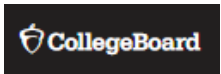


## User Guide

### BigFuture College Profiles



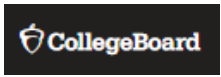


# BigFuture College Profiles

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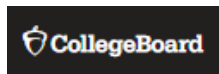
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# BigFuture College Profiles

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# BigFuture College Profiles

## Overview

### What is BigFuture College Profiles

For many years, BigFuture has been a destination for millions of prospective students to learn about colleges across the globe – 1 in 2 high school students visits BigFuture each year. With the launch of BigFuture College Profiles, we will connect students to even more helpful information about your institution and allow them to save your college profile to the list of colleges they are considering. As a College Board Search user, you can access a list of any students who have saved your college through the Interest in My College (IMC) feature and connect with those interested students directly. Launching the enhanced BigFuture College Profiles is part of our continued investment in College Board Search to help you connect with more qualified, college-bound students.

### The Importance of Completing your College Profile

Each year millions of prospective students visit BigFuture to view the profiles of institutions. Your institution's BigFuture College Profile is populated by data you provide through the Annual Survey of Colleges and other surveys administered by the College Board. Keeping your BigFuture College Profile up to date will help more students discover your institution.

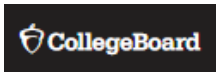
### Definitions

**Category** – BigFuture College Profile data categories generally align with the categories included in the original structure of the Annual Survey of Colleges (ASC) and the Common Data Set (CDS). Some of the familiar categories on BigFuture College Profile are General Information, Student Life, and Annual Expenses. Some ASC/CDS categories have been combined, including section C Freshman Admission and section D Transfer Admission, into a single category, Admissions. While other categories have been split into two separate categories, including ASC/CDS section B Enrollment and Persistence. Users should complete and save all of the questions in each module before submitting a category for review.

**Module** – BigFuture College Profile modules contain the questions users will respond to and provide data for. Modules can be edited and saved. All modules within a category should be completed and saved before submitting a category for review.

**Academic Year** – The academic year or period of time a question is referring to may vary by category, module, or question. Academic Years will either be stated at the top of the module, within the question, or listed as one of two options for the user to select before entering data. Please be sure to verify the time period each question is requesting before saving and submitting your data.

**College Profile** – The data that you provide in response to the questions in each module and category will be used to populate your College Profile on the student college search website, BigFuture.



# BigFuture College Profiles

## Getting Access

### If your institution is new to BigFuture College Profile

A designated BigFuture College Profile representative will be identified by your institution. That representative will receive an email from College Board inviting them to create a College Board Professional account if they do not already have one. The email will also contain an access code that can be entered as part of account creation. Once that access code is entered, the designated representative will gain access to the College Board Delegated Administration Tool which can be used to give themselves and others at the institution access to BigFuture College Profile. For additional details, on creating an account, entering the access code, and using the College Board Delegated Administration Tool, please review the instructions on page

## Getting Started

### Logging In

Login to [BigFuture College Profile](#) using the College Board professional id/password that you created when you first received access. Once you are successfully logged in, BigFuture College Profile will determine the institution(s) that you are affiliated with.

If you are affiliated with only one institution, you will be taken directly to the category page (see the “Question Organization” section for more information on the Category page) for your institution.

If you are affiliated with more than one institution, you will first have to select the institution that you want to work on (see the “Users with Access to More than One Institution” section for more information).

### Users with Access to More than One Institution

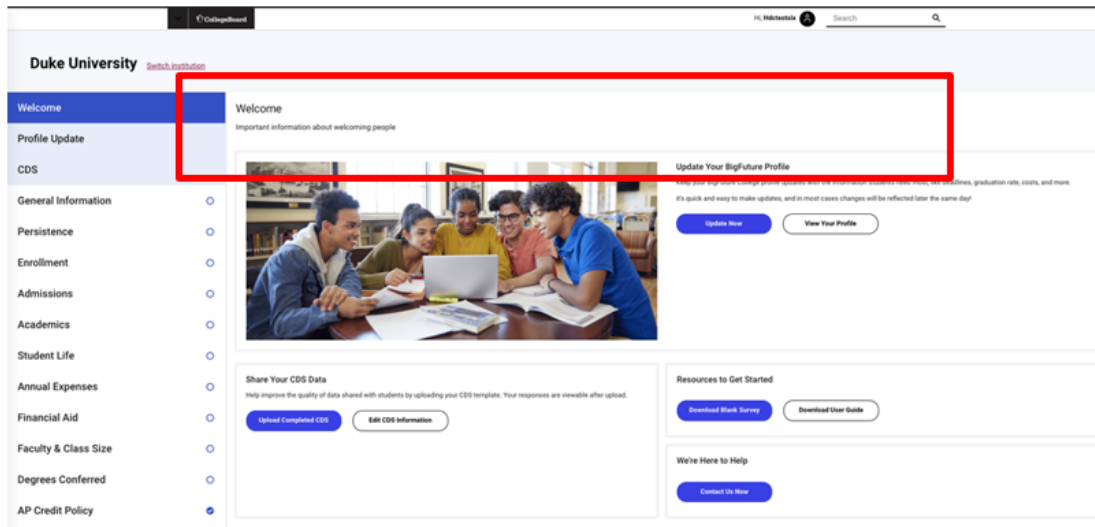
After successful login, if BigFuture College Profile determines that you are affiliated with more than one institution, you will be taken to page which displays a list of institutions that you are affiliated with. An example of that page is shown below.



On that page you will select the institution that you want to work on at that time by clicking on the name of the institution. While you are logged in, you can always get back to the list of institutions to change the institution you are working on by using the “Switch Institution” link.

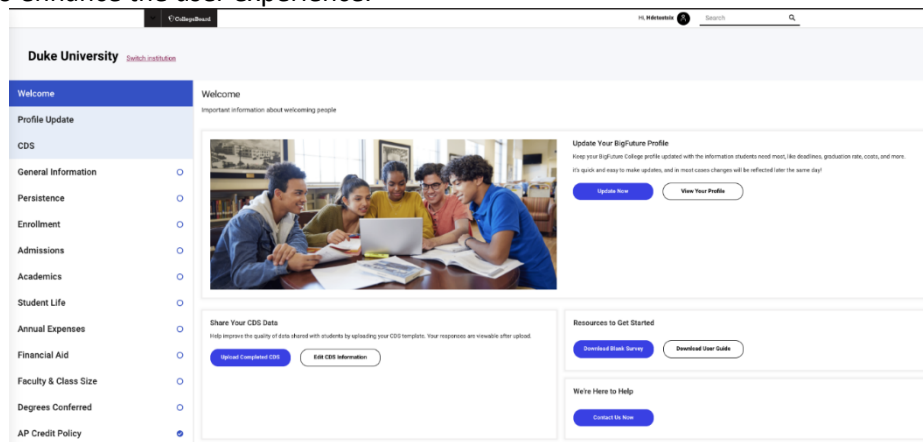
## Important Messages

At the top of each profile page, under the Welcome greeting, you will see a banner which will be used to provide important information. Such information being displayed will be regarding deadlines for completion of categories, or instructions for completion. Please be sure to read these each time you login, as they may change.



## Navigation

Once logged into your profile, you will see your institution's home screen. The categories on the left column of the page, are each category that will need to be completed. This display will also feature other sections to enhance the user experience.



- Welcome
- Profile Update
- CDS
- General Information
- Persistence**
- Enrollment
- Admissions
- Academics
- Student Life
- Annual Expenses
- Financial Aid
- Faculty & Class Size
- Degrees Conferred

## Update Your BigFuture Profile

Keep your BigFuture College Profile updated with the information students need most, like deadlines, graduation rate, costs, and more.

It's quick and easy to make updates, and in most cases changes will be reflected later the same day!

[Update Now](#) [View Your Profile](#)

### Two Ways to Access Your Profile:

- Use the left column to access each specific category.
- Use the *Update Now* button, to open your profile with a list view of all the categories.

### Share Your CDS Data

Help improve the quality of data shared with students by uploading your CDS template. Your responses are viewable after upload.

[Upload Completed CDS](#) [Edit/View CDS Information](#)

### Resources to Get Started

[Download Blank Survey](#) [Download User Guide](#)

## New Functionality/Questions

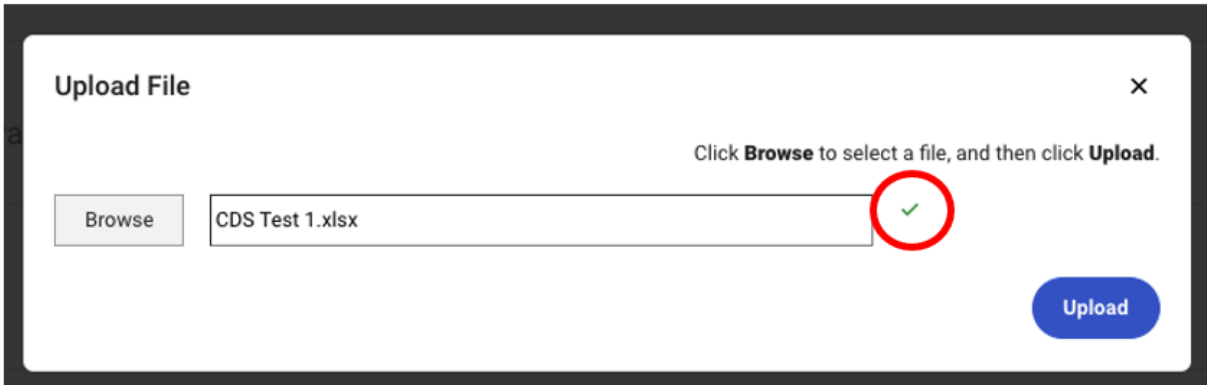
### *New CDS Upload Option:*

In order to utilize the new CDS upload feature in BigFuture, the new College Board specific CDS template must be used. This new template can be found at the following link: <https://commondataset.org/>.

### CDS DOWNLOADS

- [SUMMARY OF CHANGES](#)
- [PDF](#)
- [COLLEGE BOARD BIGFUTURE COLLEGE PROFILE IMPORT](#)
- [EXCEL](#)
- [WORD](#)

*When you are ready to upload your CDS, be sure to save it as a .xlsx file.*



Upload File

Click **Browse** to select a file, and then click **Upload**.

Browse CDS Test 1.xlsx

Upload

#### Steps to Ensure Successful CDS Upload:

1. When you have successfully selected your CDS, you will see a green check mark as verification that it was saved
2. Once the green check mark has appeared, press the “Upload” button for the pre-population of data to display
3. After the data population is complete, clicking the “Submit” button will ensure the responses are submitted for review

#### *Download Survey Responses:*

Download Survey Answers

Expand All

Collapse All


Modified on Mar 25, 2022



*“Download Survey Answers” button is located at the top of the category.*



*Download Survey View in PDF format:*



(Generated at: 10/17/2022, 9:58:04 AM US Eastern Time)

**Organization:** Lake Erie College

**Category:** Persistence

Number of degrees awarded by your institution from July 1, 2020 to June 30, 2021: (CDS B3)

Certificate/diploma

Associate degrees  
500

Bachelor's degrees  
500

Postbachelor's certificates

Master's degrees  
1000

Post-master's certificates

Doctoral degrees - research/scholarship

Doctoral degrees - professional practice  
1500

*Once PDF has been downloaded, it is able to be saved.*

***New Questions:***

CATEGORY	QUESTION TEXT	REASON
General Info	Specialized Mission	Indicators on profile added: Hispanic Serving Institution (HSI), Historically Black College/University (HBCU), and Tribal College
General Info	Diversity Equity Inclusion office URL	URL added for a more complete profile
General Info	LinkedIn (link)	URL added for a more complete profile
General Info	Virtual Tour URL	URL added for a more complete profile

<b>Enrollment</b>	"Other Gender" fields for first-year application and admission stats	CDS update
<b>Enrollment</b>	"Other Gender" fields for undergraduate and graduate enrollment stats	CDS update

## Statuses

As you are providing responses to questions, each category and module will change status based on the action you take. The status will be shown next to each corresponding category line as shown in the images below. Additionally, each category will have an available action at the bottom of the module once it has been opened. The action that is available to you will be determined by the status of the category.

**Muskingum University** [Switch institution](#)

Welcome

Profile Update

CDS

**General Information**  IN PROGRESS

Persistence

**Enrollment**  SUBMITTED

**Admissions**

Academics

Student Life

Admissions

---

International Polic

**CDS**

**General Information**  SUBMITTED

Persistence

Enrollment

Admissions  PUBLISHED




Academics

International

Student Aid

## Category Statuses

When you access your profile for the first time in a new academic year, all the categories will be in “Ready to Edit” status and the action button at the bottom of the card will be “Edit”. From there the status will progress in the following fashion:

Status	Status Icon	Definition	Action Button
<b>Ready to edit</b>	N/A	If the category has not yet been saved/submitted for the current year, the category will be in Ready to Edit status. There will not be a status icon shown next to the status. This status will indicate that the questions/responses have been reset for a new academic year and you have not yet saved any responses in the category.	Edit
<b>In Progress</b>		If at least one module in the category has been saved for the current academic year, the category will be in “In Progress” status. There will a status icon of a outline of a blue circle next to the status. This will indicate that at least one module in that category has been responded to and saved in the current academic year.	Edit
<b>Submitted for Review</b>		If the responses in the category have been submitted for the current year, the category will be in Submitted for Review status. There will a status icon of a filled in blue next to the status. This will indicate that the category is complete and responses have been submitted to College Board for review.	View
<b>Published</b>		If the responses have been reviewed by your College Board Data Editor and approved, the category will be in Published status.	View

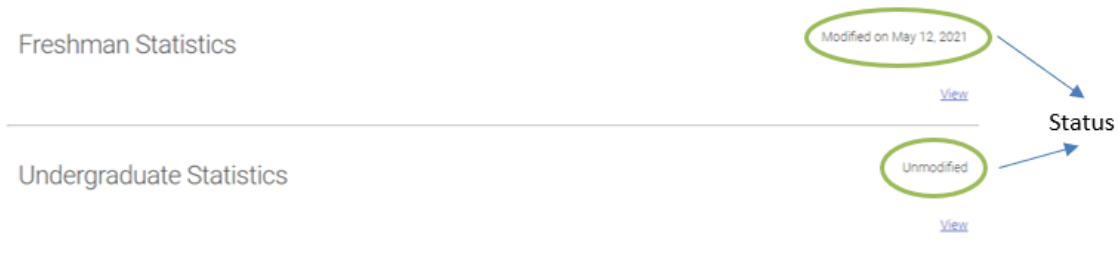
# BigFuture College Profiles

When clicking on category, there will be an option to individually open each module within the category or as an “Expand All” / “Collapse All”. These views are shown below:

## Module Status

Each module in a category will also contain a status. In this case, the status will either show the date that responses in that module were last modified in the current academic year or will show “Unmodified” to the right with the module name as shown in the image below. “Unmodified” will be shown at the beginning of each new academic year until updated responses are saved in the module for

the first time. Once the responses have been saved in the module, the status of “Unmodified” will be changed to the date of modification.



## Question Organization

### Categories

The profile questions have been grouped into categories of related questions. For example, all questions related to financial aid will be in the Financial Aid category. Each category is represented by a bar on the left side of the home page. Each category will have a status icon on them (*In Progress*, *Submitted*, etc.) to indicate how much of each category is complete.

Welcome	
Profile Update	
CDS	
General Information	●
Persistence	
Enrollment	○
Admissions	●
Academics	○
Student Life	○
Annual Expenses	○
Financial Aid	○
Faculty & Class Size	○
Degrees Conferred	○

# BigFuture College Profiles

The “Profile Update” category contains a sub-set of questions from all categories and modules in BigFuture College Profile that have been deemed the most important for ensuring that you have a strong profile that will appear in BigFuture for students to view. The questions in this category will also appear in the category/module to which they are related. When you respond to questions in this category, the responses will automatically appear when you view the question in its related category/module so that you will not have to answer the same question twice. Similarly, if you respond to the question in its home category and then view the same question in the Profile Update category, the response from the home category will appear in the Profile Update category.

## Update Your BigFuture Profile

Keep your BigFuture College Profile updated with the information students need most, like deadlines, graduation rate, costs, and more.

It's quick and easy to make updates, and in most cases changes will be reflected later the same day!

[Update Now](#)

[View Your Profile](#)

## Modules

Within categories, questions have been further grouped into modules of related questions. For example, in the Enrollment category, there is a module, Undergraduate Statistics, for all enrollment figures related to an institution’s undergraduate class. Additionally, Graduate Statistics, is the module where enrollment figures for an institution’s graduate class would be reported under.

<a href="#">Home</a> / <a href="#">Categories</a> / <a href="#">Modules</a>	<a href="#">Submit</a>
<b>Enrollment</b>	
Freshman Statistics	Unmodified <a href="#">View</a>
Undergraduate Statistics	Unmodified <a href="#">View</a>
Graduate Statistics	Unmodified <a href="#">View</a>

## Tool Tips

Next to some of the questions you will notice a black circle with an exclamation point as shown below. These are tool tips.

### Total first-time, first-year students (freshman) who applied in Fall 2020 (CDS C1)

Male

34947

Female

3691

When you hover your cursor over the circle, the tool tip will be displayed (see example below) with additional instructions/information that will help you complete your response. Please be sure to read these tool tips carefully as they will often provide detailed instructions on how to calculate your response.

### Total first-time, first-year students (freshman) who applied in Fall 2020 (CDS C1)

Male

34947

### Total first-time, first-year students (freshman) admitted in Fall 2020 (CDS C2)

Male

15017

Provide the number of degree-seeking first-time, first-year students who applied, were admitted, and enrolled (full- or part-time) in the Fall. Include early decision, early action, and students who began studies during summer in this cohort. Applicants should include only those students who fulfilled the requirements for consideration for admission ( i.e., who completed actionable applications) and who have been notified of one of the following actions: admission, non-admission, placement on waiting list, or application withdrawn (by applicant or institution). Admitted applicants should include wait-listed students who were subsequently offered admission.

## Pre-population of Data

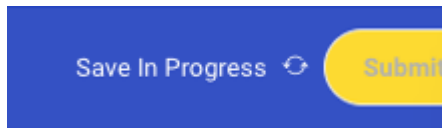
At the beginning of each academic year, you will notice that some responses are prepopulated for you and other responses are blank. Responses that typically do not change year-to-year will be prepopulated for you with your previous response in order to save you time. Please take the time to review the responses in the off chance that something has changed.

Questions that are academic year specific and typically change year-to-year will be blank. Please ensure that you respond to these questions each year.

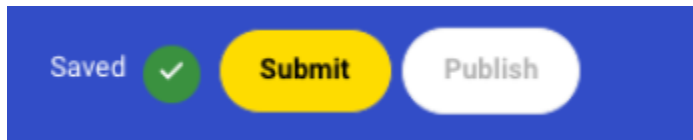
## Save/Submit Your Responses

Autosave has been implemented across all categories other than AP Credit Policy. Upon any change to a survey question, Autosave is triggered.

### *Autosave in Progress:*



### *Autosave Complete:*

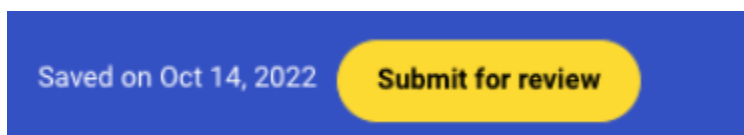


When you are satisfied with your response to each question in the category you will be able to submit the category for review depending on your role and where you are in the workflow.

**Submit** – You will not be able to submit until required fields are entered and valid values are correct. Submit is at the category level. Once you are confident that all questions in the category have been completed, you are ready to submit. Only users with a “Submitter” role are able to submit a category. If you are not a submitter for your institution, when you are satisfied with your responses to a category, please notify a submitter at your institution that responses are ready for submission.

Action	Role Required	Level	Preconditions
Autosave	Editor, Submitter	Module	<ul style="list-style-type: none"> <li>Individual questions must have valid values.</li> </ul>
Submit	Submitter	Category	<ul style="list-style-type: none"> <li>Required fields must be populated.</li> </ul>

### *Submit Button Prior to Submission:*



### *Submit Button After Submission:*








## Validating Your Responses

Two types of validations will be performed to ensure that the data you are entering is accurate and complete.

1. **Valid Values:** Anytime you save or submit your responses, individual question responses will be checked to ensure that a valid value has been entered. For example, fields that require a numeric response only contain numbers, fields that require email addresses or URLs have validly formatted responses, etc. If one of these types of errors occur, your responses will not be saved until you fix the error. These errors will be displayed under the response that contains an error.













### Validation Error:

  Please provide the URL for your school's application

 Must be a correctly formatted url

### Successful Data Entered:

Total first-time, first-year students enrolled in Fall 2021 (CDS C1)

<p> Full-Time Male</p> <input type="text" value="500"/> <p> Success</p>	<p> Part-Time Male</p> <input type="text" value="1000"/> <p> Success</p>
<p> Full-Time Female</p> <input type="text" value="900"/> <p> Success</p>	<p> Part-Time Female</p> <input type="text" value="100"/> <p> Success</p>
<p> Full-Time Other Gender</p> <input type="text" value="20"/> <p> Success</p>	<p> Part-Time Other Gender</p> <input type="text" value="10"/> <p> Success</p>

2. **Required fields** – Anytime that you submit your responses, questions which require a response will be validated to ensure that a response has been provided. You will not be allowed to submit your responses until you respond to all required questions.

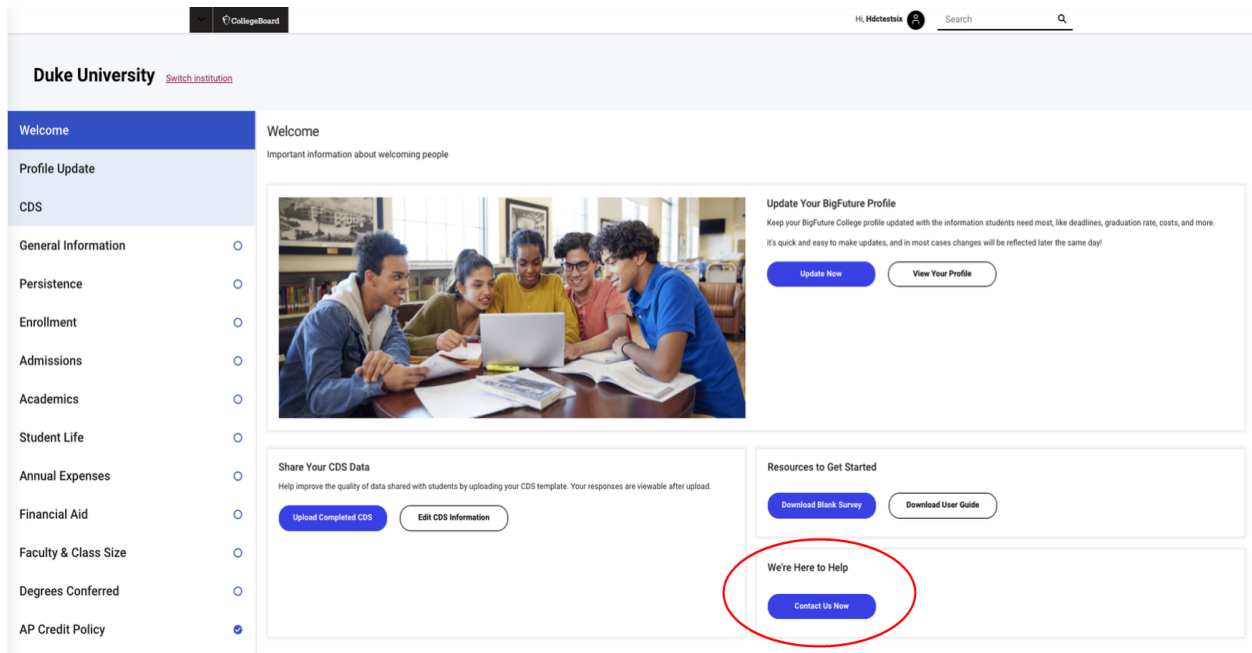
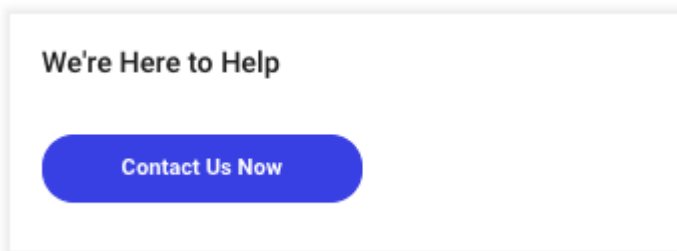
## What happens after you submit your responses

Once you submit a category, you will no longer be able to edit question responses in that category. Your College Board Data Editor will be notified and will begin to review your responses. If no issues are found, the responses will be marked as ready for publication and they will be published on the next publication date. At that time, they will be visible on your BigFuture College Profile and will be available to research entities within College Board.

If discrepancies are found with submitted responses, the Data Editor will reach out to you to review the discrepancies. Following the review, if updates are needed, the Data Editor will either make the category that has discrepancies available for you to edit again by changing the status back to “In Progress” or will make the necessary updates themselves.

## Who to contact for additional help

For additional assistance, please reach out to your assigned Data Editor. If you do not know who your assigned Data Editor is, you may use the Contact Us Now button located on the Welcome page on your BigFuture College Profile.



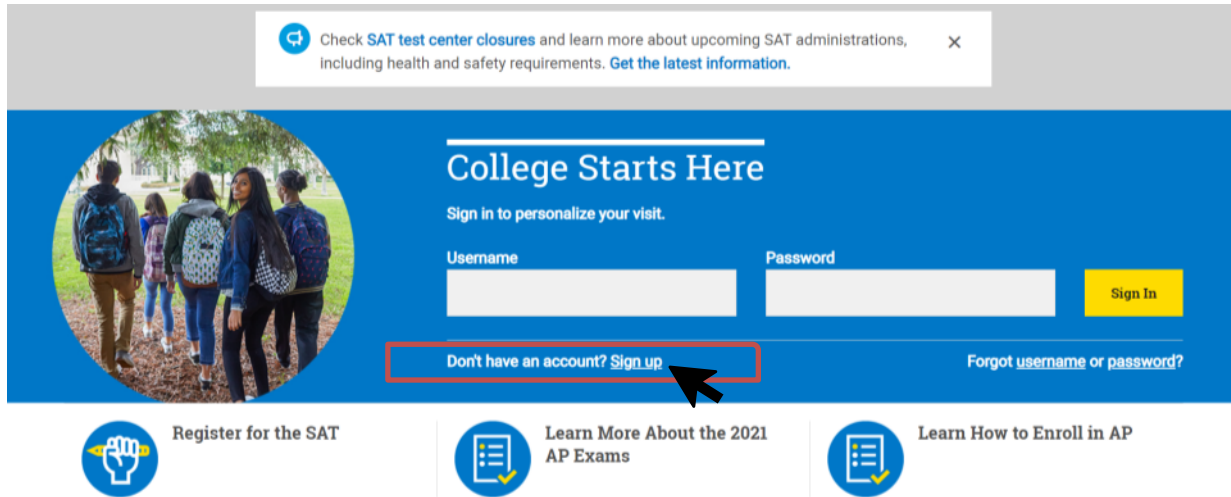
# **BigFuture College Profiles**

## **Step-by-Step Guide to Create Education Professional Accounts, Manage Institutions and Add Users**

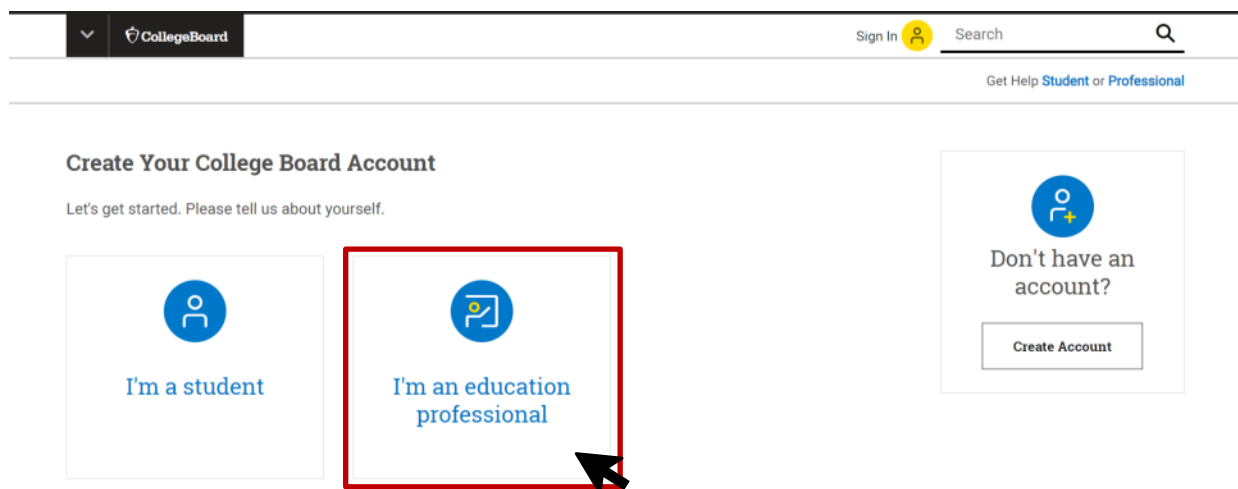
Current as of April 1, 2021

## How to Create an Education Professional Account

**STEP 1** Go to the College Board homepage at <https://www.collegeboard.org/>. To create a professional account, please click **Sign up** next to **Don't have an account?**



**STEP 2** At the **Create Your College Board Account** page, select **I'm an education professional**.



**STEP 3** Complete all fields on the **Your Information** page, including selecting a username and a strong password. At the bottom of the page you will be able to

search for your institution using its zip code, AI, DI, or CEEB code. Please review all of your information and confirm on the next page.

SAT PSAT/NMSQT AP College Planning College Search Professionals More , CollegeBoard

[Help](#)

## Create Your Professional Account

1 Your Information ————— 2 Review Information

To get started, please tell us more about you, set up your username, and let us know about the work that you do.  
All fields are required unless marked optional.

### Account Information

First Name:

Last Name:

Sex:  Female  Male

Email Address:

Confirm Email Address:

I live outside the U.S.

Yes, please send me updates and information about College Board and College Board deadlines, dates, and related programs and services.

Please share my contact information with third parties that have offers or information the College Board thinks might be of interest to me and my students, including AP Summer Institutes, professional development and academic programs and scholarships. ⓘ

Username:

Password:

Confirm password:

Choose security question:

Answer:

### Professional Information

Tell us where you work. It may be helpful to start with a ZIP code.

U.S. ZIP code of your organization:   
optional, this will help refine your selection

Where do you work?   
Or, enter your AI, DI or CEEB code:

My organization is not listed.

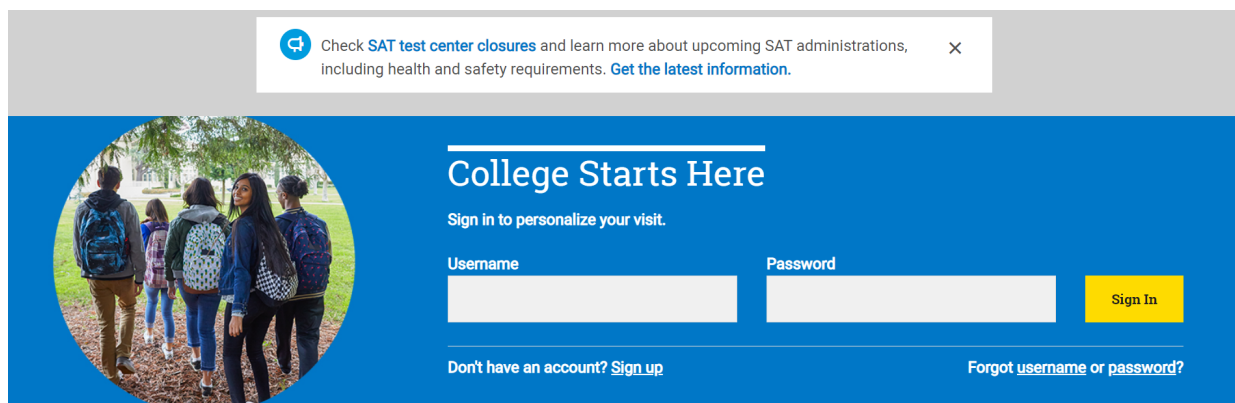
What is your primary job function?

[Cancel](#) [Next: Review](#)

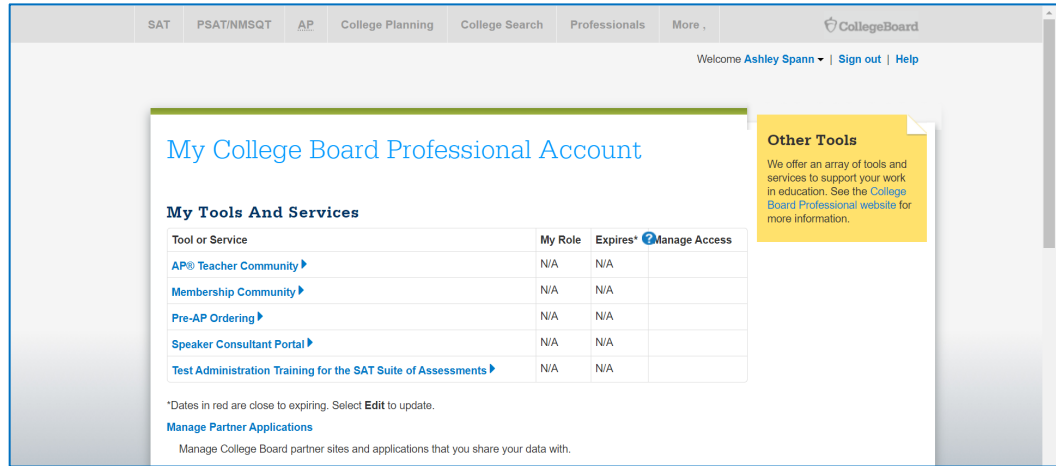
**STEP 4** After creating your account, you may return to the College Board homepage and log in to complete the registration process for BigFuture College Profiles.

## How to Manage Your BigFuture College Profiles Account

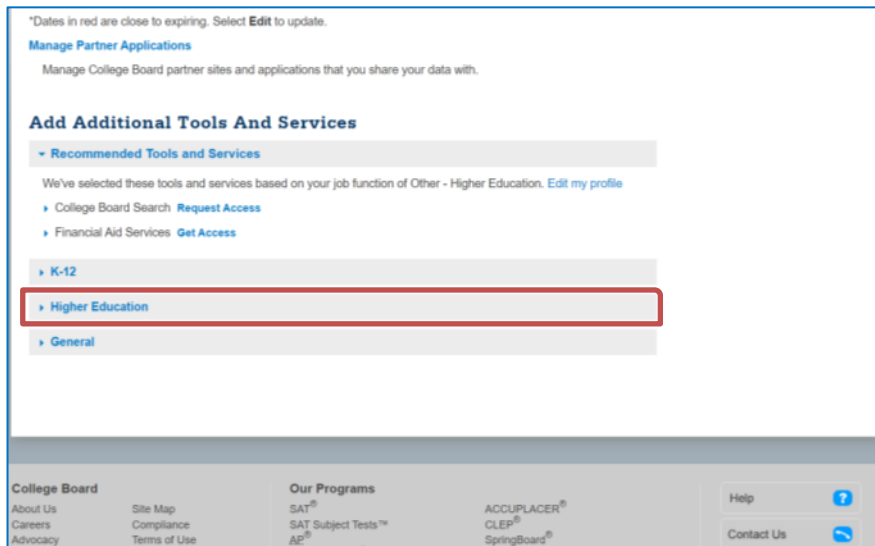
**STEP 1** To access **BigFuture College Profiles**, log in to your College Board professional account: <https://www.collegeboard.org/> If you do not have a professional account, please **click Sign up** next to **Don't have an account?** and follow the directions.



**STEP 2** After signing in, you will be directed to the **My College Board Professional Account** homepage, you may see a list of Tools and Services you already have access to as shown below. If you are directed to a different screen, just select **My Dashboard** and you will be redirected to the correct page.

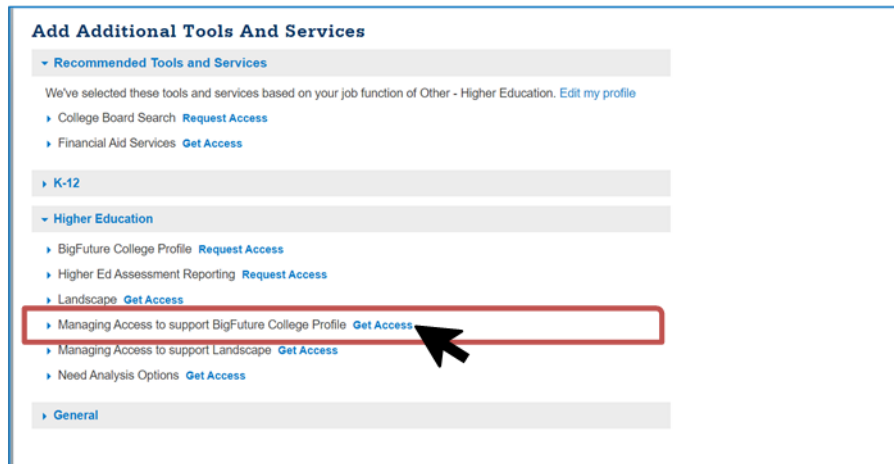


Scroll down to “Add Additional Tools and Services” and expand the Higher Education Section highlighted below.

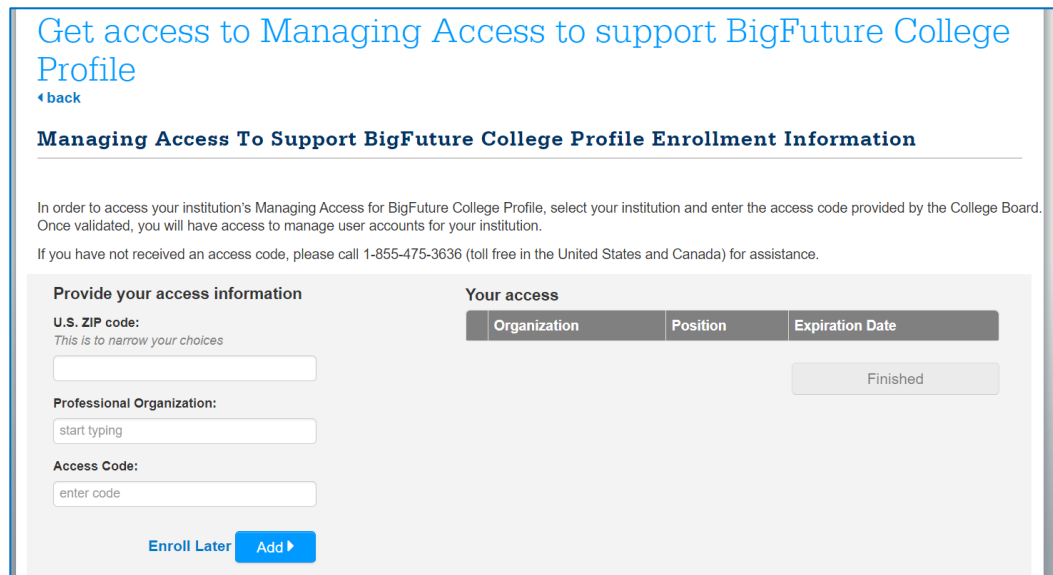


**STEP 3** After you Expand Higher Education, select **Get Access** next to the **Managing Access to support BigFuture College Profile**.

# BigFuture College Profiles

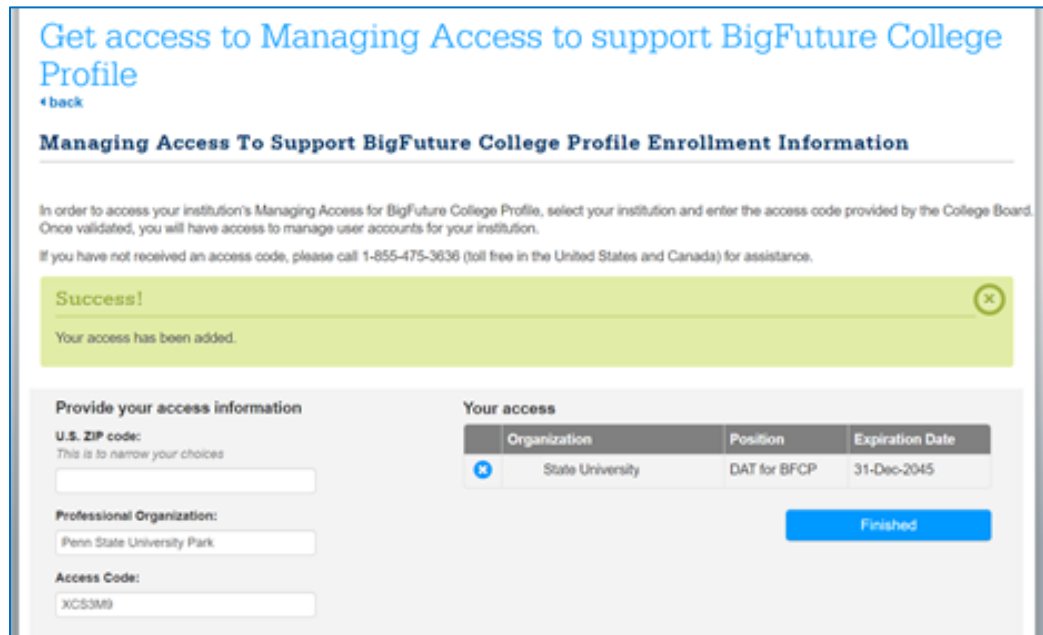


**STEP 4** To validate your request, search for your institution by entering its name or the zip code associated with its main address in the **U.S. Zip Code** and **Professional Organization** boxes, respectively.



**STEP 4** Once the correct institution is selected, please enter the **Access Code** provided to you in the email you received inviting you to create a profile. If your account is to be associated with multiple institutions, please enter them and their unique access codes individually as shown below and once all institutions have been added, please select **Finished** to be redirected to the homepage where you will see your new account(s) added to the **Managing Access to support BigFuture College Profile** on the top half of the page.





Get access to Managing Access to support BigFuture College Profile  
[← back](#)

### Managing Access To Support BigFuture College Profile Enrollment Information

In order to access your institution's Managing Access for BigFuture College Profile, select your institution and enter the access code provided by the College Board. Once validated, you will have access to manage user accounts for your institution.  
If you have not received an access code, please call 1-855-475-3636 (toll free in the United States and Canada) for assistance.

**Success!**  
Your access has been added.

**Provide your access information**

**U.S. ZIP code:**  
This is to narrow your choices

**Professional Organization:**

**Access Code:**

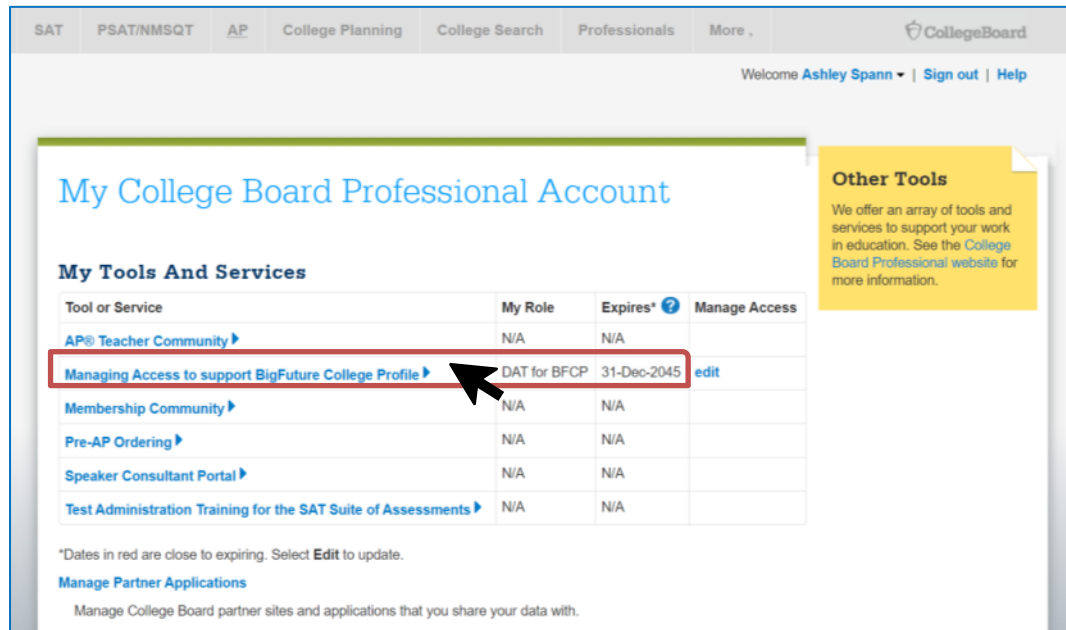
**Your access**

Organization	Position	Expiration Date
<input checked="" type="checkbox"/> State University	DAT for BFCP	31-Dec-2015

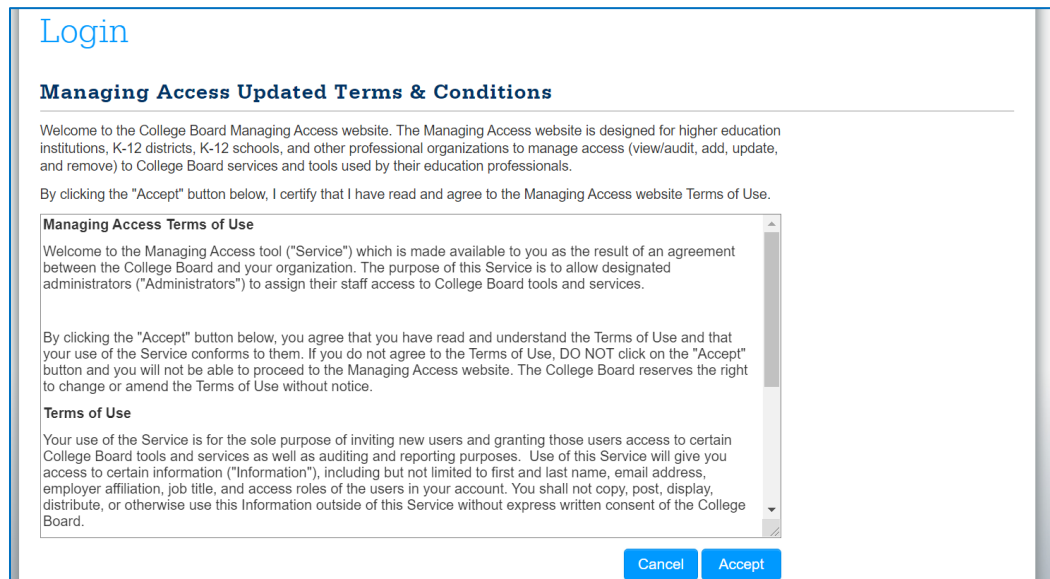
## How to Add Users to Your Account

**STEP 1** After adding your accounts (see instructions on pp. 2-4), you will see your account(s) on the **Managing Access to support BigFuture College Profile** on the top half of the page. To add additional users to the account, please click **Managing Access to support BigFuture College Profile**. Clicking edit will redirect you to the **Managing Access** page to add access codes for more institutions.

# BigFuture College Profiles



**STEP 2** When making edits for the first time, you must accept the **Managing Access Updated Terms & Conditions** when you log-in.



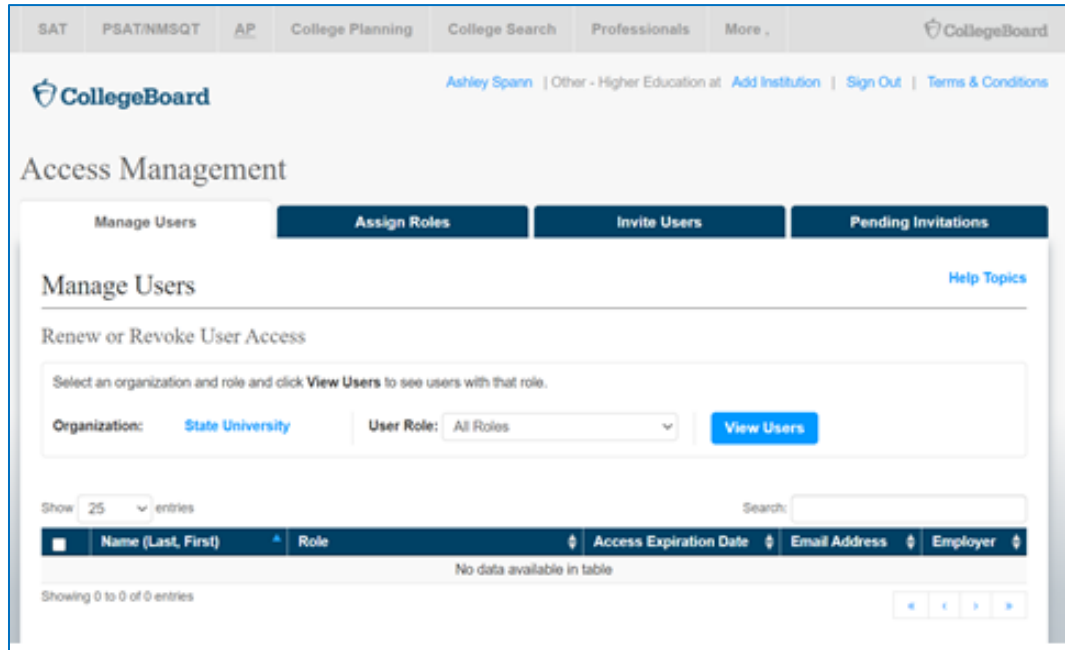
**STEP 3** Once you accept the **Terms & Conditions**, you will be redirected to the **Welcome to Managing Access** page. The **Welcome to Managing Access page** contains an introduction and helpful tips to get you started. Review the tips, then scroll down and select **Continue** to be taken to the next page.

### Tips

- Click **Help Topics** from any tab to get:
  - Quick links to Assessment Reporting, College Board Search, or Financial Aid Services.
  - Advice on matching people to user roles.
  - Tab-by-tab tips.
- Check the Assign Roles tab before using Invite Users to grant someone access.
- Anyone with a College Board account who entered your institution as employer is listed on the Assign Roles tab -- even if they don't have access. This could include former employees.

[Continue](#)

**STEP 4** This page - **Access Management** - displays a series of four tabs, each with different functions: 1) *Manage Users*, 2) *Assign Roles*, 3) *Invite Users*, and 4) *Pending Invitations*.



## MANAGE USERS

# BigFuture College Profiles

Use the **Manage Users** tab to renew or revoke the roles of current users only. The default view lists all current users for a single institution. Red expiration dates are within 30 days. Use the drop-down menus to change organization and role settings, click **View Users** to refresh the list.

The screenshot shows the 'Manage Users' interface. At the top, there are four tabs: 'Manage Users', 'Assign Roles', 'Invite Users', and 'Pending Invitations'. The 'Manage Users' tab is selected. Below the tabs, there is a 'Manage Users' header with a 'Help Topics' link. A section titled 'Renew or Revoke User Access' contains a form with two dropdown menus: 'Organization' (set to 'Beth Robinson School') and 'User Role' (set to 'All'). A blue 'View Users' button is next to the dropdowns. Below this, there is a section titled 'Users in Selected Role' with instructions to use checkboxes to select users and click 'Renew' or 'Revoke'. There are 'Renew' and 'Revoke' buttons, a search bar labeled 'Search Users', and a table of users.

<input checked="" type="checkbox"/>	Name (last, first)	Role(s)	Expires	Email Address	Organization
<input type="checkbox"/>	Aaron, Hank	Data Downloads (K-12)	08/24/2016	haaronn376@collegeboard.org	Beth Robinson School
<input type="checkbox"/>	Aaron, Hank	User Access Management (K-12)	08/24/2017	haaronn376@collegeboard.org	Beth Robinson School

## Here's how to view users and their roles

- Select your organization from the **Organization** drop down.
- A list of users who already have College Board Education Professional accounts, with access to the organization, will appear.
- Use the **User Role** drop down to see the list of users who have that role; the default is to display 10 users at a time – you may have to scroll through multiple pages to see everyone or you can change the number of entries displayed from 10 up to 100; each column in the list is sortable in ascending or descending sequence by clicking on the column header.

## Tips on Managing Users:

- If you manage roles for multiple institutions, use the **Organization** drop-down menu to switch institutions.
- Anyone with a College Board account who entered your institution as their employer is listed on this tab — even if they do not have access. This could include former employees.

## Here's how to change a user's role

- Go to **Manage Users** to revoke the current role
- Go to **Assign Roles** to add the new role

# BigFuture College Profiles

## ASSIGN ROLES

Use the **Assign Roles** tab to assign roles to new users or add roles to current users. You are also able to assign or change your role via this screen.

The **Assign Roles** tab lists everyone with a College Board account who entered your institution as their employer — whether or not they have access. You cannot remove people from this list. Red expiration dates are within 30 days.

### Here's how to assign roles:

- Check the box(es) for the individuals you wish to grant access; a role can be added to one or more individuals at a time.
- Select the **Assign Role** button - A pop-up window will appear where you assign the access expiration date.
- Confirm the expiration date.

<input checked="" type="checkbox"/>	Name (last, first)	Email	Organization	Expires
<input type="checkbox"/>	Aaron, Hank	hallen376@collegeboard.org	Association/Non-profit organization	N/A
<input type="checkbox"/>	Allin, Gigi	ggallin@collegeboard.org	Counselor	December 31, 2016

**BigFuture College Profiles** access roles are:

User Role: BigFuture College Profile Editor BigFuture College Profile Editor BigFuture College Profile Submitter

**BigFuture College Profile Editor** = Can access all categories, enter data, and save modules. This role cannot submit categories for review and publication.

**BigFuture College Profile Submitter** = Can access all categories, enter data, save modules, and submit categories for review and publication.

### Tips on Assigning Roles

- If you see users with access who shouldn't have it, such as former employees, revoke access on the **Manage Users** tab.

# BigFuture College Profiles

- If you manage roles for multiple institutions, use the **Organization** drop-down menu to switch institutions.
- After using the drop-down menus to change organization and role settings, click **Update View** to refresh the list. Checkboxes will display next to and see only users who do not already have the role you selected.
- When asked to set a role expiration date, don't just accept the default date (the next day). Choose a date that's appropriate for your institution, the role, and the user. Typical expiration dates include the end of a school year, a semester, or an admission cycle.
- If you don't see the names you're looking for, go to the Invite Users tab.

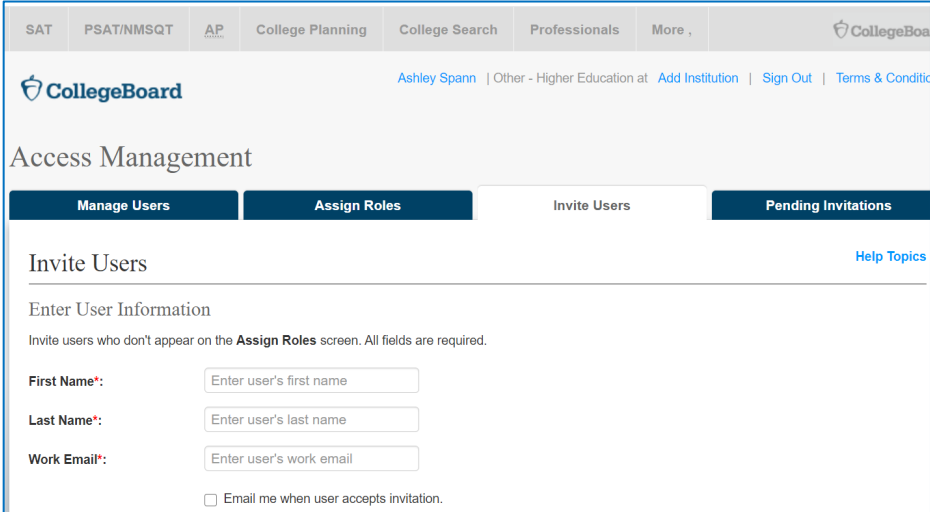
## INVITE USERS

Use the **Invite Users** tab to add new users who do not have a College Board account that lists your institution, such as:

- People without any College Board account
- New colleagues who worked for another institution when they created their account
- Colleagues who work for a related institution, such as a school district

Here's how to invite users:

- Fill out the online form, taking care to select the correct organization/role pair.
- Select the **Add Role to Invitation** button to confirm organization, role, and expiration date for the individual.
- Select the **Email Invitation** button.
- An online confirmation will appear briefly to indicate the invitation was sent successfully.



The screenshot shows the 'Invite Users' form within the 'Access Management' section of the CollegeBoard interface. The navigation bar includes links for SAT, PSAT/NMSQT, AP, College Planning, College Search, Professionals, and More. The user is identified as Ashley Spann, and there are links for 'Add Institution', 'Sign Out', and 'Terms & Conditions'. The 'Access Management' section has four tabs: 'Manage Users', 'Assign Roles', 'Invite Users', and 'Pending Invitations'. The 'Invite Users' form includes a 'Help Topics' link and a section titled 'Enter User Information' with the instruction: 'Invite users who don't appear on the Assign Roles screen. All fields are required.' The form contains three required text input fields: 'First Name\*', 'Last Name\*', and 'Work Email\*'. Below these fields is an optional checkbox labeled 'Email me when user accepts invitation.'

# BigFuture College Profiles

Choose One or More Roles for This User

Organization\*:

Role\*:

Expiration Date\*:

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## Tips on Adding Users:

- When asked to set a role expiration date, don't just accept the default date (the next day). Choose a date that's appropriate for your institution, the role, and the user. Typical expiration dates include the end of a school year, a semester, or an admission cycle.
- The invitation will not be sent until you click the **Email Invitation** button.
- To keep up with the status of your invitations, select the **Email me when user accepts invitation** checkbox.

## PENDING INVITATIONS

Use the **Pending Invitations** tab to resend or cancel invitations. Pending invitations are listed for up to 30 days after they expire.

### Access Management

Manage Users
Assign Roles
Invite Users
Pending Invitations

#### Pending Invitations [Help Topics](#)

Use the checkboxes to select users, then click **Resend Invitation** or **Cancel Invitation**.

Show  entries Search:

	Name (Last, First)	Email Address	Organization/Role Pair	Invitation Sent Date
<input type="checkbox"/>	Smith, Sample	sample.smith@epsilon.cbreston.org	Organization : State University Role : BigFuture College Profile Submitter , BigFuture College Profile Editor	March 10, 2021 5:12:03 P M EST

Showing 1 to 1 of 1 entries < > 1 >

## Tips on Pending Invitations:

- You have the ability to resend or cancel the invitation.
- Firewalls may prevent some emails from reaching their intended recipients. Suggest invitees check their spam folders for College Board messages.

## If your institution is currently a user of BigFuture College Profile

Each institution will have one or more BigFuture College Profile representatives that will be responsible for granting access to other users at the institution. Find the representative at your institution to request access. Typically, this person will be in your institution's institutional reporting team.

When your representative invites you to get access, you will receive an email invitation with instructions for creating a College Board Professional account if you do not already have one and for entering the access code. The account you create will be used for as long as you remain at the institution and for accessing all College Board Higher Education related products so please keep it safe.

You will be given one of two levels of access:

- Submitter – A submitter is allowed to enter responses to questions on the profile, save the responses, and submit the responses to College Board for review.
- Editor – An editor is allowed to enter responses to questions on the profile and to save the responses. An editor will not be allowed to submit the responses to College Board for review. A submitter at your institution will be responsible for submitting final responses. Once you are done with your responses, please notify the submitter at your institution that responses are complete and ready to be submitted.

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<sup>1</sup> Revised October 31, 2022