



The Checkmate Playbook — Family Edition

A practical guide to the next move

2 Teammates. 1 Goal. 0 Guesswork.

THE STUDENT MAKES THE MOVE.

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checkmatecollege.com

Start here: You do not need to read this whole book

College can feel like too many tabs open in your brain at once. Checkmate is built to close some of those tabs.

This Playbook is here when you need it. You do **not** have to read it from front to back. It is not homework. It is not a test.

Start with the shortest path for you:

If you are...	Start here	Then do this
Student	"Checkmate in 60 Seconds" + Chapters 1-5	Open your Board. Find your Current Move.
Parent / supporter	Chapters 2 and 19-21	Learn how to help without taking over.
Payor / Membership Manager	Chapters 2 and 20-21	Learn what you manage and what stays private.
Stuck right now	Chapter 22 + the Scenario Tours	Find the problem that looks most like yours.
Looking for FAFSA, school, transfer, or career links	Part V	Use the official links and check the live deadline.

CHECKMATE RULE

THE STUDENT MAKES THE MOVE. Checkmate can explain, organize, remind, prepare, and follow up. The student still makes the choice and takes the real-world action.

Checkmate in 60 seconds

You only need to remember five places:

BOARD = what matters now.

MESSAGES = talk with your teammate.

ASK FOR HELP = use this when you are stuck or confused.

MY DECK = useful plays, people, blockers, and wins.

MENU = schedules, resources, and other tools.

The basic loop is even simpler:

1. Open your **Board**.
2. Read your **Current Move**.
3. Do the move in real life.
4. Tell Checkmate what happened.
5. If you get stuck, **Ask for Help**.
6. Keep going.

YOUR MOVE

Open Checkmate and answer one question: **What is my Current Move?** You do not need to solve the whole week. Start there.

The one-page Getting Started checklist

- [] Finish your Starting Position / onboarding.
- [] Open your Board and make sure it matches real life.
- [] Accept the Student Commitment when asked.
- [] Choose your Mark when it appears.
- [] Schedule your first Game Plan / Semester Game Plan Team Huddle.
- [] Send one message so you know where Messages lives.
- [] Find **ASK FOR HELP**. Remember: *type it, show it, or say it*.
- [] Finish or move forward on your first Current Move.
- [] Tell Checkmate what happened.
- [] Parent/payor: read your role section before trying to manage the student's Board.

IF YOU FEEL STUCK

If all of this feels like too much, do only two things today: **open the Board** and **find the Current Move**. That is enough to begin.

A note about official information

Checkmate helps you work through college. It does not replace your school, professor, financial-aid office, admissions office, or a government agency.

OFFICIAL SOURCE WINS

If a deadline, rule, aid amount, course requirement, or school policy matters, **check the current official source**. Checkmate can help you find it and understand it.

Why? Because college information changes. A screenshot from last semester may be old. A friend may have had a different rule. A social post can be useful, but it should not beat the official source.

The resource links in this Playbook were checked on **October 7, 2026**. Always open the live page before you act on an important deadline or rule.

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PART 1: Start Strong

1. Welcome to Checkmate

1.1 What Checkmate is

Checkmate is a student-success system with a real human teammate built into it.

Its job is simple: help you see what matters, know what to do next, and get help before a small problem becomes a big one.

Two ideas sit at the center of the whole system:

THE BOARD keeps track of the process. YOUR TEAMMATE keeps track of the person.

The Board keeps the work visible. Your teammate, Travis, helps when the situation is messy, confusing, or changing.

If you are **getting to college**, Checkmate can help you stay organized through applications, essays, financial aid, scholarships, enrollment, housing, orientation, and Day One.

If you are **already in college**, Checkmate can help with classes, deadlines, and registration. It can also help with professor messages, financial aid steps, campus resources, and getting back on track after a problem.

You do not have to learn a new system each time. It is all Checkmate.

1.2 What Checkmate is not

Checkmate is not here to take over your life.

It does **not**:

- promise admission, scholarships, aid, grades, graduation, or a job;
- replace your advisor, registrar, financial-aid office, professor, counselor, or doctor;
- sign or submit official forms for you;
- do your homework or write work for you to turn in as your own;
- make the final choice for you;
- act as an emergency or 24/7 crisis service.

WATCH FOR THIS

Keep passwords and highly sensitive information out of normal Checkmate messages. Do not send Social Security numbers, FSA IDs, login codes, full card or bank numbers, or tax returns through ordinary messages, screenshots, photos, voice notes, or video chat.

1.3 The promise

Checkmate is trying to help you become:

ON TRACK • CONFIDENT • INDEPENDENT

Independent does not mean alone.

It means you are getting better at noticing the problem, finding the right person or source, asking a useful question, making the move, and checking what happened next.

2. Who does what?

College gets easier to manage when everyone knows their job.

2.1 The student

The student owns the real college life.

That means the student:

- makes the decisions;
- goes to class and meetings;
- keeps control of school accounts and passwords;
- does the academic work;
- sends messages in their own name;
- submits final forms and work;
- watches real deadlines;
- tells Checkmate when something changes.

You do **not** have to solve every problem alone. Asking early is part of being responsible.

2.2 Travis / Your Teammate

Travis helps you turn “I have no idea what to do” into a clear next move.

Your teammate can:

- clean up a messy situation;
- help organize your Board;
- help you plan a message or question;
- point you to the official source;
- help you compare choices;
- notice when something has stalled;
- help you recover after a missed deadline, bad exam, hold, or confusing notice;
- celebrate real progress.

Your teammate does not become you. He does not impersonate you or secretly do your work.

2.3 The parent / supporter

A parent’s best role is **support without takeover**.

That usually means:

- knowing the big picture;
- reading updates that are allowed to be shared;
- helping when a real parent action is needed;
- asking questions that send ownership back to the student;
- giving the student room to learn how to handle college.

PARENT MOVE

Instead of, “Did you email your professor yet?” try: **“What does your Board say your next move is?”**

2.4 The payor / Membership Manager

The person who pays may manage billing and membership details.

Paying for Checkmate does **not** mean that person can automatically see everything the student does.

Billing access and student privacy are different things.

PAYOR MOVE

Use the Payor section for payment, renewal, cancellation, and account questions. Do not ask the student for private passwords just to manage billing.

2.5 The school

Your school makes the final call on things like:

- registration and holds;
- degree rules;
- financial aid decisions;
- course space;
- grades;
- transfer credit;
- disability accommodations;
- transcripts;
- school policies;
- admission decisions.

Checkmate helps you work with the school. It does not replace the school.

3. Your first 10 minutes, 24 hours, 7 days and 30 days

You do not need to “master Checkmate.” You only need to build a small rhythm.

3.1 First 10 minutes

1. Log in.
2. Open **BOARD**.
3. Read your **Current Move**.
4. Tap through Messages, Ask for Help, My Deck, and Menu once.
5. If the Board is wrong, tell Checkmate.
6. If the Board is right, make one move.

YOUR MOVE

Do not spend your first day exploring every button. Make sure the Board is true. Then do one useful thing.

3.2 First 24 hours

Try to finish these:

- any last onboarding step;
- the Student Commitment;
- your Mark, when asked;
- your first Team Huddle booking;
- your schedule, if Checkmate asks for it;
- one real message or help request;
- one real Current Move.

3.3 First 7 days

By the end of the first week, you should know:

- what you are doing first;
- what is coming up;
- what you are waiting on;
- who has the next step when something is stuck;

- when your next Huddle is;
- where to go when you are confused.

If you cannot answer those questions yet, that is useful information. Tell your teammate what still feels unclear.

3.4 First 30 days

The first month is not about being perfect. It is about building a better pattern.

A good first month looks like this:

- you check the Board before a problem becomes an emergency;
- you ask for help earlier;
- you check official information before acting;
- you follow up instead of assuming something is done;
- your parent can support you without running the whole process;
- Travis starts to learn where you tend to get stuck.

That is progress.

4. The independence ladder

Checkmate should help you need **less** help over time, not more.

The path looks like this:

GUIDED > CHOOSE > CALL > SELF-START

This is not a grade. It is not a personality score. You may be at different levels for different problems.

4.0.1 GUIDED

You need a clear next step.

“Here is the first thing to do.”

4.0.2 CHOOSE

You can pick between a few good options.

“These are the two best paths. Which one fits?”

4.0.3 CALL

You have seen something like this before. You can call the play, with help nearby.

“I think I know what I should do next. Can you check me?”

4.0.4 SELF-START

You saw the need and made a good move before Checkmate had to tell you.

“I already emailed the professor and saved the reply.”

CHECKMATE RULE

Being independent does **not** mean guessing in a high-stakes situation. Smart students still ask for help when money, registration, deadlines, safety, or major academic choices are involved.

5. The Board: your source of truth

Think of the Board as your “what matters now” screen.

You should not have to hold the whole semester in your head.

5.1 Current Move

Your **Current Move** is the clearest thing to do next.

A strong Current Move is specific.

Good examples:

- “Email Professor Lee and ask if Exam 1 corrections are allowed.”
- “Upload the residency document to the school portal.”
- “Register for ENC1102 after the hold clears.”
- “Do five minutes of the chemistry review set.”

A weak Current Move is vague:

- “Do school stuff.”
- “Fix financial aid.”
- “Study more.”

YOUR MOVE

When you feel overwhelmed, do not scan the whole semester. Read the Current Move first.

5.2 Today's Moves

Today's Moves are the few items that really deserve attention today.

Not everything belongs here. A list of 15 “urgent” things is not a priority list.

5.3 Coming Up

Coming Up shows future items that matter soon.

A future deadline belongs here until it truly becomes a today problem.

5.4 In Play

In Play is where active situations can stay visible even when the next step belongs to someone else.

Example: You sent financial aid a document. Now the school has to review it. That does not mean the problem vanished. It may be **Waiting** until a check-by date.

The Board should match real life. If it does not, tell Checkmate.

6. Proof: a Move is not done until we know what happened

Checking a box is easy. Knowing what really happened is better.

That is why Checkmate uses a simple rule:

NO MOVE IS DONE UNTIL CHECKMATE KNOWS WHAT HAPPENED.

“Proof” does not always mean uploading a document. It can be as simple as telling Checkmate the real result.

Examples:

- “I sent the email.”
- “The professor said no.”
- “My appointment is booked for Thursday.”
- “The hold is still there.”
- “The portal says my form is under review.”
- “I finished the first five minutes.”

Sometimes the result is **Waiting**. That is still a real result.

EXAMPLE

You email the registrar about a hold. The Move is not “done forever” just because the email was sent. The next truth may be: **Waiting for registrar reply. Check again Friday.**

Closing the loop keeps small tasks from disappearing.

7. Your daily Checkmate routine

You do not need to live inside Checkmate.

Most days, the routine can be very short:

1. Open the Board.
2. Read the Current Move.
3. Check Today's Moves.
4. Do the next useful thing.
5. Tell Checkmate what happened.
6. Leave.

7.1 The five-minute version

If you only have five minutes:

1. Read the Current Move.
2. Do five minutes of it, or do the smallest first step.
3. Record what happened.

Five useful minutes beats twenty minutes of staring at the whole semester.

7.2 The “I have no energy today” version

Some days are heavy.

On those days:

- open the Board;
- choose one tiny action;
- ask for help if you are blocked;
- stop when the day is truly done.

CHECKMATE RULE

A finished day is allowed to be finished. Checkmate should not create extra work just to keep you busy.

8. Weekly Reset: get ready for your week

Once a week, zoom out.

Your Weekly Reset is a quick check of the road ahead.

Ask:

- What is due this week?
- Is anything waiting on someone else?
- Did a deadline change?
- Do I need a professor, advisor, tutor, or school office?
- Is my Current Move still the right first move?
- When is my next Huddle?

You are not trying to plan every minute. You are trying to make surprises less likely.

YOUR MOVE

At the end of the Reset, be able to say: **“This is what matters first this week.”**

9. Messages: talk to your teammate

Use Messages when you already know what you are talking about and want to continue the conversation.

Good times to message:

- you have a quick update;
- a Move changed;
- you got a reply from a professor or school office;
- you have a short question;
- you need to tell Travis what happened.

9.0.1 Weak message

“help”

9.0.2 Better message

“My financial-aid portal still shows a document missing. I uploaded it Monday. What should I check before I contact the office?”

The better message gives enough context to help you faster.

9.1 When to use Ask for Help instead

Use **Ask for Help** when you are not even sure what the problem is, where to go, or what to do next.

IF YOU FEEL STUCK

You do not have to write the perfect message. Start with what you know: **what happened, what you see, and what you are trying to do.**

10. Ask for Help: type it, show it, or say it

Ask for Help is built for the moment when your brain says, “I do not know what to do with this.”

You can:

- **type it;**
- **show it** with a safe screenshot or photo;
- **say it** with voice, when the app supports it.

You do not need to know the right office or the right college word before you ask.

10.1 What makes a great help request?

Try to include three things:

1. **What happened?**
2. **What are you trying to do?**
3. **What is stopping you?**

Example:

“I am trying to register for fall. The portal says I have a hold from Student Accounts. I do not know what it is. What should I check first?”

That is enough to start.

10.2 When Checkmate should ask one good question

Sometimes Checkmate will not know enough yet.

Instead of guessing, it should ask one useful question.

Example:

“Is the hold from Financial Aid, Student Accounts, or another office?”

One good question is better than a confident wrong answer.

WATCH FOR THIS

Before you upload a screenshot, hide or crop out passwords, Social Security numbers, FSA IDs, login codes, full account numbers, and other sensitive information.

11. Team Huddles

A Team Huddle is a 30-minute working session with Travis.

It is not a lecture. It is not a meeting just to “check in.” You should leave with more clarity than you had when you joined.

11.1 What a Huddle is for

A Huddle is useful when:

- several things need to be sorted together;
- you need to make a decision;
- your plan changed;
- a message thread is getting too long;
- you have been stuck;
- you need to build or reset your Game Plan.

11.2 The first Huddle: Game Plan / Semester Game Plan

Your first Huddle has one main goal:

Leave knowing what matters and what to do first.

You do not need to solve the whole semester in 30 minutes.

Travis will review what you already shared, check the Board with you, and turn the biggest needs into a small number of clear Moves.

11.3 How to prepare

Bring what is useful:

- your real questions;
- your school schedule;
- recent school messages;
- a confusing portal status;
- an upcoming deadline;
- a grade or exam result;
- anything that changed.

You do not need a polished speech.

11.4 Extra Huddle requests

Your current membership includes the Huddles described in your service agreement. If something important truly needs more live time, you may ask for an extra Huddle.

An extra Huddle is based on need and availability. It is not automatic.

11.5 Late / missed Huddles

Life happens. If you know you cannot make it, reschedule as early as you can.

Your signed service agreement controls the exact rules for late cancellations, missed Huddles, and whether a Huddle counts.

YOUR MOVE

Before each Huddle, know one thing you want to leave clearer than it is now.

12. My Schedule

My Schedule helps Checkmate understand when your classes happen.

That matters because a good plan has to fit your real week.

You may be able to:

- add classes;
- confirm meeting days and times;
- upload a photo of a printed schedule;
- use **Find Me a Time** to look for open space.

12.1 If you upload a schedule photo

A photo is a shortcut, not magic.

After Checkmate reads it:

1. Check every course.
2. Check the section.
3. Check the days.
4. Check the start and end times.
5. Fix anything that is wrong.
6. Confirm the schedule only when it matches your official schedule.

WATCH FOR THIS

Never trust a schedule photo more than the official schedule in your school account.

13. My Campus

My Campus helps you find the people and offices your school already provides.

That may include:

- advising;
- tutoring;
- financial aid;
- registrar / records;
- student accounts;
- career services;
- library help;
- disability or access services;
- counseling or wellness services.

A strong student does not try to do everything alone. Part of college is learning **who can help with what**.

Checkmate can help you find the right office and prepare what to ask. The school still gives the official answer.

NEW: Find your college's one-tap resource guide in the following chapter. My Campus gives you an actionable next step; the [Florida 28 school directory](#) gives you a school-by-school reference with official-source links, topic jump links and PDF downloads.

14. Florida 28: find your college

The Playbook has one shared guide to using Checkmate, plus a dedicated guide for each Florida College System institution.

How to navigate: Open your college below, use the clickable topic menu inside its school guide, and tap the official resource you need. You can return to the 28-school index at any time. On a phone, use the web guide first; the printable PDF is optional.

- [Browse all 28 colleges \(searchable\)](#)
- [Open the complete Florida 28 PDF atlas \(linked contents\)](#)
- [Open My Campus on your Board](#)

OFFICIAL SOURCE WINS. Checkmate's school guides collect official-site starting points, not institutional endorsements or guarantees of current rules. Confirm dates, holds, campus availability, programs, aid and requirements on the school's live official pages. A school-specific color strip is a navigational cue; only colors linked to published institution brand guidelines have been independently verified.

14.1 Choose your college

[Broward College — OPEN SCHOOL GUIDE →](#)

[Chipola College — OPEN SCHOOL GUIDE →](#)

[College of Central Florida — OPEN SCHOOL GUIDE →](#)

[Daytona State College — OPEN SCHOOL GUIDE →](#)

[Eastern Florida State College — OPEN SCHOOL GUIDE →](#)

[Florida Gateway College — OPEN SCHOOL GUIDE →](#)

[Florida SouthWestern State College — OPEN SCHOOL GUIDE →](#)

[Florida State College at Jacksonville — OPEN SCHOOL GUIDE →](#)

[Gulf Coast State College — OPEN SCHOOL GUIDE →](#)

[Hillsborough College — OPEN SCHOOL GUIDE →](#)

[Indian River State College — OPEN SCHOOL GUIDE →](#)

[Lake-Sumter State College — OPEN SCHOOL GUIDE →](#)

[Miami Dade College — OPEN SCHOOL GUIDE →](#)

[North Florida College — OPEN SCHOOL GUIDE →](#)

[Northwest Florida State College — OPEN SCHOOL GUIDE →](#)

[Palm Beach State College — OPEN SCHOOL GUIDE →](#)

[Pasco-Hernando State College — OPEN SCHOOL GUIDE →](#)

[Pensacola State College — OPEN SCHOOL GUIDE →](#)

[Polk State College — OPEN SCHOOL GUIDE →](#)

[Santa Fe College — OPEN SCHOOL GUIDE →](#)

[Seminole State College of Florida — OPEN SCHOOL GUIDE →](#)

[South Florida State College — OPEN SCHOOL GUIDE →](#)

[St. Johns River State College — OPEN SCHOOL GUIDE →](#)

[St. Petersburg College — OPEN SCHOOL GUIDE →](#)

[State College of Florida, Manatee-Sarasota — OPEN SCHOOL GUIDE →](#)

[Tallahassee State College — OPEN SCHOOL GUIDE →](#)

[The College of the Florida Keys — OPEN SCHOOL GUIDE →](#)

[Valencia College — OPEN SCHOOL GUIDE →](#)

15. Toolkit and What If...?

The Toolkit is for moments when you know what kind of help you need.

Examples may include:

- **WRITE AN EMAIL;**
- **EXAM PREP;**
- **WHAT IF...?;**
- other tools that fit your situation.

You may also see Recommended, Pinned, Recent, and All A-Z.

15.1 Write an Email

Use this when you know who you need to contact but want help making the message clear.

Checkmate can help with structure, tone, and questions. You still check the facts and send the message yourself.

15.2 What If...?

Use What If...? when you are thinking through a situation before you act.

Examples:

- “What if I fail this class?”
- “What if I drop this course?”
- “What if my aid does not show up?”
- “What if the class I need is full?”

The goal is not to scare you with every possible outcome. The goal is to help you see the next smart question.

CHECKMATE RULE

The next screen should remember why you opened it. You should not have to tell the same story again and again.

16. For You: FEEL IT > USE IT > SEE IT > SAY IT

For You is a small daily nudge. It is not another homework list.

The four steps are:

FEEL IT - notice what is true.

USE IT - try a useful idea or tool.

SEE IT - notice what happened.

SAY IT - put the learning into your own words.

The point is simple: help you notice patterns and build better habits.

You can grow without turning every day into a self-improvement project.

YOUR MOVE

Use what helps. Keep moving. You do not have to “perform” growth for Checkmate.

17. My Deck: the game pieces

The Deck turns college situations into game pieces you can understand and use.

It is not just a collection.

Think of it this way:

- **MY HAND** = cards that may help right now;
- **COLLECTION** = cards you have found or can discover;
- **PLAY HISTORY** = what you used and what happened;
- **ORIGIN STORY** = the moments that show how you are changing.

A card matters when it helps you make a real move.

17.1 Card classes

17.1.1 Strategy

A Strategy card is a play you can use.

Example: **START SMALL**.

17.1.2 Shield

A Shield helps prevent a problem before it grows.

17.1.3 Ally

An Ally is a person, office, or resource you can bring into the situation.

Example: **TUTORING CENTER**.

17.1.4 Villain

A Villain is a common blocker or pattern that gets in the way.

17.1.5 Boss

A Boss is a bigger challenge that may take several moves to beat.

17.1.6 Hero

A Hero card is earned from real evidence.

It should mean, “You proved something about how you handled this.”

It is not a personality quiz.

17.1.7 Chance

Chance cards represent events or surprises that can change the Board.

17.1.8 Wild

A Wild card can be useful in more than one kind of situation.

17.1.9 Joker

A Joker changes the normal pattern in a special way.

17.1.10 Grandmaster

Grandmaster is a rare, high-level card tied to strong evidence and growth.

17.1.11 Rookie

Your **ROOKIE - 5-STAR RECRUIT** card is where your story starts.

CHECKMATE RULE

Playing a card is not the same as doing the real-world action. The card helps you call the play. You still make the move and tell Checkmate what happened.

18. Choose Your Mark

Your Mark is a symbol you choose for yourself.

That is it.

There is:

- no quiz;
- no “best” Mark;
- no personality score;
- no hidden meaning assigned by Checkmate.

You pick the creature or symbol that feels right to you.

Your Mark appears on your Rookie card and becomes part of your Checkmate identity.

CHECKMATE RULE

Chosen identity is different from earned identity. You choose your Mark. You earn Hero-style proof through what you actually do.

19. Origin Story

Origin Story is the part of Checkmate that helps you look back and see real change.

It is not a streak counter. It is not a feed of every click.

It may include:

- **WHERE YOU STARTED;**
- **THE MOMENTS THAT CHANGED THE GAME;**
- **THE MOMENT IT CHANGED;**
- **WHAT YOU PROVED;**
- **THEN / NOW;**
- **YOUR WORDS;**
- **THE STORY SO FAR.**

A moment belongs in your story because it meant something.

Maybe you asked for help earlier than you used to. Maybe you recovered after a bad exam. Maybe you handled a problem on your own for the first time.

That is the point: not perfection, but evidence.

PART 2: Parents, Payors and Privacy

20. How parents should use Checkmate

Parents often come to Checkmate because they are tired of carrying the whole college process in their head.

Checkmate should help with that.

The goal is **not** to give parents a new dashboard to manage every move. The goal is to help the student grow while the family still knows the important things.

20.1 What parents can expect

When sharing is allowed, an update may answer three questions:

- **WHAT MOVED?** What changed or got done?
- **WHAT'S NEXT?** What is the student focused on now?
- **ANYTHING YOU NEED?** Does the parent actually need to do something?

A good update should take about 30 seconds to understand.

20.2 What not to ask for

You usually do not need:

- every private message;
- every Board item;
- every worry the student shares;
- the student's school password;
- a play-by-play of the whole week.

More information is not always better support.

20.3 Parent language guide

Instead of...	Try...
"Did you do your FAFSA?"	"What does your Board say the next FAFSA move is?"
"Why haven't you emailed the professor?"	"Are you stuck, or do you know the next move?"
"Give me your portal password."	"Can you show me the status without sharing your password?"
"I'll call the school for you."	"Do you want help getting ready for what you will ask?"
"You need to study more."	"What is the first realistic study move?"

Instead of...	Try...
"You're falling behind."	"What changed this week, and what are you doing first?"

PARENT MOVE

Praise the skill you want to grow: **"You handled that yourself."** **"You asked early."** **"You followed up."** **"You kept the confirmation."**

A student who learns to handle the next problem is getting more value than a student whose parent handled it faster.

21. Payor / Membership Manager guide

The Payor / Membership Manager handles the membership side of Checkmate.

At publication, the premium membership is **\$210 each month**. It includes **two guaranteed 30-minute Team Huddles** each month. New memberships start with a two-month commitment. After that, the membership continues month to month.

Your **signed service agreement** controls the real price and rules for your account if anything is different.

21.1 What the Membership Manager can typically manage

This may include:

- payment method;
- billing status;
- receipts;
- renewal;
- cancellation;
- membership questions.

21.2 What payment does not automatically provide

Paying does **not** automatically give access to:

- all student messages;
- the full Board;
- private reflections;
- detailed Origin Story content;
- school passwords;
- school records that the school protects.

PAYOR MOVE

If there is a billing problem, use the billing/account support path. Do not ask the student to share private school or financial passwords.

Payor, parent, and student are different roles. One person may fill more than one role, but the jobs are still different.

22. Privacy, sharing and student independence

Privacy can get confusing because a school, a parent, a payor, and Checkmate may all hold different kinds of information.

Here is the simple version:

- **The school** controls its school records and school privacy rules.
- **Checkmate** controls Checkmate account and sharing settings under its own policies.
- **The student's sharing choices matter.**
- **Paying for the service does not automatically unlock private student information.**

Schools may also have FERPA rules about what school employees can share with parents or other people.

You do not need to memorize the law to use Checkmate well. Just remember this:

Do not use passwords as a shortcut around privacy.

22.1 What families should never do

- share a student's school password just to watch the account;
- put FSA IDs or login codes into Checkmate;
- assume the payor can make the student's academic choices;
- store highly sensitive financial information in ordinary messages.

IF YOU FEEL STUCK

If you are not sure what a parent or payor can see, ask Checkmate. Do not solve the question by sharing passwords.

23. Where do I go? The decision map

When you are stuck, the hardest part may be knowing **where to start**.

Use this quick map:

What is happening?	First stop	Why
"I know the task. I just need to do it."	Board	The Current Move should show the action.
"I am confused or blocked."	Ask for Help	Checkmate can help sort out the situation.
"I have a quick update for Travis."	Messages	Keep the conversation going.
"I need to talk through several things."	Team Huddle	A live conversation may be easier.
"The school controls the answer."	Official school office/source + Checkmate	Checkmate helps you prepare. The school decides.
"This is an emergency or safety issue."	911 / 988 / the right emergency resource	Checkmate is not an emergency service.

IF YOU FEEL STUCK

If you still do not know where to go, use **Ask for Help** and say: "I do not know who owns this problem." That is a valid place to start.

WATCH FOR THIS

If there is immediate danger, urgent medical need, suicidal crisis, violence, or another emergency, use emergency or crisis services. Do not wait for a Checkmate reply.

24. Scenario Tour 1: registration hold

Jordan opens registration and sees a hold.

His first thought is, “Great. Now what?”

He does **not** start clicking random links. He does not assume the worst. He opens the hold details first.

24.0.1 What Jordan does

1. Reads the hold name and office.
2. Takes a safe screenshot if the message is confusing.
3. Uses Ask for Help:

“I’m trying to register for next semester. This hold is blocking me. What should I check first?”

4. Contacts the office that owns the hold.
5. Saves the reply.

24.0.2 What Checkmate does

Checkmate helps Jordan answer:

- Who owns this hold?
- What does the school say he must do?
- What is the next Move?
- Is Jordan acting now, or is he waiting on the school?
- When should he check again?

24.0.3 What Travis does

If the reply is confusing, Travis helps Jordan understand it and prepare the next question.

24.0.4 What the parent does

Usually, nothing.

A parent steps in only if the school truly needs a parent document, payment, or action.

24.0.5 Done looks like

The hold is cleared and Jordan registers, **or** Jordan has a clear next requirement and knows who owns it.

25. Scenario Tour 2: financial-aid verification or freeze

Maya finished the FAFSA. A week later, her school portal still shows a financial-aid requirement.

That does **not** automatically mean she did FAFSA wrong.

The school may need another step.

25.0.1 What Maya does

1. Opens the official school portal.
2. Reads the exact requirement.
3. Keeps tax returns, FSA IDs, Social Security numbers, and passwords out of Checkmate.
4. Uses Ask for Help with the safe status text.
5. Reads the school's instructions.
6. Completes the required action in the school's approved system.
7. Saves proof.
8. If the school must process it, she moves to **Waiting** and sets a follow-up point.

25.0.2 What Checkmate does

Checkmate helps Maya keep two things separate:

- **FAFSA was submitted.**
- **The school may still need another step.**

It can help her find the official page, plan a question, and remember when to follow up.

OFFICIAL SOURCE WINS

The government and the school decide financial-aid eligibility, amounts, and processing. Checkmate helps with the process. It does not control the result.

26. Scenario Tour 3: failed exam

Chris gets a **58** on his first chemistry exam.

His brain goes straight to: “I’m bad at chemistry.”

That feeling is real. It is also not a plan.

The better question is: **What does this score tell us?**

Chris checks:

1. How much is the exam worth?
2. What topics did he miss?
3. Was the problem knowledge, study time, test speed, anxiety, attendance, or something else?
4. What support is available before the next exam?
5. What is one change he can test this week?

Then he can use tools like:

- **EXAM PREP;**
- office hours;
- tutoring;
- a study group;
- practice questions;
- a better study block.

YOUR MOVE

A bad score is information. Use it to change the next move before you turn it into a story about who you are.

If Chris later shows real improvement, that recovery may become part of his Origin Story.

27. Scenario Tour 4: professor has not answered

Taylor emailed a professor about a make-up exam. No reply yet.

Silence can make students panic. The answer is not to send five more emails.

27.0.1 Do not

- spam the professor;
- assume silence means “yes”;
- have a parent pretend to be the student;
- ignore a real deadline while waiting.

27.0.2 Do

1. Check that the first message went to the right place.
2. Read the syllabus for office hours or response rules.
3. Keep the sent message.
4. Pick a reasonable time to follow up.
5. Follow up once when it makes sense.
6. If a deadline is close, use another proper school contact or ask Checkmate for help.

The goal is calm follow-up, not endless refreshing.

28. Scenario Tour 5: everything at once

A student has three assignments, a financial-aid notice, registration opening, a work shift, and a Huddle in the same week.

Everything feels urgent.

It probably is not.

Start by asking:

1. What has the nearest real deadline?
2. What has the biggest consequence?
3. What can wait until tomorrow?
4. What needs another person before it can move?
5. What is the smallest useful thing I can do now?

Then:

- choose **ONE THING FIRST**;
- protect time for it;
- use **START SMALL** if starting is the hard part;
- move future work to Coming Up.

CHECKMATE RULE

Priority means choosing what gets attention **and** allowing something else to wait.

29. Scenario Tour 6: missed deadline

You missed a deadline.

That feels bad. Hiding from it usually makes it worse.

The recovery move is simple:

1. Confirm exactly what was missed.
2. Check whether a late option, appeal, petition, or other path exists.
3. Contact the right person quickly.
4. Be clear and truthful.
5. Save the reply.
6. Update the Board so the next step is visible.

Do not spend two days writing the perfect apology while the real option closes.

IF YOU FEEL STUCK

The best recovery question is often: **“What can I still do from here?”**

A missed-deadline situation may become a Boss because it can take several Moves to fully recover.

30. Scenario Tour 7: considering withdrawal

A student is thinking about dropping or withdrawing from a class.

This is not a “tap the button and hope” decision.

A withdrawal can affect:

- grades;
- financial aid;
- full-time status;
- prerequisites;
- time to degree;
- money.

Before acting:

1. Check the official deadline.
2. Ask the right school advisor or office.
3. Learn what grade or record will show.
4. Check financial-aid effects.
5. Ask whether tutoring, support, or another recovery option still makes sense.
6. Verify the exact process for this course and term.

Checkmate can help organize the questions and compare the verified choices.

The student makes the final decision.

31. Scenario Tour 8: closed class

The class you need is full.

Annoying? Yes. Game over? Not always.

Possible next moves include:

- join a waitlist, if the school has one;
- check another section;
- check another campus or online format;
- ask about an approved equivalent;
- ask whether a transient course makes sense;
- contact the advisor or department;
- adjust the order of courses in the degree plan.

OFFICIAL SOURCE WINS

Do not assume another class “counts” because the title looks similar. The school decides whether a course meets the requirement.

32. Scenario Tour 9: transfer application

A student wants to transfer. The confusing part is not always the application itself.

It may be:

- prerequisites;
- planned courses;
- transcripts;
- transfer credit;
- major rules;
- deadlines.

A clean path looks like this:

1. Pick the target school, major, and term.
2. Open the official transfer page.
3. Check major prerequisites.
4. List completed courses.
5. List courses still planned.
6. Use transfer-credit tools when useful.
7. Turn missing items into Moves.
8. Save application and document confirmations.
9. Put future transcript steps in Coming Up.

For Florida public transfer planning, FloridaShines can help. For UF, use UF's official transfer pages and transfer-credit tools.

YOUR MOVE

Transfer planning gets easier when you stop asking, "Will everything transfer?" and start asking, **"What does this school require for this major?"**

33. Scenario Tour 10: FAFSA + scholarship season

“Do financial aid” is too big to be one task.

Break the season into smaller moves.

A student may need to:

- make or confirm a StudentAid.gov account;
- use the correct FAFSA year;
- complete the student section;
- invite a contributor when required;
- submit FAFSA;
- review the FAFSA Submission Summary;
- add the right schools;
- watch school-specific aid requirements;
- search for scholarships;
- check each scholarship’s real sponsor and deadline;
- save confirmations.

WATCH FOR THIS

Be careful with anyone promising “guaranteed scholarship money.” Check the sponsor, rules, cost, and official source before giving personal information or paying a fee.

The goal is not to do everything in one night. It is to keep the process moving.

34. Scenario Tour 11: schedule photo extraction

A student has a printed schedule and wants Checkmate to help organize the week.

A photo can save time, but the student still checks the result.

1. Put the whole schedule in good light.
2. Take a clear photo.
3. Upload it through the schedule flow.
4. Check every course, section, day, and time.
5. Fix anything that is wrong.
6. Confirm only when it matches the official schedule.

If the photo is hard to read, do not fight it. Take a better picture or enter the schedule by hand.

CHECKMATE RULE

A fast wrong schedule is not useful. **Confirm before Checkmate plans around it.**

PART 3: College Tools & Official Resources

35. The official-source habit

One of the best college skills is knowing **where to check the truth**.

A simple order is:

1. the current official school or government page;
2. your current official portal or account;
3. a written reply from the office that owns the issue;
4. guidance from the right advisor, professor, or office;
5. Checkmate's help organizing and understanding it;
6. third-party sites, social media, forums, and stories from other people.

Outside sources can help you find a question. They should not quietly beat the official source.

35.1 Save the source, not just the answer

When something important is confirmed, save:

- the link;
- the date you checked it;
- the rule or deadline;
- the office that owns it.

YOUR MOVE

Do not just save "the answer." Save **where the answer came from**.

That is how **VERIFY FIRST** becomes a real habit.

36. FAFSA and Federal Student Aid

FAFSA can feel bigger than it is because it mixes family information, federal rules, school follow-up, and deadlines.

Take it one step at a time.

36.1 Official starting points

- [FAFSA - Federal Student Aid](#)
- [Create a StudentAid.gov account](#)
- [Federal Student Aid Estimator](#)

36.2 What Checkmate can help with

Checkmate can help you:

- use the correct FAFSA year;
- see which step comes next;
- tell the difference between “FAFSA submitted” and “school still needs something”;
- prepare a question for financial aid;
- save proof and remember when to follow up.



Scan for official
resource

36.3 What Checkmate should not receive

Do **not** send Checkmate:

- your FSA ID password;
- Social Security numbers;
- tax-return copies;
- bank passwords or account credentials;
- login or authentication codes.

If a parent is a FAFSA contributor, that person should use the official contributor steps. They should use their own StudentAid.gov account when FAFSA asks for it.

37. College search, applications and testing

You do not need fifty college websites open at once. Start with the right tool for the question.

37.1 Compare schools

[College Navigator - NCES](#) gives federal college data. You can use it to compare schools, programs, costs, and other facts.

37.2 Apply

- [Common App](#)
- [Common App Transfer Resource Center](#)

Always check whether your school uses Common App or another application.

37.3 Institutional aid

[CSS Profile](#) is used by some colleges and scholarship programs for school-based aid.

Not every school uses it. Check the school's official financial-aid page first.

37.4 Testing

- [SAT](#)
- [ACT](#)

Testing rules can change by school and application term. Use the college's current admissions page to see what applies to you.

38. Florida transfer planning

If you plan to transfer in Florida, start with the official Florida tools:

- [FloridaShines - Plan Your Path](#)
- [Transfer Schools](#)
- [Common Prerequisites Manual](#)
- [Check Your Progress](#)

Florida has transfer agreements that can make planning easier.

But there is an important difference:

Credits can transfer without guaranteeing admission to a certain university or major.



Scan for official
resource

Always check the school and major you want. Some majors have extra courses, GPA rules, or limited space.

39. Career + scholarship tools

Useful starting points:

- [CareerOneStop Scholarship Finder](#) - search for scholarships and education awards. Check every deadline and rule with the real sponsor.
- [BLS Occupational Outlook Handbook](#) - explore jobs, common education paths, pay, duties, and job outlook.

Career information is evidence, not destiny.

A salary chart cannot tell you what kind of life you want. It **can** help you ask better questions.

40. School Pack: College of Central Florida

Use these official CF starting points:

- [CF Admissions](#)
- [CF Financial Aid](#)
- [CF FAFSA](#)
- [CF Academic Advising](#)
- [CF Dates and Deadlines](#)
- [CF College Catalog](#)
- [CF Academic Services](#)
- [CF Transcripts](#)



Scan for official
resource

40.1 When to go directly to CF

Go to CF for the official answer on:

- holds and registration;
- degree rules;
- aid status;
- transcripts;
- course substitutions;
- graduation rules;
- program admission;
- official dates and deadlines.

Checkmate can help you prepare the question and keep track of what CF tells you.

41. School Pack: University of Florida

Use these official UF starting points:

- [UF Transfer Admissions](#)
- [UF Transfer Credit Evaluation](#)
- [UF Financial Aid - How to Apply](#)
- [UF Undergraduate Catalog](#)
- [UF Dates and Deadlines](#)
- [UF Academic Advising](#)
- [UF Transcripts](#)



Scan for official
resource

41.1 Transfer-specific note

UF transfer admission depends on the **major**.

Before assuming an AA degree or transferable credits are enough, check:

- the major's required courses;
- GPA expectations;
- which term accepts transfers;
- current deadlines.

Transfer-credit tools can help you estimate. UF and the receiving college/major make the final decision about how credit applies.

42. School Pack: Valencia College

Use these official Valencia starting points:

- [Valencia Admissions](#)
- [Valencia Financial Aid](#)
- [Valencia Advising Services](#)
- [Valencia Learning Support](#)
- [Valencia Transcripts](#)
- [Valencia Catalog](#)
- [Valencia Academic Calendar](#)



Scan for official
resource

Valencia Student Success Coaches are an important official planning resource.

Checkmate can help you get ready for that conversation, write down your questions, and follow through afterward.

PART 4: Troubleshooting and Reference

43. Troubleshooting: fix the path, not just the screen

Something went wrong. Start with the smallest useful fix.

43.1 I cannot log in

1. Make sure you are using the right email.
2. Use the normal sign-in or recovery option.
3. Do **not** create a second account just because login failed.
4. If you are still stuck, contact Checkmate support. Share the email you are trying to use, but **never your password**.

43.2 My Board looks wrong

Tell Checkmate what is wrong in plain language.

Examples:

- “This Move is old.”
- “I already finished this.”
- “This is showing twice.”
- “Something urgent is missing.”
- “This deadline already passed.”
- “My Current Move does not match what happened.”

The Board should match real life.

43.3 My schedule uploaded incorrectly

Fix the course, day, or time that is wrong.

If the photo was hard to read, upload a clearer photo or enter the schedule by hand. Compare it with your official school schedule.

43.4 My Huddle link does not work

Go back to the current Huddle/scheduling area and request the current booking path.

Do not keep trying an old link from another booking.

43.5 Payment failed

The Membership Manager should open the billing/account area or contact Checkmate support.

Fix the payment method or follow the support instructions. Do not use the student's school login or private account information to solve a Checkmate billing problem.

43.6 I sent a message and nothing happened

First ask: **Who are we waiting on?**

It may be Travis, a school office, a professor, or someone else.

If a real deadline is getting close, do not assume the deadline pauses while you wait. Use Ask for Help or contact the right school office.

44. Frequently Asked Questions

44.1 Do I need to check Checkmate every day?

Not all day. A quick Board check most days is enough. Do a Weekly Reset once a week and check Messages when something changes.

44.2 What if my Current Move is wrong?

Tell Checkmate. Your Board should match real life.

44.3 Can Travis register me for classes?

No. He can help you understand the process and compare options. You control your school account and submit your own registration.

44.4 Can Checkmate fill out my FAFSA for me?

No. Checkmate can explain the steps and help you stay organized. You and any required contributors complete the real FAFSA through Federal Student Aid.

44.5 Should I send my FSA ID or password?

No. Keep it private.

44.6 Can my parent see my whole Board?

Not automatically. What a parent can see depends on your current sharing and privacy rules.

44.7 My parent pays. Does that mean they see everything?

No. Paying and seeing private student information are two different things.

44.8 Can I ask for another Huddle?

Yes. If something important needs more live time, ask. Extra Huddles depend on need, availability, and your current membership rules.

44.9 Do unused Huddles roll over?

Do not assume they do. Check your signed service agreement or current account information.

44.10 What if I miss a Huddle?

Message your teammate and reschedule. Your signed agreement explains how missed or late Huddles are handled.

44.11 What is the difference between Messages and Ask for Help?

Use **Messages** to keep a conversation going.

Use **Ask for Help** when you are stuck, confused, or not sure what the next move is.

44.12 Can I send a screenshot?

Yes, when the app allows it. Hide passwords, Social Security numbers, FSA IDs, login codes, and other sensitive information first.

44.13 What if I do not know which office to contact?

Use Ask for Help. Checkmate can help you figure out who likely owns the issue and what to ask.

44.14 Does Checkmate replace my academic advisor?

No. Your school advisor is still the official school resource.

44.15 Can Checkmate tell me whether a course will transfer?

Checkmate can help you find official transfer tools. The school you are transferring to makes the final decision about how your credit counts.

44.16 Does a Hero card mean Checkmate thinks that is my personality?

No. A Hero card is based on what you actually proved through your actions.

44.17 What does my Mark mean?

You choose it. Checkmate does not assign a personality meaning or score to it.

44.18 Can I change my Mark?

Use the current My Mark options in Checkmate. Your Mark stays something you choose, not something Checkmate scores.

44.19 Why is a card locked?

Some cards appear only after the right situation or real evidence exists.

44.20 Does playing a card mean I did the real action?

No. The card helps you call the play. You still have to do the action and report what happened.

44.21 What if I failed a class?

Bring the situation to Checkmate and the right school office. You may need to look at repeat rules, prerequisites, financial aid, and the next semester plan.

44.22 What if I want to withdraw from a course?

Check the official deadline and possible effects before you act. Checkmate can help you make a list of questions. Your school gives the official rules.

44.23 What if I change majors?

Tell Checkmate and check the new degree rules. A major change can affect required courses, transfer plans, and time to graduation.

44.24 What if a professor changes a deadline?

Use the professor's current course message as the official source for that class. Update your Board.

44.25 What if the school portal is down?

Save a screenshot if it helps. Check for an official outage notice. Avoid sending the same thing over and over. If a deadline is close, Ask for Help.

44.26 What if I am overwhelmed and cannot start?

Use **START SMALL** or **ONE THING FIRST**.

Your job is not to solve the whole week. Pick the smallest useful move.

44.27 What if my parent keeps taking over?

Read the Parent section together. Checkmate is built to help return ownership to the student.

44.28 Can Checkmate contact my professor for me?

Usually, no. The goal is to help **you** communicate directly. If a rare exception is allowed, it must be proper and authorized.

44.29 Does Checkmate do my homework?

No.

44.30 Can Checkmate help with an email or essay?

Yes. Checkmate can brainstorm, coach, proofread, and give feedback. You own the ideas, facts, and final submission. Follow your school or application rules about outside help and AI.

44.31 What happens if I stop responding?

Checkmate can follow up, but it cannot make real-life moves for you. Your participation matters.

44.32 What if I go on break for summer?

Check your membership terms. A change inside the app does not automatically change billing.

44.33 What if my payment fails?

The Membership Manager should update the payment method or contact Checkmate support.

44.34 How do I cancel?

Use the current cancellation method in your account or contact Checkmate support. Your signed agreement controls the timing and any required final payment.

44.35 What if I need an official transcript?

Use your school's official transcript process. The resource section includes starting links for CF, UF, and Valencia.

44.36 What if I need tutoring?

Use My Campus, an Ally card, or your school's official tutoring or learning-support service.

44.37 What if I have a disability accommodation question?

Contact your school's official accessibility or disability-services office. Checkmate can help you prepare your questions.

44.38 What if I am in a mental-health crisis?

Use emergency or crisis help. In the U.S., 988 is available for suicide and crisis support. Checkmate is not emergency or mental-health treatment.

44.39 What if I am not sure whether information is current?

Use **VERIFY FIRST**. Open the official source and check the date or current rule.

44.40 What is the simplest way to use Checkmate?

Open Board. Make the Current Move. Tell Checkmate what happened. Ask early when you are stuck.

45. Quick Reference: Five rules that make Checkmate work

These rules are written for people, not software.

45.1 Rule 1: THE STUDENT MAKES THE MOVE

Checkmate can prepare, explain, organize, remind, and help.

The student takes the real action and makes the real choice.

45.2 Rule 2: The Board should tell the truth

If something is finished, it should look finished.

If a deadline is in the future, it should not look overdue.

If the Board is wrong, say so.

45.3 Rule 3: You should not have to repeat the whole story

If you open Ask for Help, What If...?, My Campus, or a card for a reason, Checkmate should remember that reason as you move through the next steps.

45.4 Rule 4: Not everything is urgent

A deadline next month matters. That does not mean it needs to take over today.

The Board should help you see the difference between **important soon** and **act now**.

45.5 Rule 5: Waiting is still a real status

Sometimes you already did your part.

If the professor, school, or another person has the next step, your job may be to wait until a clear check-by date.

CHECKMATE RULE

When today's Current Move is enough, you are allowed to be done for today.

46. Game Plan walkthrough: what actually happens in the first Huddle

Your first Huddle should feel like a useful conversation, not an interview.

You are not going to sit there while Travis reads a giant form at you.

The goal is simple:

Make sure the Board matches your real life. Decide what matters. Leave knowing what to do first.

46.1 Before the Huddle

Travis reviews your Starting Position and what Checkmate already knows.

He may place a few likely needs on the Board so you are not starting from a blank screen.

Nothing is treated as final until you confirm it.

46.2 Minutes 0-3: settle in

You should hear some version of:

“We do not have to figure out your whole semester today. We are going to make sure the Board is right, decide what matters most, and leave with a few clear moves.”

46.3 Minutes 3-10: where are you right now?

Travis may ask:

- What feels good right now?
- What feels confusing?
- What have you already handled?
- Is there anything you are afraid you might miss?
- What would make the next two weeks easier?
- What kind of help is useful: reminders, explanation, organization, accountability, or a push?

There are no “right” answers.

46.4 Minutes 10-18: check the Board together

Travis shows what he thinks is true.

Your job is to say:

- “Yes, that is right.”
- “That changed.”
- “You are missing this.”

46.5 Minutes 18-25: choose a few Moves

For each Move, ask:

- What needs to happen?
- What does “done” look like?
- Is there a real date?
- What could block me?
- Who has the next step?

Keep the list small enough to use.

46.6 Minutes 25-28: choose the Current Move

Before the Huddle ends, you should know what gets attention first.

46.7 Minutes 28-30: close cleanly

Before you leave, confirm:

- your first Move;
- where to ask for help;
- anything you are waiting on;
- when the next Huddle should happen;
- whether a parent needs to do anything.

CHECKMATE RULE

A good first Game Plan gives you clarity. It does **not** dump every possible task onto your Board.

47. Message examples you can actually use

These are starting points. Make them sound like you.

47.1 Professor: clarify an assignment requirement

Subject: Question about [Assignment Name]

Hello Professor [Last Name],

I am working on [assignment] and want to make sure I understand one part of the directions.

I reviewed [syllabus/instructions], but I am still unsure about [one clear question].

Could you clarify whether [specific question]?

Thank you,

[Student Name]

47.2 Professor: request a meeting after a poor exam

Subject: Meeting about Exam 1

Hello Professor [Last Name],

I received my Exam 1 grade and want to improve before the next exam.

I reviewed the result, but I would like help understanding what I should focus on first.

Could I meet with you during office hours or another available time?

Thank you,

[Student Name]

47.3 Advisor: registration planning

Subject: Question about my [term] schedule

Hello [Advisor Name],

I am planning my [term] schedule and want to make sure I am staying on track for [degree/transfer goal].

I am considering [course or short course list].

Could you help me confirm whether [specific course] meets [specific requirement] and whether I need anything before it?

Thank you,

[Student Name]

47.4 Financial aid: unresolved requirement

Subject: Question about financial-aid requirement

Hello,

My student portal still shows [safe status or requirement].

I completed [action] on [date]. Could you tell me whether anything else is needed and how long I should normally wait before checking again?

Thank you,
[Student Name]

47.5 Registrar: hold or record issue

Subject: Registration hold question

Hello,

I am trying to register for [term], but my account shows a hold from [office or hold name].

The portal says [safe status].

Could you tell me what I need to do to clear the hold?

Thank you,
[Student Name]

47.6 Follow-up after no response

Hello [Name],

I am following up on my message from [date] about [topic].

I am checking again because [real deadline, if there is one].

Please let me know if you need anything else from me.

Thank you,
[Student Name]

47.7 The rule for email templates

A template should help you sound **clearer**, not fake.

Before you send:

- check the name;
- check the date;
- check the facts;
- check the question;

- make sure the message sounds like you.

48. Parent update examples

Parent updates should make life easier. They should not feel like surveillance.

A simple update uses three parts:

WHAT MOVED • WHAT'S NEXT • ANYTHING YOU NEED

48.1 After the first Game Plan

WHAT MOVED

We reviewed where things stand and turned the biggest needs into clear Moves.

WHAT'S NEXT

The first focus is: [plain-language Current Move].

ANYTHING YOU NEED

Nothing right now. We've got it from here.

48.2 When the student has a win

WHAT MOVED

[Student] completed / submitted / scheduled [specific thing].

WHAT'S NEXT

The next focus is [specific next move].

ANYTHING YOU NEED

Nothing right now. I just wanted you to know things are moving.

48.3 When parent action is truly needed

WHAT MOVED

[Short update.]

WHAT'S NEXT

[Student] is ready for [next action].

ANYTHING YOU NEED

Could you please [one specific parent action] by [real date]? Once that is done, [student] can keep moving.

48.4 When a Huddle is missed

Keep it simple and do not shame the student.

Example:

“[Student] missed today’s Huddle. I reached out so we can get the next one scheduled. No action is needed from you right now unless I let you know otherwise.”

49. Semester rhythm: how Checkmate changes with the calendar

College does not feel the same every week. Checkmate should not treat every week the same either.

49.1 Before classes begin

Check:

- your schedule;
- payment and financial aid;
- books or materials;
- campus or online access;
- holds;
- first-week plans;
- work and family time.

49.2 Weeks 1-2

Focus on:

- showing up;
- reading the syllabus;
- learning where class messages appear;
- finding the assignment system;
- asking early when something is confusing;
- learning where tutoring and office hours are.

This is a great time to **ASK EARLY**.

49.3 First big exams or assignments

Use the result as evidence.

Ask:

- Did my study method work?
- Did I give myself enough time?
- Did I use help early enough?
- Is this one bad result or a pattern?

49.4 Midterm

Check the real numbers.

Look at:

- actual grades;
- what recovery is still possible;
- next-term registration;
- financial-aid concerns if they apply;
- whether the Game Plan needs a reset.

49.5 Registration season

Check:

- degree rules;
- prerequisites;
- your registration date/time;
- holds;
- backup classes;
- transfer plans;
- payment readiness.

49.6 Finals

Protect what still matters.

Focus on:

- the real exam schedule;
- the work that can still change a grade;
- study time;
- questions you still need to ask;
- next-semester loose ends.

49.7 Between semesters

Close the old semester before building the next one.

Check:

- final grades;
- balances or holds;
- transcripts;

- next schedule;
- aid renewal steps;
- updated goals;
- what you learned about how you work.

50. Getting to College journey: the pre-college map

If you are still getting to college, Checkmate may organize the journey like this:

GAME PLAN > FIND YOUR FIT > APPLICATION READY > APPLICATIONS IN > FINANCIAL PLAN > THE PICK IS IN > WELCOME TO CAMPUS > DAY ONE READY > CHECKMATE

These are not levels to race through. They are simply a way to see what matters next.

50.1 GAME PLAN

Start with where you are, what you want, and what matters first.

50.2 FIND YOUR FIT

Build a school list using facts, not just vibes.

Look at:

- programs;
- admission rules;
- cost and aid;
- location and campus fit;
- transfer or career goals;
- your academic record.

50.3 APPLICATION READY

Get the pieces ready:

- accounts and logins;
- activity list;
- transcripts and testing plan;
- recommenders, if needed;
- essay plan;
- deadlines.

50.4 APPLICATIONS IN

Submitted does not always mean finished.

Keep watching:

- applicant portals;
- missing items;
- transcripts and test scores;
- financial-aid steps;
- interviews or extra forms.

50.5 FINANCIAL PLAN

Compare the **real offers**.

Look at grants, scholarships, loans, work-study, payment plans, and any rules attached to the money.

50.6 THE PICK IS IN

The student makes the college choice.

Checkmate can help compare the facts, but it does not pretend there is one perfect school for everyone.

50.7 WELCOME TO CAMPUS / DAY ONE READY

Finish the real setup:

- enrollment steps;
- orientation;
- housing, when needed;
- required health forms;
- payment;
- class schedule;
- first-week plan.

Then Checkmate can move with you into the in-college semester experience.

51. Security and account habits

Your school accounts can hold grades, money, identity information, and private records.

Protecting them is part of being independent.

51.1 Do

- use a different password for important accounts;
- turn on two-step login when offered;
- keep your recovery email and phone current;
- check the website address before you sign in;
- sign out of shared computers;
- keep useful confirmations;
- use official portals for sensitive forms.

51.2 Do not

- send your password to a parent, friend, or Checkmate;
- send login codes through Messages;
- upload tax documents to normal support chats;
- click suspicious login links;
- let someone else pretend to be you in a school account.

WATCH FOR THIS

If someone asks for a password or login code through a message, stop and verify who is asking before you do anything.

52. Student quick-reference checklists

Use these when your brain is full and you want a short list.

52.1 When you receive a confusing school message

- ☐ Read the whole message once.
- ☐ Who sent it?
- ☐ What do they want you to do?
- ☐ Is there a real deadline?
- ☐ Check the official portal if needed.
- ☐ Ask for Help if it is still unclear.
- ☐ Save proof after you act.

52.2 Before registration

- ☐ Know your registration date and time.
- ☐ Check for holds.
- ☐ Review degree/major rules.
- ☐ Check prerequisites.
- ☐ Build your first-choice schedule.
- ☐ Build a backup.
- ☐ Check payment/aid timing.
- ☐ Save your final schedule.

52.3 Before an exam

- ☐ Know what the exam covers.
- ☐ Know what you do not understand yet.
- ☐ Practice. Do not only reread.
- ☐ Ask questions early.
- ☐ Use tutoring or office hours when useful.
- ☐ Protect real study time.
- ☐ Sleep and show up ready.

52.4 When a real-world action is complete

- ☐ What happened?
- ☐ Do I have proof or confirmation?

- [] Am I waiting on someone else now?
- [] When should I check again?
- [] Does my Board match the new reality?

53. Parent quick-reference checklists

53.1 Before asking the student for an update

Ask yourself:

- Do I need to do something, or am I feeling anxious?
- Did the last Checkmate update already give me what I need?
- Can I ask a question that sends ownership back to the student?
- Am I about to solve something the student could learn to solve?

53.2 When the student is struggling

Try this order:

1. Listen.
2. Ask what the Board says.
3. Encourage Ask for Help.
4. Help create time or space if that is the real problem.
5. Step in only when a real parent action or safety need calls for it.

53.3 When celebrating progress

Praise the skill:

- “You asked early.”
- “You followed up.”
- “You checked the source.”
- “You used tutoring.”
- “You made the call.”
- “You recovered after a miss.”
- “You handled that yourself.”

54. Payor quick-reference checklist

- ☐ Know the monthly billing date.
- ☐ Keep the payment method current.
- ☐ Read the signed agreement for commitment and cancellation rules.
- ☐ Use account/support channels for billing questions.
- ☐ Do not ask for student passwords to solve billing.
- ☐ Remember: paying does not automatically unlock private student information.
- ☐ If service is ending, confirm the end date and any final payment that is still due.

55. Glossary

Ally - a Deck card that points to a person, office, place, or resource that can help.

Ask for Help - the place to go when you are stuck, confused, or not sure what to do next. Type it, show it, or say it.

Board - your main Checkmate screen for what matters now.

Boss - a bigger problem that may take several Moves to solve.

Chance - a card for a real opportunity or event that changes what is possible.

Check-by point - the date or time when you should check a Waiting item again.

Close the Loop - find out what happened after you acted instead of assuming the problem is solved.

Collection - the part of My Deck where you browse cards.

Coming Up - future items that matter soon.

Current Move - the clearest thing to do next.

Deck - Checkmate's card system for useful plays, helpers, blockers, and earned growth.

FEEL IT - the first part of For You. Notice what is true for you.

For You - a short reflection/action flow: FEEL IT > USE IT > SEE IT > SAY IT.

Game Plan - the first working plan you build with Travis. In college, it may be called a Semester Game Plan.

Grandmaster - a rare Deck class tied to strong proof of growth or skill.

Hero - an earned card based on real evidence of how you handled something.

In Play - active situations that still matter, even if they are not the Current Move.

Joker - a rare card that changes the normal pattern in a special way.

Mark - the creature or symbol you choose for yourself. Checkmate does not score it or assign a personality meaning.

Membership Manager - the person who manages membership billing. That does not automatically mean they can see private student information.

Messages - the place for normal conversation with your teammate.

Move - a clear action with a clear finish line.

My Campus - school-specific offices, people, and resources.

My Deck - the student Deck area, including My Hand, Collection, Play History, and Origin Story.

My Hand - the small group of cards that may matter most right now.

My Schedule - the place to add or confirm classes and look for usable time.

Origin Story - a record of meaningful moments that show real growth over time.

Parent Update - a short family update built around What Moved, What's Next, and Anything You Need.

Payor - a person who pays for the service. A payor is not automatically the student, parent, or person who can see private academic details.

Play History - a record of cards you played and what happened.

Proof - the result or confirmation that tells Checkmate what really happened after a Move.

Rookie - your starting identity card.

SAY IT - the part of For You where you put the lesson into your own words.

SEE IT - the part of For You where you notice the result or example.

Shield - a Deck card meant to help prevent a problem.

Starting Position - the picture of where you are when you begin or reset a plan.

Strategy - a Deck card that gives you a useful play to try.

Student Commitment - the student's promise to own the work, choices, and real-world actions.

Team Huddle - a 30-minute one-to-one working session with Travis.

Today's Moves - the small number of actions worth doing now.

Toolkit - reusable tools such as Write an Email, Exam Prep, and What If...?

USE IT - the part of For You where you try the idea in real life.

Villain - a common blocker or pattern that gets in the way.

Waiting - the status used when you already did your part and someone else has the next step.

Weekly Reset - the short flow that helps you get ready for the week.

Wild - a flexible Deck card that can fit more than one kind of situation.

56. Resource Directory — verified October 7, 2026

These links are provided as starting points. Websites, policies and deadlines can change. Confirm current information on the live official page.

56.1 General college + aid

- [FAFSA - Federal Student Aid](#)
- [Create a StudentAid.gov account](#)
- [Federal Student Aid Estimator](#)
- [College Navigator - NCES](#)
- [Common App](#)
- [Common App Transfer Resource Center](#)
- [CSS Profile](#)
- [SAT](#)
- [ACT](#)
- [CareerOneStop Scholarship Finder](#)
- [BLS Occupational Outlook Handbook](#)

56.2 Florida planning + transfer

- [FloridaShines - Plan Your Path](#)
- [FloridaShines - Transfer Schools](#)
- [FloridaShines - Common Prerequisites](#)
- [FloridaShines - Check Your Progress](#)

56.3 Checkmate

- [Checkmate College](#)
- Support email: **help@checkmatecollege.com**

57. Publication notes

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This Playbook explains how to use Checkmate. It is not the legal agreement for the service.

If this Playbook says something different from your signed agreement or privacy notice, use those documents. If it says something different from a current school or government rule, use the current official rule.

Software, links, and school rules can change. Use the current Checkmate experience and current official sources when something has changed since this version was published.

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