



At-Risk Report: Administrator Guide

The At-Risk Report utilizes predictive analytics to identify success in the College for Financial Planning® Wealth Management Designation programs. By analyzing performance patterns, the report provides a forward-looking view of exam readiness, allowing for intervention when it is most effective.



Understanding the Risk Model

The report categorizes your employees, as our students, into three statuses based on their cumulative performance and most recent high-stakes milestones:



On-Track

These learners demonstrate consistent mastery and are statistically likely to pass without intervention.



Borderline

This “movable middle” represents the highest ROI for intervention; targeted support here is most likely to shift a student back to On-Track.



At-Risk

These learners are significantly behind or struggling with content mastery and require immediate administrative intervention.

How Risk Is Calculated

The report uses a progressive model that shifts focus as your employee moves through the course.

- **Module Quizzes:** Early in the course, the status is a weighted average of all completed quizzes plus a “Good Start” buffer. This buffer prevents a single low score from immediately flagging a student as At-Risk, waiting instead for a pattern of performance.
- **Practice Exam:** Once the Practice Exam is completed, the previous quiz average is retired. The Practice Exam score becomes the new Overall Risk status.
- **Final Exam:** Once the Final Exam is completed, its result overrides all previous data to become the final Overall Risk status.

Get Started

To access these insights, simply log into your portal and click on **At-Risk Report** in the left navigation menu.

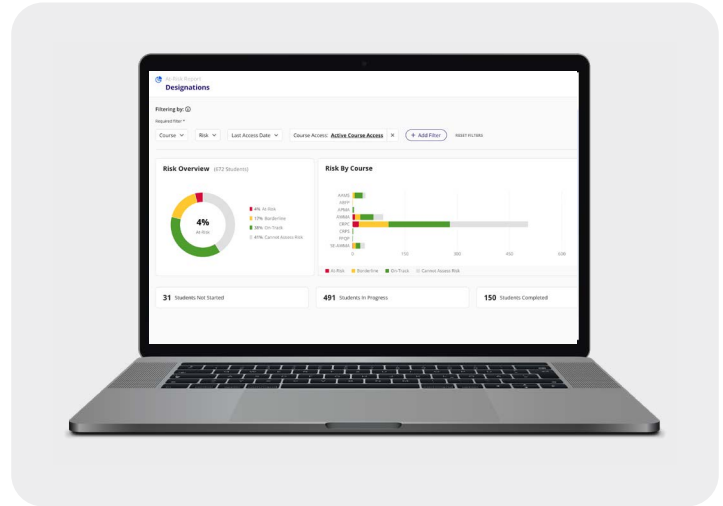


Dashboard Overview

The At-Risk Report provides you with a performance overview at a glance. Upon logging in, the report is filtered by default to show only students with Active Course Access.

Risk Summary & Graphs

- **Risk Overview:** Shows the total percentage and count of students with current On-Track, Borderline, and At-Risk statuses.
- **Risk by Program:** Breaks down risk levels by specific designations (e.g., CRPC[®], AAMS[®]).
- **Students Not Started:** Shows the total number of learners who have been enrolled but have not yet logged in or engaged with their study plan.
- **Students in Progress:** Displays the count of learners who are actively working through their study plan tasks.
- **Students Completed:** Shows the number of learners who have finished all required course components and assessments.



Summary Table

The Summary Table lists individual student details by designation. By default, the table is sorted from highest risk to lowest risk.

- **Student:** Displays your employee's full name and their enrollment start date.
- **Course Subject:** Indicates the specific Designation Program they are currently enrolled in.
- **Overall Risk:** Identifies the level of risk based on their performance on their module quizzes, Practice Exam, and Final Exam.
- **Task Progress:** Compares the percentage of tasks currently due against the percentage of tasks actually completed.
- **Average Quiz Score:** Calculates the average score across all completed module quizzes.
- **Practice Exam Score:** Displays the score on the Practice Exam.
- **Final Exam Score:** Displays the score on the Final Exam.
- **Log in as User:** Grants administrators read-only access to the student's Learning Management System (LMS). This allows you to view their study plan exactly as they see it.

STUDENT	COURSE SUBJECT	OVERALL RISK	TASKS COMPLETED	AVG SCORE	PRACTICE EXAM SCORE	FINAL EXAM SCORE	LOG IN AS USER
Tameika Parks 02/08/2025	CRPC	At-Risk	98% 91% due	61% score	43% score	N/A	
Tiffany Cardenas 02/02/2025	CRPC	At-Risk	97% 42% due	62% score	44% score	N/A	
Harvey Schultz 01/13/2025	CRPC	At-Risk	98% 93% due	66% score	57% score	N/A	
Ruth Wall 03/04/2025	SEAWMA	Borderline	100% 78% due	78% score	83% score	70% score	
Juan Becker 12/16/2025	CRPC	Borderline	100% 93% due	85% score	88% score	71% score	
Arturo Francis 12/16/2025	AWSA	Borderline	97% 97% due	74% score	72% score	N/A	

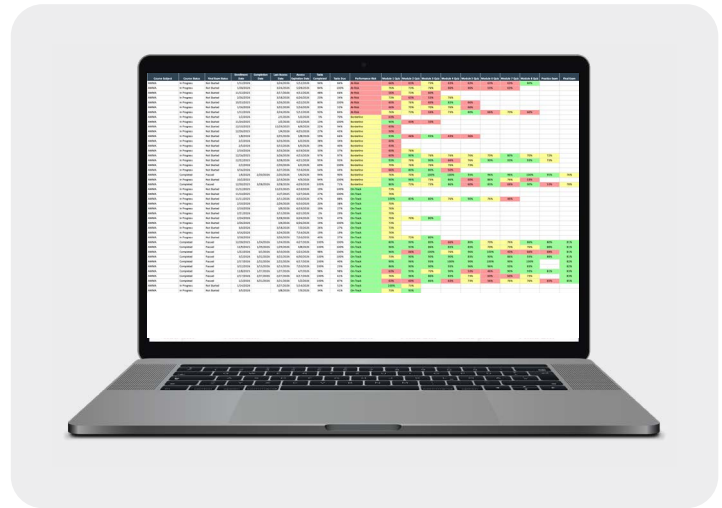


Exporting Data

The export button is located at the top right of the Summary Table. The export function is context-aware; it will only download the data currently visible based on your applied filters (e.g., if you filter for only “At-Risk” students, your export will only contain those records).

The export preserves the Red/Yellow/Green color-coding for every individual assessment.

- **Identify Trends:** Scan horizontally to see if a student is improving (shifting from Red to Green) or hitting a wall (consistent Red across all modules). Scan vertically to identify cohort-wide trends. If a specific exam column is predominantly Red, you have identified a challenge in that part of the curriculum that may require a group intervention.
- **Audit High-Stakes Exams:** Easily spot students who performed well on quizzes (Green) but struggled on the Practice Exam (Red/Yellow), indicating a need for comprehensive review.



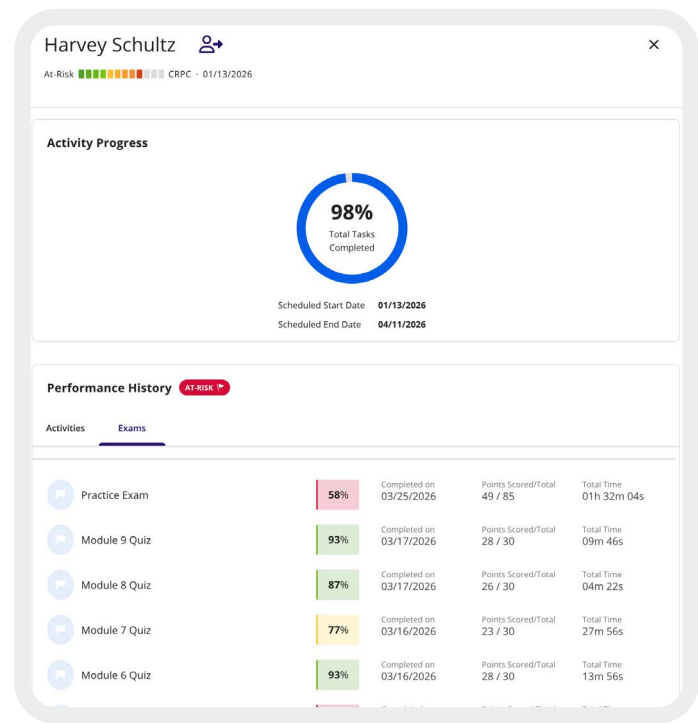
Individual Student View

To learn more about a specific employee, you can view their individual student report by clicking on their name.

Activity Progress

- This section visualizes the student’s progress compared to the course timeline.

- Total Tasks Completed:** Shows the percentage of total course tasks finished to date.
- Scheduled Start Date and Scheduled End Date:** Shows the start and end date of their study plan.





Performance History: Activities

This tab provides a granular view of the student's engagement with their study plan.

- **Task List:** Displays all tasks in the study plan.
- **Due Date:** Shows the original date each task was scheduled for completion.
- **Overdue Flag:** Identifies incomplete tasks that are past their scheduled due date.
- Use the "View only Overdue Tasks" switch to filter out completed items and focus on overdue tasks.

Activity Progress

35% Total Tasks Completed

Scheduled Start Date 01/26/2026
Scheduled End Date 05/26/2026

Performance History AT-RISK

Activities Exams

Sort by Default ⌵ ⌵ ⌵ View only Overdue Tasks ⏻

Task Name	Due Date	Status
Session 6 - Module 3: Benefits Available to a Covered Worker's Spouse, Survivors, and Ex-Spouse - Chapter 3.4	03/24/2026	Overdue
Session 6 - Module 3: Understanding Social Security, Military, and Government Benefits - Chapter 3.6	03/26/2026	Overdue
Session 6 - Module 3: Understanding Social Security, Military, and Government Benefits - Chapter 3.7	03/27/2026	Overdue
Session 6 OnDemand Class Video	03/28/2026	Overdue
Session 7 - Module 4: Bridging the Income Gap: Identifying Other Sources of Retirement Income - Chapter 4.1	03/29/2026	Overdue
Session 7 - Module 4: Bridging the Income Gap: Identifying Other Sources of Retirement Income - Chapter 4.2	03/30/2026	Overdue

Performance History: Exams

This tab allows you to monitor the student's mastery of the material through quiz and exam results.

- **Assessment List:** Displays all graded components, including module quizzes, the Practice Exam, and the Final Exam.
- **Score:** Shows the percentage earned on each assessment. Results are color-coded (e.g., Green for passing, Red for At-Risk) to highlight performance gaps at a glance.
- **Points:** Provides the raw point value achieved (e.g., 20/25) for a more detailed look at scoring.
- **Completion Date:** Records the date the student finished the assessment.
- **Total Time:** Tracks the duration spent on each exam or quiz. This is a key metric for identifying students who may be rushing through assessments without fully engaging with the content.

Scheduled Start Date 01/13/2026
Scheduled End Date 04/11/2026

Performance History AT-RISK

Activities Exams

Assessment Name	Score	Completed on	Points Scored/Total	Total Time
Practice Exam	58%	03/25/2026	49 / 85	01h 32m 04s
Module 9 Quiz	93%	03/17/2026	28 / 30	09m 46s
Module 8 Quiz	87%	03/17/2026	26 / 30	04m 22s
Module 7 Quiz	77%	03/16/2026	23 / 30	27m 56s
Module 6 Quiz	93%	03/16/2026	28 / 30	13m 56s
Module 5 Quiz	63%	03/14/2026	19 / 30	13m 48s
Module 4 Quiz	53%	03/11/2026	16 / 30	17m 25s
Module 3 Quiz	77%	03/10/2026	23 / 30	14m 07s
Module 2 Quiz	67%	03/09/2026	20 / 30	16m 58s
Module 1 Quiz	73%	03/09/2026	22 / 30	19m 04s

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