TaskStream Instructions for Instructor/Evaluators

Quick Start Guide for Evaluators
(These instructions will be used every time you score an assignment)

1. Go to www.taskstream.com and log in using your username and password
   (If you have lost or forgotten your username or password, please call TaskStream directly at
   1-800-311-5656 and ask that it gets re-sent to you.)

   ![Login Page]

   This will bring you to your home page:

   ![Home Page]

2. On the home page, you will see all DRF Programs (courses) that you are enrolled into as an
   Evaluator. Click the name of the DRF Program (course) in which you wish to complete
   evaluations. If you have multiple roles within a program, you will need to click the Evaluator tab
   at the top of the screen.
This will bring you to the search screen where you can either search for an individual or choose to view your entire roster.

3. To search for a particular author (student), type the first or last name in the appropriate field, and click Search.
To view your entire roster, proceed with the following under the **Or... Search for Multiple people** heading:

- Under the **Select Folio area to display**: area, select *Show all available categories*
- Under the **Select DRF authors to display**: area, select *All Individuals (do not filter)*
- Under the **Select Time Slicing Options**: area, select *Any Time Period*
- Under the **Include inactive subscribers**: area, select *Include inactive (expired) subscribers in search results*

Click **Continue**
This will bring you to your evaluation grid and your course roster:

<table>
<thead>
<tr>
<th>Show All</th>
<th>Assignment 1 [25 Points]</th>
<th>Assignment 2 [50 Points]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="Evaluate" alt="Evaluate" /></td>
<td><img src="Evaluate" alt="Evaluate" /></td>
</tr>
<tr>
<td>![Release all for area](Release all for area)</td>
<td>![Release all for area](Release all for area)</td>
<td>![Release all for area](Release all for area)</td>
</tr>
<tr>
<td>![Bellingeri, Joseph](Bellingeri, Joseph)</td>
<td><img src="Score=3.50" alt="Score=3.50" /> (21.88/25) <img src="View/Edit" alt="View/Edit" /></td>
<td><img src="Evaluated" alt="Evaluated" /></td>
</tr>
<tr>
<td>![Release all for Author](Release all for Author)</td>
<td>Released: 1/10/13</td>
<td></td>
</tr>
</tbody>
</table>

4. To access the work that has been submitted in each column under each assignment heading, click the yellow **Evaluate** button next to the student’s name.

4a. To document when a student fails to meet the TaskStream submission requirement, scroll to the right and click the yellow **Evaluate** button under the **Candidate Failed to Submit to TaskStream** heading to access a checkbox form. **Please note that this form is set up as an Administrative Category in TaskStream – students do not see it/cannot access it.** If students DO submit their work, then the "Candidate Failed to Submit to TaskStream" form does not apply and it is to be disregarded.

If you see any of the following instead of the yellow **Evaluate** Evaluate button next to the student’s name in the evaluation grid, please note:

- **Work Not Started** = Work has not yet been uploaded and submitted by the student. There is no action you can take until this has been done by the student.

- ![Work in Progress](Work in Progress) **Hourglass Icon** = The student has uploaded the work, but has yet to complete the process by actually submitting it for evaluation. As a result, the assignment is sitting in “limbo” and only the student can access it from their account to either remove it for revision or submit it. The student will need to be contacted and asked to return to their submission instructions, pick them up at Step 5 and follow them through to the end.

- ![Needs Revision](Needs Revision) **Call Back** = The work has been successfully uploaded and submitted for evaluation but returned to the student for revision by the Instructor/Evaluator. The revised work must be uploaded and resubmitted by the student for scoring. There is no action you can take until this has been done by the student.

- ![Evaluation in Progress](Evaluation in Progress) = The Instructor/Evaluator has started the evaluation process but has yet to complete it. This will need to be done before the scores can be recorded and reported.

- ![Evaluated](Evaluated) = The work has been successfully scored within the system, but it has not been released so that the student can access the score report and any feedback/comments provided by the instructor.

- ![Evaluated Released](Evaluated Released) = The work has been successfully scored within the system and has been released so that the student can access the score report and any feedback/comments provided by the instructor. **(This is the preferred outcome – details below on how to release evaluations after they’ve been done).**
This will bring you to the screen that gives you access to the submitted work and to the scoring rubric or Candidate Failed to Submit form (if applicable):

5. To view the submitted work, click on the work link(s) in the middle of the page. The work will open in a separate window for review.

6. To access the rubric for the work or the Candidate Failed to Submit form (if applicable), click the green Evaluate/Score Work button. This will open the scoring rubric/form in a separate window.

Separate instructions for completing both the rubric and the Candidate Failed to Submit to TaskStream form follow.

To Complete the Rubric:
For each Rubric Criterion (each rubric line), enter the appropriate score in each score area throughout the entire rubric. You can enter whole numbers or fractional values (e.g. 2.5) as needed in each line. You can also add feedback/comments if you wish to. Be sure to scroll all the way to the bottom of the rubric to ensure you’ve completed it in its entirety.
At the bottom of the rubric, select one of the three *Next Steps* (see full descriptions below the screen shot) and click **Submit Evaluation Now**.

### Next Steps

<table>
<thead>
<tr>
<th>Decide what to do with this evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Send back for revision</strong></td>
</tr>
<tr>
<td><strong>Save a copy of this submission?</strong></td>
</tr>
<tr>
<td>Yes – author will be prompted to create a new submission from scratch (although they will be able to view their previous submissions)</td>
</tr>
<tr>
<td>No – author will be able to overwrite this submission</td>
</tr>
</tbody>
</table>

- **Send External Email Notification**

<table>
<thead>
<tr>
<th><strong>Record as final but release evaluation to author later</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Author will immediately receive this evaluation report.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Record as final and release evaluation to author now</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Author will immediately receive this evaluation report.</td>
</tr>
</tbody>
</table>

- **Send External Email Notification**

### If you need to send the work back to the student for revision with comments:

- Click the first radio button next to **Send back for revision**
- Under **Save a copy of this submission?** click Yes – author will be prompted to create a new submission from scratch (although they will be able to view their previous submissions)
- Keep the box checked next to the **Send External Email Notification** option so that students will be notified that their work has been returned to them and that they can login to TaskStream to review their scores and comments if they choose to.
- Click the yellow **Submit Evaluation Now** button

### If revisions are not needed/required and you are ready to complete the process, but are not ready to share your scores and comments with your student yet:

- Click the second radio button next to **Record as final but release evaluation to author later**
- If you do not wish for students to receive notification of your evaluation, uncheck the box next to the **Send External Email Notification** option below the third radio button.
- Click the yellow **Submit Evaluation Now** button

### If revisions are not needed/required and you are ready to complete the process AND share your scores and comments with your student *(most recommended!)*:

- Click the third radio button next to **Record as final and release evaluation to author now**
- Keep the box checked next to the **Send External Email Notification** option so that students will be notified that their evaluation has been completed and that they can login to TaskStream to review their scores and comments if they choose to.
- Click the yellow **Submit Evaluation Now** button
To Complete the Candidate Failed to Submit to TaskStream Form:
For the Candidate Failed to Submit work form, click the appropriate box next to the applicable reason the student failed to submit. Add notes as needed in the text box.

At the bottom of the form, in the dark shaded SCORE box under the Final mark: Does this work meet requirements? heading, click the radio button next to Does not Meet. Then click the yellow Submit Evaluation Now button.