

Appendix B

How to Access Clinical Compliance Document Tracker in TaskStream

TaskStream Clinical Compliance Document Tracker

First, log into TaskStream.

<http://www.taskstream.com>

Use your SMC email address as your login. If you don't remember your password, do a password reset.

If you have difficulties at any point, please call the **TaskStream help desk at 800-311-5656**.

Second, click on the **Clinical Compliance** link on the right side of the screen.

The screenshot displays the TaskStream user interface. At the top, there is a navigation bar with the TaskStream logo and various menu items: Folios & Web Pages, Lessons, Units & Rubrics, Standards, Communications, Resources, TS Coordinator, System Admin, and Analytics. Below the navigation bar, there are tabs for 'Manage a program' (Author, Reviewer, Evaluator, Evaluation Manager) and a 'Customize Display' button. The main content area is divided into several sections: 'All Items' with 'RECONCILIATION REQUIRED' and 'AWAITING RELEASE' buttons; 'DRF PROGRAMS' (Directed Response Folios) with a list of assignments; 'PACT PROGRAMS' (Performance Assessment for California Teachers) with a list of PACT assignments; and 'My Links' on the right side. The 'My Links' section includes 'Messages' and 'Announcements' (both with 'new items' indicators), 'Folio & Web Pages' with various tools like 'DRF Template Builder', 'DRF Programs', 'DRF Reports', 'Form & Survey Builder', 'Launch & Manage Surveys', and 'Survey Reports'. At the bottom of the 'My Links' section, there is an 'Additional Links' section where the 'Clinical Compliance' link is highlighted with a red circle and a red arrow pointing to it.

This is the Clinical Compliance area.

More details will be described below.

Section 1: That area would show up for you if you submitted a document and it did not fulfill the requirement.

Section 2: Requirement name -- The requirements for the teaching credentials.

Section 3: Status -- Not submitted, In Compliance, Submitted, etc.

Section 4: Category -- doesn't apply for us. It will always say "Other".

Section 5: Expiration Date -- when your CSET, CPR or TB test expires

Section 6: Comments -- comments will be entered by a SMC person who reviews your documents.

Section 7: Upload -- Where you upload your documents for review.

taskstream SMCC Manager My Account Logout Go to AMS Help

Folio & Web Pages Lessons, Units & Rubrics Standards Communications Resources TS Coordinator System Admin Analytics

Clinical Compliance

Documentation Required to Maintain Clinical Compliance 7 [Upload](#)

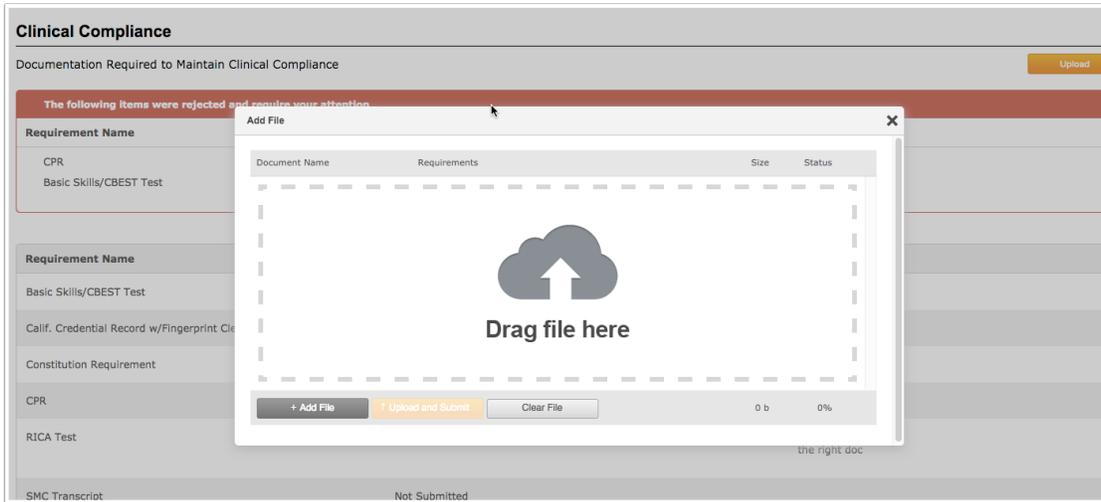
1 The following items were rejected and require your attention

Requirement Name	Evaluation Date	Comments
CPR	02/09/2015	not the right doc
Basic Skills/CBEST Test	12/05/2014	This isn't what you're supposed to do.

2 Requirement Name	3 Status	4 Category	5 Expiration Date	6 Comments
Basic Skills/CBEST Test	Not Submitted			
Calif. Credential Record w/Fingerprint Clearance	Not Submitted			
Constitution Requirement	Not Submitted			
CPR	Not Submitted			
RICA Test	In Compliance	Other	Does Not Expire	02/09/2015 the right doc
SMC Transcript	Not Submitted			

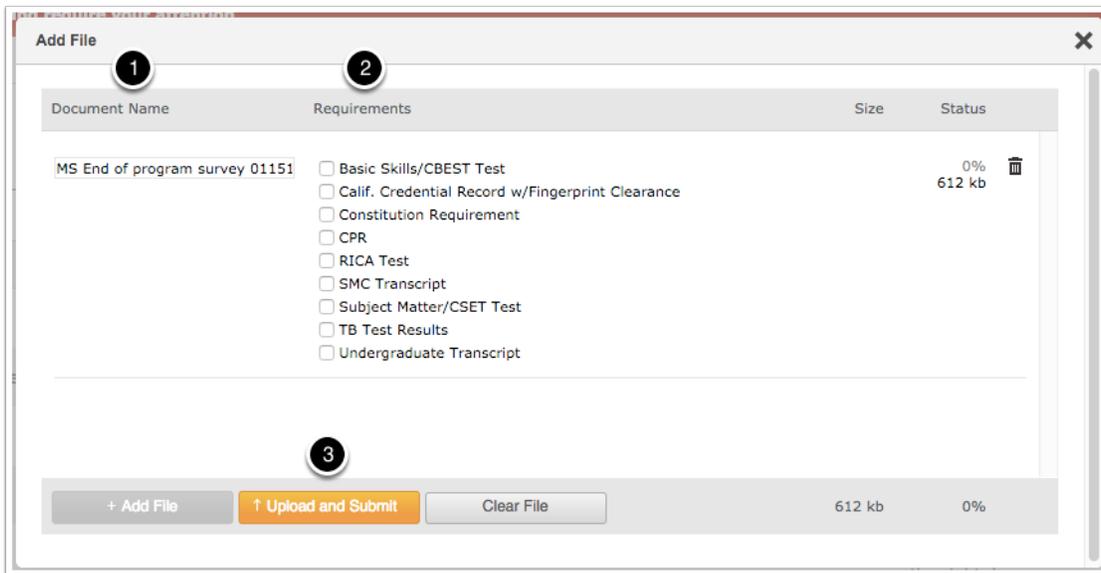
Upload

When you click on Upload, this window pops up. Simply drag and drop an electronic copy of your document to this window,



Upload Part 2

After you drag and drop your file, you'll see this screen. Notice the name of the file is on the left, under Document Name. You then need to fill out what kind of requirement the document is being submitted to fulfill. Then, click on "Upload and Submit". You can only add one file at a time, so if you click on "+ Add File" it will ignore the previous file you attached and will look for a new file.



Upload Part 3

Notice the green area (1). That tells me that my file has been successfully uploaded. Section 2 is the requirement I chose and in Section 3 I can now see that it is pending evaluation. That means that my Program Director, program assistant or placement coordinator will review the document and determine

if it is the right document, it is current, it shows all of the information that is required, etc. You will also get an email telling you that this document has been submitted and is under review.

MS End of program survey 011515.pdf has been successfully uploaded

1 The following items were rejected and require your attention

Requirement Name	Evaluation Date	Comments
CPR	02/09/2015	not the right doc

Requirement Name	Status	Category	Expiration Date	Comments
Basic Skills/CBEST Test	Pending Evaluation			
Calif. Credential Record w/Fingerprint Clearance	Not Submitted			

Document Accepted!

Woo hoo! My CBEST scores were accepted! How do I know this? You'll get an email when any document is either accepted or rejected, and it will include our comments. And in my Clinical Compliance area, I can see (1) that my document is In Compliance (YAY!) and (2) that the comments indicate that it fulfills the requirement. I now know that this requirement is taken care of and since there is no expiration date (3) that I don't have to worry about it again while I am at SMC. Hooray!

Clinical Compliance

Documentation Required to Maintain Clinical Compliance Upload

The following items were rejected and require your attention

Requirement Name	Evaluation Date	Comments
CPR	02/09/2015	not the right doc

Requirement Name	Status	Category	Expiration Date	Comments
Basic Skills/CBEST Test	1 In Compliance	Other	3 Does Not Expire	2 02/18/2015 Sample CBEST results fulfill the requirement
Calif. Credential Record w/Fingerprint Clearance	Not Submitted			

Sample email when your document is evaluated

Here's the sample email that you'll get when your document is accepted (or rejected).

Notification of Clinical Compliance Evaluation Completed Inbox x  

 **notification@taskstream.com** 11:19 AM (13 minutes ago)   

to me 

This is an automated notification that a Clinical Compliance evaluation has been completed with comments for the following requirement(s):

Basic Skills/CBEST Test
Comment: In Compliance - Sample CBEST results fulfill the requirement

To view your results, log into Taskstream and go to Clinical Compliance.

This is an automated email notification, please do not reply

About this Email

You've received this message because you are a Taskstream subscriber.

Taskstream helps ensure that today's learners have the knowledge and skills they need to succeed.  provide the highest quality cloud-based software and supporting services to manage assessment and accountability processes, demonstrate learning achievement, and foster continuous improvement throughout the education network. To learn more, please visit us at www.taskstream.com.

Taskstream, 71 West 23rd Street, New York, NY, 10010, USA

But what if my document wasn't accepted?

Sometimes you may have a document that doesn't have all of the information we need, or it isn't a clear copy, or the requirement is about to expire or it'll expire before we recommend you for your credential, or something else like this. If this is the case, the reviewer will reject the requirement and you'll get an email and this (1) notification will appear at the top of your Clinical Compliance area. It will show what wasn't accepted, when it was rejected, and a comment as to why it wasn't accepted. (We promise to have more helpful comments than this sample one. Here we will indicate something like, "test expires before the end of the year", or "copy not legible" or "all CSET tests not showing on report", etc.

Determining compliance isn't a value judgment, whether you passed the CSET with high enough scores or something like that. It is about making sure the documents are right. It's a means for us to track and evaluate your documents, not your abilities or performance.

1 The following items were rejected and require your attention		
Requirement Name	Evaluation Date	Comments
CPR	02/09/2015	not the right doc

That's all there is to the Clinical Compliance area!

If you have questions about anything in your file, please be sure to ask your program assistant, placement coordinator or Program Director. If you need help after work hours on on the weekend, please feel free to call TaskStream's help desk, 800-311-5656.