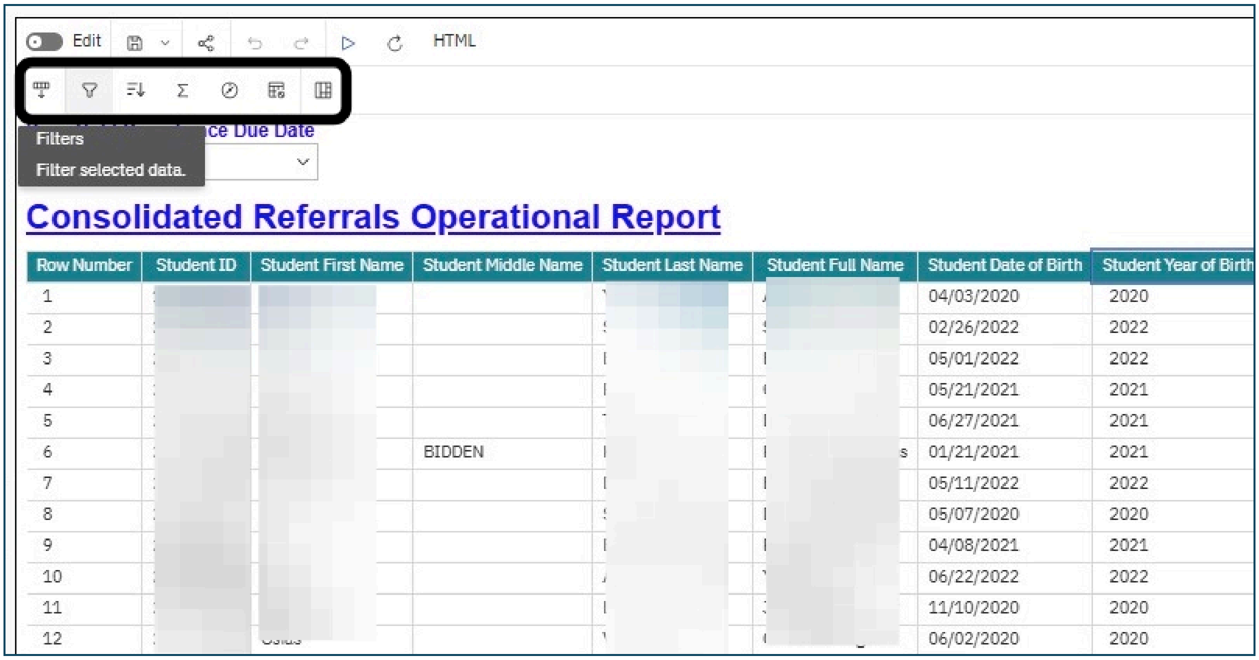
2. Use the horizontal scroll bar at the bottom of the grid to see all of the columns in the report.

3. Use the buttons at the bottom of the grid to see additional pages of the report. You can click **Page Up** or **Page Down** to see additional pages. To go directly to the first or last row of the report, click the **Top** or **Bottom** buttons.

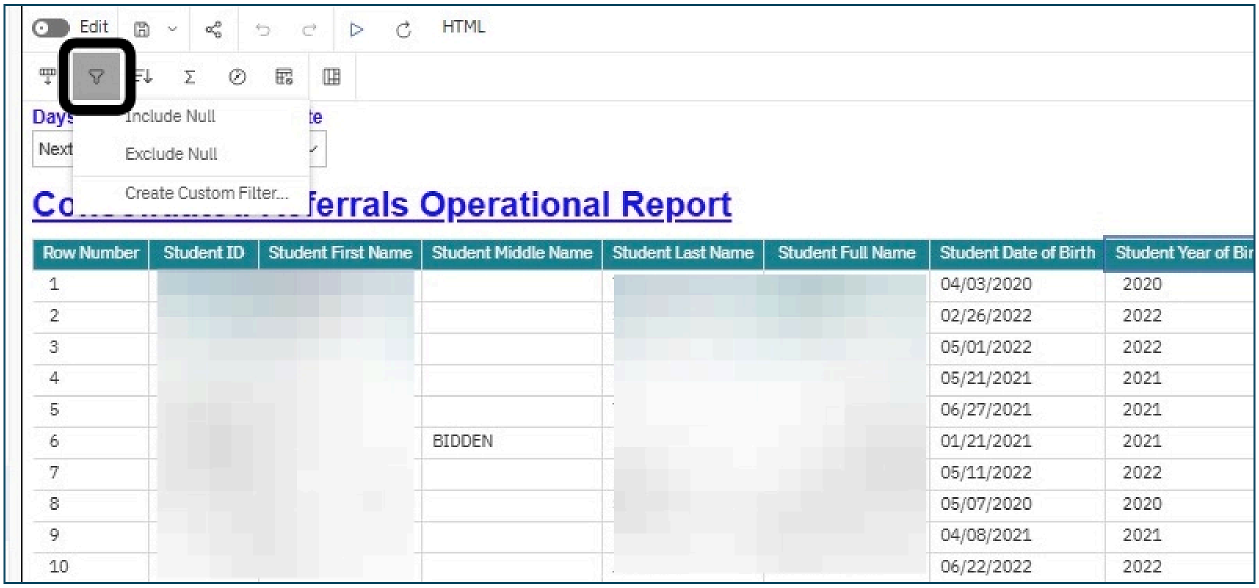

Early Intervention Document Transfer Operational Report

Row Number	Child Student ID	Child EI ID	Child First Name	Child Last Name	Child Date of Birth	Child Year of Birth	Child Home District	Child CSE / CPSE District	Child Distri
21						2022	District 28		03
22						2022	District 28		03
23						2022	District 28		03
24						2022	District 28		03
25						2022	District 19		05
26						2022	District 19		05
27						2022	District 19		05
28						2022	District 19		05
29						2022	District 19		05
30			Redacted			2022	District 10		01
31						2022	District 18		06
32						2022	District 18		06
33						2022	District 18		06
34						2022	District 18		06
35						2022	District 21		07-BK
36						2022	District 21		07-BK
37						2022	District 21		07-BK
38						2022	District 21		07-BK
39						2022	District 21		07-BK
40						2022	District 25		03

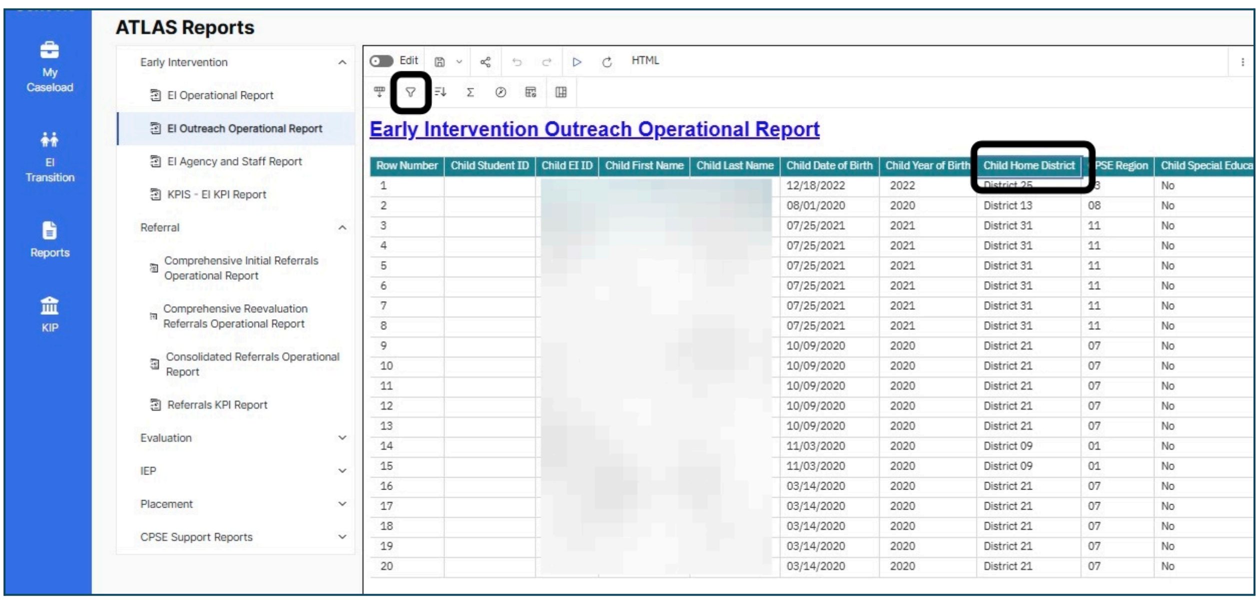
4. A toolbar that allows you to access various functionalities will appear when you click on a column header.



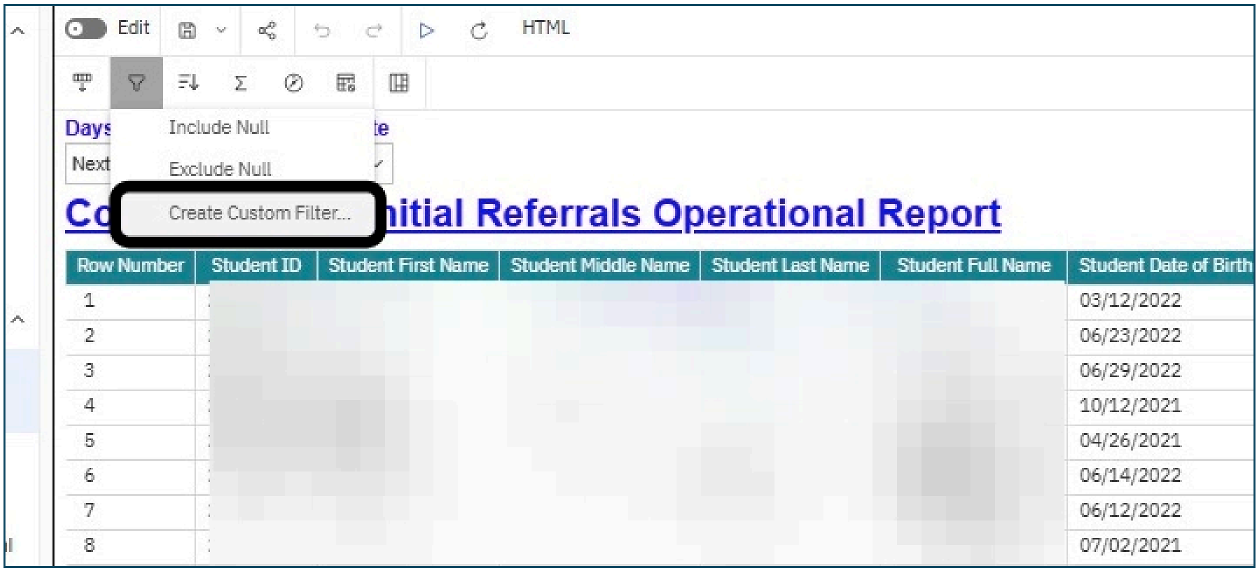
5. The tool bar contains six tools: *Unlock Toolbar*, *Filter, Sort, Summarize, Explore, Suppress and Group/Ungroup.* Hover over each tool icon for help text about the function.
    - **Unlock Toolbar**- Unlocking toolbar removes the toolbar from top of the report. Once unlocked, it can be found again by clicking on the report column header.
    - **Filter**- Filtering involves refining or limiting the data displayed in a report based on specific criteria or conditions.
    - **Sort**- Sorting arranges data in a specific order, typically either ascending or descending, based on selected attributes (e.g., alphabetically, numerically, or chronologically).
    - **Summarize**- Summarizing condenses detailed data into key metrics or overall insights, typically by aggregating information (e.g., totals, averages).
    - **Explore**- Exploring involves analyzing the data in greater depth to discover trends, patterns, relationships, or outliers.
    - **Suppress**- Suppressing hides specific data from being displayed in the report, particularly rows, columns, or categories that are not needed.
    - **Group/Ungroup**- Grouping combines similar data points into categories based on shared attributes, while ungrouping breaks these categories back down into individual data points.
6. Clicking each tool icon will bring up a menu with options to drill down into the report information.



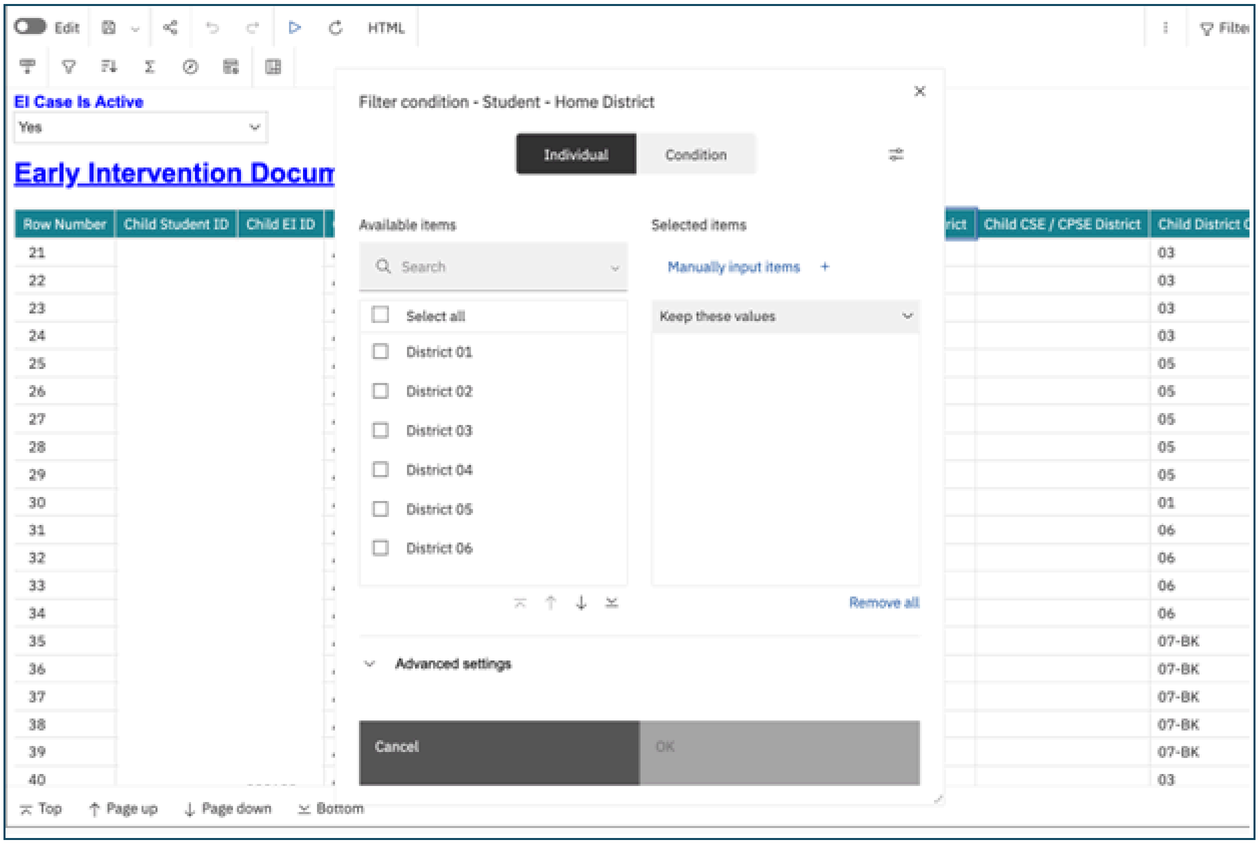
7. Select the function you would like to perform. The system will perform that function for the entire report, based on the column you have selected. For example, in this screenshot the column Child Home District was selected, then in the tool bar the Filter button was selected. This means that the entire report will filter based on the criteria added to the Child Home District.



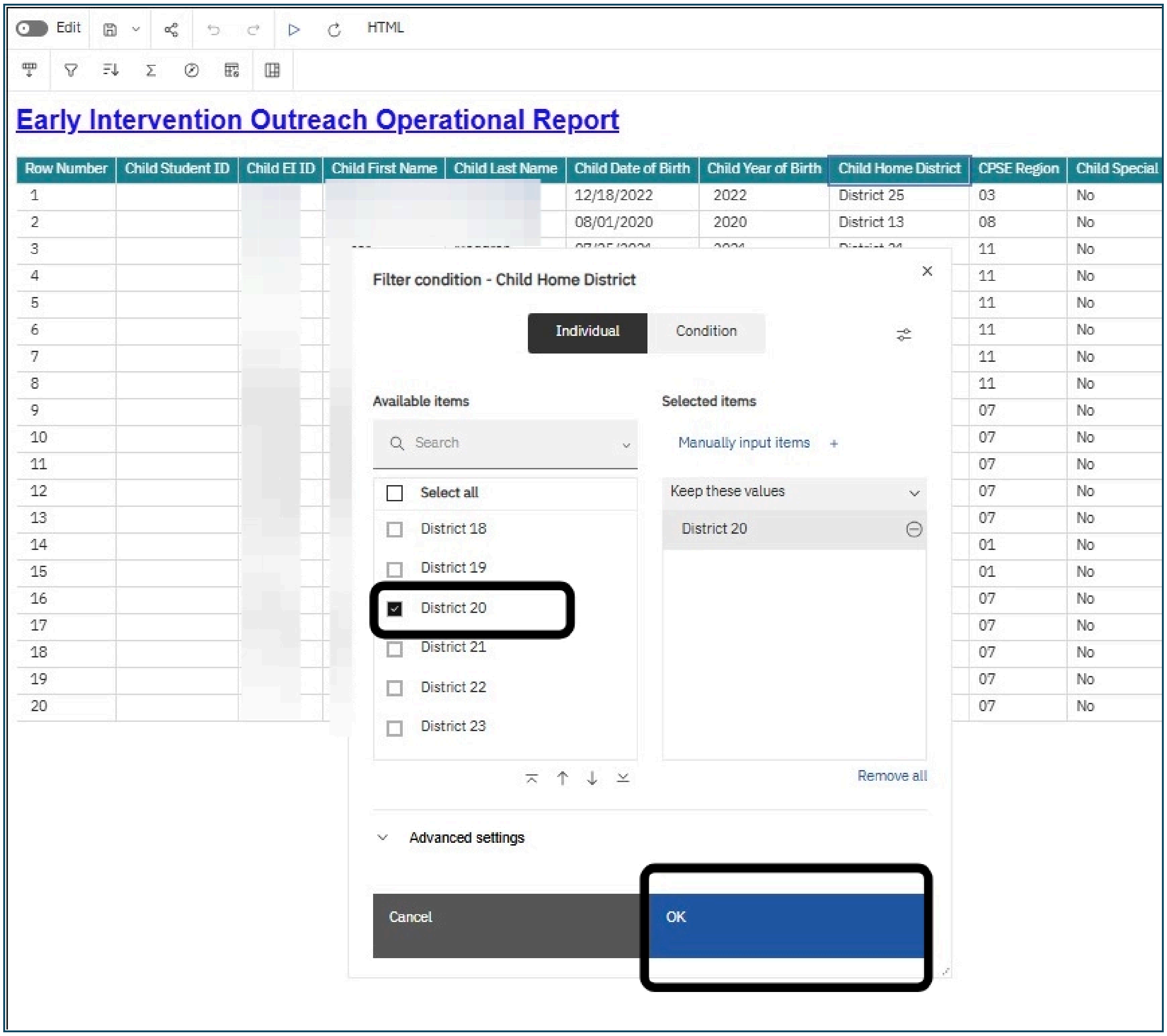
8. After clicking the filter, choose from the filters listed or create a custom filter. For example, if you wanted to filter the report to show only student records who are in District 20, you would use the custom filter function.



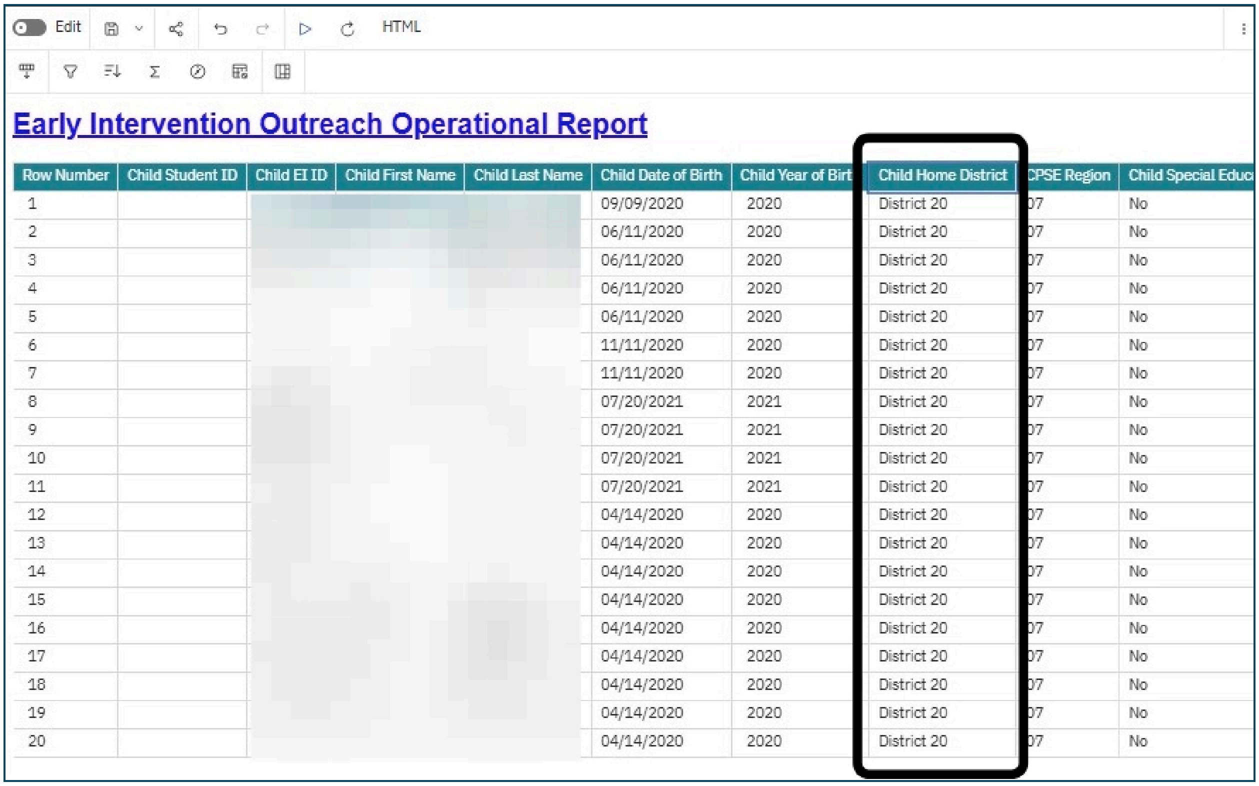
9. When you select *Create Custom Filter*, a pop-up will appear. You can create custom filters based on individual criteria or condition criteria.
    a. Individual criteria: Filtering based on a **single specific attribute or value** within the dataset. Each criterion applies to **one field or column** in isolation.
        i. Ex: Applying a filter to show rows where the “Student - District CSE/CPSE Office” column equals “08” This focuses on one attribute (Student – District CSE/CPSE Office) with a specific value (08). The result would be all students within CSE/CPSE 08.
    b. Condition criteria: Filtering based on **multiple conditions or a combination of criteria** across different columns or within a column. These conditions can be connected with logical operators such as **AND** or **OR**.
        i. Ex: Applying a filter to show rows where the “Student - District CSE/CPSE Office” equals “08” **AND** “Student - Grade” is less than 3rd Grade. Here, you’re combining two different criteria across two columns. The result would be all students within CSE/CPSE 08 in grades below 3rd Grade.



10. In this example you want to filter the Student Home District column to show students who are in the Home District of District 20. In the first column, you will scroll down using the page down tool and click the checkbox next to District 20. Then click **Ok**.

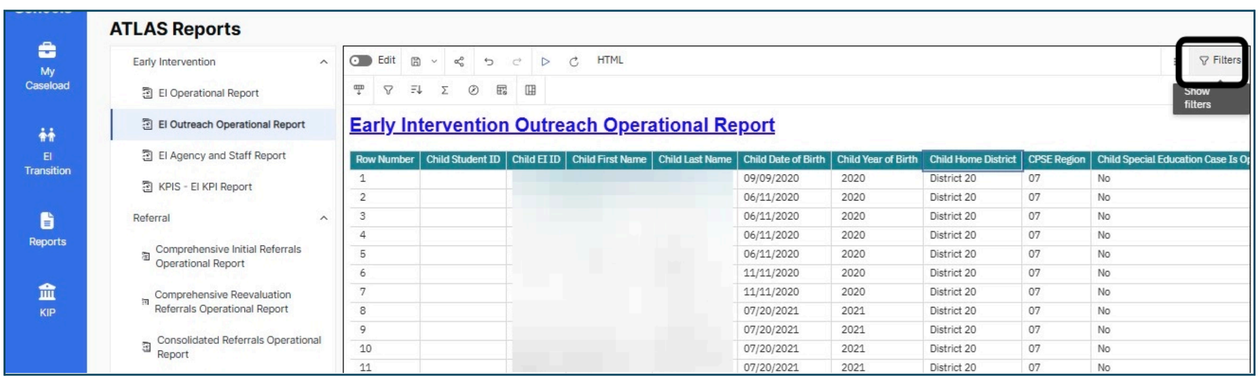


11. The report will then be filtered by the criteria. The report now shows you rows of students who are in the Child Home District 20.



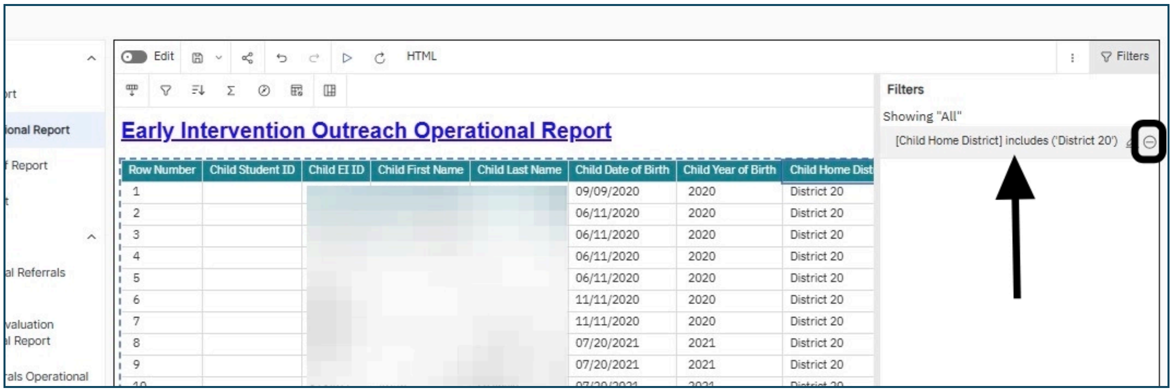
Row Number	Child Student ID	Child EI ID	Child First Name	Child Last Name	Child Date of Birth	Child Year of Birt	Child Home District	CPSE Region	Child Special Educ
1					09/09/2020	2020	District 20	07	No
2					06/11/2020	2020	District 20	07	No
3					06/11/2020	2020	District 20	07	No
4					06/11/2020	2020	District 20	07	No
5					06/11/2020	2020	District 20	07	No
6					11/11/2020	2020	District 20	07	No
7					11/11/2020	2020	District 20	07	No
8					07/20/2021	2021	District 20	07	No
9					07/20/2021	2021	District 20	07	No
10					07/20/2021	2021	District 20	07	No
11					07/20/2021	2021	District 20	07	No
12					04/14/2020	2020	District 20	07	No
13					04/14/2020	2020	District 20	07	No
14					04/14/2020	2020	District 20	07	No
15					04/14/2020	2020	District 20	07	No
16					04/14/2020	2020	District 20	07	No
17					04/14/2020	2020	District 20	07	No
18					04/14/2020	2020	District 20	07	No
19					04/14/2020	2020	District 20	07	No
20					04/14/2020	2020	District 20	07	No

12. To remove filters, click on the filters button on the top right corner of the grid.

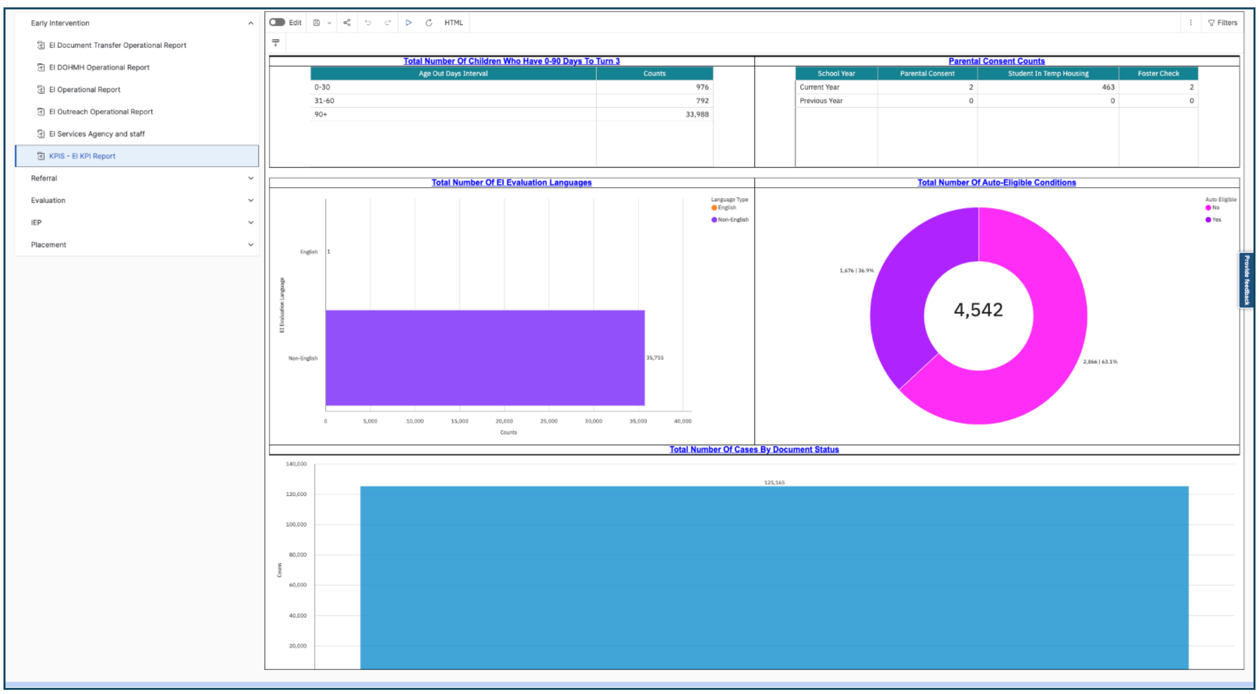


Row Number	Child Student ID	Child EI ID	Child First Name	Child Last Name	Child Date of Birth	Child Year of Birth	Child Home District	CPSE Region	Child Special Education Case Is O
1					09/09/2020	2020	District 20	07	No
2					06/11/2020	2020	District 20	07	No
3					06/11/2020	2020	District 20	07	No
4					06/11/2020	2020	District 20	07	No
5					06/11/2020	2020	District 20	07	No
6					11/11/2020	2020	District 20	07	No
7					11/11/2020	2020	District 20	07	No
8					07/20/2021	2021	District 20	07	No
9					07/20/2021	2021	District 20	07	No
10					07/20/2021	2021	District 20	07	No
11					07/20/2021	2021	District 20	07	No

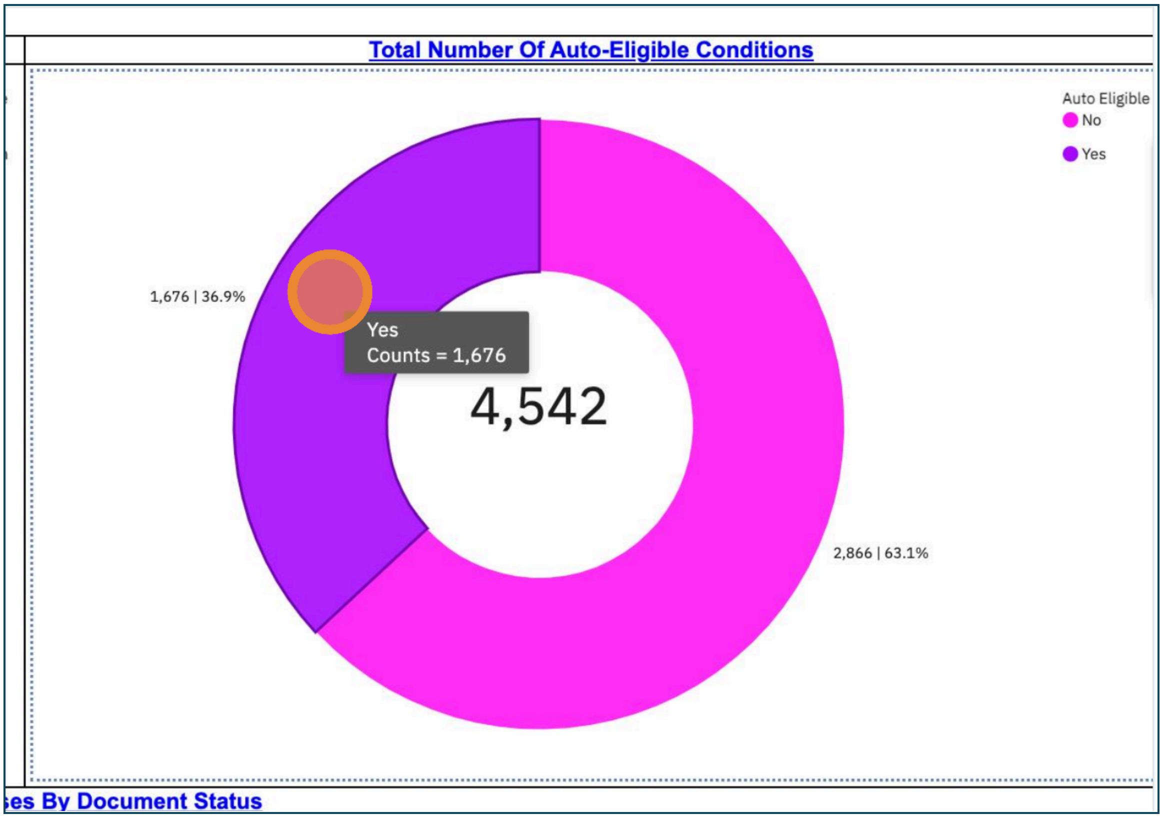
13. A panel will appear on the right side of the grid with a list of all filters that you have applied to the report. Click on the circle icon to remove the filter.



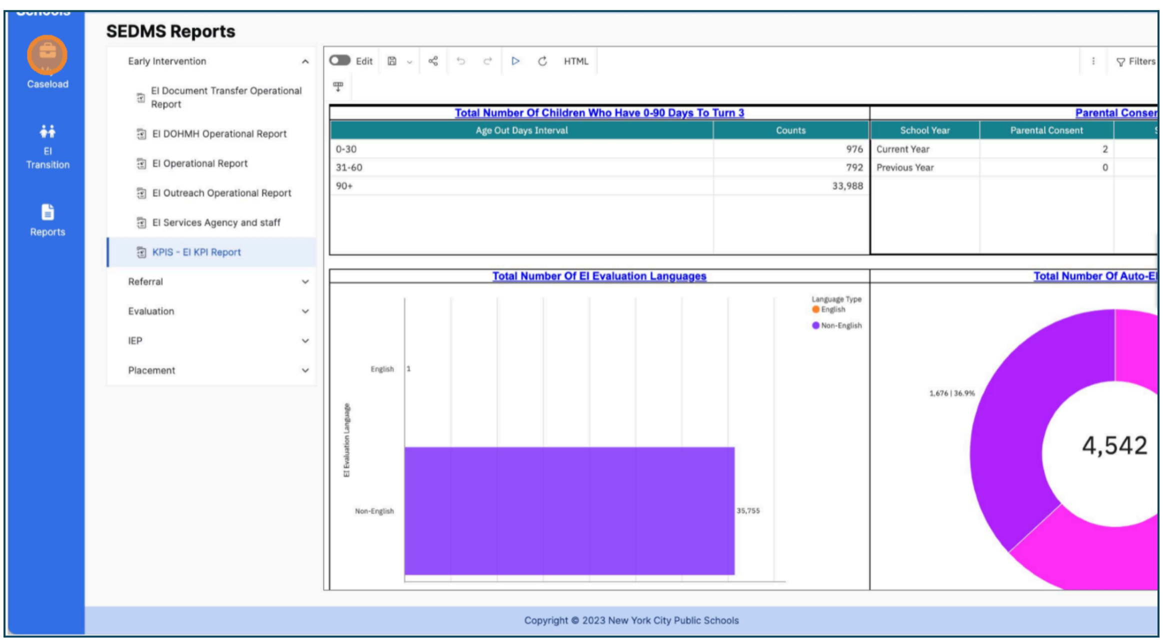
14. Click on the relevant KPI report, for example “KPIS-EI KPI Report” from the menu on the left side. KPI stands for Key Performance Indicator. The KPI Reports showcase data in a graph format, rather than the tabular format available in other reports. The types of graphs are unique to each KPI report, shown here is the Early Intervention KPI report.



15. Within the KPI report, hover over a section of the graph for more information. For example, the image below shows a circle graph of the total number of auto-eligible conditions, when you hover over a section of the graph (as shown with the light orange circle to indicate the hover over mouse) text will appear that defines the section. The text below shows “Yes Counts – 1,676". This shows that 1,676 students of the 4,542 total did qualify under auto-eligible conditions.



16. Click on **My Caseload** in the blue vertical menu on the left side of the screen to return back to your Caseload Dashboard.



Purpose of ATLAS Reports

Overview

ATLAS reports are designed to provide real-time or periodic insights into timeliness of referrals, evaluations, IEP creation, and placement. Their purpose is to support decision-making by offering detailed, up-to-date data that helps monitor and manage ongoing operations efficiently. This guide provides information about the function of each report.

Note: *This document is comprehensive as of 10/28/2025.*

Early Intervention

1. **Early Intervention Operational Report:** This report contains information about children transitioning from Early Intervention to the DOE.
   a. Sample Fields: *First Name, Last Name, CPSE Administrator, CPSE Region, Days to 3rd Birthday, Date EI Extension Ends, IEP Conference Date*
2. **Early Intervention Outreach Operational Report:** This report contains information about outreach to parents during the Early Intervention transition process.
   a. Sample Fields: *Community Coordinator Assigned, Child Name, Days to 3rd Birthday, Date of Outreach, Outreach To/From, Outreach Status*
3. **Early Intervention Services Agency and Staff Report:** This report contains information about Early Intervention service agencies and providers.
   a. Sample Fields: *Agency Name, Agency Phone, Agency ID, Staff Name, Staff Email, Staff Phone*
4. **KPIs - Early Intervention Key Performance Indicator Report:** This report provides an overview of Early Intervention performance indicators in graphs of several key metrics.
   a. Sample Graphs: *Total No. Of Extended EI Cases, Total No. Of Auto-Eligible Conditions, Total No. Of Child Cases By Document Level Status*

Referrals

1. **Comprehensive Initial Referrals Operational Report:** This report contains information about initial referrals for students who have open special education cases. It focuses specifically on the approval status of requests and provides an insight into compliance status.
   a. Sample Fields: *Request for Initial Referrals Awaiting Approval, Status of Initial Referrals in Process, Status of Request for Initial Referrals. /Additional Re-evals.*

2. **Comprehensive Reevaluation Referrals Operational Report:** This report provides information about reevaluation requests for students who have open special education cases

    a. Sample Fields: *Request for Re-eval Awaiting Approval, Request for Additional Re-eval Awaiting Approval, Status of 3-Year Mandated Reevaluation in Process*

3. **Consolidated Referrals Operational Report:** This report provides a snapshot of the number of IEPs in and out of compliance. It includes information for Initial Referrals, Requests for Initial Referrals, Requests for Reevaluation, Requests for Additional Reevaluations, and Mandated Three-Year Reevaluations for students who do not yet have a finalized IEP/IESP/SP/Ineligible/Declassification associated with the request.
    a. Sample Fields: *Status of Initial Referrals in Process, Status of 3-Year Mandated Reevaluations in Process, Status of Nursing Referrals, Status of Assistive Technology Recommendations*

4. **Referrals Key Performance Indicator Report:** This report provides visual insights into the status of referrals across New York City Public Schools by displaying graphs of several key metrics.
    a. Sample Graphs: Total Number of Counts by Referral Type, Total Number of Counts by Compliance, Total Number of Counts by Reason for Delay

Evaluations

1. **Comprehensive Assessment Operational Report:** This report displays assessment information associated with students who have not completed the evaluation process.
    a. Sample Fields: *Compliance Report for Completed Assessments YTD, Compliance Report for Incomplete Assessments, Evaluations to Be Completed (which includes Assessments to be completed, the party responsible for completing the assessment, the date by which the IEP meeting must be held, the status of the assessment report, and the reason for any delay in completing the assessment).*
2. **Consolidated Evaluations Operational Report:** This report displays case status information for students who have not completed the evaluation process.
    a. Sample Fields: *Status of 3 Year Mandated Reevaluations in Process, List of CPSE Incomplete Evaluations, Change to Evaluator – Authorized Evaluator Required, CPSE Assessment Workload*
3. **Evaluations Key Performance Indicator Report:** This report provides visual insights into the status of evaluations across New York City Public Schools by displaying graphs of several key metrics.
    a. Sample Graphs: *Number of Assessments by Days Until Compliance Due and Number of Assessments by Compliance Status*

IEP

1. **Comprehensive Annual Review IEPs Operational Report:** This report provides information about the IEP process for students who have annual reviews in progress.
    a. Sample Fields: *Status of Annual Reviews, Status of Annual Reviews NYSED Approved NPS, Annual Review Report (which includes data regarding student IEPs to facilitate timeliness of required yearly review, including details on specific IEP services for which progress reports must be collected, as well as family information for ease of contact)*

2. **Consolidated Preschool IEPs Operational Report:** This report provides information about the preschool IEP process for preschool students who have referrals or annual reviews in progress.
    a. Sample Fields: *IEPs Not Completed by Meeting Date, Related Service Recommendations, Status of Annual Reviews, Status of IEPs for Turning 5, Compensatory Service Recommendations*
3. **IEP Key Performance Indicators Report:** This report provides visual insights into the status of IEP's across by displaying graphs of several key metrics.
    a. Sample Graph: Compliance by Process Type and Counts

Placement

1. **Consolidated Placement Operational Report:** This report displays placement and related information, it highlights students who may be out of compliance for placement and assists users in understanding the volume of placements and efficiency of the placement process.
    a. Sample Fields: *Placement Status, Reconvene IEP Meeting Parent/DOE requested, Status of Students Declassified, Seat Projection Report, State Approved NPS Student Tracking, CPSE Awaiting Authorization – First Attends, Partially Served Indicator*

CPSE Support Reports

1. **Students Assigned Report:** This report displays students and their assigned CSE administrators.
    - Sample Fields: *Demographic information, Home District, CSE Region, and Activity Description (current activity status), Assigned First Name and Last Name*
2. **Students Pending Request for Additional Assessments Review Report:** This report displays requests for additional assessments that are pending review by CPSE Administrator.
    - Sample Fields: *Home District, CSE Region, Agency Name, Assessment Type, Submitted Date*
3. **Students Pending Assessment Report Review Report:**This report lists all requests for additional assessments that are currently pending review by the CPSE Administrator.
    - Sample Fields: *Evaluator Type, Evaluator Name, Evaluation Type, Eval Status, agency Name*

4. **Students Unassigned Report:** This report displays all students who are currently waiting for a CSE Administrator assignment.
   - Sample Fields: *Demographic information, Home District, CSE Region, and Activity Description (current activity status)*
5. **Students Pending STAC5 Review Report:** This report lists all STAC-5 requests that are currently pending approval.
   - Sample Fields: *CSE Region, Evaluator Type, Evaluation Type, Eval Status, Agency Name, Evaluator Name*
6. **Student CPSE Assessment Workload Report:** The purpose of this report is to identify students with pending assessments that are at risk of missing compliance timelines.
   - Sample Fields: *Demographic Information, Guardian Information, Referral Source, Consent Date, Compliance Status, Referral Language, 60 Day Compliance Status, Assigned CPSE Administrator*
7. **Management Report from Referral through Placement** This report displays the number of compliant and non-compliant cases by CSE, grouped by process stage so that administrators can monitor compliance.
   - Sample Fields: *Referral - cancelled, Closed, Pending Review; Evaluation - requested, Rejected, Rescheduled; IEP - closed, Finalized; Placement - closed, Finalized. Data is distributed by timeline ex: 0-5 Days, 6-10 Days, etc.*