**TASKSTREAM INSTRUCTIONS**

**Subscribing Directions:**
1. Go to [www.taskstream.com](http://www.taskstream.com)
2. Click on the Subscribe/Renew Today link in the Subscriber Login box
3. In Step 1: Activate Subscription, select **Create** a new TaskStream subscription
4. Then, click Continue under **Option 1**: Credit card purchase (I do not have a key code)
5. If you don’t have a credit card, call the TaskStream Help Desk at 1-800-311-5656, and they will send you a form to let you pay the more traditional way (check).
6. Follow the directions for the remaining six steps

(*If you click on the Subscription Rates link in the Subscriber Login box, you will see three different price listings. You need to pay the **Students: Higher Education** fees, and the cost will depend on how many years you will be in the education program before you submit your electronic portfolio to be evaluated during your student teaching. Typically, this is three to four years for most of the undergraduate students. If you have any questions, contact the TaskStream Help Desk at 1-800-311-5656.*)
Enrollment Directions:
(This step connects you to the DRF or program code.)
1. Go to www.taskstream.com and log in to your TaskStream account.
2. In the yellow message box on the far left hand side, click on the Enter Code button.

3. Under the heading Self Enrollment, enter the program code you were assigned in F300 in the Enter program code field and click the Search button. (Example: IPFWS2009)
4. You will be able to review the program information that corresponds to the code that you entered. To be enrolled in the program, click the Enroll button. If you do not wish to be enrolled in the program at this time, click the Do Not Enroll button.
5. Once you have successfully enrolled into the correct program, you will be taken back to the home page and will be able to see the program code listed under **Work on a DRF Program.**

   *(Directed Response Folios)*

   *Note: If you enroll yourself into an inactive program, the program will not show up until the Program Manager activates the program.*

*Important Note: You will only have **ONE** program code in the author tab under the heading **Work on a DRF Program!**
Creating and Naming Your Presentation Folio Directions:
1. In the upper right hand corner, click on the second tab from the left Folios & Web Pages.
2. Under the heading Folios & Web Pages, type the name of your web folio in the New Folio or Web Page Name: text box and click Continue.
   *The name of your Presentation Folio will be your first and last name and portfolio for Checkpoint 1
   Example: Susan Smith’s Portfolio for Checkpoint 1

3. In the Select Template Category box, select Custom Templates (designed by your learning community).
4. A drop down menu will open up (Select Custom Template).
5. You need to select Working Folio under Presentation Folio Templates and then click Continue.
6. Under the heading First…Choose Layout, select a style or layout for your Presentation Folio.
7. Next, under the heading Then…Select Theme, select a color scheme and then click Save Changes.
8. You will then receive a message Your changes have been saved as well as an overview of your Presentation Folio.

9. Click on the Edit Content tab and vertical menu will be on the left hand side. This is your Presentation Portfolio!
   - The name of your Presentation Portfolio will in the top left hand corner
   - A large text box with the bold heading Select Page/Area to Edit will have the following buttons underneath: Add Area, Delete Area, Move Area, Copy Area
   - The name of your Presentation Folio will be underlined, and then, you should see Part 1 with ten sub links and the 10 INTASC standards (or Page) with Reflect and Artifact 1, 2, and 3 links (or Content Section) underneath each standard.

*If you DO NOT see the following, you have not set up your Presentation Folio correctly and probably missed a step or misunderstood the directions. Contact TaskStream at 1-800-311-5656 for assistance.*
**Working on Your Web Folio Directions:**

1. Click on the second tab **Folios & Web Pages**.
2. Under **Presentation Folios**, click on the name of your Working Folio.
3. You should be in the third tab **Edit Content**.
4. Click on a link either under **Part 1** or click on one of the **Reflect and Artifact** links under one of the **INTASC standards**.

![Web Folio Screenshot]

5. Click on the **Attachment** link at the bottom of the page.
6. Under **Add New Attachment**, click on the **Browse…** button below **Select File**.
7. Browse for the attachments that you want to upload to your electronic portfolio and select **Open**
   - Make sure your work is either saved in a combined pdf file or in a one Word file attachment!
   - Make sure you attach your artifact and reflective analysis under ONE **Reflect and Artifact**. Each of the three **Reflect and Artifact** links under every standard should have ONE artifact and ONE reflective analysis combined in one document!!!

8. Under **Name File**, type the name of the document you are attaching and click on **Add File**.
   - You will see the name of the file attachment under **Currently Attached Uploaded Files**. You are able to **View**, **Edit**, or **Delete** any file attachments that you do not want or that were accidentally uploaded incorrectly; this option is on the right hand side in this section.
9. After you have uploaded the file attachment(s), click **Save & Return** in the bottom right hand corner, and you will now be back in the **Edit Content** tab where you will see the file attachments you have just uploaded.

10. You can log out of TaskStream or continue working on your Presentation Folio.
**Submitting Your Web Folio to a Checkpoint Directions:**

1. **Under Work on a DRF Program**, click on your self enrollment code/program code. *(Directed Response Folio)*

2. In the vertical menu **General Information**, you will see a list of all the **Checkpoints** with a **Submission** link underneath, which you need to click.

3. Select the **Attachments** button at the bottom.

4. **Under Add New Attachment**, select *An artifact created in TaskStream* and then select *Web folios* in the *-Select category-* vertical drop down menu. *(Lesson, Folio, etc.)*

5. In the second vertical drop down menu *Select work…*, click on the name of your Working Folio, click **Add File**, and then click **Save and Return**.

6. In the upper right hand corner, besides **Status**, click on **Submit Category**.

7. A message **Are you sure you want to submit to Checkpoint ___ for evaluation?** will open up, and you can click **Yes – Submit My Work**. *(You can also type in a message to the assigned reviewer under Add optional comments for your evaluator.)*

8. You will then receive the message **You have successfully submitted “Checkpoint ___”**, and you can click on the **Print this Confirmation** link and then **Close Window**.

   *Notice that under the second column Actions you will see the word **Submitted** with a date and time underneath. You will also notice a **Cancel Submission** button, and if you click on this, it will cancel your submission to that checkpoint. Your status will then change to **Needs Revision**. *However, once you submit to a Checkpoint and log out of TaskStream, your Presentation Folio becomes “locked”, meaning you will not be able to access it until the assigned reviewer releases it back to you or “unlocks” it.*

"Under Work on a Directed Response Program, click on your self enrollment code/program code. In the vertical menu General Information, you will see a list of all the Checkpoints with a Submission link underneath, which you need to click. Select the Attachments button at the bottom. Under Add New Attachment, select An artifact created in TaskStream and then select Web folios in the -Select category- vertical drop down menu. In the second vertical drop down menu Select work…, click on the name of your Working Folio, click Add File, and then click Save and Return. In the upper right hand corner, besides Status, click on Submit Category. A message Are you sure you want to submit to Checkpoint ___ for evaluation? will open up, and you can click Yes – Submit My Work. *(You can also type in a message to the assigned reviewer under Add optional comments for your evaluator.)* You will then receive the message You have successfully submitted “Checkpoint ___”, and you can click on the Print this Confirmation link and then Close Window. *Notice that under the second column Actions you will see the word Submitted with a date and time underneath. You will also notice a Cancel Submission button, and if you click on this, it will cancel your submission to that checkpoint. Your status will then change to Needs Revision. *However, once you submit to a Checkpoint and log out of TaskStream, your Presentation Folio becomes “locked”, meaning you will not be able to access it until the assigned reviewer releases it back to you or “unlocks” it.*
Checking the Grader’s Comments after You Have Submitted to a Checkpoint Directions:

1. Under Work on a DRF Program, click on your self enrollment code/program code. (Directed Response Folio)

2. In the upper right hand corner, click on the second tab Comments.

3. To request comments or feedback from an assigned reviewer, click the Request Comment button above, and select the area or submission that you would like to receive feedback on from your assigned checkpoint reviewer and click Continue.

4. Check the box beside the reviewer assigned to review your work, and click the Continue button.

5. The message Feedback Requested Successfully will pop up, and you can then click Close Window.

6. You can then communicate with the reviewer by typing comments in the Add your comment message box.

   *If there are no comments, then you need to keep waiting for feedback.
   *If you receive a comment indicating that you need to make revisions and resubmit your work, then you need to follow those instructions.

7. *Keep in mind that while your work is being graded, your Presentation Folio becomes locked, so you will NOT be able to access it.
Re-submitting Your Presentation Folio If You Do NOT Pass a Checkpoint Directions:
*Once you have deleted your old work, made the necessary revisions, and saved these new changes/work on your computer or flash drive, you are ready to upload your revised work!
1. Click on the second tab Folios & Web Pages.
2. Under Presentation Folios, click on the name of your Presentation Folio.
3. You should be in the third tab Edit Content.
4. Click on a link either under Part 1 or click on one of the Reflect and Artifact links under one of the INTASC standards.
11. Click on the Attachment link at the bottom of the page.
12. Under Add New Attachment, click on the Browse… button below Select File:
13. Browse for the attachments that you want to upload to your electronic portfolio and select Open
• Make sure your work is either saved in a combined pdf file or in a one Word file attachment!
• Make sure you attach your artifact and reflective analysis under ONE Reflect and Artifact. Each of the three Reflect and Artifact links under every standard should have ONE artifact and ONE reflective analysis combined in one document!!!
14. Under Name File, type the name of the document you are attaching and click on Add File.
• You will see the name of the file attachment under Currently Attached Uploaded Files. You are able to View, Edit, or Delete any file attachments that you do not want or that were accidentally uploaded incorrectly; this option is on the right hand side in this section.
15. After you have uploaded the file attachment(s), click Save & Return in the bottom right hand corner, and you will now be back in the Edit Content tab where you will see the file attachments you just added.
16. You can log out of TaskStream or continue working on your Presentation Folio.
*You are now ready to resubmit to the Checkpoint!
17. Under Work on a DRF Program, click on your self enrollment code/program code.
(Directed Response Folio)
18. In the vertical menu General Information, you will see a list of all the Checkpoints with a Submission link underneath, which you need to click.
19. In the upper right hand corner, besides Status, click on Re-submit Category.
20. A message Are you sure you want to submit to Checkpoint ___ for evaluation? will open up, and you can click Yes – Submit My Work.
• You can also type in a message under Add optional comments for your evaluator.
21. You will then receive the message You have successfully submitted “Checkpoint ___”, and you can click on the Print this Confirmation link.
22. Click on Close Window.
(Note: The picture of the lock means that you are not able to access your Presentation Folio until the assigned reviewer releases/unlocks it!)
*Notice that under the second column Actions you will see the word Submitted with a date and time underneath. You will also notice a Cancel Submission button, and if you click on this, it will cancel your submission to that checkpoint.
Passing a Checkpoint Directions:

**Make sure you check the comments for each checkpoint!**

1. Go to [www.taskstream.com](http://www.taskstream.com) and log in to your TaskStream account.
2. Click the **Folios & Web Pages** tab at the top.
3. Under **Presentation Folios**, you will see the name of your Working Folio, which will be “locked”.
4. Click the **Copy** button.
5. Change the name of your Working Folio for the next Checkpoint.  
   Example: Susan Smith’s Portfolio for Checkpoint 2
   *All of your work that you uploaded for the previous checkpoint will be transferred when you save and make a copy of your Web Folio for the next checkpoint!*
6. Click the **Copy** button again.
7. You will then have a portfolio from the previous checkpoint that is locked and a new portfolio for the next checkpoint allowing you to upload new work.

8. *Remember: All of your work that you uploaded for the previous checkpoint will be transferred when you save and make a copy of your Web Folio for the next checkpoint!

*If you need additional help, contact TaskStream at 1-800-311-5656 or email them at help@taskstream.com.