Interactive Checklist

An Overview

CollegeBoard

Interactive Checklist Overview

Key Points regarding implementation for school-level staff

Specific to you and your school/program's administration:

- ***Primary*** Test Coordinator receives an interactive checklist for ***each*** school/program they serve in that capacity
- Primary Test Coordinators may delegate tasks within their checklist to other coordinators on their team (e.g.,their backup test coordinator, SSD coordinator, tech coordinator, etc.)
- Task notification and weekly project overview emails
  - Sent to the primary Test Coordinator or the individual to whom they assigned the task
  - Only the individual responsible for the task (i.e., primary or their assignee) can mark that task complete
  - The individual responsible for the task can set the frequency for reminder emails

Introduction & Instructions:

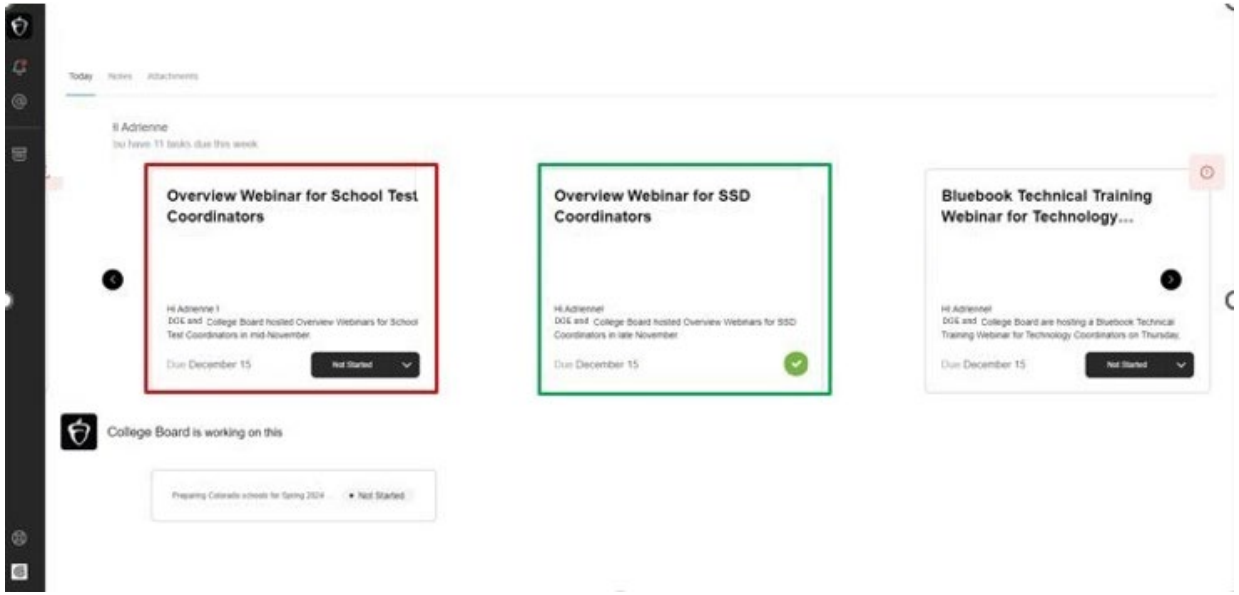
- Every year in Late November/Early December a welcome email and the initial tasks for the Interactive Checklist are launched
- A refresher for those materials is provided in the six slides that follow

Project Plan View

After clicking “View Project”, you will see the **Project Plan** for your role(s).

- Overdue tasks are outlined in **red**.
- Complete tasks are outlined in **green**.
- Open tasks are outlined in **grey**.
- If you can’t start a task yet, you’ll see a ! symbol. They appear for your awareness, but there’s no action to take at that moment.
- You can update task status using the button at the bottom of the task card.

If you want to see more information about a task, click on the task card.

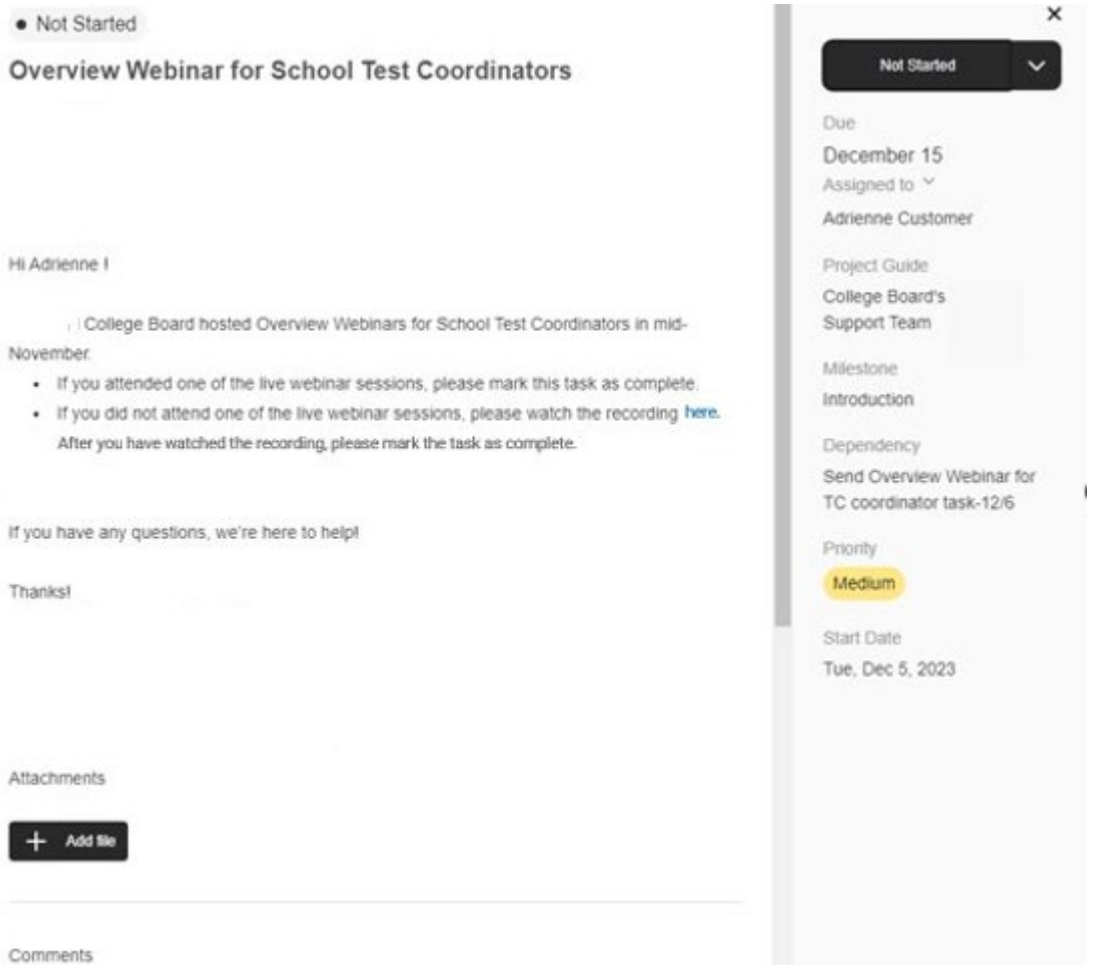


Detailed View of Task Card

If you click on the **task card**, you will see **detailed information** about that task.

This includes:

- **Instructions** for completing the task;
- **Links** that may be needed;
- **Deadline** for task completion;
- **Status button**, to update task status.

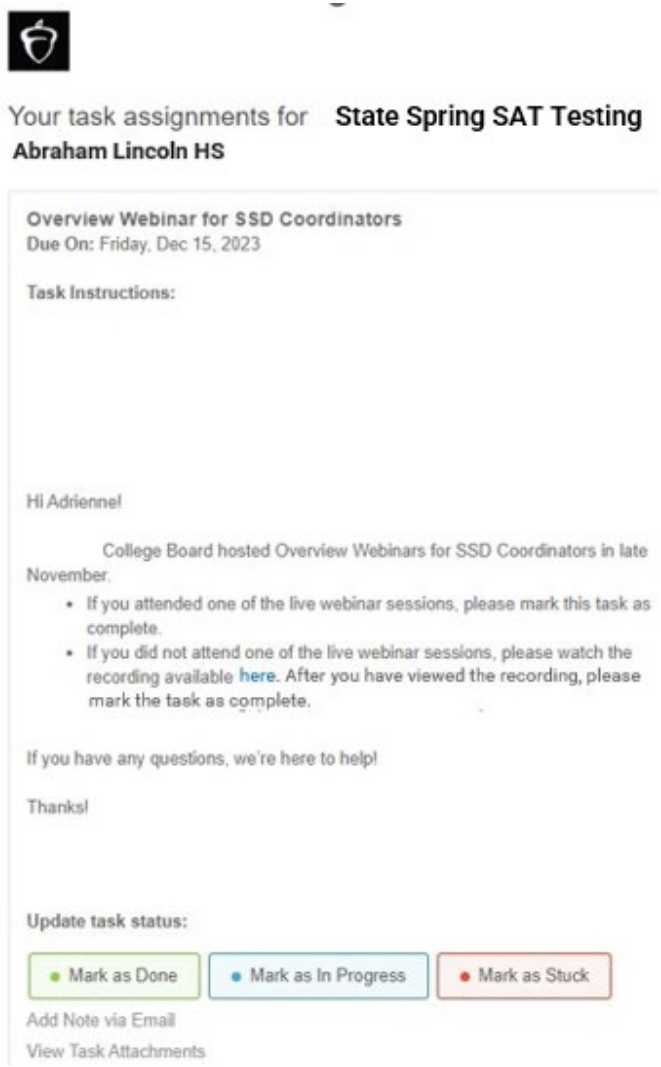


Task Notification Email

You will receive a custom **task notification email** for each task you need to complete. The email includes directions and relevant links.

Through this email, you will provide a status update: done, in progress, or stuck.

- Marking a task as **done** lets us know you're finished with that task.
- Marking a task as **in progress** lets us know you're working on that task.
- Marking a task as **stuck** lets us know you need help.



Your task assignments for **State Spring SAT Testing**
Abraham Lincoln HS

Overview Webinar for SSD Coordinators
Due On: Friday, Dec 15, 2023

Task Instructions:

Hi Adrienne!

College Board hosted Overview Webinars for SSD Coordinators in late November.

- If you attended one of the live webinar sessions, please mark this task as complete.
- If you did not attend one of the live webinar sessions, please watch the recording available here. After you have viewed the recording, please mark the task as complete.

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

Thanks!

Update task status:

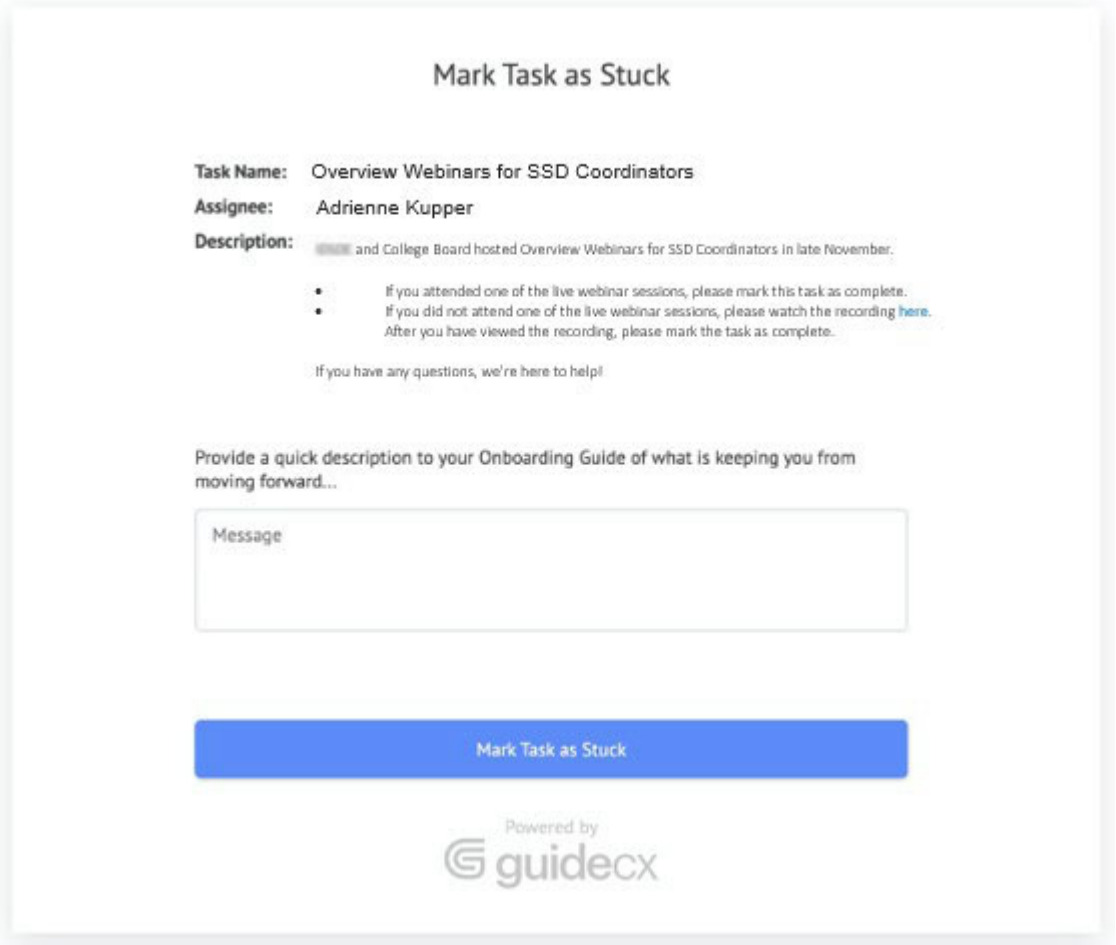
Mark as Done | Mark as In Progress | Mark as Stuck

Add Note via Email
View Task Attachments

When You Are Stuck

When you **mark a task as stuck**, you'll see a pop-up where you'll be asked to tell us more about the difficulty you're having. Providing this information will help us provide you with targeted support.

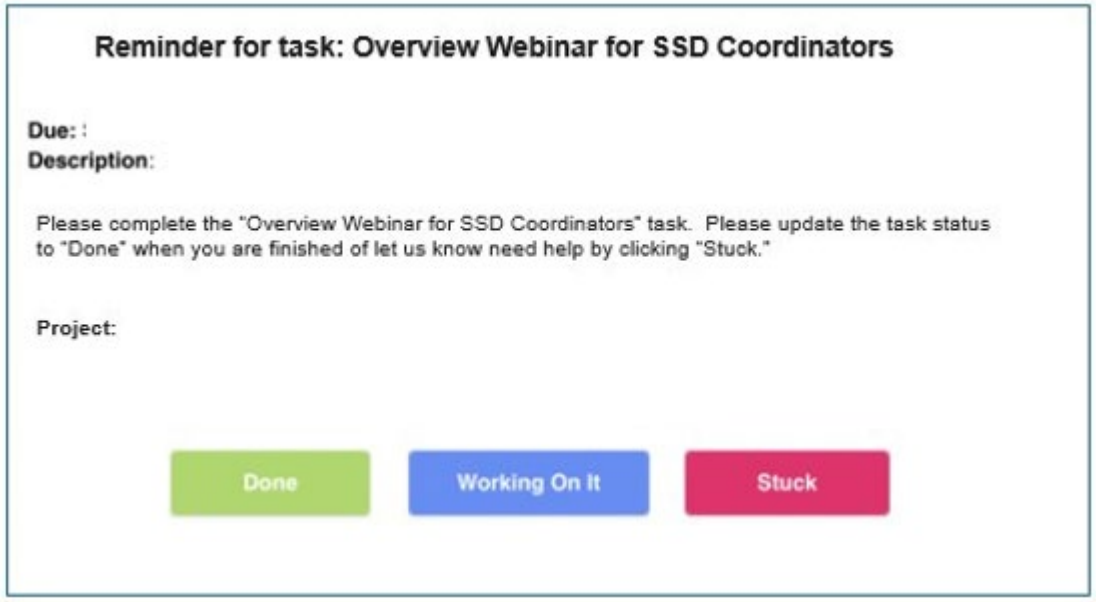
Once you click "Mark Task as Stuck," a support ticket will be opened with your state's Customer Service team.



Task Due Date Reminder Emails

If you haven't completed a task, you will receive a task due date reminder email **the day before the task is due**. In that reminder email, you can update the status of the task.

If you haven't completed a task by the due date, you will receive another reminder **the day after the task is due**. You can also update the status of the task in the overdue reminder email.

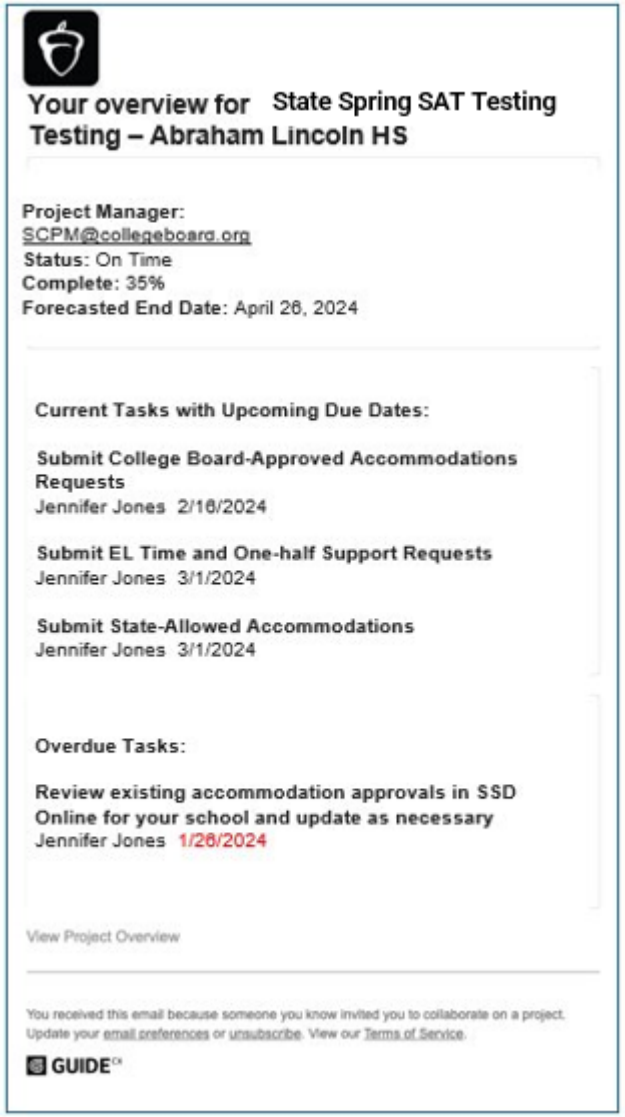


Project Overview Email

Each Monday you'll receive a **project overview email**. In this email you will see:

- **Project completion percentage:** this lets you know how far along you are with your completed tasks.
- **Upcoming tasks:** these are tasks that 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 your project overview email. Similarly, if you're all caught up, you may receive an email that doesn't show any upcoming or overdue tasks.



Your overview for State Spring SAT Testing Testing – Abraham Lincoln HS

Project Manager:
SCPM@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