

Start here — how the dashboard works

Everything that is the same on every page: signing in, the header, the date buttons, the profile drawer, the Contacted control, moving cards, texting, and where every number comes from.

1 What this page is for

WHAT THIS IS

The Leadership Dashboard is one private website that shows the whole school at once: who asked about a program, who applied, who enrolled, who is in class, who finished, who got certified and who got hired — plus the money attached to each step. Nothing on it is typed in from memory: the numbers come from the school website, from Transition Enroll (the enrollment system) and from what staff record on this dashboard.

WHO CAN USE IT

Only staff with a login. Every page sits behind the sign-in screen, and access is logged. Student contact details are confidential — treat every page as internal.

WHERE TO BEGIN

1. **Today** tells you who is waiting on you right now.
2. **Pipeline** is where you move people forward.
3. **Leads & Admissions** is the full list of inquiries.
4. **Students** is everyone currently in class.
5. **Executive** is the one-page summary for the owner.

Every page title and every section title has a small ? beside it. Click it for a plain-English explanation of that part. The ? **Help** button at the bottom-right explains whichever page you are on.

2 The header, top to bottom

THE TOP BAR

- **All is Well logo** — decoration only; it does not navigate.
- **30d / 90d / 12mo** — the time window most tabs count in. The one you press turns purple.
- **LIVE DATA pill** — green means the dashboard is reading the real database. If it ever says *Simulation*, the numbers are sample data, not real students.
- **Classes portal** — opens the class schedule site in a new tab.
- **Student portal** — opens the site students use to see their own programs, dates and payments. Staff can sign in there with the dashboard password to look someone up.
- **Website** — alliswellhca.com, the public site whose forms feed this dashboard.
- **Wellness site** — the Health & Wellness Center site.
-  **Manual** — opens the manual library (the pages this help is built from).
-  **Overview** — the short walk-through flip-book.
- **Your email** — who is signed in. Anything you save is recorded under this address.
- **Sign out.**

THE TWO MENU ROWS

Row one is the **Dashboard** group (numbers and charts). Row two holds **Student Records** (day-to-day student work), **Transition Enroll · live** (the enrollment system, read-only) and **Operations** (reports, texting, partners). On a narrow screen each row scrolls sideways — use the small › arrow at the right end of the row.

3 Where every number comes from

THREE SOURCES, ONE DATABASE

SOURCE	WHAT IT SENDS	HOW OFTEN
The school website (alliswellhca.com)	Every page visit (anonymous), every inquiry form, every online application, the text-message consent box.	Instantly, as it happens.

Transition Enroll	Programs (catalogue), classes, students, registrations and payments. New students are copied into the pipeline as <i>Enrolled</i> ; student stages are moved forward from class dates.	Every hour, five minutes past the hour, Texas time.
Staff, on this dashboard	Stage moves, Contacted / Not contacted, close-out reasons, ad spend, monthly typed numbers, checklist items, attendance, skills, clinicals, certification results, notes, partners, texts.	The moment you save.

TIME ZONE

Everything is counted in **Texas time** (Central). "Today" starts at midnight in Little Elm, not in London.

TWO DOORS IN, TWO KINDS OF RECORD

Someone who fills in the website form gets a record whose ID starts **AIW-**. Someone who registers in Transition Enroll gets a record whose ID starts **TE-S-** and arrives already at *Enrolled*. The dashboard does **not** yet join the two by phone or email, so a person who inquires on the website and later enrolls in Transition Enroll shows twice: mark the website record Contacted and move it along by hand so it does not sit in the Today queue.

Three students are missing a dashboard record (they enrolled before the sync existed). They appear on the Transition Enroll tabs but not in the Students tab. Mission Metrics will add them.

4 The person profile drawer

Click a name on Today, a card on the Pipeline, or a student on Class Progress and a panel slides in from the right. It is the one place to see everything about one person.

TOP OF THE DRAWER

- Name, program and stage.
- **Call** — dials the phone on the record (works on a phone or a Mac with iPhone calling).
- **Text** — opens the Communication Center with this one person already chosen.
- **Email** — opens your email app with their address filled in.

CONTACT

Phone and email exactly as they gave them.

WHERE THEY ARE

ROW	MEANING
Stage	The pipeline stage right now.
Program	What they asked about or enrolled in. Website inquiries show the website's short program code (e.g. cna-3-week-evening); Transition Enroll students show the full program name.
Tuition attached	The published tuition of that program, or — if the program has no published price.
Came to us through	Website form, website application, Transition Enroll registration, or Transition Enroll inquiry — and, for website visitors, whether they came from a link (Facebook, Google...).
Arrived	The date the record was created and how long ago that was.
Contacted?	The green/red dropdown. See <i>Marking someone Contacted</i> .
How	Phone call, text, email or in person — and who recorded it.
Owner	The staff member responsible, or Unassigned.
Text consent	Yes if they ticked the text-message box on the website form; No if they left it unticked; — if the form did not ask (Transition Enroll students).
Employed at / Student since / Diploma-GED / Certified before / Wants career services / How they heard	Shown when the record has them — Transition Enroll students carry the enrollment-form answers.

PAYMENTS

For Transition Enroll students: every payment with date, amount and status, and the total paid.

TEXTS AND FOLLOW-UPS

Every text the school has sent this person from the dashboard or automatically (welcome text, staff alerts do not appear here), newest first, with sent / failed / queued status.

WEBSITE ACTIVITY

The pages this person looked at on alliswellhca.com, if their visit was tied to their inquiry.

5 Marking someone Contacted / Not contacted

The same green/red dropdown appears in three places and they all change the *same* record: the **Today** queue (Contacted? column), **Leads & Admissions** (under Response time) and the person's **profile drawer**.

TO MARK SOMEONE CONTACTED

1. Change the dropdown from **Not contacted** to **Contacted**.
2. A small box opens inside the page: **Date and time** (already set to now — change it if the call happened earlier) and **How** (phone call, text, email, in person, or leave as "Not recorded").
3. Press **Save**. The time cannot be in the future.

WHAT HAPPENS WHEN YOU SAVE

- The record gets the contact date and time, the method, and your email as the person who recorded it.
- The database works out the **minutes from arrival to first contact** itself — that feeds Speed to Lead and the "Response time" column.
- A brand-new lead (stage *Lead*) is moved to the *Contacted* column of the Pipeline automatically.
- Every tab redraws so Today, Leads & Admissions, Speed to Lead, the Pipeline, the profile and the 6 pm digest all agree.
- The change is written to the audit log.

TO CHANGE THE DATE OR TIME LATER

Click the date shown beside the green dropdown; the same box opens.

TO UNDO

Choose **Not contacted**. The contact fields are cleared. If the person had been moved to *Contacted* automatically they go back to *Lead*; a stage set by hand is left alone.

Moving a card out of **New Lead** on the Pipeline asks the same question in the same box, so there is only one way to record a first contact.

6 Moving people along the Pipeline

THREE WAYS TO MOVE A CARD

1. The small <> arrows on the card move it one column back or forward. A greyed arrow means the card is already in the first or last column (hover it to see the hint).
2. **Drag** the card and drop it on another column.
3. In **Parked & closed out**, press **Reactivate** to bring a parked person back to the stage they were at.

LEAVING NEW LEAD

The first time a card leaves New Lead the dashboard asks when and how the person was contacted, in the in-site box. Cancel leaves the card where it was.

WHAT THE COLUMNS MEAN

COLUMN	MEANS
New Lead	Asked about a program; nobody has spoken to them yet.
Contacted	Staff have made first contact.
Interested	Still keen after the first conversation (the system calls this <i>Qualified</i>).
Application Started	Began the online application.
Application Completed	Finished it and was accepted.

Deposit Pending	Accepted, waiting on the deposit (a display column — the deposit itself is recorded in Transition Enroll).
Enrolled	Registered in a class in Transition Enroll (the hourly sync places new students here).
Active Student	The class has started. Moved here automatically on the class start date.

After the class ends the person moves off the board to *Completed*, then *Certified* and *Employed* as staff record those on the Student Records tabs.

PARKING SOMEONE

Close-out reasons (Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching) are recorded when a lead is closed; the board groups them into the five side lanes. Nothing is deleted.

7 Texting, alerts and the 6 pm digest

THE SCHOOL TEXTING LINE

All texts go out from (940) 312-5305, the RingCentral line registered to the Info@ mailbox. Replies land in RingCentral, not on the dashboard.

AUTOMATIC TEXTS

- **Welcome text** — sent the moment someone submits the website inquiry form with the text-consent box ticked.
- **Staff alerts** — a text to the staff phone when a new lead, a new application or a new enrollment arrives.
- **6 pm digest** — one text a day at 6 pm Texas time: new leads, never-contacted, applications open, enrollments, and the people who need a call.

TEXTS YOU SEND

Use the **Comms** tab (Communication Center) or the **Text** button on a profile. Texts go only to people with a valid phone who have not opted out. Every text is logged on the person's profile.

EMAIL

Emails from the Communication Center go out from info@alliswellhca.com through the school's email service (Resend) to the email on the person's record. If the email key is ever missing on the server, emails wait in the Outbox as "saved, not sent" and the result line says so.

8 The "?" buttons and this manual

Every page title and section title carries a small ?. Click it for a short explanation in the page. Press **Esc** or click outside to close it. The bottom link, **Open the full manual page**, opens the long version for that tab in a new tab.

The floating ? **Help** button (bottom-right) explains whichever tab is showing.

The manual library (the  **Manual** button) has one page per menu item plus this Start-here page. The popups and the manual are written from the same text, so they always match.

9 Step by step

Sign in

1. Open all-is-well-dashboard.vercel.app.
2. Type your staff email and password (the same login works on the Student Portal staff side).
3. Press **Sign in**. Your email appears at the top-right; that is the name the dashboard records when you save something.
4. To leave, click **Sign out** at the top-right.

Change the time window

1. At the top of the page click **30d**, **90d** or **12mo**.
2. Most Dashboard-group tabs (Overview, Leads & Admissions, Programs & Revenue, Outcomes, Marketing ROI, Capacity, Speed to Lead, Revenue, Pipeline) count only people who *arrived* inside that window.
3. Some tabs ignore it on purpose: **Website Activity** has its own 7 / 30 / 90-day / 12-month buttons; **Monthly Stats** has its own month arrows; **Students** shows everyone in class regardless of when they arrived; the four **Transition Enroll** tabs are all-time.

Open a person's profile

1. Click a person's name on the Today queue, the Pipeline (click a card), or Class Progress.
2. A drawer slides in from the right with everything about that person (see *The person profile drawer* below).
3. Click < **Back** or press Esc to close it.

Print a page or save it as PDF

1. On the Overview tab click **Print / save PDF**.
2. In the print window choose **Save as PDF** as the printer.
3. The "?" buttons and the floating Help button are hidden automatically on paper.

10 If something looks wrong

The page says "Simulation data".

The database keys are missing from config.js on that deployment. Real data returns the moment they are set; nothing else needs rebuilding. Tell Mission Metrics.

A number looks lower than Transition Enroll.

Check the time window (30d / 90d / 12mo) first. Then remember the hourly sync: something entered in Transition Enroll in the last hour may not be here yet.

I saved something and it did not stick.

A red message with the reason appears at the point you saved. If it says "Could not save", take a screenshot and send it to Mission Metrics. Refresh the page and check again before re-entering.

The dashboard is slow to open.

The first load pulls every inquiry and the full all-time roster (hundreds of rows) and draws about forty charts. Ten seconds on a slow connection is normal; after that, moving between tabs is instant.

Overview — the business at a glance

The first page after sign-in: four headline numbers, the three lines that matter, the pipeline end to end, where people drop off, and how fast leads are answered.

1 What this page is for

WHAT THIS PAGE IS FOR

A one-screen health check. If you only look at one page a week, look at this one. Everything on it obeys the **30d / 90d / 12mo** buttons at the top: the numbers count people who *arrived* inside that window.

HOW TO READ IT IN 30 SECONDS

1. **Inquiries** up and **Enrolled** flat → a follow-up problem, not a marketing problem.
2. **Median response** over an hour → go to **Today** and work the queue.
3. A step in the funnel that loses most people → that is the conversation to fix (price, schedule, paperwork).

BUTTONS ON THIS PAGE

Print / save PDF prints the whole page (choose "Save as PDF" as the printer).

2 The number cards

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

CARD	WHAT IT COUNTS
Inquiries	People who asked about a program in the window — website forms, website applications and Transition Enroll registrations and inquiries together. The small note converts it to a monthly pace.

Enrolled	Of those, how many reached Enrolled or beyond. The note is the share of inquiries.
Tuition booked	Published tuition added up across everyone who reached Enrolled or beyond. It is <i>booked</i> (promised), not <i>collected</i> (paid) — the Payments tab shows collected money.
Median response	The middle value of "minutes from arrival to first contact" across people who were contacted. Half were answered faster, half slower. The note is how many were never contacted.

3 Inquiries, enrollments and revenue over time

WHAT IT SHOWS

Three lines by day (30d), by week (90d) or by month (12mo): **inquiries**, **enrollments** and **tuition booked** (right-hand scale, purple bars).

HOW TO READ IT

- Inquiries rising while enrollments stay flat = leads are not being converted; look at Speed to Lead.
- Both rising together = marketing and follow-up are both working.
- A spike in inquiries on one day usually matches a post or an ad — check Website Activity for the source.

WHERE THE NUMBERS COME FROM

Every inquiry record, by the date it arrived; enrollments by the date the person's record was created if they reached Enrolled. Hover a point for the exact value.

4 The pipeline, end to end

WHAT IT SHOWS

A bar for every stage from **Lead** to **Employed** with the number of people who reached at least that stage in the window. Everyone who is Enrolled is also counted at Lead,

Contacted, Qualified and so on — it is cumulative.

THE TEN STAGES

Lead → Contacted → Qualified (shown as "Interested" on the board) → Application → Accepted → Enrolled → Started → Completed → Certified → Employed.

THE NOTE UNDERNEATH

Says how many are parked with a close-out reason, so the bars and the total reconcile.

5 Where the drop-off happens

WHAT IT SHOWS

The same funnel as a percentage: what share of all inquiries survived to each stage. 100% at Lead, falling to the right.

HOW TO USE IT

The biggest single drop is the step to fix first. A big drop from Contacted to Qualified means the first conversation is not landing; from Accepted to Enrolled it is usually money or the start date.

6 Speed to first response

WHAT IT SHOWS

Left: how many people were first contacted **under 5 minutes, 5–60 minutes, 1–8 hours, over 8 hours, and never**. Right: four cards — Answered within the hour, Answered later, Never contacted (with the tuition that represents), and Under 5 minutes.

WHY IT MATTERS

A lead reached inside five minutes is many times more likely to enrol than one reached the next day. It is the cheapest thing on this dashboard to improve: it needs no advertising, only a phone.

WHERE THE MINUTES COME FROM

The database works out minutes from the moment the inquiry arrived to the first-contact time recorded on the dashboard (or in Transition Enroll). If nobody records the contact, it counts as never contacted — so record every call.

The full picture is on the **Speed to Lead** tab.

7 Step by step

Compare this month with the quarter

1. Click **30d**, note Inquiries and Enrolled.
2. Click **90d**. If the 90-day enrolled share is higher than the 30-day one, recent leads are being lost faster than before.

Find the weak step

1. Look at **Where the drop-off happens**.
2. The bar that falls furthest below the one before it is the step losing the most people.
3. Open the **Pipeline** tab and look at that column's cards.

8 If something looks wrong

Tuition booked looks too high.

It is face value of every enrolled student's program tuition, including people on payment plans who have not finished paying. For cash actually received use Transition Enroll > Payments.

Median response says "—".

Nobody in the window has a first contact recorded yet. Record contacts on Today or Leads & Admissions.

Executive View — the whole school on one page

Enrollment, marketing, money, academics and career outcomes, side by side, using the same numbers as the detail tabs. Built for the owner and the board.

1 What this page is for

WHAT THIS PAGE IS FOR

A single page to print or read aloud in a leadership meeting. Nothing is calculated differently here: each card is the same figure you would find on its own tab, so there is never a second version of the truth.

ORDER OF THE PAGE

1. Enrollment — who is in class, what is coming.
2. Marketing — traffic in, leads in, how many became students.
3. Financial — what is booked.
4. Academic — completion, withdrawal, certification.
5. Career Outcomes — certified graduates and placements.

The 30d / 90d / 12mo buttons apply to the "in range" cards (leads, enrolled, booked); the "right now" cards (current students, upcoming cohorts, seats) ignore the window.

2 The number cards

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

CARD	WHAT IT COUNTS
Current students	People at the Started stage right now — in class today. Comes from the all-time roster, not the date window.

Enrolled in range	People who reached Enrolled or beyond and arrived inside the window.
Upcoming cohorts	Scheduled classes with a published start date in the future.
Seats available	Empty seats across those upcoming cohorts — each one is tuition waiting.
Visitors today	Unique website visits since midnight Texas time.
Leads in range	Inquiries that arrived inside the window, with the monthly pace underneath.
Top lead source	The single "how they heard about us" answer that produced the most leads.
Lead → enrollment	$\text{Enrolled} \div \text{leads}$, as a percentage.
Tuition booked	Published tuition across everyone enrolled in the window.
Average tuition booked	$\text{Tuition booked} \div \text{enrolled students}$.
Open pipeline (face value)	Tuition attached to everyone still open and not yet enrolled.
Outstanding balances	Not tracked yet — will activate when payment-plan balances are connected.
Completion rate	$\text{Completed} \div \text{started}$, for the window.
Withdrawals / closed out	Inquiries closed with a recorded reason.
Certification rate	$\text{Certified} \div \text{completed}$.
Active programs	Distinct programs with someone enrolled.
Certified graduates	People with the certified flag — the number workforce funding is awarded against.
Placements	Graduates with an employer on record.
Placement rate	$\text{Placed} \div \text{certified}$.

Employers hiring

Distinct employers named on graduate records.

3 Enrollment

Four cards (Current students, Enrolled in range, Upcoming cohorts, Seats available), the enrollment trend line, enrollments by program, and a table of upcoming cohorts with seats, enrolled and open seats. Open seats are the fastest revenue in the building: the class is already scheduled.

4 Marketing

Visitors today, Leads in range, Top lead source and the lead-to-enrollment percentage, plus a chart of leads by source. "Source" is what people ticked on the form or, for website visitors, the link they came from (Facebook, Google, direct...). See the Marketing ROI tab for cost per student once ad spend is entered.

5 Financial

Tuition booked, Average tuition booked, Open pipeline at face value, and Outstanding balances (not yet tracked). The note underneath states plainly that these are booked amounts, not cash collected; cash is on Transition Enroll > Payments.

6 Academic

Completion rate, Withdrawals / closed out, Certification rate and Active programs. Completion and certification come from the stages staff record on the Student Records tabs (Class Progress, Certification & Testing).

7 Career Outcomes

Certified graduates, Placements, Placement rate, Employers hiring, and a table of the top employers by graduates placed. This is the start of the staffing division's client list: every employer that has hired an All is Well graduate.

8 Step by step

Prepare the monthly leadership page

1. Click **30d** at the top.
2. Open **Executive**.
3. Read top to bottom; each card is explained in the table above.
4. For a printable copy use the Overview tab's **Print / save PDF**, or press Ctrl/Cmd+P here.

9 If something looks wrong

Outstanding balances is blank.

By design. Balances need the payment-plan integration; the card says so rather than guess.

Current students differs from the Students tab.

They should match — both read the same roster. If not, refresh; the roster loads once per visit.

Today — what needs you

One queue of every person who is waiting on the school, ordered by what it costs to ignore them. Start your day here.

1 What this page is for

WHAT THIS PAGE IS FOR

It answers one question: **who should I call first?** Every open inquiry that is waiting on the school is listed, the most expensive to ignore at the top. The amount beside each person is the tuition of the program they asked about — what walks away if nobody follows up.

WHO APPEARS HERE

Only people who are still open (not parked, not finished) and who are waiting for one of four reasons:

REASON SHOWN IN THE "WHY" COLUMN	RULE	URGENCY
Never contacted	No first contact recorded at all.	Highest (red)
Contacted but stalled at Lead / Contacted	First contact made, but still in the first two columns after 24 hours.	High (amber)
Application open <i>N</i> days	Started the application more than 3 days ago and has not finished.	High (amber)
Accepted but not enrolled	Application completed more than 5 days ago, no registration yet.	Medium

Within the same urgency, higher tuition comes first.

WHICH PEOPLE ARE COUNTED

People who arrived inside the time window chosen at the top (30d / 90d / 12mo). Widen the window to see older items.

Work the list from the top. Marking someone **Contacted** right on this page removes them from "Never contacted" everywhere at once.

2 The number cards

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

CARD	WHAT IT COUNTS
Needs action now	How many people are in the queue right now. Red when it is more than zero.
Never contacted	How many of those have never had a first contact recorded. These are the ones that cost the most, because the chance of enrolling drops fastest in the first hours.
Tuition attached	The published tuition of every program in the queue, added up. It is face value, not a forecast — what is at stake, not what you will collect.
Longest wait	The oldest untouched item, in days from when the inquiry arrived. Red once it passes three days.

3 Ageing of everything open

WHAT IT SHOWS

The queue split into four age bands by how long the person has been waiting since they arrived: **Under 24 hours**, **1–3 days**, **3–7 days** and **Over a week**. Bars are people; the purple line is the tuition attached to each band (right-hand scale).

HOW TO READ IT

- Healthy: tall green bar on the left, almost nothing on the right.
- A tall **Over a week** bar means inquiries are going cold before anyone reaches them — that is lost money, not a marketing problem.
- If the line is high where the bar is low, a few expensive programs are stuck.

WHERE THE NUMBERS COME FROM

The same people as the queue below; age is measured from the moment the inquiry arrived.

4 The queue

WHAT IT SHOWS

Every waiting person, one per row, most urgent first, up to 50 rows.

THE COLUMNS

COLUMN	MEANING
Why	The reason they are on the list (red = never contacted, amber = stalled or application open, plain = accepted but not enrolled).
Name	As they typed it on the form.
Program	What they asked about. Website inquiries show the website's short code.
Tuition	Published tuition of that program; \$0 when the program has no published price.
Waiting	Time since they arrived, in plain words (under 1 hr, 6 hr, 3 days, 2 weeks).
Contacted?	The green/red dropdown. Change it here to record a first contact; the date shown beside it can be clicked to change the time.
Owner	Staff member responsible, or Unassigned.
Phone	Click to call.

SORTING

Click any heading; click again to flip. Sorting by **Contacted?** groups the not-contacted people together.

5 Staff action counters

WHAT IT SHOWS

Five running counts of work to do. Any counter above zero is outlined in red. Click one to see the people behind it.

COUNTER	WHO IS COUNTED
New leads (today)	Everyone who arrived since midnight, Texas time.
Applications incomplete	Open people sitting at <i>Application Started</i> .
Follow-ups needed	Contacted, still open, not yet accepted, and it has been more than a day since they arrived.
Never contacted	Open people with no first contact recorded.
Stale over 3 days	Open, not yet accepted, older than three days.

WHY "DAYS" IS MEASURED FROM ARRIVAL

The dashboard does not yet record the moment a person entered each stage, so "waiting" is counted from when the inquiry arrived. It is a fair proxy for a lead, less so for someone months into an application.

6 People behind the counter

This list appears only after you click a staff action counter. It shows up to 100 people with name, program, stage, days waiting, owner and phone. **Timeline** opens the person's profile drawer. **Clear filter** hides the list again.

Names and phones appear because this page is behind the login, the same as the admissions queue — do not print or share it outside the school.

7 Step by step

Work the queue

1. Look at the top row: the "Why" pill tells you the reason.
2. Click the phone number to call from a phone or Mac, or click the name to open the profile and use **Text**.
3. When you have spoken to them, change the **Contacted?** dropdown to **Contacted**, confirm the time and how, press **Save**. They drop out of "Never contacted" and, if they were a brand-new lead, move to the Contacted column on the Pipeline.
4. If they should move further (Interested, Application...) do it on the Pipeline tab.

Sort the queue a different way

1. Click any column heading (Why, Name, Program, Tuition, Waiting, Contacted?, Owner, Phone).
2. Click the same heading again to flip the order. The arrow shows the current sort.
3. The default is urgency first, then tuition.

See who is behind a staff counter

1. Scroll to **Staff action counters**.
2. Click a counter (for example *Follow-ups needed*). A list of the people appears below it with name, program, stage, days waiting, owner and phone.
3. Press **Timeline** on a row to open that person's profile.
4. Press **Clear filter** to hide the list.

8 If something looks wrong

Someone I called still shows "Never contacted".

The contact was not recorded on the dashboard. Set the Contacted? dropdown to Contacted (you can back-date the time). Calls made outside the dashboard are not detected automatically.

The queue is empty but I know there are open leads.

Empty means nobody meets the four waiting rules — every open lead has been contacted and is moving. Check the time window (30d / 90d / 12mo) if you expected older people.

The phone column is cut off.

The table is wider than the box on a small screen; drag the table sideways or widen the window.

Pipeline — the enrollment board

Every open inquiry as a card, in the column for its stage. Move cards with the arrows or by dragging; click a card for the full profile.

1 What this page is for

WHAT THIS PAGE IS FOR

This is where admissions work happens. Each card is one real person from the website or Transition Enroll — nobody is typed in. Columns run left to right from **New Lead** to **Active Student**; inside each column the cards are grouped by how long ago the person arrived (Today, Last 7 days, Last 14 days, Last 30 days, Older).

GETTING AROUND THE BOARD

- The board is a box about 70% of the screen tall; scroll **up and down** inside it for more cards.
- Use the big <> arrows at either side, or the purple scroll bar at the bottom, to see more columns. A greyed arrow means you are at the end.
- **Show** filters to website-only or Transition-Enroll-only people. **Sort by** reorders the cards in every column.

WHAT A CARD SHOWS

Name, program, a source chip (Website form / Website application / Transition Enroll registration / Transition Enroll inquiry), how they were contacted (once recorded), days in the pipeline, and the two small move arrows.

THE KEY LINE ABOVE THE BOARD

Says how many cards came from the website and how many from Transition Enroll, and which time window is showing.

2 Parked & closed out

WHAT IT SHOWS

Five side lanes for people who are not moving forward right now. They are not a second status system: each lane is simply a group of the close-out reasons already recorded on the person.

LANE	CLOSE-OUT REASON(S) BEHIND IT
Follow-Up Needed	Cost / funding
Not Ready	Not eligible yet
Future Class	Schedule conflict
Unable to Contact	Never responded
No Longer Interested	Went elsewhere, Just researching

REACTIVATE

Returns the person to the stage they were at when they were parked, clears the reason, and puts the card back on the board.

Parking from the dashboard (choosing a reason with a button) is not built yet; reasons currently come from the database. Reactivating *is* available.

3 Step by step

Move someone forward after a call

1. Find the card (use **Sort by > Name A-Z** if the column is long).
2. Click the card's > arrow, or drag the card to the next column.
3. If the card is leaving **New Lead**, the in-site box asks when and how you contacted them. Check the time, pick how, press **Save**.
4. The card moves and the change is saved to the record and the audit log.

Park someone who is not going ahead

1. There is no park button on the board yet. A close-out reason (Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching) is written to the record by Mission Metrics on request, or arrives with imported data.
2. Once a reason is on the record the card leaves the board and appears in the matching lane under **Parked & closed out**.
3. Until a button exists, ask Mission Metrics to close out a lead, or simply leave it in its column.

Bring a parked person back

1. Scroll to **Parked & closed out**.
2. Press **Reactivate** on the card. They return to the column they were in.

See only website leads

1. Set **Show** to *Website only*.
2. Set it back to *Everyone* when done — the choice is not remembered after a refresh.

4 If something looks wrong

The back arrow on a card is grey.

The card is already in the first column (New Lead); there is nowhere further back. Hover the arrow for the hint.

I moved a card and it jumped back.

The save failed and a message said why. The most common cause used to be a database rule that has since been fixed; if it happens again, screenshot the message.

A person is on the board twice.

They inquired on the website (AIW- record) and later registered in Transition Enroll (TE-S- record). Move or park the website one by hand; the records are not joined automatically yet.

Days in pipeline seems wrong.

It counts from when the inquiry arrived, not from when they entered the current column, because stage-entry times are not recorded yet.

Website Activity — who came, from where, and what they looked at

Every page visit the school website records, counted by source and by page, plus who the enrolled students actually are and what happened today.

1 What this page is for

WHAT THIS PAGE IS FOR

It shows whether marketing is bringing people to alliswellhca.com and what they do when they get there. Visitors are anonymous: this page is about behaviour and sources, not names. Names appear only on Leads & Admissions once someone fills in a form.

ITS OWN TIME BUTTONS

This tab ignores the 30d / 90d / 12mo buttons in the header. Use **7 days** / **30 days** / **90 days** / **12 months** at the top of the page, and **Refresh** to pull the latest visits.

THE FOUR BLOCKS ON THE PAGE

1. **Website Activity** — visits, sources, pages, and how enrolled students found the school.
2. **More detail** — depth, time on site, programs viewed, busiest hours and days, longest visits.
3. **Who Our Students Are** — the enrolled students, from their Transition Enroll enrollment form.
4. **Today's Enrollment Activity** — live counters since midnight.

WHAT "SOURCE" MEANS

SOURCE	HOW IT IS DECIDED
facebook / instagram / tiktok / google	The link the visitor clicked carried that platform's tag (Facebook and Google add one automatically to ad and post links), or Charmaine's own tag <code>?utm_source=facebook</code> was on the link.
google (organic)	The visitor came from a Google search result.

direct	No tag and no referring site — typed the address, used a bookmark, or came from an app that hides where it came from (Instagram and Facebook apps often do this).
other	A referring site that is not one of the known platforms.

Tip for posts: add `?utm_source=facebook` (or instagram, tiktok) to the end of any link you post. Every click is then counted correctly, whatever app it comes from.

2 The number cards

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

CARD	WHAT IT COUNTS
Visits to the website	Unique visits (one person, one sitting) in the chosen window.
Asked about a program	Inquiry forms received in the window. Names are on Leads & Admissions.
Applied online	Completed online applications in the window.
Enrolled in a class	Transition Enroll registrations in the window.
Pages per visit	Average number of pages one person opens.
Time on site	Average time, for people who opened more than one page (a single-page visit has no measurable length).
Looked at a program	Visits that opened at least one program page.
Looked at tuition	Visits that opened the tuition page.
Students on record	Everyone who has ever enrolled through Transition Enroll.
Women	Share who selected female on the enrollment form.

Most common age The age band with the most students.

Most common city The city most students gave.

3 Where visitors came from

Visits by source with the share of the total. See the source table on this page's main explanation for how each source is decided. The window label beside the heading shows which days are counted.

4 What they looked at

Visits per page, most visited first. Program pages tell you which programs people are curious about before they ever fill in a form; compare with **Programs & Revenue** to see which ones convert.

5 How the people who enrolled found us

Not visitors — **enrolled students**, counted by the "how did you hear about us" answer on their Transition Enroll registration form. This is the truest marketing measure on the dashboard because it is tied to real tuition.

6 More detail

How people behave once on the site: pages per visit, time on site, whether they opened a program page or the tuition page, how deep they went, which program pages, busiest hours and days, and the longest individual visits (started, stayed, pages, came from, what they looked at). Visitors stay anonymous throughout.

7 How deep people went

Visits grouped by how many pages were opened: 1 page, 2-3, 4-6, 7 or more. Many one-page visits from a paid source means the landing page is not holding attention.

8 Programs people looked at

Visits per program page. Rank this against enrollments per program to spot programs with lots of interest and few sign-ups — usually price or schedule.

9 Longest visits

The individual visits that stayed longest: when they started, how long, how many pages, where they came from, and the pages in order. A long visit that ends on the application page and never submits is a follow-up opportunity once that person fills in any form.

10 Who Our Students Are

Every student who has enrolled through Transition Enroll, counted by what they told the school on the enrollment form: age band, how they heard about the school, city, and background. Use it to aim marketing at the people who actually become students.

11 Where they live

Students by city with share of the total, from the address on the enrollment form.

12 Background, as reported at enrollment

Students by the background group they selected on the enrollment form, exactly as the form words it. Optional on the form, so the shares are of those who answered.

13 Today's Enrollment Activity

Live counters since midnight Texas time: Visitors online now, New leads today, Applications started, Applications completed, Applications abandoned, Deposits pending (at Accepted, before Enrolled), Enrolled today, Follow-ups needed (contacted, open, quiet for over a day). Press **Refresh** for the latest.

14 Step by step

Check whether a Facebook post worked

1. Post the link with `?utm_source=facebook` on the end.
2. The next day open Website Activity, choose **7 days**.
3. In **Where visitors came from** read the facebook row. In **What they looked at** see which pages those visitors opened.

See the busiest time to staff the phones

1. Scroll to **More detail**.
2. The two charts show visits by hour of day and by day of week. Inquiry forms follow the same pattern.

15 If something looks wrong

"direct" is most of the traffic.

Links from phone apps often arrive with no source. Tag the links you post (see the tip above). Visits before 5 September 2026 were never tagged and stay "direct".

A number says "Could not load".

The database call for that block failed (usually a brief connection issue). Press **Refresh**

.

My own visits are being counted.

Visits from automated tools are dropped, but a real person on staff counts like anyone else. Testing visits can be deleted from the database on request.

Monthly Stats — one month, side by side with the last

The numbers the school reports each month. Live rows are calculated from Transition Enroll and the website; the rest are typed in by whoever knows the number.

1 What this page is for

WHAT THIS PAGE IS FOR

A month-by-month scorecard. Each row is one number for the month showing, next to the same number for the month before, and the change between them.

LIVE ROWS

Rows marked **Live** are worked out by the database every time the page opens, in Texas time, and cannot be edited:

ROW	HOW IT IS COUNTED
New leads	Inquiry records that arrived in the month (website + Transition Enroll).
Website leads	Of those, the ones from the website forms.
Registrations	Class registrations made in Transition Enroll in the month.
New students	Students whose first-ever registration was in the month.
Tuition collected (\$)	Successful Transition Enroll payments dated in the month.
Classes started	Classes whose start date falls in the month.
Students who finished a class	Registrations whose class end date falls in the month.
Website visits	Unique website visits in the month.

TYPED ROWS

Anything nothing captures automatically (for example exam passes reported by a testing body). Press **Enter** on the row to record or change the number; a typed number nobody has entered reads "not entered" — the page never guesses.

2 The number cards

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

CARD	WHAT IT COUNTS
Month showing	The month on screen. Use the arrows to move.
Live numbers	How many rows are calculated automatically.
Typed-in numbers	How many rows were typed by staff for this month.
Compared against	The previous month; the Change column is against this.

3 The month

The table: one row per metric with **This month**, **Last month** and **Change**. Live rows carry a purple **Live** badge and no Enter button. Typed rows show who entered them and a note. Move months with the buttons at the right of the heading.

4 Step by step

Look at a past month

1. Press « **Previous** (or **Next** »).
2. Press **This month** to come back.

Type a number

1. Click the row's value cell and press **Enter**.
2. Type the number (leave blank to clear it), then an optional note on where it came from.
3. The row shows who typed it and when.

5 If something looks wrong

A live row is lower than I expect.

Live rows use Texas time and only count what is in the database. A payment made in Transition Enroll in the last hour appears after the next hourly sync.

The old typed numbers from September 5 are gone.

They are hidden, not deleted: a live row always wins over an old typed row for the same month. The old rows are still in the database.

Class Progress — one class, every step

Pick a class and see every student in it and how far each has got, from first inquiry to a job.

1 What this page is for

WHAT THIS PAGE IS FOR

Where the whole class stands at once. Choose a class in the dropdown at the top right. The funnel shows how many students have reached each step; the card list underneath shows every student with a progress bar and where they are now.

THE DEMONSTRATION CLASS

One entry in the dropdown is a **demonstration class** with made-up students that shows every data point the system can track. A banner says so when it is selected. Real classes come from Transition Enroll.

OPENING A STUDENT

Click any card for that person's full timeline: where they stand, every step with its date, an at-a-glance summary and the contact log.

2 The number cards

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

CARD	WHAT IT COUNTS
Seats filled	Students registered in this class against the seats the class has.
Completed training	How many have reached Completed.
Placed in work	How many have an employer on record.

Tuition in this cohort

Published tuition × students, for this class.

3 How far the class has got

A bar per step showing how many students in the class have reached it. Where the bars drop is where people get stuck. Steps run from the inquiry through Enrolled, Started, Completed, Certified and Employed.

4 Students

One card per student: name, a progress bar across the steps, where they are now, and how many steps are done. Click a card for the full timeline.

5 Step by step

Check a class before it starts

1. Choose the class.
2. Look at **How far the class has got** — everyone should be at least at Enrolled.
3. Open any student still short of Enrolled and read their timeline.

6 If something looks wrong

The class I want is not in the list.

Only classes with at least one registration appear. Check Transition Enroll > Classes.

Leads & Admissions — every inquiry

The full list of everyone who asked about a program in the window, newest first, grouped by how long ago they came in. Search, filter, sort, mark contacted, export.

1 What this page is for

WHAT THIS PAGE IS FOR

The admissions desk's master list. Where **Today** shows only the people waiting on you, this page shows *everyone* who arrived in the time window — contacted or not, enrolled or not — so nothing is lost.

CONTROLS AT THE TOP

- **Search** — name, phone or program; the list narrows as you type.
- **All stages** — show one stage only.
- **All sources** — website form, website application, Transition Enroll registration or Transition Enroll inquiry.
- **Export CSV** — downloads the rows on screen as a spreadsheet file (ID, name, phone, program, source, received, response minutes, stage, tuition, owner).

THE AGE BUTTONS

Above the table: **All**, **Last 7 days**, **8 to 14 days ago**, **15 to 30 days ago**, **Older**, each with a count. The table is also grouped by these bands with a purple header row.

2 The number cards

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

CARD	WHAT IT COUNTS
New today	Arrived in the last 24 hours.

Awaiting first contact

Open inquiries with no first contact recorded. Every one is a paid-for lead.

In application

Started an application but not yet enrolled.

Enrolled

Reached Enrolled or beyond, with the share of all inquiries.

3 Inquiries by day of week

How many inquiries arrived on each weekday in the window. Staff the phones where the bars are tall; if weekends are busy and nobody answers until Monday, Speed to Lead will show the cost.

4 Why prospects didn't enroll

Close-out reasons on parked records: Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching. Reasons are recorded at the moment a lead is closed out. Empty when nobody in the window has been closed out.

5 Step by step

Find one person

1. Type part of the name, phone or program in **Search**.
2. Click the row's **Call** button to dial, or use the Contacted? dropdown to record a call.

Work everyone not yet contacted

1. Click the **Response time** heading to sort; "never contacted" rows group together.
2. Or set the stage filter to *Lead*.
3. Record each call with the dropdown as you go.

Export for a spreadsheet

1. Set the filters you want.
2. Press **Export CSV**. The file downloads to your computer and opens in Excel or Numbers.

6 If something looks wrong

The phone shows as a run of digits.

Website forms accept any format; Transition Enroll formats numbers. Both dial correctly from the Call button.

Program shows a code like cna-hhsc-cbt.

That is the website's short name for the program the person picked; Transition Enroll students show the full title.

Value says TBD_PRICE.

The program has no published price on the storefront, so no tuition is attached rather than guessed.

Programs & Revenue — which programs draw interest and which earn

Every program on the live Transition Enroll catalogue: demand, conversion, and what each actually earns.

1 What this page is for

WHAT THIS PAGE IS FOR

To see the school program by program: which ones people ask about, which ones they buy, and where the money comes from. All figures obey the 30d / 90d / 12mo window.

INTEREST VERSUS ENROLLMENT

Tall interest with short enrollment means the price or the schedule is the barrier, not the demand — those are the programs to look at first.

UNPRICED PROGRAMS

Some programs show "Request More Information" on the storefront instead of a price. They appear as **TBD_PRICE** here and are left out of revenue totals rather than guessed at.

2 The number cards

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

CARD	WHAT IT COUNTS
Programs offered	Programs on the catalogue, verified against the storefront.
Top earner	The program with the highest booked tuition in the window.
Unpriced programs	Programs with no published price ("Request info" at the moment of decision).

Average tuition

Average published tuition across priced programs.

3 Which programs draw interest — and which convert

Two bars per program: inquiries and enrollments in the window. The gap between them is the conversion problem, program by program.

4 Revenue by program

Enrolled students × published tuition, per program. Booked, not collected.

5 Share of total revenue

The same revenue as a share of the whole, so the two or three programs the school actually lives on are obvious.

6 The full catalogue

Every program with tuition, length, mode (day / evening / hybrid / online), inquiries, enrolled, conversion % and revenue for the window. Rows marked TBD_PRICE have no published price.

7 Step by step

Decide which program to promote

1. Look at **Which programs draw interest**: pick a program with many inquiries and few enrollments.
2. Check its price and next start date on the catalogue table.
3. Use **Comms** to text everyone who asked about it with the application-encouragement template.

8 If something looks wrong

A program is missing.

The catalogue is read from Transition Enroll by the hourly sync; a program created in the last hour appears after the next run.

Student Outcomes — completion, certification, employment

The numbers workforce funding is awarded against: who finished, who passed the exam, who got hired, and by whom.

1 What this page is for

WHAT THIS PAGE IS FOR

Proof of results. Funders, the Texas Workforce Commission and employers all ask the same three questions: did they finish, did they get certified, did they get a job? This page answers them for the window.

WHERE THE NUMBERS COME FROM

- **Completed** — moved automatically when the class end date passes (from Transition Enroll class dates), or set by staff.
- **Certified** — the certified flag, set on Certification & Testing when a pass is recorded.
- **Employed** — an employer on the person's record, with the days-to-employment figure.

2 The number cards

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

CARD	WHAT IT COUNTS
Completed training	Reached Completed or beyond in the window, with the share of those who started.
Certified	Have the certified flag, with the share of completers.
Employed	Have an employer on record, with the share of certified graduates.

**Placements
logged**

Number of employer placements recorded.

3 Completion & certification by program

Per program: how many finished the course and how many passed the exam. A wide gap means people are finishing but not testing — the certification follow-up text in Comms is built for exactly that.

4 Employment at 30 / 60 / 90 days

Of the certified graduates, how many had a job within 30, 60 and 90 days of graduation, from the days-to-employment recorded with the placement.

5 Graduate outcomes over time

Graduated, certified and placed, by month, so a good or bad quarter is visible.

6 Employer placements

Every employer that has hired an All is Well graduate: type, graduates placed, roles, and whether they have hired more than once. This is the beginning of the staffing division's client list.

7 Step by step

Answer a funder's question

1. Set the window to **12mo**.
2. Read Completed, Certified and Employed. For the by-program breakdown use the first chart; for the employer list scroll down.
3. For a file to send, use **Reports > TWC Reporting** and Export CSV.

8 If something looks wrong

Certified is zero.

Nobody has had a pass recorded on Certification & Testing in the window yet. The flag is set there, not guessed from completion.

Marketing ROI — which channel produces paying students

Every person counted by how they said they heard about the school; tuition is what they actually paid; spend is only what staff enter here.

1 What this page is for

WHAT THIS PAGE IS FOR

To answer "is the money we spend on marketing coming back?". It never guesses spend: until an amount is typed in **Enter ad spend**, the cost and return columns stay blank.

THE CHANNELS

Google, Social media, Referral, Sign or advertisement, School or university, Other — the same list as the "how did you hear about us" question on the Transition Enroll registration form, so leads and spend line up.

THE THREE NUMBERS THAT MATTER

- **Cost per lead** = $\text{spend} \div \text{leads}$.
- **Cost per student** = $\text{spend} \div \text{enrolled}$.
- **Return** = $\text{tuition paid} \div \text{spend}$.

2 The number cards

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

CARD	WHAT IT COUNTS
Ad spend	Everything typed into Enter ad spend for the months in the window.
Tuition paid	Real payments (Transition Enroll) by students who enrolled in the window.

Cost per student

Ad spend ÷ enrolled students. Blank until spend is entered.

Best channel

The channel with the highest return on spend, or the most enrollments if no spend is entered.

3 Enter ad spend

Month, channel, amount, **Save spend**. The table underneath lists what has been entered with who entered it. Amounts are stored per month and channel; saving again replaces.

4 Leads vs. enrollments by channel

Two bars per channel. A channel with many leads and few enrollments is costing money, not making it.

5 Cost to acquire a student

Spend ÷ enrollments, per channel. Only channels with spend entered appear.

6 Return on spend

Tuition paid ÷ spend, per channel. Above 1 the channel pays for itself.

7 Channel detail

One row per channel: spend, leads, enrolled, enrolled %, cost per lead, cost per student,

tuition paid, return.

8 Step by step

Enter this month's ad spend

1. Under **Enter ad spend** choose the month and the channel.
2. Type the amount in dollars.
3. Press **Save spend**. The row appears in the small table and every cost figure on the page updates.
4. Entering the same month and channel again replaces the earlier amount.

Remove an amount

1. Find the row in the spend table and press its delete button.

9 If something looks wrong

Cost per student says "—".

No spend has been entered for that channel in the window.

Facebook is not a channel.

On the registration form Facebook is part of *Social media*. Enter Facebook and Instagram spend under Social media.

Capacity & Cohorts — seats sold against seats available

The constraint on growing without a second location: which classes are full, which are empty, and what the empty seats are worth.

1 What this page is for

WHAT THIS PAGE IS FOR

Under-filled classes are the fastest revenue available — the room and the instructor are already paid for. This page lists every upcoming class with its fill rate and what it would earn if full.

WHERE THE CLASSES COME FROM

Transition Enroll: every scheduled class with its seat limit and the students registered in it, refreshed hourly.

2 The number cards

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

CARD	WHAT IT COUNTS
Seats scheduled	Total seats across upcoming classes.
Seats filled	Registered students across those classes.
Empty seats	Scheduled minus filled. The room is already paid for.
Revenue on the table	Empty seats × tuition — if every seat filled.

3 Upcoming cohorts

Program, start date, mode, seats, enrolled, fill %, revenue if filled, and a status (Open / Filling / Full / Under-filled).

4 Waitlists

When a class fills, the interest goes on a list and fills the next start date. Shows cohort, start, seats, status and the waitlist count.

5 Seat utilisation by month

Filled versus empty seats per month across all classes starting that month.

6 Where the workload sits

Open leads by owner. If everything is stacking on one person, that is the owner-dependency problem made visible — assign owners on the profile.

7 Step by step

Fill an under-filled class

1. Find the class in **Upcoming cohorts** with a low fill rate and the highest "revenue if filled".
2. Open **Comms**, audience *By program*, that program; send the class-approaching or application-encouragement text.

8 If something looks wrong

A class shows 0 seats.

No seat limit is set on that class in Transition Enroll. Set it there; it appears after the next hourly sync.

Speed to Lead — how fast leads are answered, and what the gap costs

A lead answered inside an hour behaves like a different business from one answered the next day. This page measures the gap and prices it.

1 What this page is for

WHAT THIS PAGE IS FOR

The single biggest lever the school controls. It shows how long people wait for a first contact, how conversion falls as the wait grows, when the gaps open (which hours and days), and how each staff member is doing.

HOW "FIRST RESPONSE" IS MEASURED

Minutes from the moment the inquiry arrived to the first-contact time recorded with the Contacted control (or a Transition Enroll contact). The database computes it; it cannot be typed. People with no contact recorded count as **never contacted**.

Recording calls is what makes this page true. A call nobody records looks like a lead nobody answered.

2 The number cards

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

CARD	WHAT IT COUNTS
Median first response	The middle wait among contacted people — half faster, half slower.
Answered within the hour	Share of contacted people reached within 60 minutes.

Conversion inside an hour

Of people answered within the hour, how many enrolled — against the rate for everyone else.

Never contacted

Open people with no first contact, with the tuition that represents at the fast-response conversion rate.

3 How long people wait

Left: how many people fall in each wait bucket (under 5 min, 5–60 min, 1–8 hours, over 8 hours, never). Right: the share of each bucket that went on to enrol. The right-hand chart is the argument for answering fast.

4 When the gaps open

Median response by hour of day and by day of week. Gaps cluster where nobody is rostered — evenings and weekends, typically.

5 By owner and over time

Median response per staff member, and the median week by week so improvement (or slippage) is visible.

6 Step by step

Find the hours nobody answers

1. Look at **When the gaps open**: the hour-of-day chart.
2. Tall bars are hours when leads wait longest. Cover those hours or set the welcome text to promise a call-back time.

7 If something looks wrong

The by-owner chart is empty.

Owners are Unassigned on most records. Set owners on the profile so the chart can split by person.

Upsell Ladder — graduates who can step up to a combination

The combination programs are a progression. A CNA graduate can step up to Advanced PCT, a Phlebotomy graduate to Clinical Support Specialist, a Medical Assistant graduate to Clinical Medical Specialist. This page shows who is on each rung and what the next step is worth.

1 What this page is for

WHAT THIS PAGE IS FOR

Graduates already trust the school. Selling them the next program up is cheaper than finding a stranger. The page lists every graduate of a single program who has not yet taken the combination that contains it, and the uplift — the difference between what they paid and the combination tuition.

THE RUNGS

GRADUATED FROM	NEXT RUNG	UPLIFT
Certified Nursing Assistant	Advanced PCT	+\$2,200
Phlebotomy	Clinical Support Specialist	+\$750
Medical Assistant	Clinical Medical Specialist	+\$750

WHO IS COUNTED

All-time graduates (not just the date window), one row per person, matched by the real Transition Enroll program names. People who already hold a combination are excluded.

2 The number cards

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

CARD	WHAT IT COUNTS
Graduates who could step up	Completed a component of a combination and have not taken the combination.
Uplift available	Sum of the uplift across all of them.
Average step up	Uplift per graduate.
Combination revenue booked	Tuition booked on combination programs in the window.

3 Who is on each rung

Graduates per single program that feeds a combination. Each bar is a pool of warm prospects for the combination above it.

4 What each step up is worth

Left: total uplift per rung. Right: the mix of single versus combination enrollments.

5 Combination take-up over time

Single-program against combination enrollments by month. Rising combination share means the ladder is working.

6 Step-up candidates

Name, program completed, next rung, uplift, phone. Names appear because the page is behind the login.

7 Step by step

Run a step-up campaign

1. Scroll to **Step-up candidates** and note the rung with the most names.
2. Open **Comms**, audience *Graduates*, and send the certification-follow-up or a custom message naming the combination.

8 If something looks wrong

Uplift shows \$0 for someone.

Their program name did not match a known rung. Tell Mission Metrics the program name so it can be added.

Revenue & Forecast — booked, open, and what the next ninety days look like

What the pipeline is worth, what is already booked, and a weighted forecast, using the tuition confirmed on 15 August.

1 What this page is for

WHAT THIS PAGE IS FOR

Money, three ways: **booked** (enrolled students × tuition), **open pipeline** (people not yet enrolled × the tuition they asked about), and **weighted pipeline** (open pipeline discounted by how often each stage actually closes).

BOOKED VERSUS COLLECTED

Booked is a promise; collected is cash. Cash is on Transition Enroll > Payments.

THE WEIGHTS

The weighted figure is a planning assumption, not a measured rate: earlier stages are discounted more than later ones.

2 The number cards

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

CARD	WHAT IT COUNTS
Booked revenue	Tuition of everyone who reached Enrolled or beyond in the window.
Open pipeline	Tuition attached to everyone still open and not yet enrolled.
Weighted pipeline	Open pipeline discounted by stage — a planning assumption.

Average tuition booked Booked ÷ enrolled. Was about \$1,030 before the 15 August price list.

3 Booked revenue by month

Tuition attached to students who reached Enrolled or beyond, by the month they arrived.

4 Where the money is sitting

Left: pipeline value by stage. Right: the same value weighted by how often each stage closes.

5 Which programs and channels earn

Revenue by program and by the channel that introduced the student.

6 Single programs against combinations

The four combination programs carry the highest tuition; this shows how much of the income they represent.

7 Step by step

Estimate next quarter

1. Set 90d.
2. Read Booked (already won) and Weighted pipeline (likely to close).
3. Compare with **Capacity > Revenue on the table** for what empty seats could add.

8 If something looks wrong

Booked revenue changed without new enrollments.

Tuition on a program changed in Transition Enroll; booked revenue uses current published tuition.

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.

Attendance — a date grid per class

Tap any cell to cycle Present → Absent → Tardy → Make-Up. Session types cover Classroom, Online, Lab, Clinical and Externship.

1 What this page is for

WHAT THIS PAGE IS FOR

Daily attendance for one class at a time. Choose the class in the dropdown; each row is a student, each column a session date. Tap a cell to change it — it saves immediately.

THE CODES

CODE	MEANS
P Present	Attended.
A Absent	Did not attend.
T Tardy	Late.
M Make-Up	Missed time recovered in a make-up session.

SESSION TYPES

Classroom, Online, Lab, Clinical, Externship — shown under each date so a clinical day is not confused with a classroom day.

ATTENDANCE RATE

Present + Tardy + Make-Up, divided by all sessions so far. Under 80% flags the student on the Instructor tab.

2 The number cards

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

CARD	WHAT IT COUNTS
Students on the grid	Students in the chosen class.
Attendance rate	Across the class, sessions so far.
Absences	Total absent cells.
Make-up sessions	Missed time recovered.

3 Step by step

Take attendance for today

1. Choose the class.
2. Find today's column.
3. Tap each cell: once for Present, again for Absent, again for Tardy, again for Make-Up.

4 If something looks wrong

The grid is empty.

The class has no session dates yet, or no students. The banner at the top says which.

Clinicals & Externships — every placement

Facility, student, dates, hours against the requirement, and clearance status.

1 What this page is for

WHAT THIS PAGE IS FOR

To see every student's clinical or externship placement in one list, with hours completed against what the program requires and whether the student is cleared to attend (background check, immunisations, CPR).

THE TABLE

Facility, student, program, dates, required hours, completed hours, clearance (Cleared / Pending / Problem).

FACILITIES

The cards at the bottom are the facilities; click one to filter the placements above to that site. Facilities are managed on the **Partners** tab.

2 The number cards

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

CARD	WHAT IT COUNTS
Active placements	Placements whose dates include today, across the facilities in use.
Hours completed	Completed hours against required hours, all active placements.
Cleared to attend	Students with clearance complete.
Clearance problems	Students with a clearance problem — fix these before the start date.

3 Facilities

One card per facility with the number of placements. Click a card to filter the table; click again to clear. Add or edit facilities on the Partners tab (kind: Clinical site or Externship site).

4 Step by step

Update hours after a shift

1. Open the student from the Students tab, tab **Clinicals**.
2. Enter the hours completed and save.

5 If something looks wrong

Search finds nothing.

Search covers facility, student and program names only.

Certification & Testing — who is eligible, registered and passed

By testing organisation. The certified flag is the number workforce funding is awarded against.

1 What this page is for

WHAT THIS PAGE IS FOR

To track every student from finishing class to holding a certificate. The result recorded here sets the **certified** flag that Outcomes, Executive and the TWC report all use.

TESTING ORGANISATIONS

Texas HHSC (nurse aide registry), **Prometric** (CNA exam), **NHA** (phlebotomy, EKG, medical assistant, PCT, CMA), **Other**. The organisation is suggested from the program and can be changed.

THE TABLE

Student, program, org, eligible (yes/no), registered (yes/no), exam date, result (Pass / Fail / Pending), certificate number.

2 The number cards

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

CARD	WHAT IT COUNTS
Students in testing window	Started, completed or certified — everyone who could be testing.
Registered for an exam	Have an exam registration recorded.
Passed	Result recorded as Pass.

Retests needed

Result recorded as Fail. Schedule these first.

3 Step by step

Record an exam result

1. Open the student (from here or the Students tab), tab **Certification**.
2. Set exam date and result; for a pass add the certificate number.
3. Save. The certified flag is set and the student counts on Outcomes at once.

4 If something looks wrong

A graduate is missing from the list.

Only students at Started, Completed or Certified appear. Someone still at Enrolled has not begun class.

Instructor View — one instructor's classes

What an instructor sees: their cohorts, rosters and check-offs, and nobody else's. A demonstration of role-scoped access.

1 What this page is for

WHAT THIS PAGE IS FOR

Everything an instructor needs for their own classes without the rest of the school's data: rosters, attendance, skills check-offs, at-risk students, and a place to log a note. Choose the instructor in the dropdown; the banner explains what is scoped.

2 The number cards

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

CARD	WHAT IT COUNTS
My cohorts	Classes assigned to this instructor.
My students	Students across those classes.
At risk	Attendance under 80% or a checklist item flagged.
Skills passed	Skills check-offs marked passed across my students.

3 My cohorts

Roster, attendance and skills for each class. The attendance button opens the same tap-

to-cycle grid the office uses.

4 At-risk students

Attendance under 80%, or a checklist item flagged past due / attention needed. Name, class, reason, and a button to open the record.

5 Log a student note

Choose a student, type the note, press Save note. Recorded with your email and the time; visible on the student's Notes tab.

6 Step by step

Log a note about a student

1. Scroll to **Log a student note**.
2. Choose the student, type what happened in class, press **Save note**. It appears on the student's record under Notes.

Take attendance from here

1. Under **My cohorts** press the attendance button on the class. The same tap-to-cycle grid opens.

7 If something looks wrong

The dropdown has no instructors.

Instructors are assigned to classes in the class record. Ask the office to assign them.

Catalogue — every program as it is sold today

Tuition, deposit, next open class, and how many students each program has ever enrolled. Read live from Transition Enroll; nothing typed by hand.

1 What this page is for

WHAT THIS PAGE IS FOR

A read-only copy of the Transition Enroll storefront, refreshed hourly. Use it to check a price or a start date without opening Transition Enroll.

THE TABLE

Program, total tuition, deposit, next class (the next open start date, or "none scheduled"), enrolled all time, and collected (successful payments ever, for that program).

THE FOUR TRANSITION ENROLL TABS

All four (Catalogue, Classes, Students & Registrations, Payments) are all-time and ignore the 30d / 90d / 12mo buttons. They are read-only: to change anything, change it in Transition Enroll and it appears here within the hour.

2 The number cards

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

CARD	WHAT IT COUNTS
Programs on offer	Programs in the catalogue.
Open classes	Classes currently open for registration.
No class scheduled	Programs with no upcoming class — nothing to sell until one is scheduled.

Highest tuition

The most expensive program.

3 Step by step

Check a price

1. Find the program row; read Total tuition and Deposit.

4 If something looks wrong

Next class is blank.

No open class exists for that program in Transition Enroll. Schedule one there.

Classes — every class ever scheduled

All 400+ classes, with who is in each. Open classes first.

1 What this page is for

WHAT THIS PAGE IS FOR

The class schedule with rosters. Filter with the buttons: **Open** (registration open), **Closed** (past), **All**.

THE TABLE

Program, starts, ends, status, enrolled, seats left, and an **Open** button that shows the class drawer: enrolled, seats left, collected, hours, and the roster.

2 The number cards

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

CARD	WHAT IT COUNTS
Classes ever scheduled	All classes in Transition Enroll.
Open for registration	Classes taking registrations now.
Classes this year	Classes starting this calendar year.
Students in open classes	Registrations across open classes.

3 Step by step

See who is in a class

1. Press **Open** on the row. The drawer lists every registered student; click a student to open their record.

4 If something looks wrong

Seats left is negative.

More students are registered than the seat limit set in Transition Enroll. Raise the limit there or move a student.

Students & Registrations — everyone who has registered since 2022

Every student who registered through Transition Enroll, every program they took, and what they paid. Open a row for the payment plan.

1 What this page is for

WHAT THIS PAGE IS FOR

The all-time student register. Search by name, email, phone or program. The first table is the last 30 days of registrations; the charts show registrations per month and how students heard about the school; the big table is every student.

THE STUDENT DRAWER

Press **Open** on a row: registrations (every program with class dates and status), paid (every payment), heard about us, diploma / GED, and contact details.

NEW STUDENTS AND THE STUDENT PORTAL

A student registered here can sign in to the Student Portal the same day with the email on their registration — nothing to set up.

2 The number cards

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

CARD	WHAT IT COUNTS
Students	Distinct students ever registered.
Registered in the last 30 days	Registrations in the last 30 days.

Registrations

Registrations ever (a student may have several).

Repeat students

Students with more than one registration — the Upsell Ladder in action.

Pipeline

How many of these students have a dashboard pipeline record.

3 Registered in the last 30 days

Every class registration in the last 30 days, newest first: registered date, student, program, class start, status, heard about us, and Open.

4 Registrations per month

The last 24 months of registrations. Seasonality shows here: plan marketing around the low months.

5 How students heard about the school

The registration-form answer, counted across all students. The same list drives Marketing ROI.

6 Step by step

Find what a student paid

1. Search the name.
2. Press **Open**. Every payment is listed with date, amount and status; the total is at the top.

7 If something looks wrong

A student registered an hour ago is not here.

The sync runs at five past each hour. Refresh after that.

Payments — money actually collected

Deposits, installments and full payments taken through Transition Enroll (Stripe).

1 What this page is for

WHAT THIS PAGE IS FOR

Cash, not promises. Every payment record from Transition Enroll with its status. Only **succeeded** payments are counted in totals; failed and refunded are listed but not added.

THE TABLE

Date, amount, status, type (deposit / installment / full), method, description.

2 The number cards

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

CARD	WHAT IT COUNTS
Collected all-time	Sum of successful payments ever.
Collected (this year)	Sum of successful payments since 1 January, year to date.
This month	Sum since the first of the month, Texas time.
Average payment	Collected ÷ number of successful payments.

3 Collected per month

The last 24 months, successful payments only. This is the line to compare against Monthly

4 Step by step

Reconcile a month

1. Read **Collected per month** for the month.
2. Compare with the Stripe payout for the same month; the difference is Stripe fees and refunds.

5 If something looks wrong

A payment is missing.

Payments arrive with the hourly sync. A payment made outside Transition Enroll (cash, check) is not here unless entered there.

Reports & Compliance — pick a report, narrow it, export it

Nine report types plus the TWC preset. Drafts to verify, never to file blind.

1 What this page is for

WHAT THIS PAGE IS FOR

Getting numbers out of the dashboard as a file. Choose a report type, narrow by program, cohort, stage and dates, read the summary line, and press **Export CSV**.

THE REPORT TYPES AND THEIR COLUMNS

REPORT	COLUMNS
Leads	Name, Phone, Program, Source, Received, Response (min), Stage, Owner
Enrollment	Name, Program, Cohort, Stage, Tuition, Enrolled (inquiry month)
Completions	Name, Program, Stage, Certified, Employer
Withdrawals	Name, Program, Stage reached, Reason, Owner
Certification	Name, Program, Testing org, Registered, Result, Certified
Job Placement	Name, Program, Employer, Employed within (days)
Attendance	Name, Cohort, Program, Present, Absent, Tardy, Make-Up, Rate
Tuition Status	Name, Program, Tuition booked, Payment status
TWC Reporting	Program, Enrolled, Completed, Withdrawn, Certified, Employed, Placement rate

THE TWC PRESET

Presses the right type and dates for a Texas Workforce Commission report in one click. Verify every figure before filing.

2 Step by step

Produce a certification list for a program

1. Report type **Certification**.
2. Program: choose it. Dates: the period.
3. Read the summary line, then **Export CSV**.

Produce the TWC figures

1. Press **TWC preset**.
2. Adjust the dates if needed.
3. Export CSV and check each program row against Certification & Testing and Outcomes.

3 If something looks wrong

The table is empty.

The filters exclude everyone. Clear the stage filter first; it is the usual culprit.

Communication Center — pick who, pick a template, press Send

Texts go out right away from the school's texting line; emails from info@alliswellhca.com.

1 What this page is for

WHAT THIS PAGE IS FOR

Sending the same message to a group of people — or one person — without leaving the dashboard, with the name, program and start date filled in per person.

AUDIENCE

Choose a type, then a target: **One person, By stage, By program, By cohort, Graduates, All open leads**. The count shows first; press **Show recipients** to list names.

COMPOSE

Channel (Text or Email), a template or a blank message, subject (email only), the message. Merge tags fill in per person when sent: `{{first_name}}`, `{{program}}`, `{{start_date}}`.

THE TWELVE TEMPLATES

Requested info confirmation, Application encouragement, Abandoned application follow-up, Deposit request, Enrollment confirmation, Missing documents, Class approaching, Payment due, Payment missed, Clinical instructions, Completion congratulations, Certification follow-up. Pick one and edit the words freely.

WHAT HAPPENS ON SEND

- Each message is saved to the Outbox as *queued*.
- Texts are sent at once from (940) 312-5305 to the phone on each person's record. People with no valid phone or who opted out are skipped and the Outbox says so.
- Emails are sent at once from info@alliswellhca.com to the email on each record, in a simple branded layout. People with no email address are skipped.

- The result line reports sent / failed / skipped.
- Every text appears on the person's profile under Texts and follow-ups.

Texts are real and immediate. Check the count and the message before pressing Send.

2 The number cards

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

CARD	WHAT IT COUNTS
Recipients	How many people the audience contains (count only; names on request).
Channel	Text or Email, as chosen.

3 Audience

Type, target, the count, and **Show recipients** for the names. Parked people are excluded from stage and program audiences.

4 Compose

Channel, template, subject (email only), message, and the button: **Send text now** or **Send email now**.

5 Outbox

Every message queued from this page, newest first: when, to whom, channel, template, status (queued / sent / failed / skipped — with the reason).

6 Step by step

Text everyone in a class about the start date

1. Audience: **By cohort**, choose the class.
2. Channel: Text. Template: **Class approaching**.
3. Read the message; the start date fills in per person.
4. Press **Send text now**. Read the result line.

Text one person

1. Audience: **One person**, choose the name (or press **Text** on their profile, which lands here with them selected).
2. Write the message and send.

7 If something looks wrong

It says "saved but not sent".

The texting service could not be reached or is not configured on the server. The messages wait in the Outbox; contact Mission Metrics.

Someone was skipped.

No valid phone on the record, or they opted out (text consent = No).

Emails are not going out.

The result line says why. "Not connected" means the email key is missing on the server (Mission Metrics); "skipped" means the person has no email address on the record.

Employer & Partnership Database — one list of every partner

Clinical sites, externship sites, employers and workforce partners, with the agreement dates that quietly expire and the placement counts that win the next agreement.

1 What this page is for

WHAT THIS PAGE IS FOR

One place for every organisation the school works with. The two things that matter are the **agreement expiry** (so a site does not lapse the week students are due) and **placements** (proof for the next negotiation).

KINDS

Clinical site, Externship site, Employer, Workforce partner. Filter with the dropdown; search by name, contact or program.

THE TABLE

Kind, partner, contact, programs accepted, capacity, agreement expires (red when past, amber inside 60 days), placements.

2 The number cards

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

CARD	WHAT IT COUNTS
Partners on file	All partners.
Agreements expiring soon	Inside the next 60 days.
Agreements expired	Renew before placing more students.

Graduates placed

Across all partners, from graduate records.

3 Add a partner

The form: kind, organisation name, contact, phone, email, programs accepted, capacity (students at a time), agreement expires, notes. Save or Cancel.

4 Step by step

Add a partner

1. Press **Add partner**.
2. Kind, organisation name, contact person, phone, email, programs accepted (e.g. CNA, PCT), capacity, agreement expiry date, notes.
3. Press **Save partner**.

Edit a partner

1. Click the row; the same form opens filled in. Change and save.

5 If something looks wrong

Placements is 0 for an employer I know has hired.

Placements count graduates whose record names that employer exactly. Record the employer on the graduate's record (Outcomes / student record).