

Elite Analytics

Insurance and Securities Candidate Summary Dashboard

By default, this view will be for all active candidates in either your Insurance or Securities segment and includes the candidates of managers reporting to you in your hierarchy. The two graphs display a high level visual of your candidates' preparedness.

Overall Risk Level

This shows candidates by their overall risk status, which is measured as their likelihood of passing the Readiness Exam. This is determined by the candidate's cumulative score average of assessments (Chapter Quizzes, Practice Exams, and Readiness Exams).

- **High Risk** – Cumulative average of 69% or below
- **Moderate Risk** – Cumulative average between 70% and 79%
- **On Track** – Cumulative average of 80% or greater

Readiness Exam Status

This shows candidates who have attempted the Readiness Exam and may be ready to take their licensing exam.

Filtering on the Summary Dashboard

The summary dashboard may be filtered by Manager, Candidates' Last Active Period, and/or by Candidates' course of study. As filters are selected, the candidate summary counts will be updated. All filter selections are maintained when you Navigate to the Detailed Candidate Summary Dashboard.

- **Manager** – Allows you to filter to All managers or to a specific manager in your hierarchy.
- **Candidate Last Activity** – Allows you to filter to candidates with activity in the last 30, 60, 90, 180, or All days.
Some time periods may not show on the list if candidates were not active in that time frame.
- **Course** – List is populated based on the course(s) your candidates are actively studying.

Navigating to the Detailed Candidate Summary Dashboard

You can navigate to the Detailed Candidate Summary Dashboard through either the Overall Risk Level or Readiness Exam Status graphs.

In either graph you can click the center "Total Candidates" to see all candidates, or any of the segments (Risk Level: High, Moderate, On Track; Readiness Exam Status: Not Passed, Passed) to see candidates within those breakdowns.

Insurance Detailed Candidate Dashboard

When you navigate to this page, any filters selected, or segments clicked from the Candidate Summary Dashboard will be carried over. By default, the list is sorted by the overall risk status in ascending order (high, moderate, on track).

Detailed Candidate Dashboard

- **Candidate** – Last Name, First Name and Course of Study
 - Clicking the hyperlink in the name will direct you to a more detailed view of the Candidate's Activity and Usage
- **Manager** – Name of the manager that the candidate registered with
- **Overall Risk Status** – The risk of the candidate not passing the Readiness Exam
Risk status is calculated as the Cumulative Score Average attempted by Exam Type for Chapter Quizzes, Practice Exams, and Readiness Exam
 - **On Track** – 80% or greater
 - **Moderate Risk** – 70%-79%
 - **High Risk** – 69% or less
- **Chapter Progress** – Number of topics completed out of the total topics in all chapters within the course
- **Total Hours** – Total amount of time spent in the course
- **Quiz Average** – The average score for all quizzes attempted in the course
- **Practice Exam: Learning Mode Average** – The average score for all Learning Mode Practice Exams attempted in the course
- **Practice Exam: Exam Mode Average** – The average score for all Exam Mode Practice Exams attempted in the course
- **Best Readiness Exam** – The highest score achieved on all Readiness Exam attempts in the course
- **Certificate Status** – Applicable only in states where prelicensing certification is required
 - **Valid** – The certificate of completion has been issued to the candidate and is not expired
 - **Pending** – The certificate exam required a proctor and certificate of completion request is under review
 - **Expired** – The issued certificate of completion is no longer valid due to expiration
 - **Canceled or Revoked** – Certificate of completion was found non-compliant after review and is no longer valid
- **Start Date** – The date the candidate registered for the course
- **Licensing Exam Date** – If inputted by the candidate within the LMS, this is the anticipated date of the candidate's licensing exam
- **Last Activity** – The date that the candidate was last active. Note that for candidates who log in but do not study this date will remain the same

Filtering on the Detailed Candidate Dashboard

The dashboard may be filtered by Manager, Candidates' Last Active Period, Course, Risk Status, and Readiness Status. As filters are selected, the candidate summary counts will be updated. All filter selections are maintained when you navigate to the Detailed Candidate Summary Dashboard.

- **Manager** – Allows you to filter to All managers or to a specific manager in your hierarchy.
- **Candidate Last Activity** – Allows you to filter to candidates with activity in the last 30, 60, 90, 180, or All days.
Some time periods may not be shown on the list if candidates were not active in that time frame.
- **Course** – List is populated based on the course(s) your candidates are actively studying.
- **Risk Status** – Filtering based on the candidates' risk status: High, Moderate, or On Track.
 - **High Risk** – Cumulative average of 69% or below
 - **Moderate Risk** – Cumulative average between 70% and 79%
 - **On Track** – Cumulative average of 80% or greater
- **Readiness Status** – Filtering based on candidates that have Attempted, Passed, or Not Passed the Readiness Exam. *Note: Readiness Exam passing score is 80%.*

Search for Candidate

Type at least three letters of your candidate's name (first or last) to filter down to those that match your input.

Emailing Candidates

You can email candidates by clicking the checkbox next to their name and then clicking the "email" button near the top right of the column headings.

This will open your computer's default email client. If you are sending an email to only one candidate, their email will be in the "To" box. If emailing more than one candidate, their emails will be in the "BCC" (Blind Carbon Copy) box.


Archiving Candidates

You can archive candidates while on the "Active" candidate tab by clicking the checkbox next to their name and then clicking the "archive" button near the top right of the column headings.

Unarchiving Candidates

You can unarchive candidates while on the "Archived" tab by clicking the checkbox next to their name and then clicking the "unarchive" button near the top right of the column headings.

Subscribing to Emailed Reports

There are five different standard reports that you may subscribe to either daily or weekly by clicking the **Subscription Settings** button, at the top right of the window, then clicking the pencil icon  and saving your preferences. You may also have each of these reports sent to additional recipients by clicking the **+ Additional Recipient** button in the setup window and entering an additional email address.

Each report provides you with a pre-filtered view of your active hierarchy.

- **Candidate Summary Report** – Status overview of ALL active candidates in your hierarchy.
- **Inactive Candidate Report** – Candidates in your hierarchy that have not had activity in the last two business days.
- **Moderate Risk Report** – Active candidates in your hierarchy with a moderate risk (cumulative assessment score average between 70% and 79%) of not passing the Readiness Exam.
- **High Risk Report** – Active candidates in your hierarchy with a high risk (cumulative assessment score average of 69% or below) of not passing the Readiness Exam.
- **Readiness Exam Report** – Candidates who have successfully completed the Readiness Exam with a score of 80% or higher.