

Interactive Checklist powered by GuideCX

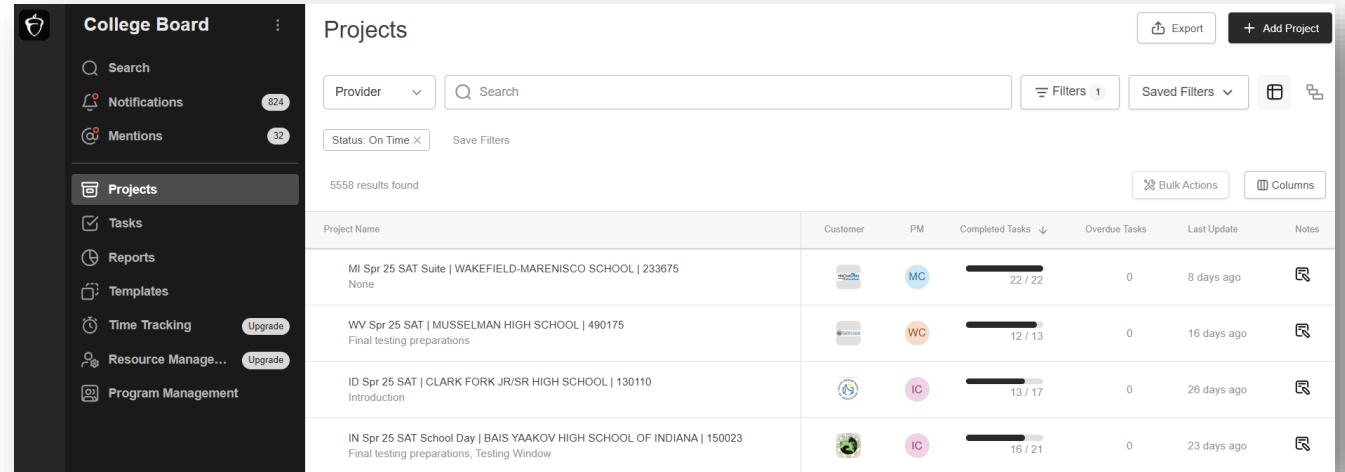
November 2025

Agenda

- ☐ What is it?
- ☐ Who uses it?
- ☐ Emails sent by Guide CX
- ☐ How do I access it?
- ☐ What does test day staff need to do with it?
 - Working with tasks
 - Mark task status
- ☐ Reassigning tasks
- ☐ Change user notifications
- ☐ Common Issues and Questions
 - Forgot Password
 - View As
 - Resend an invitation email
 - Troubleshooting tips

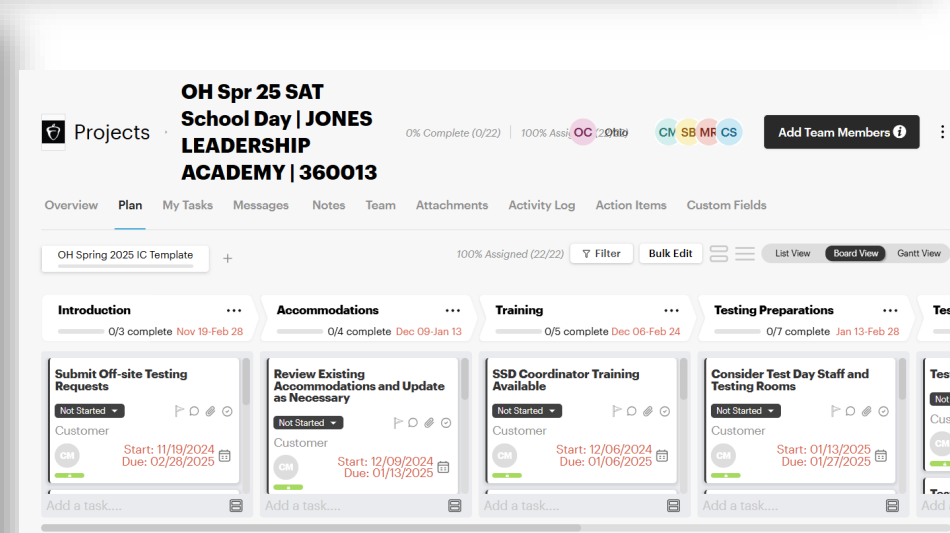
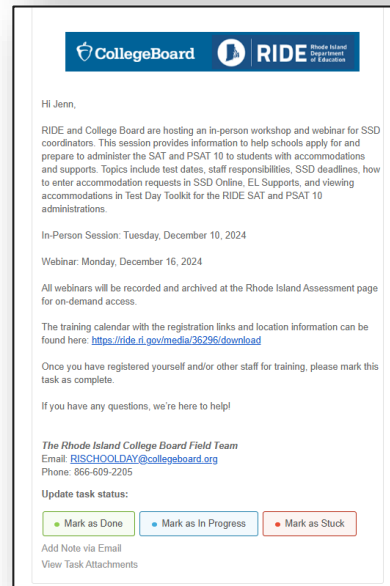
What is it?

- It is a project planning tool that sends emails to primary test coordinators in advance of the due date for key tasks.
- It also contains self-reporting tools within the emails that enable coordinators to inform College Board how they are progressing on tasks.
- If a state administers more than one assessment, and a school has more than one primary test coordinator (such as a different coordinator for SAT versus PSAT 10), then the school may have more than one checklist, as tasks can only be assigned to one person at a time.



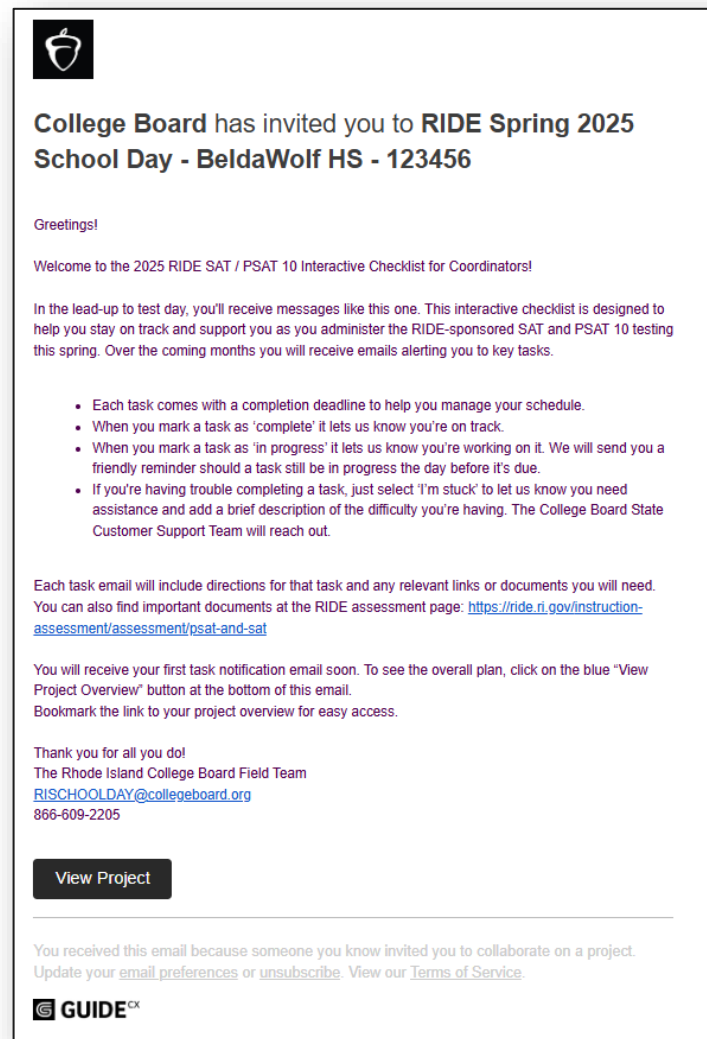
The screenshot shows the College Board Projects dashboard. On the left is a dark sidebar with navigation links: Search, Notifications (824), Mentions (32), Projects (selected), Tasks, Reports, Templates, Time Tracking (Upgrade), Resource Manage... (Upgrade), and Program Management. The main area is titled 'Projects' and includes a search bar, filters (Status: On Time, Save Filters), and a table of 558 results. The table has columns for Project Name, Customer, PM, Completed Tasks, Overdue Tasks, Last Update, and Notes. Four projects are visible:

| Project Name | Customer | PM | Completed Tasks | Overdue Tasks | Last Update | Notes |
|--|----------|----|-----------------|---------------|-------------|--------|
| MI Spr 25 SAT Suite WAKEFIELD-MARENISCO SCHOOL 233675 None | [Icon] | MC | 22 / 22 | 0 | 8 days ago | [Icon] |
| WV Spr 25 SAT MUSSELMAN HIGH SCHOOL 490175 Final testing preparations | [Icon] | WC | 12 / 13 | 0 | 16 days ago | [Icon] |
| ID Spr 25 SAT CLARK FORK JR/SR HIGH SCHOOL 130110 Introduction | [Icon] | IC | 13 / 17 | 0 | 26 days ago | [Icon] |
| IN Spr 25 SAT School Day BAIS YAAKOV HIGH SCHOOL OF INDIANA 150023 Final testing preparations, Testing Window | [Icon] | IC | 16 / 21 | 0 | 23 days ago | [Icon] |



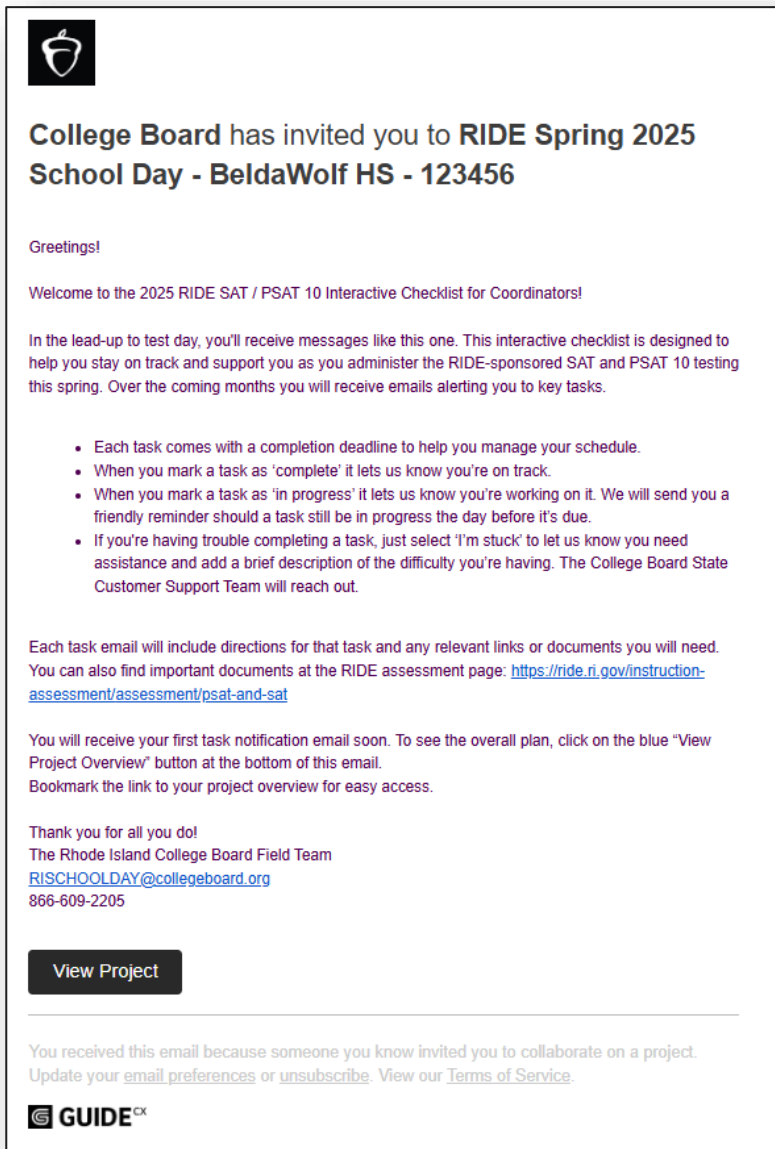
Who uses it?

- All school primary test coordinators are assigned the tasks.
- School primary test coordinators may delegate tasks to other school staff, but only primary test coordinators are assigned.



Launch Email

- Test Coordinators will receive an email from their state's inbox launching the Interactive Checklist in the coming weeks.
- **By default, primary Test Coordinators are assigned all tasks in the project. The Test Coordinator may then reassign tasks to relevant test day staff, if desired.**
- If you did not receive the welcome email, please check your spam/junk folder.
- If you didn't receive the email, and you are listed in SSOR as the primary test coordinator for spring 2026 testing, please contact your state's College Board Customer Support.



Project Overview Email

Each Monday morning all assigned team members receive a **project overview email**.

In this email you will see:

- **Project completion:** Informs you how far along you are with your tasks. This percentage could change if more tasks are added to the plan.
- **Upcoming tasks:** These are active tasks you should be working on, along with their due dates.
- **Overdue tasks:** These are tasks you haven't completed but which were already due, along with their due dates.

If you completed a task, it won't appear on the project overview email. If you are all caught up and on track, you may receive an email that doesn't show any upcoming or overdue tasks.



Your overview for Colorado Spring 2024 SAT and PSAT Testing – Kupper High School

Project Manager: College Board's Colorado Support Team
ColoradoSchoolDaySupport@collegeboard.org

Status: On Time

Complete: 35%

Forecasted End Date: April 26, 2024

Current Tasks with Upcoming Due Dates:

Submit College Board-Approved Accommodations Requests

Jennifer Jones 2/16/2024

Submit EL Time and One-half Support Requests

Jennifer Jones 3/1/2024

Submit State-Allowed Accommodations

Jennifer Jones 3/1/2024

Overdue Tasks:

Review existing accommodation approvals in SSD Online for your school and update as necessary

Jennifer Jones 1/26/2024

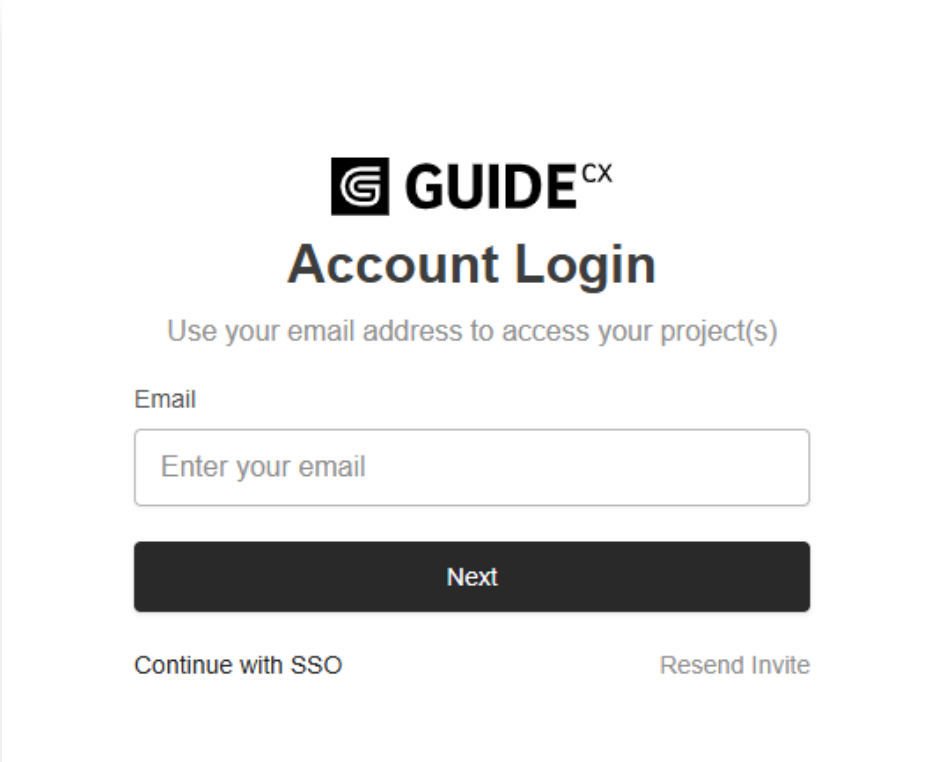
[View Project Overview](#)

You received this email because someone you know invited you to collaborate on a project.
Update your [email preferences](#) or [unsubscribe](#). View our [Terms of Service](#).

GUIDE^{cx}

How do I access it?

- GuideCX created a custom domain for College Board – <https://collegeboard.guidecx.com>
- School Test Coordinators can click 'View Project' in the email to login to GuideCX directly.





The screenshot shows the 'GUIDE^{CX} Account Login' page. At the top is the GuideCX logo. Below it, the text 'Use your email address to access your project(s)' is displayed. There is an 'Email' label above a text input field containing the placeholder 'Enter your email'. Below the input field is a dark 'Next' button. At the bottom of the page, there are two links: 'Continue with SSO' on the left and 'Resend Invite' on the right.

What does Test Day Staff Need to Do?

- We designed this interaction as a low-effort tool to proactively engage with the primary coordinator at a school.
- The biggest thing we ask the coordinator to do is to mark the tasks complete when they receive the emails asking their status, or if they need help, to mark that task as stuck.

Task Email View

- The person assigned the task will receive a custom task notification email with directions and attachments/links for relevant documentation to complete the task. By default, all primary test coordinators will be assigned to all tasks.
- Through this email, the person assigned the task will provide a status update: Done, In Progress, or Stuck. Clicking the stuck button will send an email to the state's College Board Support inbox, opening a support ticket with College Board Customer Service.
- If the person assigned the task hasn't provided a status update for a task, they will receive a task reminder shortly before the task is due.
- **No login is required** to mark tasks complete, in progress, or stuck in a task email.



Hi Jenn,

RIDE and College Board are hosting an in-person workshop and webinar for SSD coordinators. This session provides information to help schools apply for and prepare to administer the SAT and PSAT 10 to students with accommodations and supports. Topics include test dates, staff responsibilities, SSD deadlines, how to enter accommodation requests in SSD Online, EL Supports, and viewing accommodations in Test Day Toolkit for the RIDE SAT and PSAT 10 administrations.

In-Person Session: Tuesday, December 10, 2024

Webinar: Monday, December 16, 2024

All webinars will be recorded and archived at the Rhode Island Assessment page for on-demand access.

The training calendar with the registration links and location information can be found here: <https://ride.ri.gov/media/36296/download>

Once you have registered yourself and/or other staff for training, please mark this task as complete.

If you have any questions, we're here to help!

The Rhode Island College Board Field Team
Email: RISCHOOLDAY@collegeboard.org
Phone: 866-609-2205

Update task status:


● Mark as Done ● Mark as In Progress ● Mark as Stuck

[Add Note via Email](#)
[View Task Attachments](#)

Working with Tasks

● Mark as Done

Task Completed!



Plan for Test Day Staff and Testing Rooms

Great work on completing this task. We'll let your project manager know.


Project Name
RIDE Spring 2025 School Day - BeldaWolf HS - 123456

Description

Once a task is marked as Done, this pop-over will appear. Reminder emails for this task will cease.

● Mark as In Progress

In Progress



Plan for Test Day Staff and Testing Rooms

We'll let your project manager know that you've started working on this task.

Project Name
RIDE Spring 2025 School Day - BeldaWolf HS - 123456

Once a task is marked as In Progress, this pop-over will appear, and reminder emails will continue to be sent until the task is marked complete.

● Mark as Stuck

Provide a quick description to your Project Manager of what is keeping you from moving forward

Description...

Mark Task as Stuck

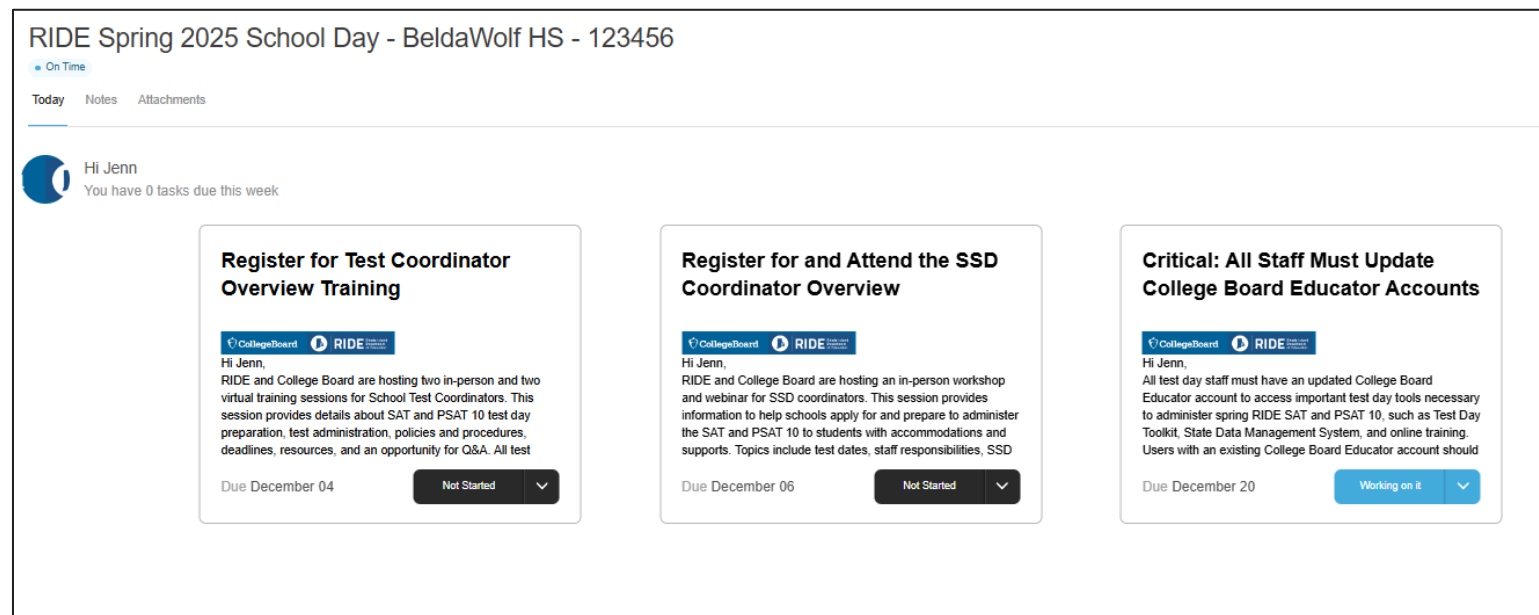
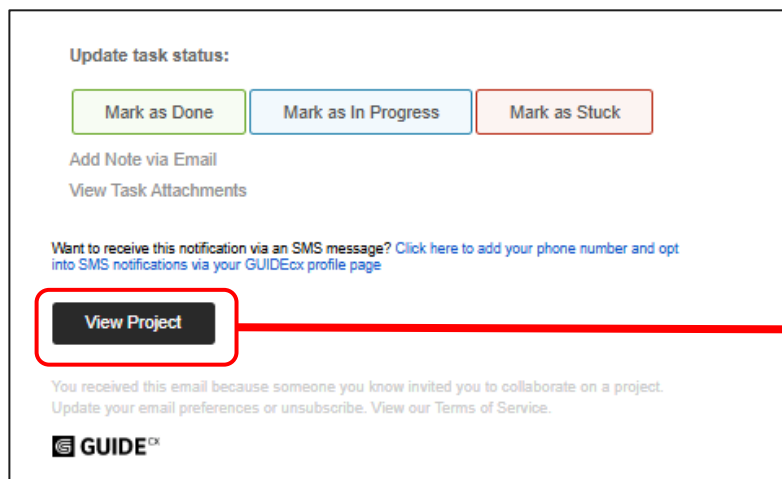
View Project

Once a task is marked as Stuck, this is the screen that appears. Please add your **name, AI Code, and brief description of your issue** to this pop-up and then an email is sent to College Board Customer Service. You will continue to receive reminder emails until this task is marked complete.

Project Plan

- If you click View Project at the bottom of the welcome and task reminder emails, you will see the Project Plan, which is a list of your tasks in chronological order. This is where you can interact with the tasks, such as reassigning them to another member of your test day staff, within the Project Plan.

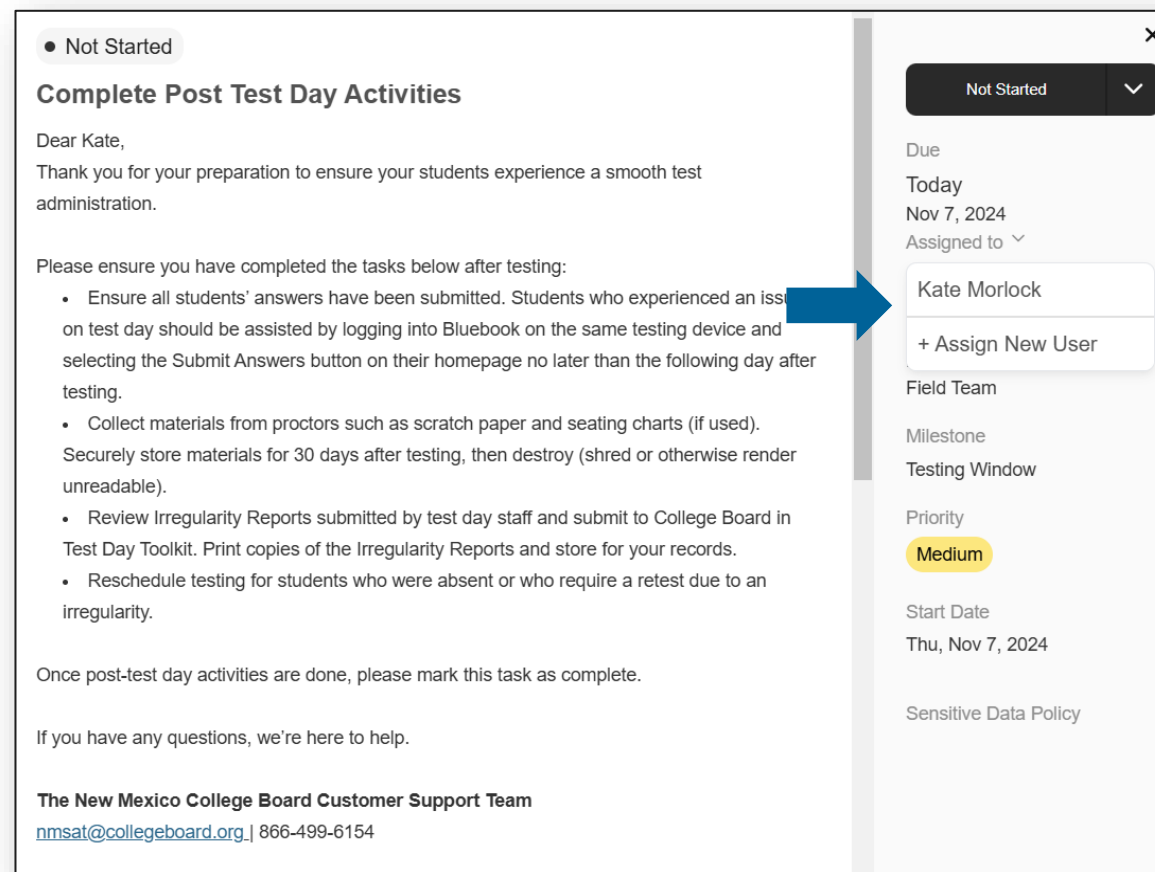
<https://collegeboard.guidecx.com>



Reassigning Tasks

Reassigning Tasks

- The Test Coordinator may assign tasks to any other member of the project team at their school by selecting the task details.
- In the Project Plan, click on the task you want to reassign.
- Click on the right "Assign New User" button to re-assign the task to a new member of the team. This person can be a new member of the project team; by entering their email, they will receive an email welcoming them to the project and the task assignment email.
- Note: The coordinator must be logged in to GuideCX to reassign tasks; this cannot be done from the task email. **Once the task is reassigned, the test coordinator will not be able to see that task in their view.**



• Not Started

Complete Post Test Day Activities

Dear Kate,
Thank you for your preparation to ensure your students experience a smooth test administration.

Please ensure you have completed the tasks below after testing:

- Ensure all students' answers have been submitted. Students who experienced an issue on test day should be assisted by logging into Bluebook on the same testing device and selecting the Submit Answers button on their homepage no later than the following day after testing.
- Collect materials from proctors such as scratch paper and seating charts (if used). Securely store materials for 30 days after testing, then destroy (shred or otherwise render unreadable).
- Review Irregularity Reports submitted by test day staff and submit to College Board in Test Day Toolkit. Print copies of the Irregularity Reports and store for your records.
- Reschedule testing for students who were absent or who require a retest due to an irregularity.

Once post-test day activities are done, please mark this task as complete.

If you have any questions, we're here to help.

The New Mexico College Board Customer Support Team
nmsat@collegeboard.org | 866-499-6154

Not Started

Due Today
Nov 7, 2024

Assigned to Kate Morlock

+ Assign New User

Field Team

Milestone

Testing Window

Priority Medium

Start Date
Thu, Nov 7, 2024

Sensitive Data Policy

Reassigning Tasks, cont.

• Not Started

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nmsat@collegeboard.org | 866-499-6154

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Today
Nov 7, 2024

Assigned to
Kate Morlock

+ Assign New User

Field Team

Milestone
Testing Window

Priority
Medium

Start Date
Thu, Nov 7, 2024

Sensitive Data Policy

Not Started

Due
Today
Nov 7, 2024

Assigned to

Kate Morlock

+ Assign New User

Field Team

Milestone
Testing Window

Tasks can be reassigned before they have started, while they are in progress, or after completion.

+

Add a new user and reassign task

First Name

Last Name

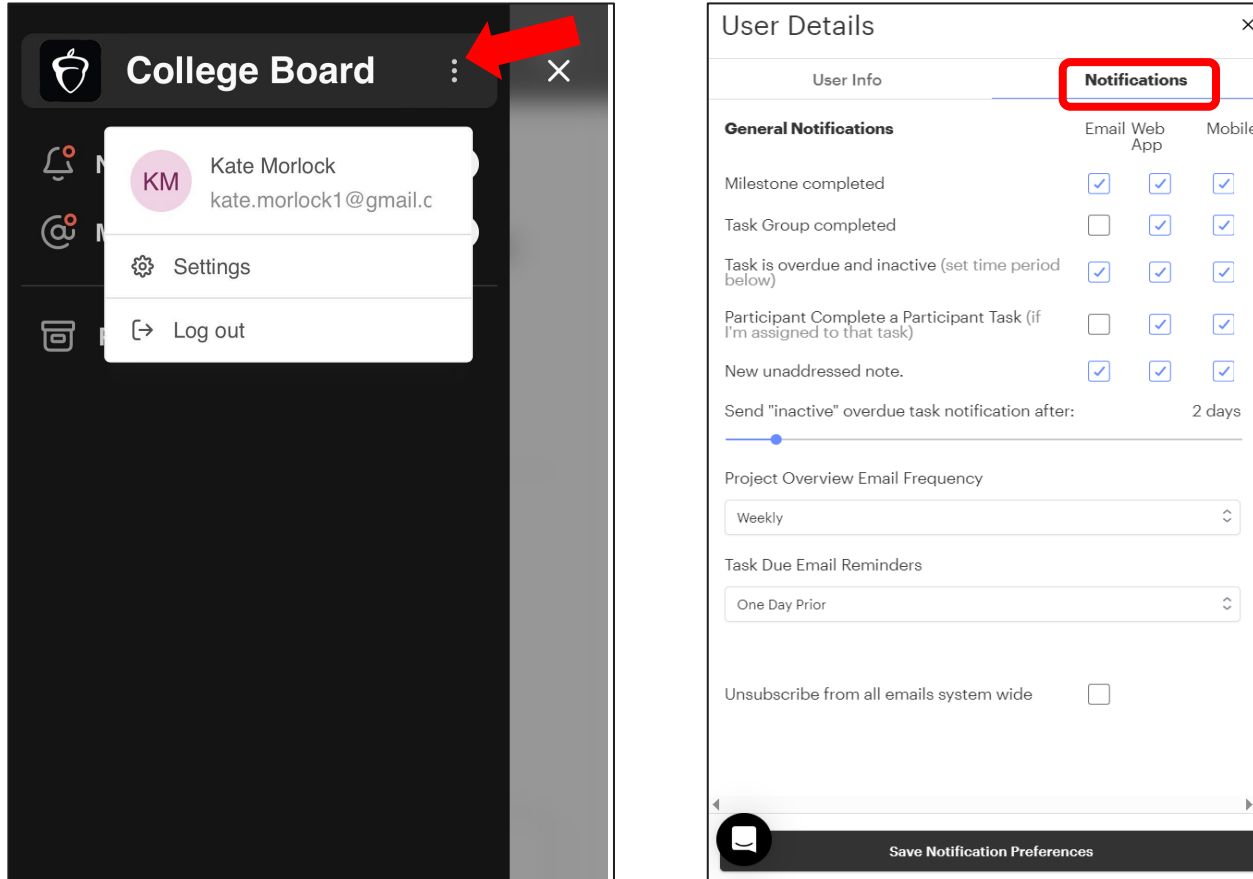
Email

Cancel

Reassign

Setting Notification Preferences

Setting Notification Preferences



Users can adjust their notification settings.

- Upon logging into GuideCX, click the 3 dots menu in the upper right corner of the left hand navigation panel and then click Settings.
- In the Notifications area, you can adjust the settings to meet your preferences.

Common Issues and Questions

And Troubleshooting Tips

Forgot Password?

Visit collegeboard.guidecx.com and click Forgot Password?

The image illustrates the password reset process for GuideCX. It consists of three main parts: a web form, a confirmation message, and an email template.

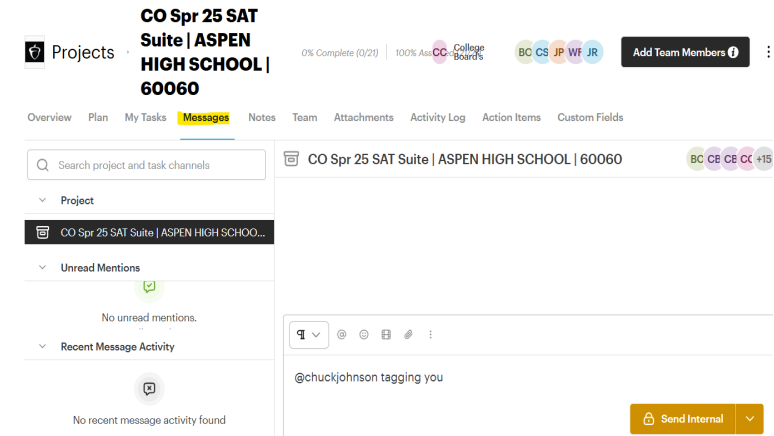
Web Form: The form is titled "GUIDE^{CX} Forgot your password?". It prompts the user to enter their email address and provides a "Reset Password" button. The email field contains "jennbelda@gmail.com".

Confirmation Message: A message box titled "Reset Password" states: "If that email address is in our database, we will send you an email to reset your password".

Email Template: The email is addressed to "Jenn!" and says: "Someone has requested a link to change your password. You can do this through the link below." It includes a "Reset Password" button. A disclaimer at the bottom states: "If you didn't request this, please ignore this email. Your password won't change until you access the link above and create a new one." and "You received this email because someone you know invited you to collaborate on a project. Update your email preferences to choose the types of emails you receive. Unsubscribe from all future emails generated by GuideCX."

Troubleshooting tips

1. I didn't get the welcome email – how do I get it resent?
 - Check your spam/junk folder – sometimes firewalls block these kinds of emails.
 - Contact CB Customer Support to have the email resent.
2. I am not getting any emails from Guide!
 - Confirm these emails are not going to your spam/junk folder.
 - Contact CB Customer Support to have a test email sent.



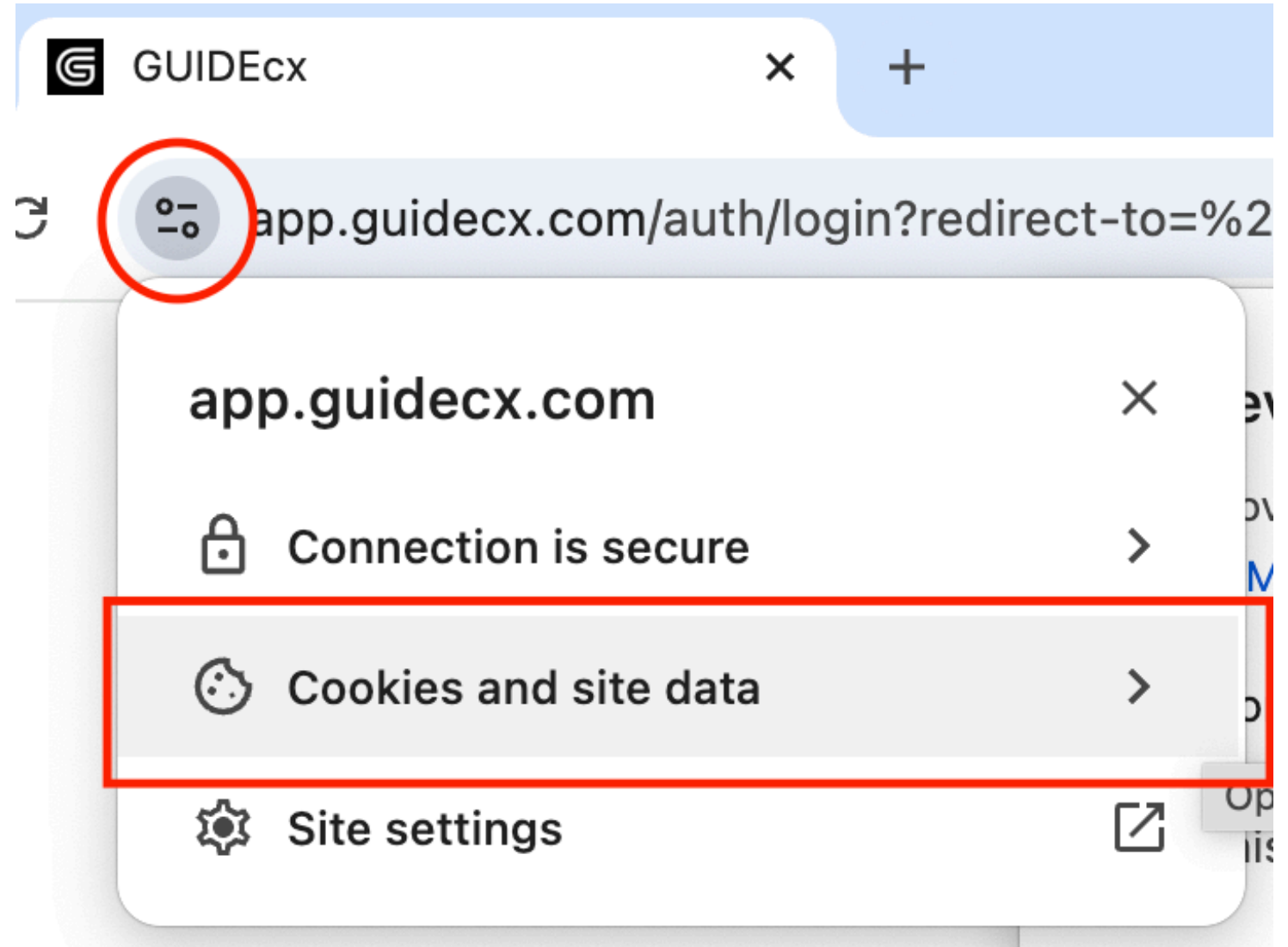
Clear cache and cookies

Clear cache and cookies

How to clear your cache and cookies for GUIDEx specifically:

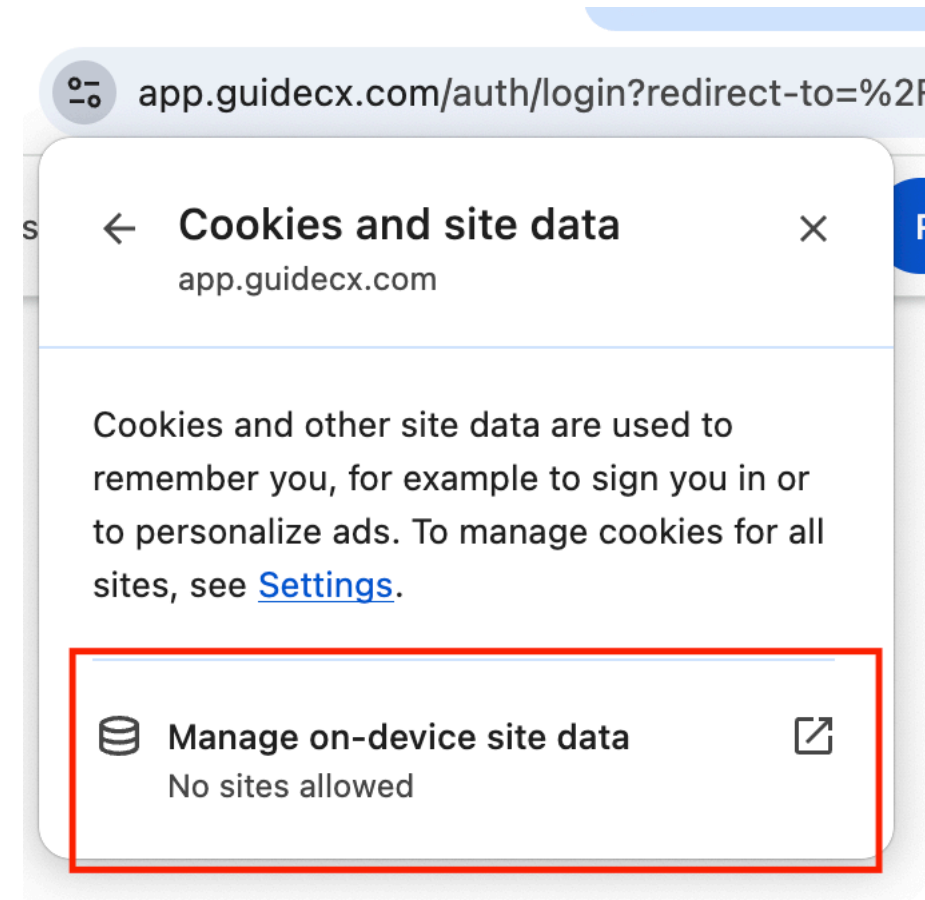
Select the kabob menu on the left of your GUIDEx URL (see screenshot at right)

Select "Cookies and site data"



Clear cache and cookies, cont.

Select "Manage on-device site data" (see screenshot)



Clear cache and cookies, cont.

You will see a pop up appear (see screenshot)
Click all trash cans that appear!
Click Done and Reload your page.

