Taskstream Handbook

Evaluators

(Logging in for the First Time & FAQs)
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Logging in for the first time

Step 1: Log In
Go to taskstream.uncc.edu and use your Ninernet ID and password to log in. *If your credentials do not work, you will need to email taskstream@uncc.edu with your name, position, department, and 800# so you can be added.

Step 2: Accept the User Agreement
Click on “I Accept Agreement”

Step 3: Enter Your Account Information and Details
Make sure to use your UNC Charlotte email address and Ninernet Password. Please note: This will not affect or change any existing passwords you have.
Find Your Program(s)

1. To begin, go to taskstream.uncc.edu. If you get a pop-up asking if you would like to display secure and non-secure items, click Yes.
2. Log into TaskStream with your Ninernet username and password.

How To Access Student Work

There are TWO ways that you may access student work.

#1 - The first is the easiest & fastest way for evaluating multiple students. You should use this option when you are grading multiple assignments; OR have multiple students and/or have students who are in different portfolios.

1. From the home screen, click on the 'evaluation required' button.
(Note: student work that has been evaluated by you, but NOT yet released to the author will appear in the 'awaiting release' button. If this button is has a 1+, please go in and ensure you release ALL evaluations, and please ensure this is reviewed and completed every semester!)

#1 - On the evaluator tab, click on the "Evaluation Required" button.

Note: There will be 1+ if student work is ready to be evaluated.

Please note: this is NOT where you may search for a specific student.

Please click on this button if there is a 1+. This means that there are student assignments that you have evaluated BUT NOT yet released to the student.
2. On the next screen, you will be able to either search for an individual student OR select one or all of the portfolios you are an evaluator for. (Portfolios which have items requiring your evaluation with have an exclamation point (!) next to the name.) Click **Continue**.

3. The following screen will show all the students who have work submitted to you for evaluation. To access the work that has been submitted, click **Evaluate**.
NOTE: If you need to immediately unlock the author’s work without an evaluation, click **Send Back to Author**.

4. To access the work, you can do one of the following depending on the type of submission completed.

A. To view an attachment, click on the attachment directly:

   ![Attachment View](image)

B. To view a form, click “Open Below” or “Open Full Size” if you want the response to open in a separate window. Note you can also export the form responses in Word if you wish. *(MAKE SURE YOUR POP UPS ARE NOT BLOCKED FOR TASK STREAM)*

5. To Score the submissions, click the **Score Work** button. A pair of side-by-side pop-up windows open, one with the work submission on left and the second with the evaluation method on right. *(MAKE SURE YOUR POP UPS ARE NOT BLOCKED FOR TASK STREAM).*
#2 – The second way to evaluate student work should be used if you are only evaluating assignments in one specific portfolio; OR if you need to search for one specific student’s current (or previously evaluated) work.

1. Click on the program you need to evaluate.
2. In the Evaluation area, to search for a particular author, type the first or last name in that field, and click **Search**.

**Display Preferences**

Directions: To view items to evaluate, first complete the following selections. Please note: You can only select 50 programs at a time.

Search for One Author (Name or Student ID):

**Search**

**Or... Select Programs to Evaluate (Max. 50)**

**DISPLAY PREFERENCES:**
- Include Overall Folio Eval
- Include No Submission Requirements
- Include Inactive (Expired) Authors
- Only those evaluations sent back

**All Programs that currently have items requiring attention**

3. You will be asked if you want to view all parts of the authors (faculty member’s) work. Select the pieces you want to see. Remember: not all faculty will have completed all pieces. Click **Continue**.

4. You should see the student’s name on the left along with **purple buttons** that say Evaluate. You will click on the buttons to begin a review of the submission.

**How to use the Rubrics:**

5. Depending what you are evaluating, your evaluation type will differ:

The UNCC COED uses 2 different evaluation types at evaluation types: the **met/not met** method, and **evaluate with a rubric** method.

**How to Use the *Met/Not Met* Method**

Select whether or not the student has completed the assignment as described.
How to Use the *Rubric* Method:

For each Rubric Criterion, enter the appropriate score.

For all evaluations, from the bottom of the page select one of the three Next Steps. It is highly recommended that all evaluators select “Record as final and release evaluation to author now.”

Click Submit Evaluation Now.

If you have any additional questions or comments, please do not hesitate to contact the help desk at Taskstream@uncc.edu
Frequently Asked Questions

General

Q1: How can I see what my students see?

A1: Faculty can use the same enrollment codes students use to enroll in a DRF (portfolios) to see the student view of the portfolio. Once a faculty evaluator uses an enrollment code, click the Author tab at the top of your screen to see the student view of the portfolio. Click the Evaluator tab to return to the Evaluator role.

Q2: How can I get more help with TaskStream?

A2: Faculty may always contact our COED IT department for assistance by sending an email to Taskstream@uncc.edu or reference the UNCC Taskstream Helpsite.

There are several other ways that you can access information about TaskStream and get help with using the website from Taskstream directly.

Online Help: While working in TaskStream, you can access the complete online resource at any time from the Help link at the top of your screen. You are navigated to the Help Home page, where you can choose to:

• Browse Help by topic area. When Help has been opened (in a separate pop-up window), you can continue to browse the table of contents or search for other areas of interest.
• Click the Downloadable Guides link to access PDF versions of the help documentation.

Help for a specific tool: Many work pages and even specific features in TaskStream display a Help on this Topic or Help and Preferences link. This context-sensitive help opens special FAQs or navigates you directly to an online Help page related to that area. Some elements of a page may display a icon. Click this icon for quick help related to that element.

TaskStream Glossary: TaskStream uses a special vocabulary to describe tasks and artifacts. Online Help includes a Glossary to familiarize you with these terms.
Q3: Do I need to make any changes to my computer or Internet browser to use TaskStream?

A3: TaskStream is accessed online, using your standard Internet browser. In most cases, the default Internet browser settings are compatible with TaskStream features. Some users of Internet Explorer (IE) may experience features as “missing” due to IE security settings and will need to add TaskStream as a trusted site.

In some cases, you may need to make adjustments to other browser settings (such as “cookies”). For more information, please refer to the TaskStream Technical FAQs.

Evaluating Work

Q4: How do I evaluate work that has been submitted to me?

A4: You can access work that has been submitted to you either by specific program or across multiple programs.

Note: If you have multiple roles in TaskStream, start by clicking on the Evaluator tab on your home page.

To access ALL work for a selected program:

1. Click on the name link of the DRF program (portfolio) for which you want to evaluate work.
2. You are navigated to a Search area. You can search for an individual author or search for work in specific DRF categories (where you can further choose to view all individuals in that DRF or only those awaiting evaluation).
3. Once you have made your selections, click the Continue button. You are navigated to an evaluation grid that will display the name(s) of the author(s) you selected.
4. The evaluation grid lists the requirements in this DRF. For each selected author, the work status is displayed for each related submission. When work is awaiting evaluation, you can click an Evaluate button.
5. You are navigated to the specific evaluation area for that author’s work for this requirement. Work is presented on the View Work tab.
6. Once you are ready to evaluate the work submission click the green Evaluate/Score Work button. A pair of side-by-side pop-up windows opens, one with the work submission and the second with the evaluation method.

Note: If the pop-up windows do not appear, browser may be blocking pop-ups. See our Technical FAQ “Does TaskStream use pop-ups” for more information.

7. Complete the evaluation, selecting the radio button for one of these options:

   a. Send back for revision. Your comments are sent to the author as a provisional evaluation, enabling the author to make improvements before resubmitting for a final score. Note that this may not be available in all cases.
b. Record as final but release evaluation to author later.
c. Record as final and release evaluation to author now.

8. Once you have made your selection click the Submit Evaluation Now button.

To access ALL work that needs to be evaluated (potentially across multiple programs):

1. Click the Evaluation Required shortcut at the top of your Evaluator tab.
2. You are navigated to a page where you can (optionally) narrow your focus to a single Author and/or select specific program(s) for which you want to evaluate work.
3. Once you have made your selections, click Continue. You are navigated to an evaluation grid that will display the name(s) of the author(s) you selected.
4. This will take you to the evaluation grid. Depending on your selection, include either a single selected author's work or ALL authors with work awaiting evaluation in the programs you selected. You can click an Evaluate button, and then continue your evaluation using Steps 5 through 8 above.

Home page tile view only:

If a Program tile displays a filled blue flag next to Evaluation Required, you can quickly access ONLY work for which evaluation is required for that specific Program:

1. Click on the Evaluation Required link in the tile.
2. You are navigated to a table of work submissions in this Program that require evaluation. Each work submission appears on a separate line.
3. You can click an Evaluate button, and then continue your evaluation using Steps 5 through 8 above.

Q5: I do not see an Evaluator tab on my home page. How can I access work that has been submitted to me?

A5: You will only see separate tabs on your home page if you have multiple roles in TaskStream (Author, Evaluator and/or Evaluation Manager). If you have only the Evaluator role, your home page will instead display a list of the DRF programs into which you are enrolled.

If you do not see an Evaluator tab and ALSO do not see any DRF programs listed on your home page, you are not currently enrolled as an evaluator in any programs. Please contact the IT department at Taskstream@uncc.edu and request that you be enrolled as an evaluator in the correct programs.

Q6: My author/student says work is locked and cannot be submitted. How can I unlock this person’s work?

A6: Work becomes locked when it is submitted for evaluation.
If you have **not yet** evaluated the work submission, an author can cancel his/her submission and unlock the work.

To do this the author will return to the DRF, click on the submitted requirement and then click the **Cancel Submission** button. This will unlock the student’s work so that he/she can continue working.

If you have **already submitted** an evaluation for the work, only the Evaluation Manager can unlock it.

A designated Evaluation Manager for this program can access the work submission by clicking the View/Edit link from an evaluation grid, to open the **View Work** page. From there, he/she can click the **Send Work Back for Revision** button to unlock the work submission. At this point, the padlock icon is no longer visible next to the work, and the student will be able to add more work to this requirement.

**Q7: How do I change/edit an evaluation after the score has been released?**

**A7:** Once an evaluation has been completed and the score released to the Author, only an Evaluation Manager can edit the evaluation. Contact Taskstream@uncc.edu.

You will see some common icons that can help you with the process:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Evaluate Submitted: 02/08/11" /></td>
<td>Yellow box with green up-left arrow means you can complete the evaluation. Click the yellow <strong>Evaluate</strong> box to complete the assessment.</td>
</tr>
<tr>
<td><img src="image" alt="Work in Progress" /></td>
<td>Hourglass icon means the candidate has started the assignment but has not yet submitted work to you for evaluation.</td>
</tr>
<tr>
<td><img src="image" alt="Needs Revision" /></td>
<td>Magnifying glass icon means the evaluator has sent the work back to the candidate for revision and resubmission. This may or may not be used.</td>
</tr>
<tr>
<td><img src="image" alt="Resubmitted" /></td>
<td>Yellow box with red double arrow means the candidate has resubmitted the assignment to the instructor for re-evaluation.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluation in Progress" /></td>
<td>Evaluator has not yet finished scoring the assignment.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluated" /></td>
<td>Evaluation has been completed.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluation Released" /></td>
<td>Evaluation has been made available to the student.</td>
</tr>
</tbody>
</table>
Q8: As an Evaluator, how do I access previously evaluated work?

A8: If you are enrolled as an Evaluator in a program, you can access work that has already been evaluated by clicking the name of that program on the Evaluator tab of your home page.

- You can search for work by a specific author.
- You can search for multiple authors with work in some or all areas of that DRF. To view only previously completed evaluations, select to view "All Individuals (do not filter)."

From the resulting evaluation grid, you can access previously evaluated work by clicking the View/Edit link for the appropriate assignment. This link navigates you to a display of tabbed pages of information related to that area, starting with a summary of the Evaluation/Score.

- To view your completed evaluation for the selected assignment, click the Evaluation/Score tab.
- To view the work previously submitted by the author, click the Work Submission tab.
- When applicable, you may also choose to view related Interactions w/Reviewer(s).

Programs/Enrollment

Q9: How can I enroll my authors/students into a program?

A9: Students must self-enroll into our DRF programs at UNC Charlotte (with a few exceptions). Students must use an enrollment code and follow their own directions to enroll. College of Education enrollment codes can be found at http://education.uncc.edu/Taskstream ... if you or your students are unsure which enrollment codes to use, contact your department chair or program director.

Q10: My students are trying to submit work to me in Taskstream but they cannot see my name as an evaluator. What do I do?

A10: If your students do not see your name listed as an option when asked to submit work, you may not be currently enrolled as an evaluator in that program. Please contact the IT department at Taskstream@uncc.edu and request that you be enrolled as an evaluator in the correct programs.
Q11: How do I know which program I am working in, and how do I toggle between programs?

A11: If you are an evaluator with access to multiple programs, you will need to frequently move between the programs. You can always see which program you are currently working in by the title in the top left, beneath the menu bar.

The easiest way to toggle between programs is to click on the ‘home’ icon in the top left hand menu bar (the icon will looks like a white house on a blue background).
# Dispositions

## Evaluating the Dispositions Portfolio for Course Instructors in all Programs

*Note: these directions are tailored to evaluating Dispositions assessments. The steps are the same for completing all Taskstream evaluations.*

**NOTE:** To complete your candidate’s evaluations, you will have **two options**:

- Use Evaluation Shortcuts
- OR
- View and Evaluate by Program ➔ this is a listing of all the portfolios (DRFs) our students are enrolled in that you have been given access to. You will have to select a portfolio (DRF) to evaluate.

**Step 1:** Scroll through the list of portfolios available to you and click the one you need:

<table>
<thead>
<tr>
<th>To evaluate dispositions for candidates in the ….</th>
<th>Click on the portfolio titled …</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Licensure Programs including,</td>
<td>“(Advanced Programs) Name of Program” portfolio (with a Book Worm)</td>
</tr>
<tr>
<td>- MAT students in Phase II (who have already earned a teaching license)</td>
<td></td>
</tr>
<tr>
<td>- MEd students / MA students</td>
<td></td>
</tr>
<tr>
<td>- Add-On Licensure program students (AIG, MSA, Elem Math, etc.)</td>
<td></td>
</tr>
<tr>
<td>- MSA students</td>
<td></td>
</tr>
<tr>
<td>- EdD / PhD students</td>
<td></td>
</tr>
<tr>
<td>Will be in the portfolios beginning with (Advanced Programs) and the name of the program.</td>
<td><img src="image" alt="DRF Program" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counseling Program</th>
<th>“Counseling (Master's level) or (PhD only)” (with a Book Worm):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="DRF Program" /></td>
</tr>
</tbody>
</table>

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Note: These directions are tailored to evaluating Dispositions assessments. The steps are the same for completing all Taskstream evaluations.

**Step 1:** Scroll through the list of portfolios available to you and click the one you need:

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<tbody>
<tr>
<td></td>
<td><img src="image" alt="DRF Program" /></td>
</tr>
</tbody>
</table>
To evaluate dispositions for candidates in the Undergraduate or Graduate Certificate Programs, including all students seeking their first (initial) teaching license

Click on the portfolio titled “edTPA Practice + Dispositions” portfolio for their content area (with a lock and key icon):

Step 2: Two options:

1. You may search by individual:

   Display Preferences
   
   Directions: To view items to evaluate, first complete the following selections. Please note: You can only select 50 programs at a time.
   
   Search for one Author (Name or Student ID):
   
   Search
   
   Or... Select Programs to Evaluate (Max: 50)
   
   DISPLAY PREFERENCES: Include Overall Folio Evals Include No Submission Requirements Include Inactive (expired) authors Only those evaluations sent back
   
   1 programs that currently have items requiring attention

   Use this function by entering the individual candidate’s name in the right box and click “Search.”

2. You may search for multiple people. There are numerous filters: For this Help Sheet, we selected, “Advanced Dispositions & Exit Survey” and “All Individuals (do not filter)” and Activity within last 6 months. Once you make your sections, click “Continue.”
Step 3: With either option, you will see a screen that shows you the evaluations for the course instructor to complete:

Remember: you only need to complete the assessments (Entry or Midpoint or Final) for your course – the students work on this portfolio in multiple courses!

Under Disposition Self-Assessment 1 (Entry): Instructors evaluate ➔
- **Self-Assessment 1** – Instructors mark as “met/not met” – **REQUIRED FOR ALL PROGRAMS**

Under the Disposition Self-Assessment 2 (Midpoint): Instructors evaluate ➔
- **Self-Assessment 2 + Instructor Evaluation** – candidates submit a completed self-assessment; instructors evaluate candidate dispositions using a rubric. Scores based on class interactions, observations, and any other valid information source (such as school partner feedback, for example) – **REQUIRED FOR ALL PROGRAMS**

(ADVANCED PROGRAMS ONLY!) Under Program Exit + Instructor Eval (Exit): Instructors may evaluate ➔
- **The Program Exit + Instructor Evaluation** – candidates affirm their commitment to the dispositions; Instructors mark as “met/not met”. **REQUIRED FOR ADVANCED PROGRAMS**
You will see some common icons that can help you with the process:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Green box with purple Evaluate" /> Submitted: 09/09/17</td>
<td>Green box with purple Evaluate means you can complete the evaluation. Click the yellow Evaluate box to complete the assessment.</td>
</tr>
<tr>
<td><img src="image" alt="Hourglass icon" /></td>
<td>Hourglass icon means the candidate has started the assignment but has not yet submitted work to you for evaluation.</td>
</tr>
<tr>
<td><img src="image" alt="Magnifying glass icon" /> Needs Revision</td>
<td>Magnifying glass icon means the evaluator has sent the work back to the candidate for revision and resubmission. This may or may not be used.</td>
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<td><img src="image" alt="Purple means" /> Resubmitted</td>
<td>Purple means the candidate has resubmitted the assignment to the instructor for re-evaluation.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluator has not yet finished scoring the assignment" /> Evaluation in Progress</td>
<td>Evaluator has not yet finished scoring the assignment.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluation has been completed" /></td>
<td>Evaluation has been completed.</td>
</tr>
<tr>
<td><img src="image" alt="Evaluation has been made available to the student" /></td>
<td>Evaluation has been made available to the student.</td>
</tr>
</tbody>
</table>

**Click on the purple Evaluate button to complete the candidate’s assessments.**

**Completing the Individual Dispositions Assessments**

**Step 1:** After you click the yellow Evaluate button, you will see the evaluation screen.
- The candidate’s submission should be a file attachment at the bottom of the screen. You can click on the link or on the View Work tab at the top of the page.
- Use the buttons on the left to Score Work or Cancel the Evaluation. Note that you can see when the author submitted the work.

**Click the blue “Score Work” button to begin.**

**Optional**
- Click on Evaluation Method in the center of the page to see the evaluation criteria before you begin scoring (optional). You will also be able to see the Directions Provided to Candidates (Authors) (optional).
- Use the upper right-hand tabs to view the Evaluation History of the assessment (optional).
Step 2: Complete the assessment based on the criteria provided.

If you have disabled your pop-up blocker, a pop up will open in your computer window. Click okay. The evaluation screen will appear.

- Open and confirm that the candidate has uploaded the correct file(s) or completed the assignment which if it is an attachment will be under the File Attachments on the same screen.
- Go to the Evaluation screen (the right side of the split screen). Score the work and submit the evaluation.

If your evaluation method is using Met/Not Met, just mark the appropriate button and Submit Evaluation Now.

You can close or resize either of these screens as needed.
Once you have evaluated the candidate’s work / dispositions, the icon on the evaluation screen will update the status of the submission. Candidates will be able to see this from their TaskStream account as well.
TO SUMMARIZE:

For the **Dispositions Self-Assessment 1** (completed during an Entry-Point Program course):
- Dispositions Self-Assessment 1 – rated by instructor as *met/not met*

For the **Dispositions Self-Assessment 2** (completed during a Mid-Point Program course):
- Dispositions Self-Assessment 2 + Instructor Evaluation – dispositions rated by instructor on rubric

For the **Dispositions Program Exit + Instructor Eval** (completed at an Exit-Point Program course): (REQUIRED FOR ADVANCED PROGRAMS ONLY!!)
- Program Exit + Instructor Evaluation – rated by instructor as *met/not met*

If you have any questions, please send an email to Taskstream@uncc.edu.

Many thanks for all you do for our students. 😊