

The Portfolio Page: A How-To Guide

The **Portfolio** page pulls everything you have recorded across Chalk and Chart (curriculum, grades, reading, instructional time, and calendar) into one tidy report you can view on screen, print, save as a PDF, download as a slideshow, or email to an outside evaluator.

This guide walks through every function on the page.

Student

From

To

All students ▾

07/27/2026



08/03/2026



This week

This month

This quarter

Calendar year

School year

Include: ☒ Curriculum ☒ Grades ☒ Reading Log ☒ Instructional Time ☒ Calendar ☐ Gallery Photos

☐ Standardized Test Results

☐ Volunteer Time

Scholar feature

☐ Email Evaluator

Scholar feature

Print / Save PDF

Download slideshow (PPTX)

Demo Family Portfolio

All students · 2026-07-27 to 2026-08-03

Curriculum (2)

DATE	STUDENT	SUBJECT	LESSON	STATUS
2026-08-03	Linus	Math	Fractions: adding unlike denominators	planned
2026-08-03	Ada	Math	Calculus: limits review	Complete

Grades (6)

DATE	STUDENT	SUBJECT	TITLE	GRADE
2026-07-29	Ada	History	Constitution quiz	85%
2026-07-30	Ada	Math	Calculus midterm	94%
2026-07-30	Linus	Math	Fractions quiz	3 - Satisfactory
2026-07-31	Ada	English	Beowulf essay	88%
2026-08-01	Ada	Science	Chemistry lab report	91%
2026-08-01	Linus	English	Spelling test	4 - Outstanding

Calendar

Attendance: 0 present, 0 absent.

DATE	STUDENT	ACTIVITY	TIME
2025-09-03 (weekly)	Ada	Piano lesson	15:00-16:00
2026-08-05 (weekly)	Ada	Piano lesson	16:00-16:45

Opening the Portfolio page

From the main menu on the left, click **Portfolio**. On a phone, the Portfolio is not on the bottom bar, so tap **More** (the menu button on the far right of the bottom bar) and then tap **Portfolio**.

The page has two parts: a **controls** card at the top (student, dates, what to include, and the export buttons) and the **report** itself below, which updates as you change the controls.

Before you start: The report only shows records you have already added on the other pages. If a section looks empty, add some lessons, grades, reading, time, or calendar entries first, or widen your date range. When there is nothing to show for the chosen dates, the report reads "No records in this range. Try widening the dates."

A note on Scholar features: Some options on this page are marked with a small **Scholar** pill and are labeled below as "a Scholar-plan feature." The sample **Demo Family** used in these screenshots is on the Scholar plan, so every option is visible.

Part 1: Choosing who and when

The top row of the controls card decides whose records appear and for which dates.

The screenshot shows the controls card with the following elements:

- Student:** A dropdown menu set to "All students".
- From:** A date picker set to "07/27/2026".
- To:** A date picker set to "08/03/2026".
- Time Period:** A row of buttons: "This week", "This month", "This quarter", "Calendar year", and "School year".
- Include:** A row of checkboxes: "Curriculum" (checked), "Grades" (checked), "Reading Log" (checked), "Instructional Time" (checked), "Calendar" (checked), and "Gallery Photos" (unchecked).
- Additional Options:** "Standardized Test Results" (unchecked), "Volunteer Time" (unchecked), "Email Evaluator" (unchecked), and "Gallery Photos" (unchecked). The "Volunteer Time" and "Email Evaluator" options are marked with a red "Scholar feature" pill.
- Buttons:** "Download slideshow (PPTX)" (blue button), "Print / Save PDF" (white button with grey border), and "Email Evaluator" (white button with grey border).

Field	What it does
Student	Choose All students to include the whole family, or pick one child (for example, Ada or Linus) to report on just them.
From	The first date to include.
To	The last date to include.

The report rebuilds automatically whenever you change the student or either date, so there is no "Generate" button to press. While it rebuilds you will briefly see "Compiling report..."

Tip: When the page first opens, it defaults to your **school year**: from your school start date (set on the Family page) through today, so you see populated data right away.

Quick preset buttons

Next to the dates is a row of preset buttons that fill in **From** and **To** for you in one click:

Button	Range it sets
This week	Sunday through Saturday of the current week.
This month	The first to the last day of the current calendar month.
This quarter	The current three-month calendar quarter.
Calendar year	January 1 to December 31 of the current year.
School year	From your school start date (set on the Family page) through today. If you have not set a start date, it uses January 1 of the current year.

Clicking any preset sets the dates and rebuilds the report immediately.

Part 2: Choosing what to include

The **Include** row lets you turn report sections on and off with checkboxes. Every box is ticked by default. Unticking a box removes that section from both the on-screen report and any export.

Student

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To

All students ▾

07/27/2026



08/03/2026



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Checkbox	What it adds to the report
Curriculum	A table summarized by subject (not every lesson, which would run too long): start date, student, subject, and lessons completed (for example, "8 of 20").
Grades	A table averaged by subject: student, subject, the book title(s) used for it, and the average grade for that subject (a percent with a letter, or an average 1-to-4 with its label).
Reading Log	A table of books: student, book, started, finished, and status.
Instructional Time	Hours and days logged, with progress gauges (see Part 4).
Calendar	An attendance summary (present and absent counts) and a table of activities.
Gallery Photos	Your gallery photos, shown as a Gallery (N) section. Available on every plan, they appear in the on-screen report, the Print / Save PDF, and the slideshow.
Standardized Test Results	Available on every plan: tick this to add a Standardized Testing Log table (date, student, test, result, and note) to the report.

Two more options appear in this row on the Scholar plan:

- **Volunteer Time** (a Scholar-plan feature): tick this to add each student's Volunteer Time service log (date, organization, activity, hours, and totals) to the report.
- **Email Evaluator** (a Scholar-plan feature): tick this to open the panel for emailing the report to an outside evaluator. See Part 6.

Part 3: Print or Save as PDF

On the right of the **Include** row is **Print / Save PDF**. This is included on every plan.

1. Set the student, dates, and the sections you want.
2. Click **Print / Save PDF**.
3. Your browser's print dialog opens. Choose your printer to print, or choose **Save as PDF** as the destination to save a copy to your computer.

The printout hides the on-screen controls and leads with a branded masthead: the Chalk and Chart logo above a brand-colored rule, the title "Homeschool Portfolio", a subtitle with the student or

scope and the date range, and a "Printed [date]" stamp. (Your family name stays as the on-screen heading; the printed page uses this branded masthead instead.)

Part 4: The on-screen report

Below the controls, the report shows a heading (your family name plus "Portfolio"), the scope (for example, all students or one child), and the date range. Each section you left ticked appears in order, and each shows a count in its heading (for example, "Curriculum (12)").

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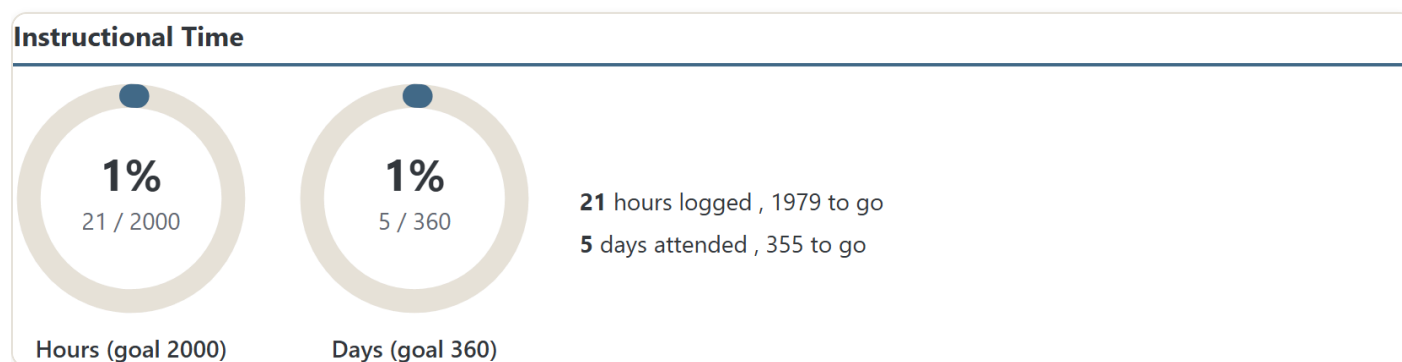
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The sections are:

- **Curriculum:** one row per subject in range, with its start date and how many lessons are complete.
- **Grades:** one row per subject in range, with the average grade and the book title(s) used.
- **Standardized Testing Log:** shown only when the **Standardized Test Results** box is ticked.
- **Reading Log:** books read or in progress during the range.
- **Instructional Time:** hours and days, with progress gauges (below).
- **Calendar:** an attendance line plus a table of activities. Weekly activities are labeled "(weekly)" next to their date.
- **Gallery:** your gallery photos, shown when the **Gallery Photos** box is ticked, with a count in its heading (for example, "Gallery (8)").

The Instructional Time gauges

The Instructional Time section shows two circular progress gauges side by side:



- The **Hours** gauge compares the hours you logged against your **yearly hour goal**.
- The **Days** gauge compares the days attended against your **yearly days goal**.

Each gauge shows a percentage in the center and the running total against the goal beneath it (for example, "84 / 180"). Next to the gauges, a short summary spells it out, such as "84 hours logged, 96 to go" and "42 days attended, 138 to go." If a goal is not set on the Family page, the gauge reads "no goal set" and simply shows what you have logged. When you pick a single student, the gauges use that student's color; for the whole family they use the app's default color.

Tip: Your hour and days goals live on the **Family** page. Update them there and the gauges here follow along.

Part 5: Download slideshow (PPTX)

Download slideshow (PPTX) is a Scholar-plan feature. It builds a PowerPoint-style slideshow of the report that you can present or share.

A blue button with rounded corners and a white border. The text "Download slideshow (PPTX)" is written in white, sans-serif font.

1. Set the student, dates, and sections as usual.
2. Click **Download slideshow (PPTX)**. The button reads "Working..." while the deck is built, then the file (`portfolio.pptx`) downloads to your computer.

Every slide carries the Chalk and Chart logo in the top-right corner. The cover slide leads with the student's name, then a line reading "Grade ____ • School Year ____" (the Grade comes from the student's grade level and the School Year is derived from the report's date range; each shows a blank to hand-write if the value is unavailable), then "Homeschool Portfolio", then the date range.

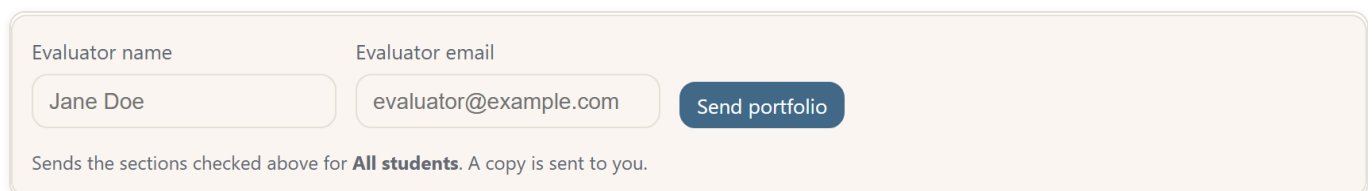
Gallery photos are controlled by the **Gallery Photos** checkbox in the **Include** row (see Part 2): when it is ticked, your photos appear in the slideshow along with the on-screen report and the PDF.

On other plans: If your plan does not include the slideshow, the button is hidden and a note reads: "Text reports and printing are included on every plan. The PowerPoint slideshow with gallery photos is a Scholar feature." Printing and Save as PDF are always available.

Part 6: Email the portfolio to an evaluator

Emailing your portfolio to an outside evaluator is a Scholar-plan feature. Many families have their year reviewed by an evaluator, and this sends them the report directly.

1. In the **Include** row, tick **Email Evaluator**. A small panel appears.

A light beige form with rounded corners. It contains two input fields: "Evaluator name" with the text "Jane Doe" and "Evaluator email" with the text "evaluator@example.com". To the right of these fields is a blue button labeled "Send portfolio". Below the input fields is a line of text: "Sends the sections checked above for **All students**. A copy is sent to you."

Evaluator name

Evaluator email

Jane Doe

evaluator@example.com

Send portfolio

Sends the sections checked above for **All students**. A copy is sent to you.

2. Fill in the panel:

Field	What it does
Evaluator name	The reviewer's name (for example, "Jane Doe").
Evaluator email	The email address the report is sent to (for example, " evaluator@example.com ").

3. Click **Send portfolio**. The button reads "Sending..." while it works.

The email includes exactly the sections you have ticked in the **Include** row, for the same student and date range shown on screen, and a copy is sent to you. The panel notes this beneath the fields: "Sends the sections checked above for [scope]. A copy is sent to you."

Send portfolio stays greyed out until you have entered both a name and an email and the report has at least some data to send. After a successful send, the page confirms with a message such as "Portfolio emailed to evaluator@example.com. A copy was sent to you."

Note: If email delivery is not yet switched on for your account, the report is prepared but not actually sent, and the page tells you so.

Quick reference

I want to...	Do this
Report on one child	Student dropdown → pick the child
Report on everyone	Student dropdown → All students
Set the dates fast	Click a preset: This week , This month , This quarter , Calendar year , or School year
Set exact dates	Fill in From and To
Drop a section	Untick it in the Include row
See time progress	Keep Instructional Time ticked and read the Hours and Days gauges
Print or make a PDF	Print / Save PDF , then choose your printer or Save as PDF
Add test results	Tick Standardized Test Results
Download a slideshow (Scholar)	Click Download slideshow (PPTX)
Include your gallery photos	Tick Gallery Photos in the Include row
Email an evaluator (Scholar)	Tick Email Evaluator → fill in name and email → Send portfolio

Screenshots use a sample "Demo Family" with two students, Ada and Linus, on the Scholar plan.