

Creating Coaching Plans in TaskStream

1. Go to www.TaskStream.com

Log in to TaskStream with your **username** and **password** you designated when you created your TaskStream account.



TaskStream login form with fields for Username and Password, and the TaskStream logo below.

2. Folios & Web Pages

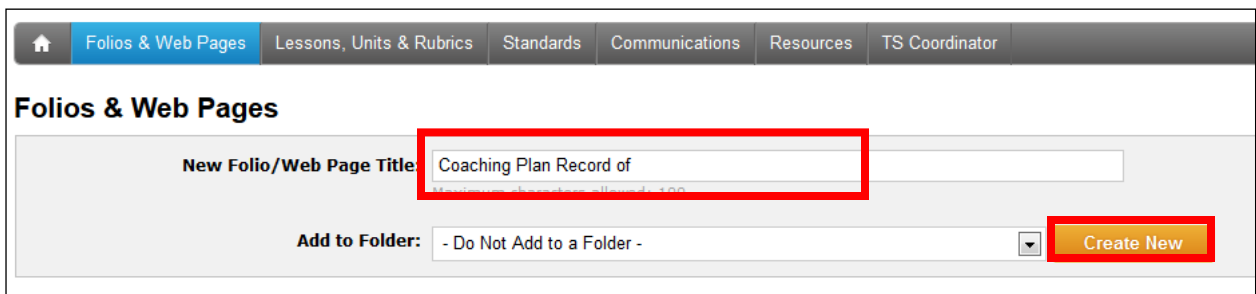
Click on 'Folios & Web Pages' on the top menu bar.



TaskStream navigation menu with 'Folios & Web Pages' highlighted in a red box.

3. Create your Record

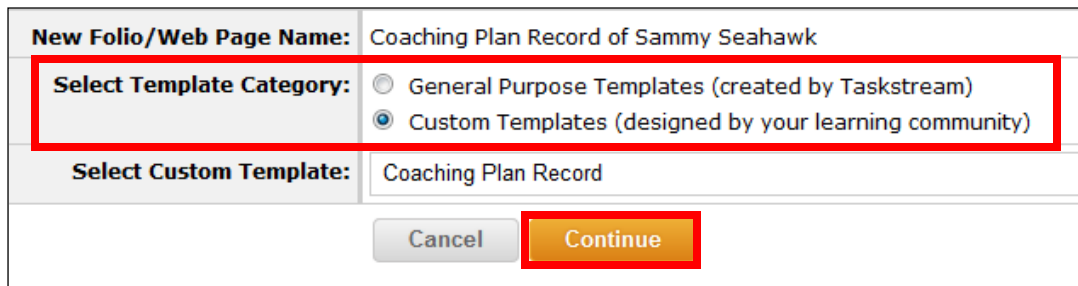
You will be creating a New Folio/Web Page. Title this **Coaching Plan Record of (Your Name)** and then click the **Create New** button.



TaskStream 'New Folio/Web Page' form. The title field contains 'Coaching Plan Record of' and is highlighted in a red box. The 'Add to Folder' dropdown is set to '- Do Not Add to a Folder -'. The 'Create New' button is highlighted in a red box.

4. Custom Template

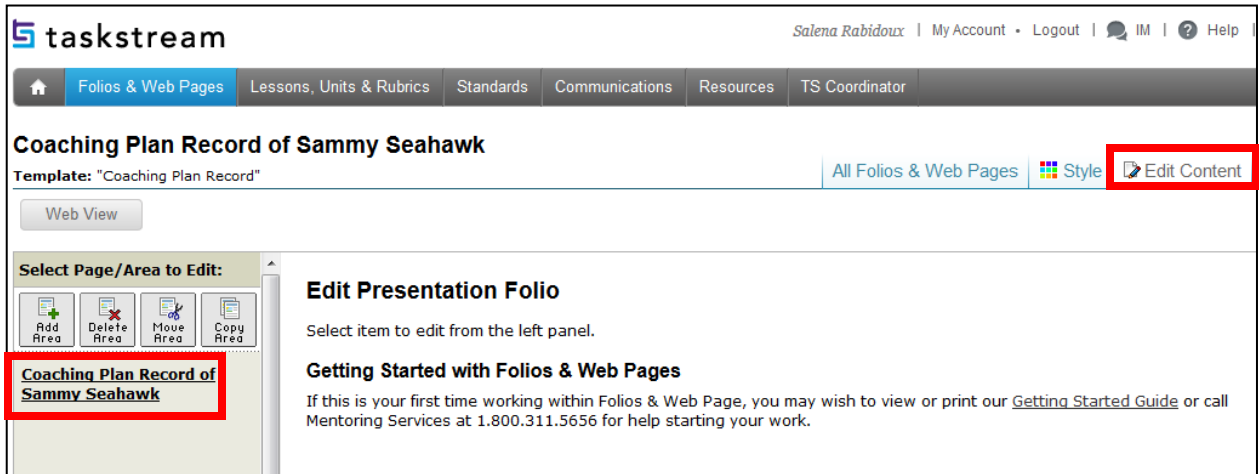
On the next screen, click in the radio button for **Custom Templates (designed by your learning community)**. From the drop down menu next to **Select Custom Template**, choose **Coaching Plan Record**. Click **Continue**.



TaskStream 'Select Custom Template' form. The 'New Folio/Web Page Name' field contains 'Coaching Plan Record of Sammy Seahawk'. The 'Select Template Category' section has two radio buttons: 'General Purpose Templates (created by Taskstream)' and 'Custom Templates (designed by your learning community)'. The 'Custom Templates' radio button is selected and highlighted in a red box. The 'Select Custom Template' dropdown is set to 'Coaching Plan Record'. The 'Continue' button is highlighted in a red box.

5. Access your Record

On the next screen, click on the **Edit Content** tab, then in the left column click on the title of your folio **Coaching Plan Record of Your Name**



taskstream Salena Rabidoux | My Account • Logout | IM | ? Help

Home Folios & Web Pages Lessons, Units & Rubrics Standards Communications Resources TS Coordinator

Coaching Plan Record of Sammy Seahawk All Folios & Web Pages Style **Edit Content**

Template: "Coaching Plan Record" Web View

Select Page/Area to Edit:

Add Area Delete Area Move Area Copy Area

Coaching Plan Record of Sammy Seahawk

Edit Presentation Folio
Select item to edit from the left panel.

Getting Started with Folios & Web Pages
If this is your first time working within Folios & Web Page, you may wish to view or print our [Getting Started Guide](#) or call Mentoring Services at 1.800.311.5656 for help starting your work.

6. Edit Text & Image

In the 'Text and Image Section' that has sub categories of 'Intern Name, Grade Level, etc.' click on the **Edit Text & Image** button in the top right corner. Fill in your information, after your information is typed in click the **Save and Return** button.

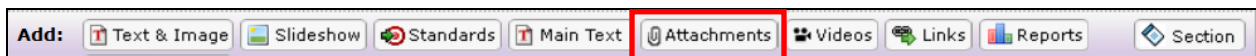


▼ **Text and Image Section** **Edit Text & Image** Delete Section

Intern Name
Grade Level
Partnership Teacher Name
School

7. Attachments

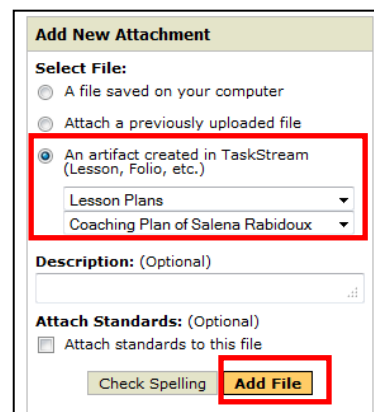
After your demographic information is entered, scroll to the bottom of your Coaching Plan Record. Click on the **Attachments** button.



Add: Text & Image Slideshow Standards Main Text **Attachments** Videos Links Reports Section

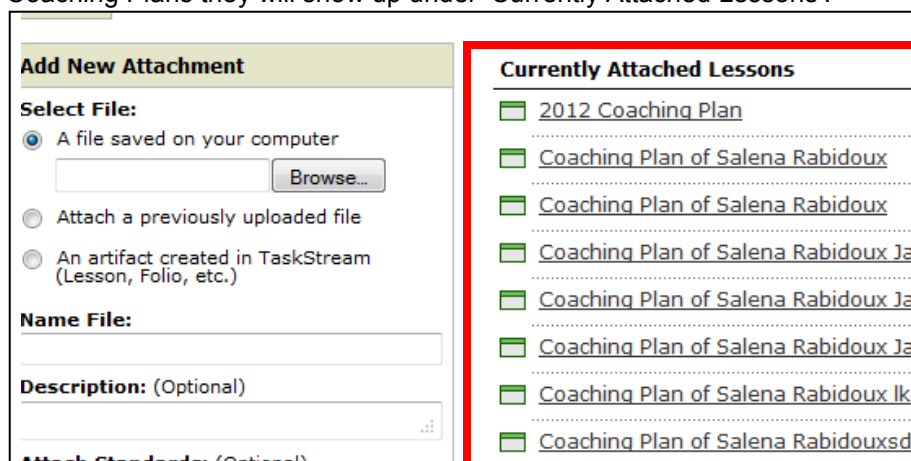
8. Adding Artifacts

On the next screen, you will begin to add your Coaching Plans into this Coaching Plan Record. To add a new attachment, under Select File click the radio button next to **An artifact created in TaskStream**. Two drop-down menus will appear. Choose **Lesson Plans** for the category and then **select your specific Coaching Plan** that you want to add. Click the 'Add File' button.



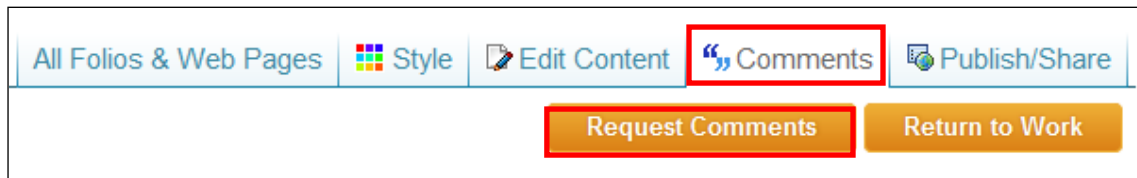
9. End of Semester Review

You can add all of your Coaching Plans at the end of the semester or during the semester. As you add your Coaching Plans they will show up under 'Currently Attached Lessons'.



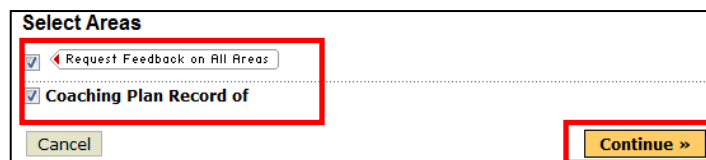
10. Request Comments

At the end of the semester, and after all of your Coaching Plans have been attached to this portfolio, go to the 'Edit Content' tab in your Coaching Plan Record and click on the 'Request Comments' button at the top of your screen.



11. Request Feedback on All Areas

A pop-up box will appear. Place a check mark in the box next to 'Request Feedback on All Areas' and then click the 'Continue' button.



12. Select Supervisor and Program Coordinator

On the next screen, place a checkmark in the box next to the name 'Program Coordinator' and another checkmark in the box next to the name of your **Supervisor**.

All Fall 2012 Teacher Interns		
<input type="checkbox"/> Daniel Beguhl	<input type="checkbox"/> John Bennett	<input type="checkbox"/> Ava Bevins
<input type="checkbox"/> Sara Burke	<input checked="" type="checkbox"/> Program Coordinator	<input type="checkbox"/> Jeff Ertzberger
<input type="checkbox"/> Kathy Fox	<input type="checkbox"/> Connie Gruber	<input type="checkbox"/> Dee Hall
<input type="checkbox"/> Heidi Higgins	<input type="checkbox"/> Karen Hill	<input type="checkbox"/> Susan Hoggard
<input type="checkbox"/> Rich Huber	<input type="checkbox"/> Daniel Johnson	<input type="checkbox"/> Allison Jones
<input type="checkbox"/> Hengameh Kermani	<input type="checkbox"/> Karen LaRue	<input type="checkbox"/> Katie McLam
<input type="checkbox"/> Diana Mintz	<input type="checkbox"/> Shelby Morge	<input type="checkbox"/> Brenda Nordin
<input type="checkbox"/> Allison Nye	<input type="checkbox"/> Ann Potts	<input type="checkbox"/> Salena Rabidou
<input type="checkbox"/> John Rack	<input type="checkbox"/> Dr. Roney	<input type="checkbox"/> JoAnn Shaw
<input type="checkbox"/> Marcee Steele	<input type="checkbox"/> Amy Taylor	<input type="checkbox"/> Dan Wait
<input type="checkbox"/> Brad Walker	<input type="checkbox"/> Joe Webb	<input type="checkbox"/> Ronnie Weppler
<input type="checkbox"/> Cindy Wiseman		

By the end of your internship there should be a minimum of 8 Coaching Plans attached within this Coaching Plan Record.