

Student Profile Reference Guide

Overview

This reference guide provides an overview of how to access and navigate student profiles within ATLAS. It includes step-by-step instructions for viewing and logging events and outlines how to locate and manage student documents.

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

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

Contents

How to View and Log Events.....	2
Navigating Student Documents.....	12

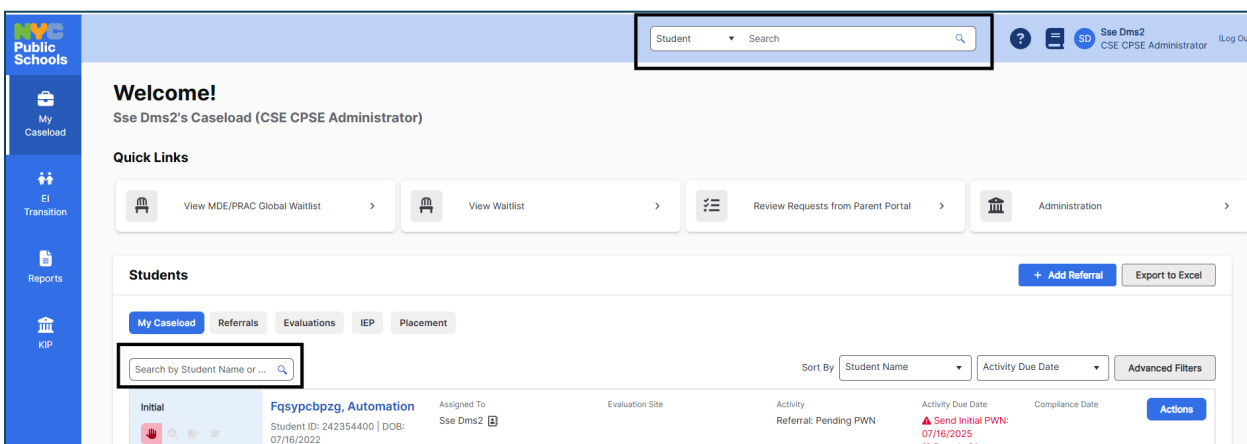
How to View and Log Events

This section provides step-by-step instructions for viewing and logging interactions in ATLAS, such as calls, emails, texts, letters, and in-person visits. It highlights the importance of including detailed information and offers tips for effective documentation. Logging interactions helps track communication between all parties supporting the student.

How to Log an Event

1. From the dashboard, search for the student for whom you'd like to view and/or log an event.

Note: You can search using the search bar below the **My Caseload** button, or by using the ATS search bar at the top of the screen.



Tip: If the student doesn't appear in your search, try unchecking the My Caseload button at the top of the grid. The button will be blue when it is enabled and gray when it is disabled. Some users can only see students assigned to their caseload. In that case, unchecking My Caseload would not return any search results.

2. Once you've found the student, click on their name to open the **Student Profile**.

Students

My Caseload Referrals Evaluations IEP Placement

gus

Love, Gus

Additional Reeval

Student ID: 242300825 | DOB: 09/11/2020

DBN: | District 07

Assigned To Sse Dms2

Evaluation Site CSE Location 01

Activity Pending

Page 1 of 10 items per page

- From the Student Profile, click **Events Log** tab. This log shows both user-logged interactions and system generated events. System generated events are automatically logged by ATLAS when key actions are initiated or finalized. For example, when a referral is opened, or when an initial social history is finalized.

Love, Gus

Additional Reeval

Student ID: 242300825 | DOB: 09/11/2020

DBN: | District 07

Assigned To Sse Dms2

Evaluation Site CSE Location 01

Activity Pending IEP

Activity Due Date

Student Profile

Gus's

Disability Classification: Preschool student with a Disability

IEP Placement Recommendation: Approved Special Education Program

Next Annual Review Date: 08/28/2026

El Extension Date

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

Programs: Special Class

Related Services: No Related Services to show

Copyright © 2025 New York City Public Schools

- To log a new interaction, click on **+Log Event** located on the top left side.

Preschool student with a Disability

Approved Special Education Program

08/28/2026

Service Details

Student Information

Documents

Team

Events Log

Misc

+ Log Event



Export to Excel

Type	Date/Time Occurred	Event Subject	Logged By	Generated
System Generated	08/28/2025, 10:50 AM	Consent for Additional Assessments : Finalized	Sse Dms2	No
System Generated	08/28/2025, 10:50 AM	Referral Open	Sse Dms2	No
System Generated	08/28/2025, 10:50 AM	Outreach Request for Additional Reevaluation : Finalized	Sse Dms2	No
System Generated	08/28/2025, 10:47 AM	Referral Pending PWN	Sse Dms2	No
System Generated	08/28/2025, 10:45 AM	Referral Pending Review	Sse Dms2	No
System Generated	08/28/2025, 10:44 AM	Referral Closed	Sse Dms2	No

- From the *Log Event* pop-up, complete all required and relevant fields.

Log Event

Outreach

In-reach

Related Action

Related Action

Related Action Date

Date/Time

Current Date

09/02/2025

Time Occurred

Contact Details

Cancel

Log Event

6. Indicate whether the interaction is **Outreach** (you initiated contact with another party, such as a related service provider, evaluator, or CPSE administrator) or **In-reach** (someone contacted you, such as a parent reaching out about their child).

Note: The fields displayed will vary based on the type of interaction selected.

Outreach	In-reach
----------	----------

7. Complete the **Related Action** section by selecting the appropriate options from the dropdown menus and entering the date field.

Related Action	
Related Action IEP Meeting ▼	
Related Action Date 09/02/2025 	Attempt(s) 2 ▲▼

8. Complete the Date/Time section by entering the date and time fields.

Date/Time	
Current Date	
09/02/2025 	Time Occurred 

9. Complete the Contact Details section by filling in the fields manually or selecting from the dropdowns.

Note: The *To* field will auto-populate with the user's information but can be edited if needed.

Contact Details

From

Ssedms

To

Contact Method

Response Method

Engagement Status

- Complete the **Additional Information** section by attaching relevant documents, filling in text fields, and selecting the appropriate options from the dropdowns.

Note: You may upload supporting documents (e.g., a PDF of an email or a scanned letter). Do not use this field to upload student forms, workflow documents, or any files other than evidence of the interaction.

Additional Information

Select files...

Drop files here to select

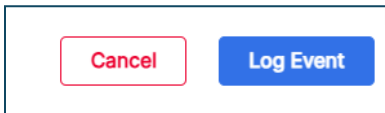
Note

Type here

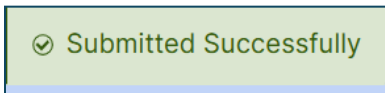
Language

Language Support

11. Once all fields are complete, click **Log Event** in the bottom-right corner. To exit without saving, click **Cancel** (note: all entered information will be lost).



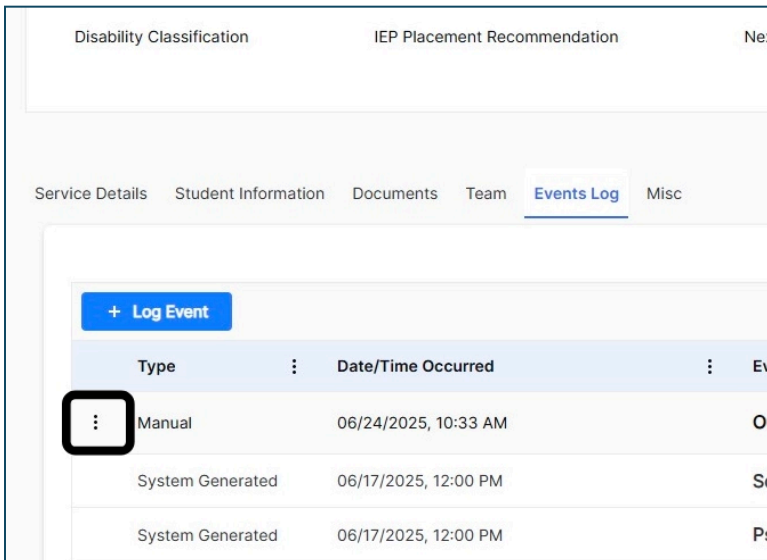
12. ATLAS will confirm once your submission is successful and will navigate back to the Student Profile.



How to View Events

1. From the *Events Log* tab, click the three vertical dots next to the Event you would like to view.

Note: System generated events do not include additional information and cannot be edited or deleted, therefore there is no option to view additional information, edit, or delete them.



13. From the pop-up you will have the following options:

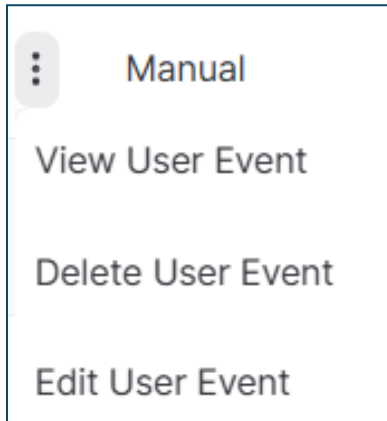
- a. **If you created the event:**

- i. **View User Event:** a pop-up will appear for you to view the details of the event.
 - ii. **Delete User Event:** this will delete the event

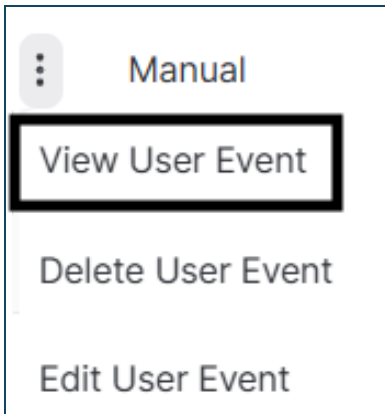
iii. **Edit User Event:** you will return to step 5 where a pop-up will appear for you to make edits.

b. If the event was logged by another user:

i. View User Event: a pop-up will appear for you to view the details of the event.



14. To view additional details about the interaction, click **View User Event** .



15. A *Log Event* pop-up will appear with view-only access.

Log Event [X]

Outreach | In-reach

Related Action
 Related Action: IEP Meeting
 Related Action Date: 09/02/2025
 Attempt(s): 2

Date/Time
 Current Date: 09/02/2025
 Time Occurred

Contact Details

Cancel **Log Event**

16. To Exit, click **Cancel**.

Cancel Log Event

17. To delete the interaction, click **Delete User Event**.

Note: Users can only delete events they created.

Manual

- View User Event
- Delete User Event**
- Edit User Event

- From the *Log Event* pop-up, click **Delete Log Event** to remove the event, or click **Cancel** to return to the student profile.

Log Event

×

Outreach

In-reach

Related Action

Related Action

IEP Meeting

Related Action Date

09/02/2025

Attempt(s)

2

Date/Time

Current Date

09/02/2025

Time Occurred

Contact Details

Cancel

Delete Log Event

19. To edit an event, click **Edit User Event**.

Note: Users can only edit events they created.

20. From the *Log Event* pop-up, update or edit the fields you wish to change.

Log Event

×

Response Method

Engagement Status

Additional Information

Select files...

Drop files here to select

Note

demo

Cancel

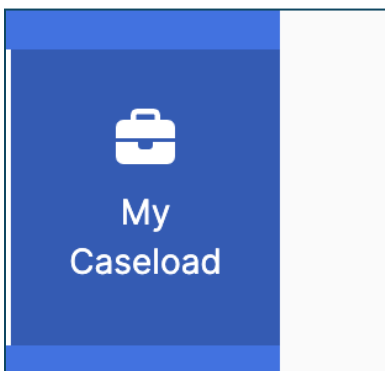
Log Event

21. Click **Log Event** to save your changes, or click **Cancel** to exit and return to the student profile.

Cancel

Log Event

22. After logging or reviewing interactions, click **My Caseload** to return to the dashboard.

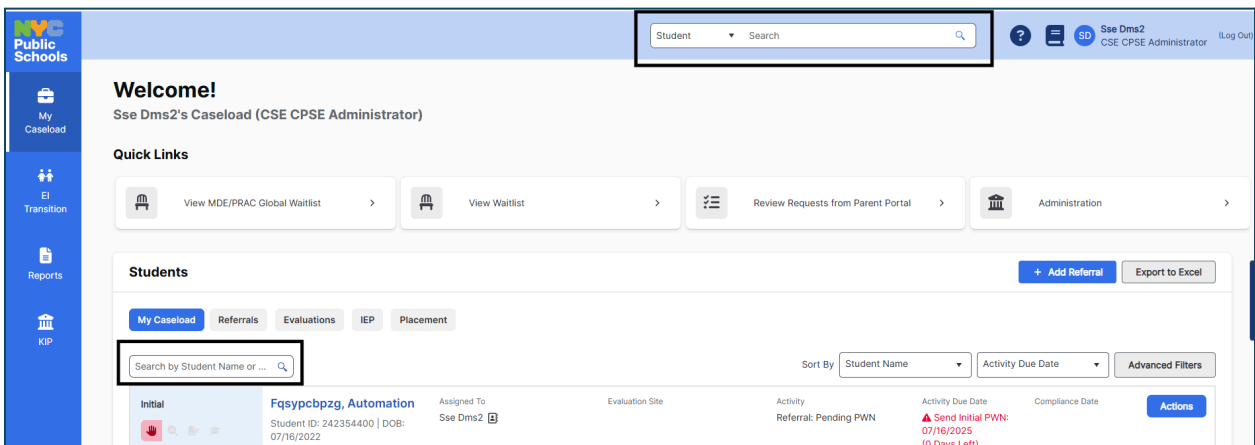


How to Navigate Student Documents

This section provides step-by-step instructions for navigating and accessing student documents in ATLAS. Documents are organized by school year and process stage. Some documents are generated automatically by ATLAS and others are created by users.

1. From the dashboard, search for the student.

Note: You can search using the search bar below the **My Caseload** button, or by using the ATS search bar at the top of the screen.



Tip: If the student doesn't appear in your search, try unchecking the My Caseload button at the top of the grid. The button will be blue when it is enabled and gray when it is disabled. Some users can onLog in to ATLAS. On the **My Caseload** dashboard, search for the student by **First Name**, **Last Name**, or **Student ID**. You can use the search box above the student list or the box at the top right of the ATLAS screen.

2. Click the student's name.

Students

My Caseload

Referrals

Evaluations

IEP

Placement

Gus

Sort By Student Name

Additional Reeval	Love, Gus	Assigned To Sse Dms2	Evaluation Site CSE Location 01	Activity Pending IEP	Activ
	Student ID: 242300825 DOB: 09/11/2020 DBN: District 07				

1

Page 1 of 1

10 items per page

3. You will be navigated to the Student's Profile.

NYC Public Schools

My Caseload

EI Transition

Reports

KIP

Student Search

Sse Dms2 CSE CPSE Administrator (Log Out)

Additional Reeval

Love, Gus

Assigned To Sse Dms2

Evaluation Site CSE Location 01

Activity Pending IEP

Activity Due Date

Compliance Date

Actions

Student ID: 242300825 | DOB: 09/11/2020

DBN: District 07

Student Profile

Manage Student

Gus's

Disability Classification

Preschool student with a Disability

IEP Placement Recommendation

Approved Special Education Program

Next Annual Review Date

08/28/2026

EI Extension Date

Service Details

Student Information

Documents

Team

Events Log

Misc

Programs

Special Class

Related Services

Activate Windows

Go to Settings to activate Windows.

Provide Feedback

4. From the student's profile, click the **Documents** tab.

Student Profile

Gus's

Disability Classification	IEP Placement Recommendation	Next Annual Review
Preschool student with a Disability	Approved Special Education Program	08/28/2026

[Service Details](#)
[Student Information](#)
[Documents](#)
[Team](#)
[Events Log](#)
[Misc](#)

Programs

Special Class

English | 5 days per week | Full Day | Student to Teacher Ratio: 6:1:1

08/28/2025 - 09/30/2025

Special Education Classroom

Related Services

No Related Services

Supplementary Aids and Services

Assistive Technology

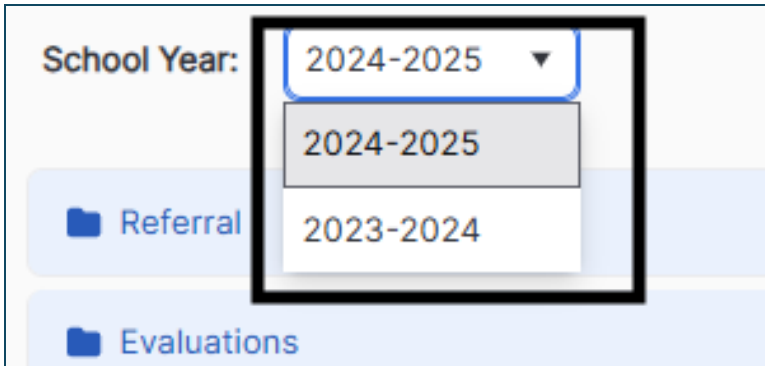
5. Documents are organized by **School Year** and in folders by **Process Stages**.

[Service Details](#)
[Student Information](#)
[Documents](#)
[Team](#)
[Events Log](#)
[Misc](#)

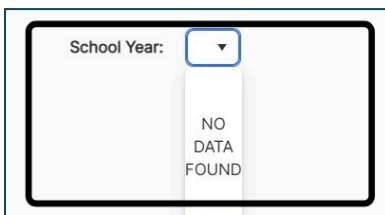
School Year: 2024-2025 ▼

- Referral
- Evaluations
- IEP
- Placement

6. To view documents from a specific year, use the dropdown to make appropriate selection.



Note: Only years for which a student has documents will appear in the drop-down. If a student has no documents yet, the menu will read “**No Data Found**”.



7. To view documents, use the dropdown next to the category header to expand the folder and view the associated files.



8. Once expanded, the student’s available documents appear in a list. Users can view details such as **Date Created**, **Document Name**, **Document Type**, **Uploaded By**, or **Actions**. **Actions** available include **Print**, **Download**, and **Delete**, which are each represented by an icon.

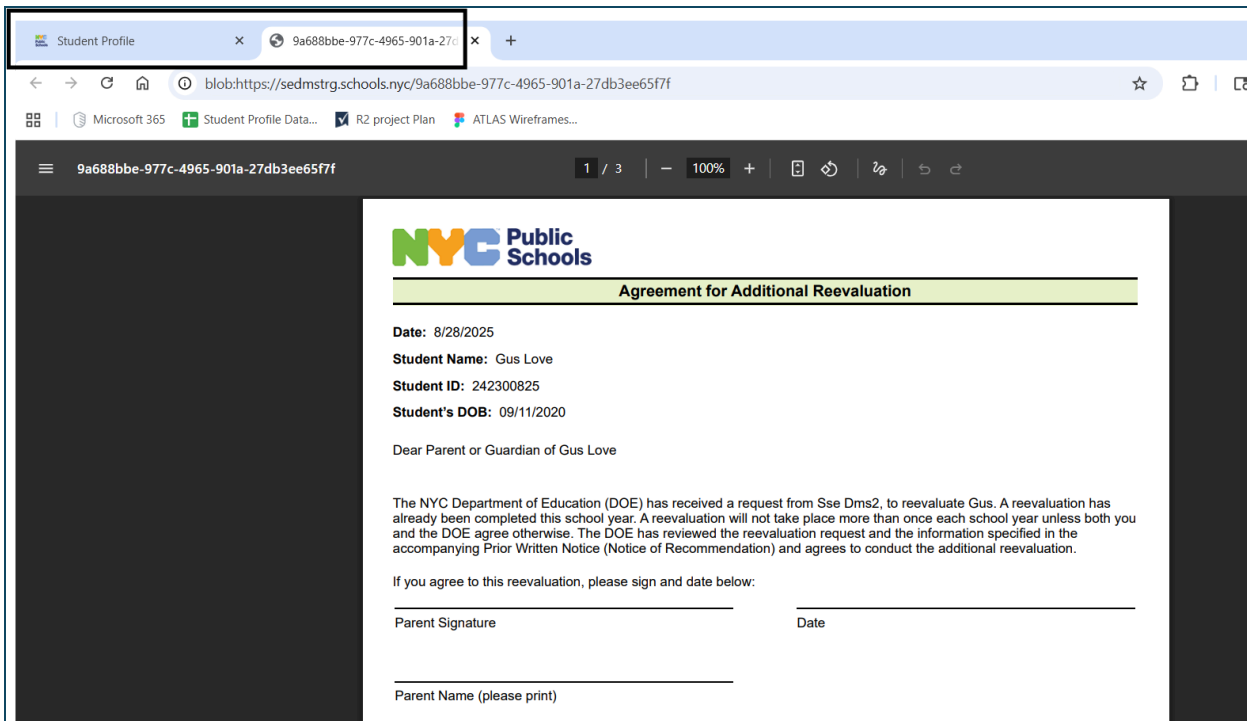
Evaluations				
Date Created	Document Name	Document Type	Uploaded By	Action
08/28/2025	AdditionalReEval Consent: 242300825	Additional Reevaluation Consent	SEDMS_App	 
08/28/2025	AdditionalReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	RequestForReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	PS Psychological Assessment: 242300825	Psychological Assessment	SEDMS_App	 
08/28/2025	Observations: 242300825	Custom Observation Assessment	SEDMS_App	 
08/28/2025	Social History Evaluation: 242300825	Social History Evaluation Assess...	SEDMS_App	 
08/28/2025	ATLAS Test - Copy.docx	Other Assessment	ssedms2	 
08/28/2025	ATLAS Test - Copy.docx	Use of Electronic Mail	ssedms2	 
08/28/2025	ATLAS Test - Copy.docx	Consent for Initial Evaluation	ssedms2	 

Note: System-generated documents cannot be deleted. The delete icon will only appear for users with deletion permissions.

9. To open a document, click its blue, hyperlinked name under *Document Name*.

Evaluations				
Date Created	Document Name	Document Type	Uploaded By	Action
08/28/2025	AdditionalReEval Consent: 242300825	Additional Reevaluation Consent	SEDMS_App	 
08/28/2025	AdditionalReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	RequestForReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	PS Psychological Assessment: 242300825	Psychological Assessment	SEDMS_App	 
08/28/2025	Observations: 242300825	Custom Observation Assessment	SEDMS_App	 
08/28/2025	Social History Evaluation: 242300825	Social History Evaluation Assess...	SEDMS_App	 

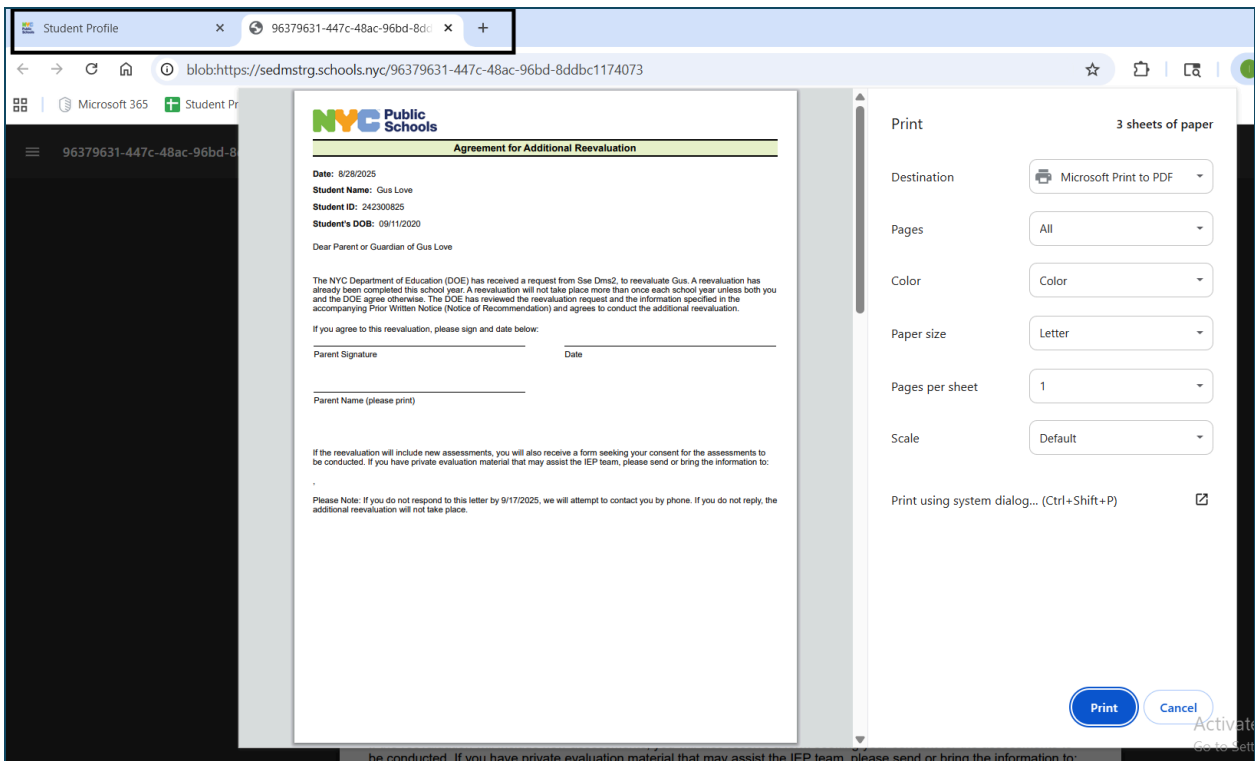
10. The document will open as a PDF in a new tab. To return to the ATLAS dashboard, either click the original *Student Profile* tab at the top of your browser or simply close the PDF tab.



11. Available actions for each document include Print, Download, and Delete, represented by icons. To print, click the **Print** icon (first icon, resembling a printer) under *Action*.

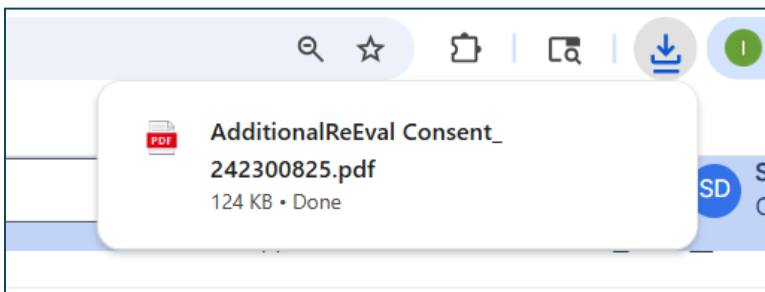
Date Created	Document Name	Document Type	Uploaded By	Action
08/28/2025	AdditionalReEval Consent: 242300825	Additional Reevaluation Consent	SEDMS_App	 
08/28/2025	AdditionalReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	RequestForReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	PS Psychological Assessment: 242300825	Psychological Assessment	SEDMS_App	 

12. The document will open in print preview in a new tab, where you can select your print options. To return to the ATLAS dashboard, either click the original *Student Profile* tab at the top of your browser or simply close the PDF tab.



13. To download a document, click the Download icon (the second icon, shown as a down arrow) under *Action*. The file will appear in your browser's downloads.

Evaluations				
Date Created	Document Name	Document Type	Uploaded By	Action
08/28/2025	AdditionalReEval Consent: 242300825	Additional Reevaluation Consent	SEDMS_App	 
08/28/2025	AdditionalReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	RequestForReEval Consent: 242300825	Consent for Additional Assessme...	SEDMS_App	 
08/28/2025	PS Psychological Assessment: 242300825	Psychological Assessment	SEDMS_App	 



14. To delete a document, click on the **Delete** icon (the third icon resembling a trash can) under *Action*.

Note: The delete icon will only be available to users with deletion rights for a given document.

08/28/2025	ATLAS Test - Copy.docx	Other Assessment	ssedms2	  
08/28/2025	ATLAS Test - Copy.docx	Use of Electronic Mail	ssedms2	  
08/28/2025	ATLAS Test - Copy.docx	Consent for Initial Evaluation	ssedms2	  
08/28/2025	ATLAS Test - Copy.docx	Physical Examination	ssedms2	  
08/28/2025	Social History Package: 242300825	Social History Package	SEDMS_App	 

15. A pop-up will appear. Click **Yes** to delete the document or **No** to cancel. To return to the documents page, click the **X** in the top-right corner to close the pop-up.

Please confirm

X

Are you sure you want to delete the document?

No

Yes