

Reassigning Declined and Dormant Engagements

Not every assignment sticks the first time, and that's expected. Two kinds of engagement come back to your queue, and you'll see both in the **Client Assignment Team** dashlet alongside the new **Submitted** ones:

- **Assignment Declined**— a mentor reviewed the engagement you assigned and decided it wasn't the right fit, so they declined it. It returns to you to be matched with someone else.
- **Dormant**— an engagement that had been under way but has gone inactive, and has come back to your team to be picked up again.

Reassigning is the same process. Handling a returned engagement works just like a new one: review the client's industry and requested areas, look across the **CBM Members** for a capable mentor — a different one this time — and repeat the **Section 3** assignment steps for them: set the **Assigned Mentor** and **Assigned Users**, move the **Assigned User** on the engagement's contacts and the client to the new mentor, and set the **status** back to **Pending Acceptance**. The engagement is then offered to the new mentor.

A quick look before you reassign. It's worth a glance at why an engagement came back. For a declined one, the records and the client's needs haven't changed — you're simply finding a better-matched mentor. For a dormant one, check the engagement's history — its Sessions and notes — so the next mentor knows where things stand before they accept.

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