



Quick-Start Guide for edTPA™ Candidates



taskstream

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About edTPA

edTPA is a pre-service assessment process designed by educators to answer the essential question: "Is a new teacher ready for the job?" edTPA includes a review of a teacher candidate's authentic teaching materials as the culmination of a teaching and learning process that documents and demonstrates each candidate's ability to effectively teach his/her subject matter to all students.

Stanford University faculty and staff at the Stanford Center for Assessment, Learning, and Equity (SCALE) developed edTPA, formerly the Teacher Performance Assessment. They received substantive advice and feedback from teachers and teacher educators and drew from experience gained from over 25 years of developing performance-based assessments of teaching (including the National Board for Professional Teaching Standards (NBPTS), the Interstate Teacher Assessment and Support Consortium (InTASC) Standards portfolio, and the Performance Assessment for California Teachers). The design and review team was comprised of more than 100 university faculty, national subject-matter organization representatives (e.g., NCTM, NCTE, NSTA, etc.), and K-12 teachers.

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Overview

This guide was created for edTPA Candidates who will be required to submit their work to Pearson for scoring. This guide documents the workflow for a candidate who is required to send their edTPA assessment to Pearson. Please note that some candidates participated in local evaluation and were not required to submit their work to Pearson for scoring; therefore, some of the steps in this document may not apply to those individuals.

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Need Help?

If you have any additional questions or comments, please do not hesitate to contact Mentoring Services at help@Taskstream.com or at 800-311-5656, press 1 for support.

PEARSON CUSTOMER SUPPORT FOR edTPA CANDIDATES **edTPA Policies, Registration, and Submission** **Pearson ePortfolio System**

*Use the email communication form on the [Pearson Contact Us Page](#)
 or call: (413) 256-2889 or (866) 565-4872*

1. Review Policies and Register for edTPA Using the Pearson System

In order to submit your portfolio and have your portfolio officially scored by Pearson, ***you must register with Pearson.*** If you have any questions about this process, please contact [Pearson edTPA Customer Support](#).

1. Please refer to the Professional Responsibilities section in the edTPA Handbook and to the Pearson website, www.edTPA.com, for important information you need to know about permissions, confidentiality, and other requirements.
2. Go to the "[Register](#)" page on the [Pearson edTPA site](#) and review the important information in the links in the section, "Before you Register."
3. Then, click the **Next** button and continue clicking **Next** until all specific registration requirements have been reviewed.
4. Click on the [Register Now](#) button to begin the registration process in the Pearson edTPA registration system.
5. Complete the registration process by following the instructions in the [Pearson edTPA registration system](#).
6. Verify that the assessment in the Pearson edTPA registration system is the same as the assessment that you are building in Taskstream. Each assessment must have the exact same name in both systems.

For example:

Elementary Literacy is **NOT THE SAME** as Elementary Literacy – Washington

Elementary Education is **NOT THE SAME** as Elementary Literacy

If you have any questions regarding which assessment you should be completing, please contact your institution.

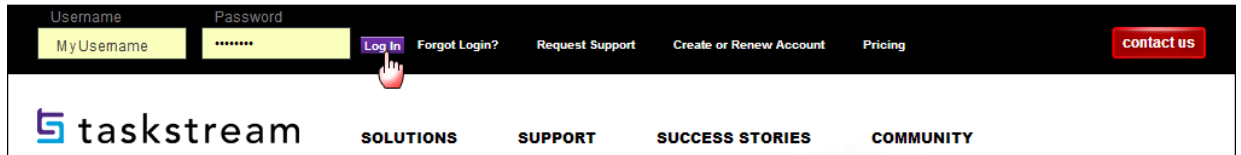
7. After completing the registration, click the **Choose a Portfolio Platform System** link in the Pearson System.

8. Indicate that you are using an Integrated Platform Provider System in the Pearson ePortfolio System. Refer to the [“Using the Pearson ePortfolio system—candidates”](#) document on the [Pearson edTPA site](#) for instructions on obtaining an Authorization Key from Pearson. The ***Authorization Key is required for transferring your portfolio*** from Taskstream to the Pearson ePortfolio System.

2. Build Your edTPA Portfolio in Taskstream

Accessing Your edTPA Portfolio in Taskstream

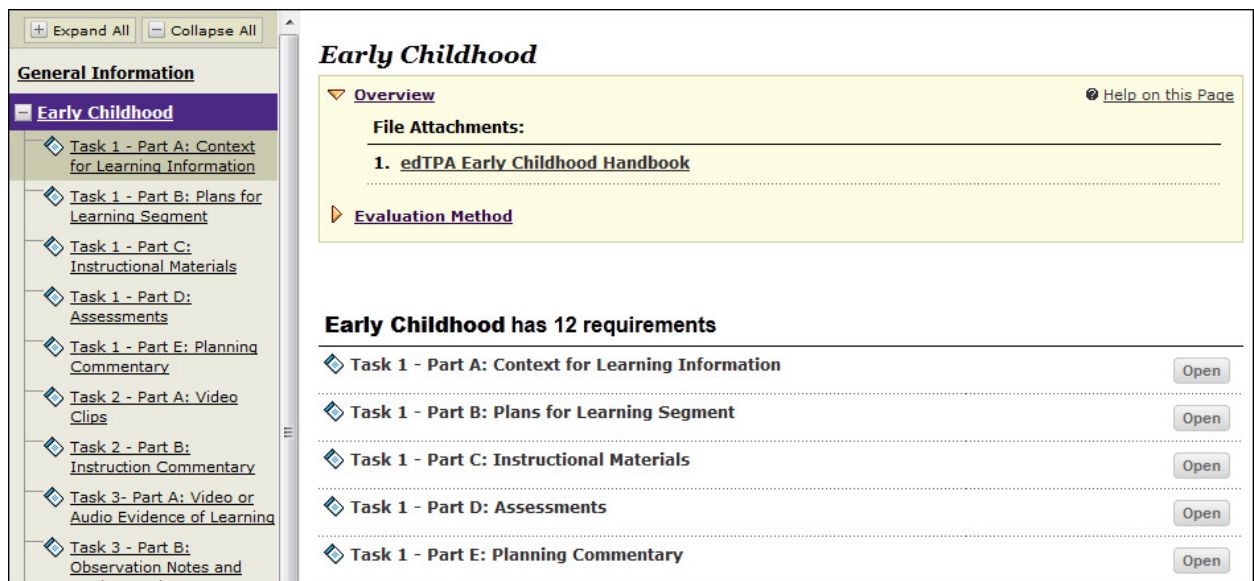
1. To begin, go to www.taskstream.com and log into Taskstream using your username and password.



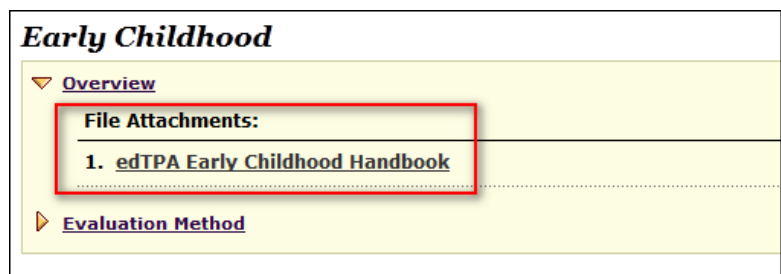
2. To access edTPA, click the name of the edTPA Subject Area from the home page.



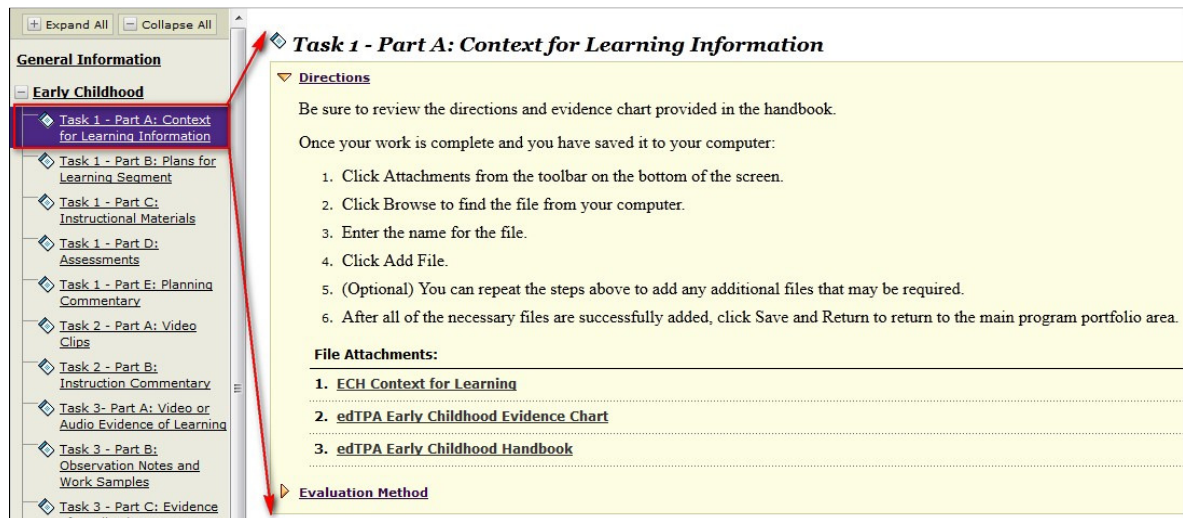
3. You will see the links for the edTPA Tasks in the left-hand structure menu.



4. Click the name of the edTPA subject area to access a link to the corresponding edTPA Handbook.



5. If you click a link in the left-hand menu, the content of the chosen Task section will be displayed in the right-hand content area.



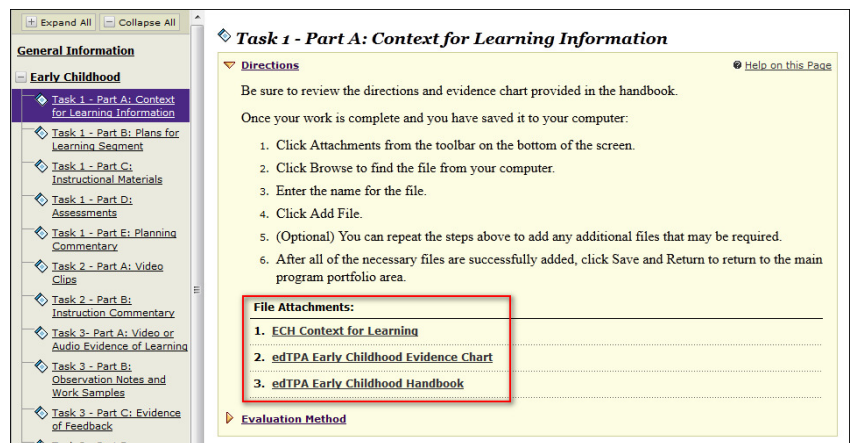
6. In the example below, the selected edTPA Task and Part is “Task 1 – Part A: Context for Learning Information” in the Early Childhood assessment for edTPA.

Click the **Directions** link to view the directions that have been specified for the task.

Under the “File Attachments” heading, you will see other pertinent documents.

Refer to the Evidence Chart and Handbook for file submission

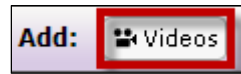
requirements, as each Task requires a different number of files to be submitted and only specific file types are accepted.



Uploading Your Files

- Once you have added your response to the Word document, save the file to your computer with your changes and file extensions intact, then attach the modified file to the corresponding Task in Taskstream.

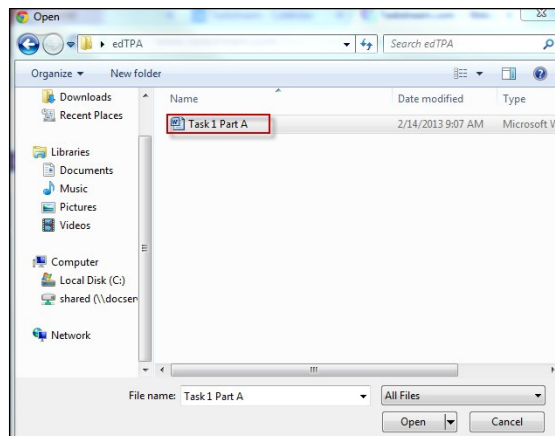
2. Click **Attachments** or **Videos** (depending on the task) from the bottom of the screen.



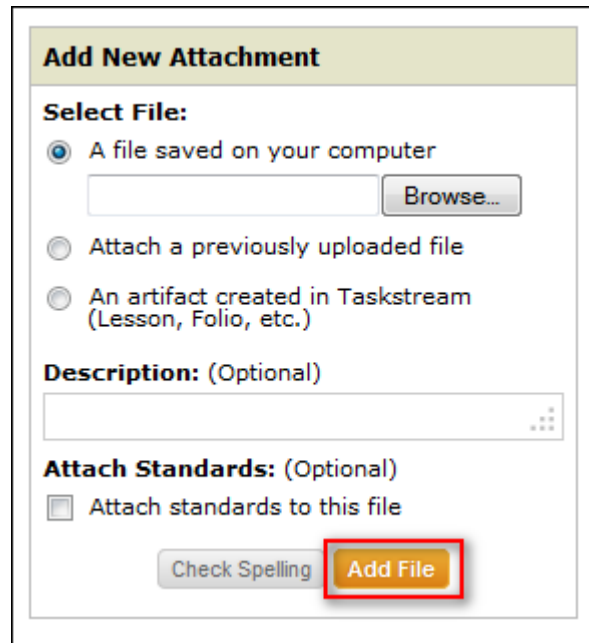
3. Click **Browse** to navigate to and select the file from your computer.

A dialog box titled "Add New Attachment" with a light green header. It contains three radio buttons under "Select File:". The first is selected and has a red box around its "Browse..." button. The other two are "Attach a previously uploaded file" and "An artifact created in Taskstream (Lesson, Folio, etc.)". Below is a "Description: (Optional)" text field and an "Attach Standards: (Optional)" section with a checkbox for "Attach standards to this file". At the bottom are "Check Spelling" and "Add File" buttons.

4. Double-click on the file name to select it from your computer's files.



5. Click **Add File** to upload the file to Taskstream.



The screenshot shows the 'Add New Attachment' form. It has a title bar 'Add New Attachment' in a light green box. Below it, the 'Select File:' section has three radio button options: 'A file saved on your computer' (selected), 'Attach a previously uploaded file', and 'An artifact created in Taskstream (Lesson, Folio, etc.)'. The first option has a text input field and a 'Browse...' button. The 'Description: (Optional)' section has a text area. The 'Attach Standards: (Optional)' section has a checkbox labeled 'Attach standards to this file'. At the bottom, there are two buttons: 'Check Spelling' and 'Add File'. The 'Add File' button is highlighted with a red rectangular box.

6. *Files must be uploaded to Taskstream one at a time. Repeat these steps for each file attachment if you have multiple files to upload for this Task.*

7. When you have uploaded all the files needed for the task, click **Save and Return**.

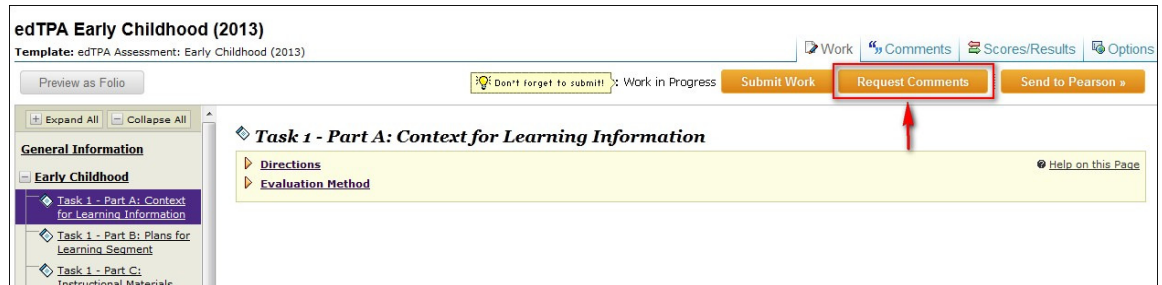


The screenshot shows a single orange button with the text 'Save and Return' in white. The button is highlighted with a black rectangular border.

3. Request Feedback in Taskstream

Depending on your program settings, this option may not be available in your account.

1. Click **Request Comments** from the top of the Work tab.



2. Select the areas you want your reviewer to see. Then click **Continue**.

 This screenshot shows the 'Request Feedback/Share with Reviewer' dialog box. At the top, there is a title bar and a 'Directions' section: 'Directions: Select the area(s) on which you would like feedback. In the next step you will select from whom to request feedback. You may request feedback from people assigned to you as "reviewers" by your instructor or program manager.' Below the directions are 'Cancel' and 'Continue »' buttons. The 'Continue' button is highlighted with a red box. Under the 'Select Areas' section, there is a checkbox for 'Request Feedback on All Areas'. Below that, there is a section for 'General Information' with a checkbox for 'Early Childhood'. Under 'Early Childhood', there is a list of tasks with checkboxes: 'Task 1 - Part A: Context for Learning Information' (checked), 'Task 1 - Part B: Plans for Learning Segment', 'Task 1 - Part C: Instructional Materials', 'Task 1 - Part D: Assessments', 'Task 1 - Part E: Planning Commentary', 'Task 2 - Part A: Video Clips', and 'Task 2 - Part B: Instruction Commentary'. The list of tasks is highlighted with a red box.

3. Select your Reviewer(s) and then click **Continue**.

Select Reviewers

Directions: The reviewers that appear below are the reviewers that have been assigned to review your work.

Cancel Continue »

edTPA Early Childhood (2013) ☐ Select All

☐ Dr. Anderson ☒ Dr. Corbett ☐ Dr. Jones

☐ Dr. Roberts

Cancel Continue »

4. The following screen will confirm that you have successfully given your Reviewer access to your work.

Feedback Requested Successfully

Close Window

You have successfully requested feedback from **Dr. Corbett**.

Now that you have requested feedback, you may wish to add your own comments for reviewers to read. To do so, close this window, enter your comment and click 'Submit'.

General Comment Area

- OR -

Specific Comment Areas

My Title

Page One

Subpage A

Click 'General Comment Area' and **Add Comment** to add general comments.


Click a folio area and **Add Comment** to add comments about a specific folio area.

4. Transfer Your Portfolio to the Pearson ePortfolio System


1. Make sure to complete each Task before you transfer your portfolio to Pearson for official scoring. After you finish the last Task, click **Send to Pearson** in the upper-right hand corner of the work area to transfer your portfolio.



2. If any of your Tasks contain too few, too many, or the wrong type of file, a validation error screen will appear. You will need to return to the work area and correct the errors before you can transfer your portfolio to Pearson. For more information about edTPA file uploading guidelines, please refer to the File Attachments area of a task's Directions (see **Pages 6-8** for details).



The following error(s) have been detected


Number of validation errors: 3

TASK3PARTA_V2: 5.doc either does not have an extension OR does not have a valid extension. Please do not attempt to rename the current filename to fix the extension issue. Instead, please delete your current file and reattach one with a valid file extension.
TASK3PARTA_V2: Assessment.docx either does not have an extension OR does not have a valid extension. Please do not attempt to rename the current filename to fix the extension issue. Instead, please delete your current file and reattach one with a valid file extension.
TASK3PARTB_V2: TASK3PARTB_V2 does not contain the minimum number of files expected.
TASK1PARTA_V2: TASK1PARTA_V2 does not contain the minimum number of files expected.

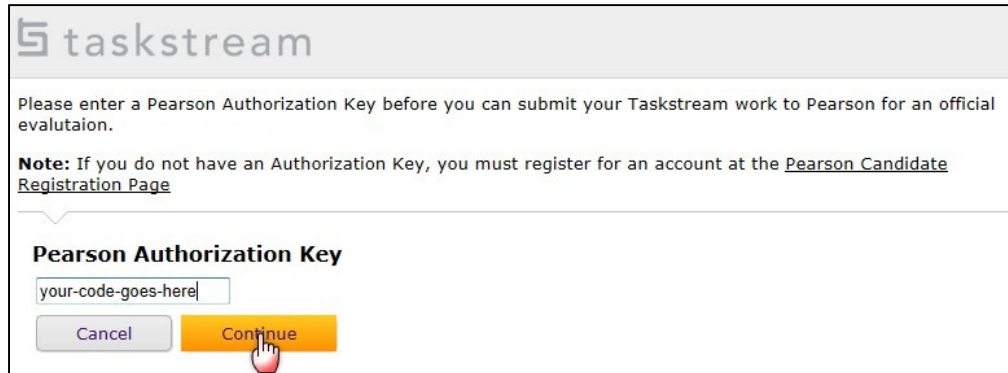
Please correct the error(s) and try again.

If you have submitted work for a Taskstream evaluation, either cancel your submission or contact your evaluator and have them send the work back to you, so you can fix the error(s).

For more information please contact Mentoring Services at 800.311.5656 or email help@taskstream.com.

If you need to correct any errors and your work is locked from editing, you can either cancel your submission to your university in Taskstream or contact your evaluator and have them send the work back to you for revision.

3. Once your work passes the validation process, type in your Pearson Authorization Key and click **Continue**.



If you have not yet obtained your Pearson Authorization Key, please access the web link below to receive your code.

<https://edtpa.eportfolio.pearson.com/eportfolio/view/authentication/espLogin.seam>

4. Before the work is sent to Pearson, you will need to check the box to accept the Taskstream submission agreement.
5. Click **Yes – Send to Pearson**.

Before you can transfer a copy of your edTPA assessment from Taskstream to Pearson, you must accept this agreement.

By pressing the, “Yes – Transfer to Pearson,” button, I acknowledge that I understand that my edTPA assessment, including all of the assessment artifacts, is being transferred to Pearson and, once transferred, the copy of this edTPA assessment is no longer under the control of Taskstream. Responsibility for the security and integrity of the transferred copy of this assessment rests solely with Pearson.

Any questions regarding the transferred copy of the edTPA assessment or scoring of the edTPA assessment should be directed to Pearson via the E-mail communication form at the following web address:

<http://www.edtpa.com/Contacts.aspx>

You can also contact Pearson by phone:

(413) 256-2889
(866) 565-4872
Available 9:00 a.m.–6:00 p.m. Eastern time, Monday–Friday, excluding July 4

Do you accept the terms above? ☐ I accept

After requesting that Taskstream send your work to Pearson for scoring, it will take up to 48 hours for this transfer to be completed if there are no issues with the file that has been uploaded and transferred. If you or the Pearson system identifies issues with the transferred files, you will need to contact Taskstream, reupload your file into Taskstream and retransfer the files to Pearson. **Please be sure to allow for up to 48 hours after making your corrections for the portfolio to be transferred and up to 5 days to complete the entire process which includes the transfer to Pearson and the review, labeling, and submission of the portfolio within the Pearson system. Please refer to the [Pearson edTPA website](#) for more information about the transfer and submission processes.**

6. You are able to monitor the progress of the transfer by going to the **Scores/Results** tab and clicking on **History/Comments**.

History/Comments for Elementary Education		
Date	Action	Comments
01/07/2013 10:21 am (EST)	User Agreement Accepted	Transfer Request ID: 2058
01/07/2013 10:21 am (EST)	Request Queued	Transfer Request ID: 2058
01/07/2013 10:22 am (EST)	Transfer Request Initiated To Pearson	Transfer Request ID: 2058
01/07/2013 10:27 am (EST)	Transfer Request to Pearson Pending	Transfer Request ID: 2058
01/07/2013 10:27 am (EST)	Portfolio Sent to Pearson	Transfer Request ID: 2058
01/07/2013 10:32 am (EST)	Transfer Request to Pearson Pending	Transfer Request ID: 2058
01/07/2013 10:42 am (EST)	Portfolio Transferred to Pearson Successfully	Your TaskStream portfolio is successfully transferred and can now be accessed at Pearson.

7. Once the history shows the message, “Your Taskstream portfolio is successfully transferred and can now be accessed at Pearson,” **you must log in to the Pearson ePortfolio system** to review and submit your edTPA portfolio assessment for official scoring.:

<https://www.edtpa.com/App/AutoPost.aspx?partner=ESp&action=Home>.

You must now log in to the Pearson ePortfolio System and follow the submission instructions in order to have your portfolio scored by Pearson.

5. Review and Submit Your Portfolio to Pearson Using the Pearson ePortfolio System

In order to have your portfolio officially scored by Pearson, ***you must review and submit your portfolio using the Pearson ePortfolio System.***

A video tutorial called “[Submitting your assessment with the Pearson ePortfolio system](#)” on the [Pearson edTPA site](#) has been created to assist you with this process.

If you have any questions about this process, please contact [Pearson edTPA Customer Support](#).

1. Once the transfer successfully completes, [log into the Pearson ePortfolio system](#). You must now review the files that have been transferred for each Task and Part in the edTPA assessment.
2. For each Part in each Task, click **View**.



3. Review each file that has been transferred by clicking on the file icon in the Pearson ePortfolio System.

Refer to the [edTPA FAQ on the Pearson edTPA site](#) if you have trouble reviewing or previewing your files.

4. Click on **Add Label** to label each file as required (e.g., Lesson 1 Clip 1, Student 1).

For more information about labeling, please review the information for “Candidates using an integrated edTPA platform provider system” in the [“Using the Pearson ePortfolio system—candidates”](#) document on the [Pearson edTPA site](#).

Elementary Mathematics Portfolio
Task 3: Assessing Student Learning

Part A: Student Work Samples ☐ Ready to Submit

✖ Please fix file problems shown below.

1. Preview files.
View every file to verify processing was successful and it adheres to the Professional Responsibilities in the handbook.
2. Indicate completion.
Check “Ready to Submit” when you have completed your work for this part.

ELEM_MATH_Student_Work_Samples...
Labels Missing Add Label
03/04/2013 07:01 AM PST | Label Required

ELEM_MATH_Student_Work_Samples...
Labels Missing Add Label
03/04/2013 07:02 AM PST | Label Required

ELEM_MATH_Student_Work_Samples...
Labels Missing Add Label
03/04/2013 07:02 AM PST | Label Required

5. After confirming that each of your files has been properly transferred and labeled, check **Ready to Submit**.

Elementary Mathematics Portfolio
Task 3: Assessing Student Learning

Part A: Student Work Samples ☒ Ready to Submit

1. Preview files.
View every file to verify processing was successful and it adheres to the Professional Responsibilities in the handbook.
2. Indicate completion.
Check “Ready to Submit” when you have completed your work for this part.

ELEM_MATH_Student_Work_Samples...
Student 1
03/04/2013 07:01 AM PST | Ready

ELEM_MATH_Student_Work_Samples...
Student 2
03/04/2013 07:02 AM PST | Ready

ELEM_MATH_Student_Work_Samples...
Student 3
03/04/2013 07:02 AM PST | Ready

6. The Status column and graphs will indicate when everything has a status of **Ready to Submit**.

Portfolio Summary

3 of 3 Tasks Ready to Submit

Task 1: Planning for Instruction and Assessment **Show Instructions** 5 of 5 Parts Ready to Submit

PARTS	STATUS	FILES
Part A: Context for Learning Information	Ready to Submit	ELEM_MATH_Context_for_Learning_Information_1.pdf
Part B: Lesson Plans for Learning Segment	Ready to Submit	ELEM_MATH_Lesson_Plans_for_Learning_Segment_1.pdf
Part C: Instructional Materials	Ready to Submit	ELEM_MATH_Instructional_Materials_1.pdf
Part D: Assessments	Ready to Submit	ELEM_MATH_Assessments_1.pdf
Part E: Planning Commentary	Ready to Submit	ELEM_MATH_Planning_Commentary_1.pdf

Task 2: Instructing and Engaging Students in Learning **Show Instructions** 2 of 2 Parts Ready to Submit

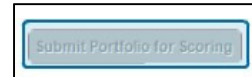
PARTS	STATUS	FILES
Part A: Video Clip(s)	Ready to Submit	<Multiple files>
Part B: Instruction Commentary	Ready to Submit	ELEM_MATH_Instruction_Commentary_1.pdf

Task 3: Assessing Student Learning **Show Instructions** 4 of 4 Parts Ready to Submit

PARTS	STATUS	FILES
Part A: Student Work Samples	Ready to Submit	<Multiple files>
Part B: Evidence of Feedback	Ready to Submit	
Part C: Assessment Commentary	Ready to Submit	ELEM_MATH_Assessment_Commentary_1.pdf
Part D: Evaluation Criteria	Ready to Submit	ELEM_MATH_Evaluation_Criteria_1.pdf

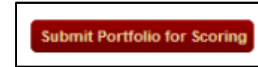
7. If everything has NOT been marked Ready to Submit, the **Submit Portfolio for Scoring** button will be grayed out.

Please repeat steps 2 through 6 for each of your files that do not have a status of **Ready to Submit**.



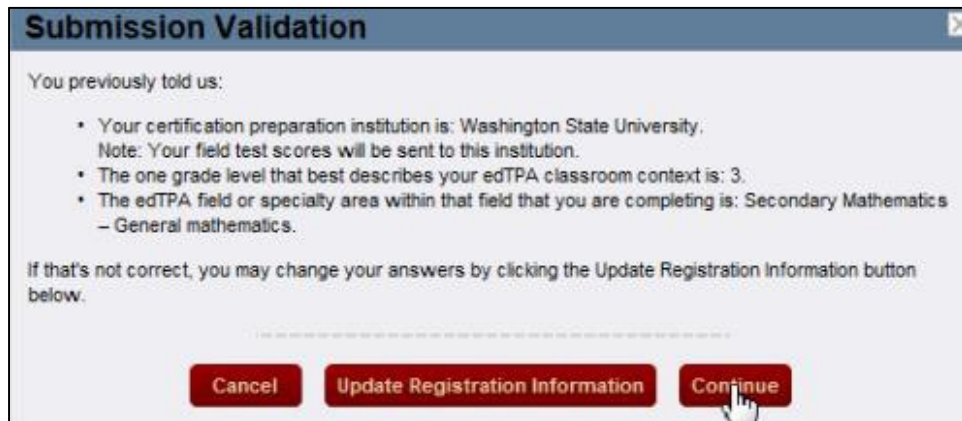
8. When everything is **Ready to Submit**, the **Submit Portfolio for Scoring** button will be available.

Click this button when you are ready to submit your portfolio to Pearson for official scoring.



9. The first of three validation and agreement screens will pop up.

Review your registration information in the Submission Validation screen.



Click **Continue** to confirm that your registration information is correct.

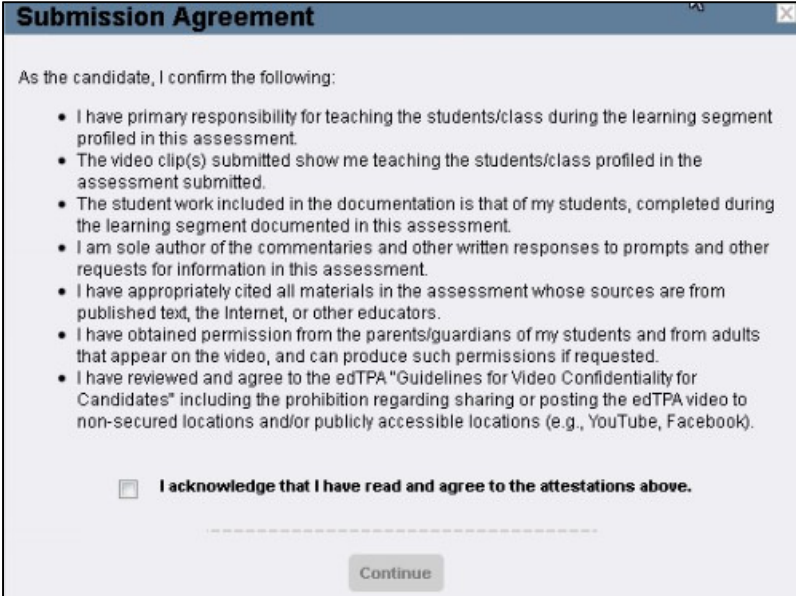
Click **Update Registration Information** if you need to change the information.

Click **Cancel** to cancel out of the submission process.

10. Read the Submission Agreement.

Check the box to acknowledge the agreement.

Click **Continue**.



Submission Agreement

As the candidate, I confirm the following:

- I have primary responsibility for teaching the students/class during the learning segment profiled in this assessment.
- The video clip(s) submitted show me teaching the students/class profiled in the assessment submitted.
- The student work included in the documentation is that of my students, completed during the learning segment documented in this assessment.
- I am sole author of the commentaries and other written responses to prompts and other requests for information in this assessment.
- I have appropriately cited all materials in the assessment whose sources are from published text, the Internet, or other educators.
- I have obtained permission from the parents/guardians of my students and from adults that appear on the video, and can produce such permissions if requested.
- I have reviewed and agree to the edTPA "Guidelines for Video Confidentiality for Candidates" including the prohibition regarding sharing or posting the edTPA video to non-secured locations and/or publicly accessible locations (e.g., YouTube, Facebook).

☐ I acknowledge that I have read and agree to the attestations above.

Continue

11. Review the Final Submission Agreement.

Check the box to indicate that you understand the agreement.

Click **Submit**.

NOTE: If you click **Submit** in this box, you will not be able to cancel out of the submission process. Your portfolio will be officially submitted to Pearson for scoring.



Final Submission Agreement

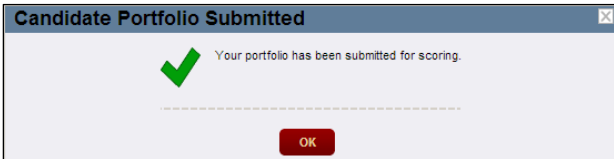
Once you submit your portfolio to Pearson, you will no longer be able to view or edit it. If you have participated in the formative feedback process with faculty reviewers, your faculty reviewers will no longer be able to send feedback through the Message Center.

If you have not already completed a final review of your materials, in particular the uploaded version of your files, please close this window and do so before submitting.


☐ I understand that by submitting my portfolio to Pearson, my submission is final and I will no longer have access to my files through the Pearson ePortfolio system for any edits or reviews.

Submit

12. Finally, click **OK** to close the dialog box.



Candidate Portfolio Submitted

 Your portfolio has been submitted for scoring.

OK

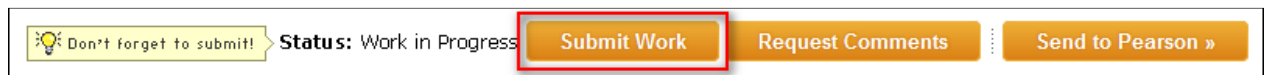
13. You will also receive a confirmation via email when your portfolio has been submitted to Pearson for official scoring.

6. Submit Your Portfolio to Your University for Evaluation Using Taskstream

Note: Please do not submit your edTPA portfolio for evaluation at your university until after you have submitted it to Pearson.

See instructions below for details.

1. Make sure to complete each task before you submit your portfolio. After you finish the last task, click **Submit Work** in the upper-right hand corner of the work area.



2. Follow the instructions on the screen to submit your assignment.
3. If you wish, you can click the **Print this Confirmation** button to print a record of the date and time of your portfolio submission to your University.

This does not confirm your portfolio submission to Pearson for official scoring.