Taskstream Handbook

Evaluators (Instructors)
Contents

Glossary of Taskstream Terms: .................................................................................................................. 3
Logging in for the first time .......................................................................................................................... 4
Enrolling and Accessing Your DRF Program(s) (THE PORTFOLIO) ............................................................... 5
How to Access Student Work ...................................................................................................................... 6
There are TWO ways that you may access student work ............................................................................ 6
#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. ........ 6
.................................................................................................................................................................. 8
#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 .................................................. 9
.................................................................................................................................................................. 11
How to use the Rubrics: .............................................................................................................................. 12
Submitting an Evaluation ............................................................................................................................. 13
Send Back to Student for Revision .............................................................................................................. 14
Cancelling an Evaluation in Progress ........................................................................................................ 15
Frequently Asked Questions ....................................................................................................................... 16
Evaluating Dispositions ............................................................................................................................... 19
Completing the Individual Dispositions Assessments ................................................................................. 23
Glossary of Taskstream Terms:

**Author:** “Author” is the Taskstream word for “student” ... the student is the author of the work.

**Evaluator:** The person who is scoring the work, usually the course instructor.

**DRF:** Directed Response Folio. This is the portfolio program that you are working on when you are logged into Taskstream. A person can be enrolled in more than one DRF. All the DRFs you are enrolled in are available from your Taskstream homepage.

**Enrollment Code:** Students (and instructors who wish to see the “student view” of the DRF) must use a designated enrollment code to join the correct DRF portfolio. Each DRF has a different enrollment code. To obtain a list of enrollment codes and select the correct one for your program, go to [http://education.uncc.edu/taskstream](http://education.uncc.edu/taskstream) and click on “Enrollment Codes”

**Taskstream:** Taskstream is the designated assessment system for the Cato College of Education at UNC Charlotte.

**To begin using your Taskstream DRF programs, please follow the directions for Evaluators (Instructors) below.**

*If you have any questions, please do not hesitate to contact us at coedassessment@uncc.edu*
Logging in for the first time

Step 1: Log In
To begin, go to https://taskstream.uncc.edu and log into Taskstream using your assigned NinerNet ID and password. *

*Note: if you receive an error message saying you do not have a Taskstream account, send an email with your name, 800 ID number, Niner Net username and UNCC email address requesting a Taskstream account to taskstream@uncc.edu. DO NOT purchase or renew a membership.

Step 2: Duo Code
Duo notification will pop-up which will force you to accept. (Please disable all pop-up blockers at this point)
Enrolling and Accessing Your DRF Program(s) (THE PORTFOLIO)

1. To view your portfolio(s), go to https://taskstream.uncc.edu and log into Taskstream using your assigned NinerNet ID and password.

2. When you log in, you may see one or more tabs. Depending on what you are wanting to do in Taskstream will depend on which tab you need to be under.

   - **Author** allows you to view a portfolio as a student.
   - **Evaluator** allows you to view student submissions and score the work.
   - **Evaluation Manager** is only accessible to certain faculty members so you may not see this one.

3. Under the Evaluator tab, you will see a list or icons related to the portfolios that you have access and students are able to submit assignments to you.

   * If you do not see any portfolios or need to be added to additional portfolios, send an email to coedassessment@uncc.edu so you can be set up.

Some portfolios have icons; that’s okay (some examples appear below). The portfolios may also be listed by name. All undergraduate and graduate certificate students will use the “edTPA Practice + Dispositions” portfolio for their program. All advanced programs (including PhD, EdD, MeD, MAT, MA, MSA, MS, post-master’s graduate certificate add-on, and all counseling majors) will use the portfolios designated by a bookworm!

<table>
<thead>
<tr>
<th>Portfolio title</th>
<th>Portfolio icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>“edTPA Practice + Dispositions (content area)”</td>
<td>![icon]</td>
</tr>
<tr>
<td>“Advanced Programs (content area)”</td>
<td>![icon]</td>
</tr>
<tr>
<td>“Spring/Fall 20XX: ST-GI End of Semester” (for student teachers only)</td>
<td>![icon]</td>
</tr>
<tr>
<td>Default icon (used for non-licensure portfolios)</td>
<td>![icon]</td>
</tr>
<tr>
<td>“Field Experiences Portfolio” &amp; “Student Teaching Application”</td>
<td>![icon]</td>
</tr>
<tr>
<td>Others as needed</td>
<td>Various</td>
</tr>
</tbody>
</table>
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!)

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.
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:

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.

3. You will be asked if you want to view all parts of the authors 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.

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

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

D. 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)
6. 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).*
How to use the Rubrics:

7. 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. Select SCORE, and indicate whether or not the student is Emerging, Emerging, Proficient, Advanced, or Advanced.
Submitting an Evaluation

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.

Final Score
SCORE
Rubric Total: 24.00

Overall Comments:

Attach files - Optional (Up to 3 files)

NAME FILE (5 MB MAX) VISIBLE TO AUTHOR?

Add More Files

Next Steps

- Send back for revision
  This report will be sent back as a provisional evaluation to help guide the author’s revision. The author will have to resubmit work in order to be re-evaluated.
  Yes Send external email notification

- Record as final but release evaluation to author later

- Record as final and release evaluation to author now
  Author will immediately receive this evaluation report.
  Yes Send external email notification

CANCEL CHECK SPELLING SAVE DRAFT PREVIEW SUBMIT EVALUATION NOW
Send Back to Student for Revision

1. At the Evaluation Screen, you will select the Send Back for Revision. Make sure to check the Send external email notification to the student. You can provide overall comments to the student before submitting.

Final Score

SCORE
Rubric Total: 24.00

Overall Comments:

Attach files - Optional (Up to 3 files)

NAME
FILE (5 MB MAX)
VISIBLE TO AUTHOR?

Add More Files

Next Steps

- **Send back for revision**
  This report will be sent back as a provisional evaluation to help guide the author’s revision. The author will have to resubmit work in order to be re-evaluated.
  - Send external email notification

- **Record as final but release evaluation to author later**

- **Record as final and release evaluation to author now**
  Author will immediately receive this evaluation report.
  - Send external email notification
Cancelling an Evaluation in Progress

1. Evaluators can cancel an evaluation that is in progress by clicking the name of the portfolio in which they wish to cancel an evaluation. He or she should then choose the filter for the appropriate requirements and select Show everyone - all items (do not filter).

2. For work submissions where an evaluation is in progress, a clock icon will appear next to Evaluate Button.

3. The Evaluator should click the Evaluate Button, then click the Cancel Evaluation button in the upper-left hand corner of the screen.

4. The student will now be able to cancel the work submission and edit their work. In the Work tab of their DRF, the student should go to the requirement they need to edit and click the Cancel Submission button in the upper-right area of the page. Canceling the submission will unlock the work and allow the student to make changes and corrections before submitting the work again.

**PLEASE NOTE:** If your evaluation has already been completed, only an evaluation manager will be able to cancel the evaluation. Send an email to coedassessment@uncc.edu with the name of the student and assignment that you wish to cancel an evaluation.
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. If you can’t see a portfolio under the Author tab, then email coedassessment@uncc.edu with the name of the portfolio you would like a student view.

Q2: Do I need to make any changes to my computer or Internet browser to use TaskStream?

A2: 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 adjust other browser settings (such as “cookies”). For more information, please refer to the TaskStream Technical FAQs.

Evaluating Work

Q3: I do not see any evaluations on my home page. How can I access work that has been submitted to me?

A3: You will only see work that has been submitted to you directly. Students must select an evaluator when submitting work. The only exception is the Field Experiences Portfolio where students in the initial teacher preparation programs upload clinical observation logs.

Q4: My student says work is locked and cannot be submitted. How can I unlock this person’s work?

A4: 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. Please contact coedassessment@uncc.edu to have the evaluation cancelled.

\footnotesize \textbf{taskstream}
Q5: How do I change/edit an evaluation after the score has been released?

A5: Once an evaluation has been completed and the score released to the Author, only an Evaluation Manager can edit the evaluation. Contact coedassessment@uncc.edu.

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

<table>
<thead>
<tr>
<th>Icon Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate</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>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>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>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>Evaluation in Progress</td>
<td>Evaluator has not yet finished scoring the assignment.</td>
</tr>
<tr>
<td>Evaluated</td>
<td>Evaluation has been completed.</td>
</tr>
<tr>
<td>Evaluation Released</td>
<td>Evaluation has been made available to the student.</td>
</tr>
</tbody>
</table>

Programs/Enrollment

Q6: How can I enroll my authors/students into a program?

A6: 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](http://education.uncc.edu/Taskstream) ... if you or your students are unsure which enrollment codes to use, contact your department chair or program director.

Q7: My students are trying to submit work to me in Taskstream but they cannot see my name as an evaluator. What do I do?

A7: 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 Office of Assessment at coedassessment@uncc.edu and request that you be enrolled as an evaluator in the correct programs.
Q8: How do I know which program I am working in, and how do I toggle between programs?

A8: 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).
# Evaluating 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><strong>Advanced Licensure Programs including,</strong></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></td>
</tr>
<tr>
<td><strong>Counseling Program</strong></td>
<td>“Counseling (Master’s level) or (PhD only)” (with a Book Worm):</td>
</tr>
<tr>
<td></td>
<td></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:

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

**OR**

---

![Taskstream logo](taskstream.png)
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**
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="Evaluate" /></td>
<td>Green box with purple Evaluate 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>Purple 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>

- **Click on the purple Evaluate button to complete the candidate’s assessments.**
Completing the Individual Dispositions Assessments

Step 1: After you click the 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.

You can close or resize either of these screens as needed.
- 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.

If your evaluation method is using a rubric, complete, rating each item … and mark as final or send back for revisions as needed. Then click Submit Evaluation Now.

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 regarding this process, please send an email to coedassessment@uncc.edu. Please allow 48 business hours for a response.

Many thanks for all you do for our students. 😊