

Students — everyone currently in class

One student, one profile. Open a row for the full record: readiness checklist, attendance, skills, clinicals, certification, notes and change log, all in one place.

1 What this page is for

WHAT THIS PAGE IS FOR

The working roster. It lists everyone at the **Started** stage — in class right now — from the all-time roster, so it does not change with the 30d / 90d / 12mo buttons. Students arrive here automatically on their class start date (the hourly sync moves Enrolled → Started) and leave when the class ends.

THE TABLE

COLUMN	MEANING
Student	Name and phone.
Program	The program they are enrolled in.
Cohort	The class (start date).
Stage	Started, always, on this page.
Enrollment checklist	A small bar: how many of the nine readiness items are complete.
Flags	Past-due or attention-needed checklist items, low attendance, clearance problems.
Open	Opens the full record.

THE FULL RECORD (THE DRAWER)

Nine tabs:

1. **Overview** — contact details, program, cohort, stage, a summary of everything below.

2. **Readiness Checklist** — nine items: Application, Enrollment Agreement, ID, Background Check, Deposit, CPR Card, Documents, Clinical Clearance, LMS Access. Each is Complete, Pending, Missing, Past Due or Attention Needed. Click an item to change it.
3. **Attendance** — this student's row from the attendance grid with the rate.
4. **Skills** — the skills check-off list for the program (passed / not yet / needs practice).
5. **Clinicals** — placement, dates, hours against the requirement, clearance.
6. **Certification** — testing organisation, eligible, registered, exam date, result, certificate number.
7. **Notes** — dated staff notes; add one at the bottom.
8. **Comms** — every text sent to the student.
9. **Change Log** — who changed what and when (the audit log).

2 The number cards

The cards across the top of the page, left to right.

CARD	WHAT IT COUNTS
Active students	People at Started right now.
Programs running	Distinct programs among them.
Median checklist	The middle readiness score across the roster (items complete out of nine).
Need attention	Students with a past-due or attention-needed checklist item.

3 Step by step

Tick off a checklist item

1. Open the student, tab **Readiness Checklist**.
2. Click the item and choose the new status.
3. It saves at once and shows in the Change Log.

Add a note

1. Open the student, tab **Notes**.
2. Type what happened and press **Save note**. Your email and the time are recorded.

Find a student

1. Type part of the name, phone or program in **Search** at the top.

4 If something looks wrong

A student who is in class is not listed.

Either their class start date has not passed yet (they are still Enrolled — see the Pipeline) or they enrolled before the sync existed and have no dashboard record; three such students are known and will be added.

The checklist is all Pending.

Nothing has been recorded yet; the checklist starts blank for each student.