Overview: The Time Tracker feature in CPP allows you to track the time you spend in your student meetings. It is important to always use this feature so you can audit the time spent to determine where efficiencies can be gained or where processes can be improved. This transaction can be recorded in a couple different ways:

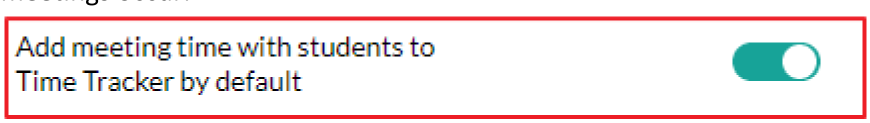
1.) As a part of scheduling the next meeting.
2.) Manually at some point before or after meeting with your student.

Setup:

Make it automatic:

1. From the CPP dashboard, choose 'My Settings & Preferences'

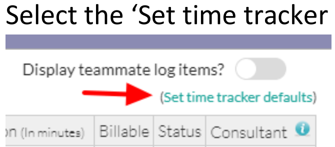
2. Under 'Calendar & Alert Settings', click on the toggle for 'Add meeting time with students to Time Tracker by default'. This allows items to be added to the tracker by default as scheduled meetings occur.



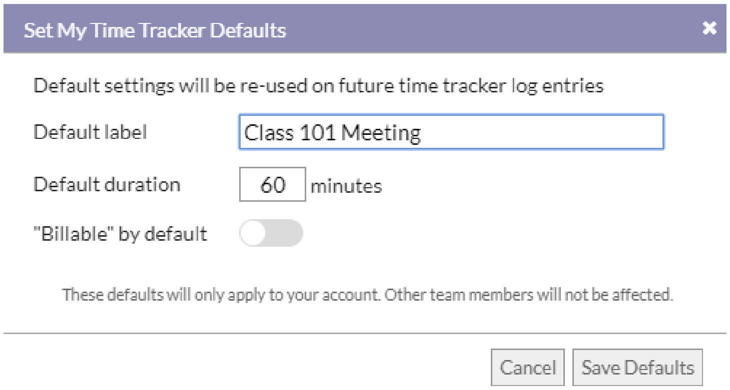
Other Setup:

1. Navigate to any student contact card.
2. Select 'Edit Time Tracker' from the menu.

3. Select the 'Set time tracker defaults' link on the Student Time Tracker window.



4. Enter the Default label, and duration.



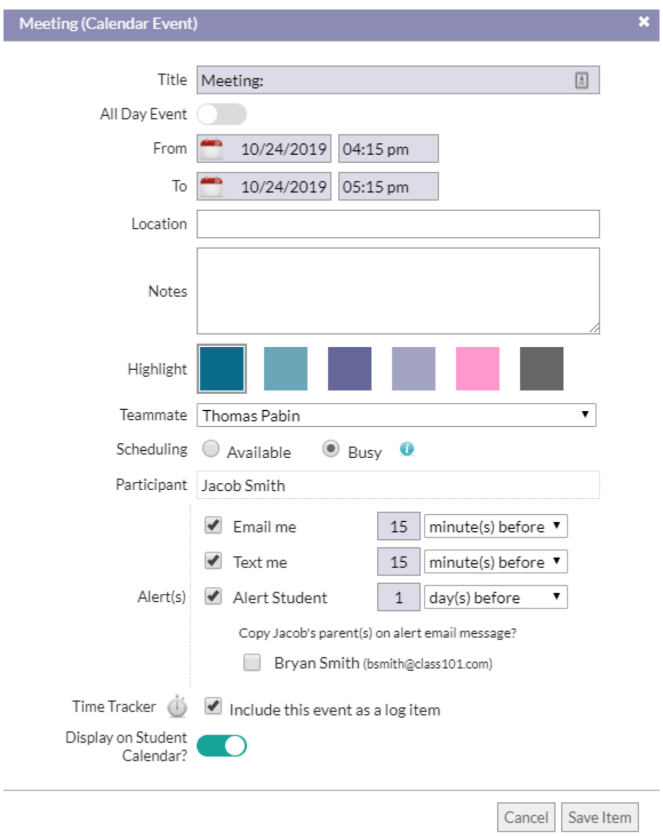
5. Select ‘Save Defaults’.
6. Select ‘Done/Close’

Usage:

Scheduled Meetings

1. Navigate to your student contact card.
2. Select ‘Add New Meeting’.

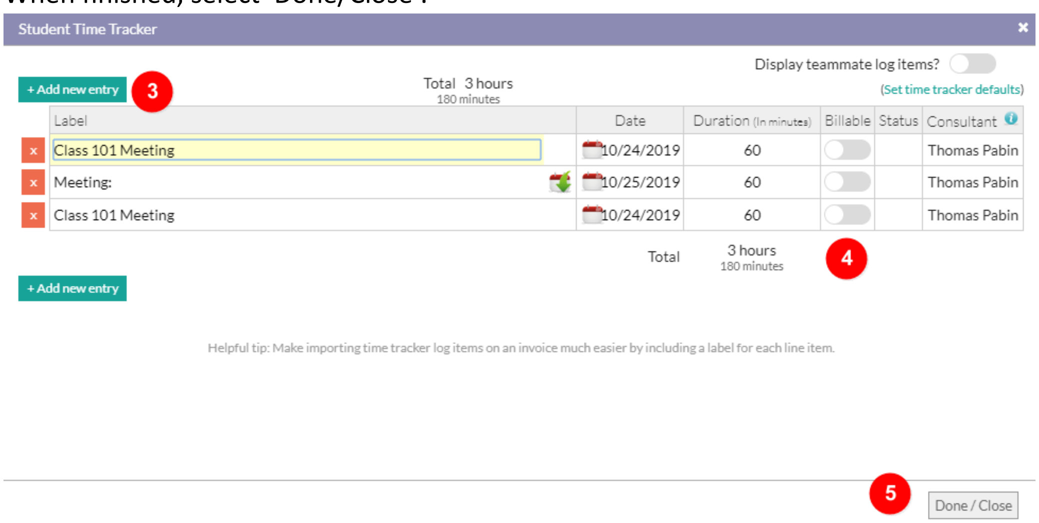
3. Enter the specifics of your meeting. Title (Including whether it is Virtual or In Person), the Date and Time of the meeting, a location and any notes. You can affect how to send notifications to the Student and/or their parents.
4. Be sure the Time Tracker checkbox is selected.
5. Choose whether it should be displayed on the Student Calendar.
6. Select ‘Save Item’.



Manual Entry – Can be used to record or catch up your time with students.

1. Navigate to your student contact card.
2. Select 'Edit Time Tracker' from the menu.

3. Select '+Add new entry'. The default information from your setup should populate the line. Make any necessary edits to the Label, Date or Duration. The student's assigned consultant will default into the line.
4. Do not change the Billable flag. We do not use this information for billing.
5. When finished, select 'Done/Close'.

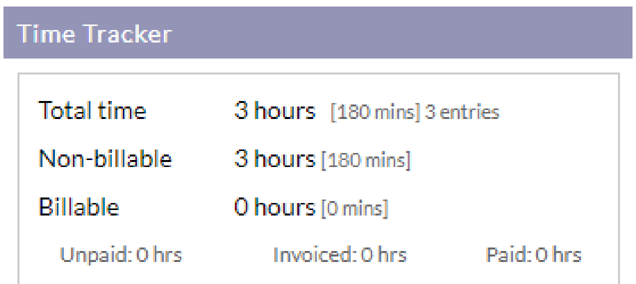


6. To remove an entry, just use the X beside the line.

Reporting:

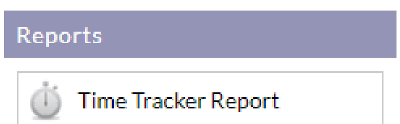
Each Student:

1. Each Contact Card has a 'Time Tracker' summary box on the left side of the screen. If you click in that box, you will see the detail for that Student.

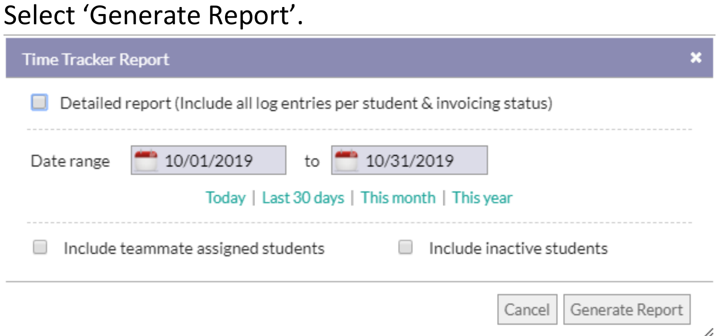


All Students:

1. To see totals for your Time Tracker information, go to the Students tab.
2. Select 'Time Tracker Report' from the Reports section.



3. Enter the information you would like to see
   a. Whether you want to see Detail in the report
   b. Set the Date range
   c. Select whether to include your teammate assigned students, and whether to include inactive students.
4. Select 'Generate Report'.



5. From here, you can choose to Download the file or 'View Report'.