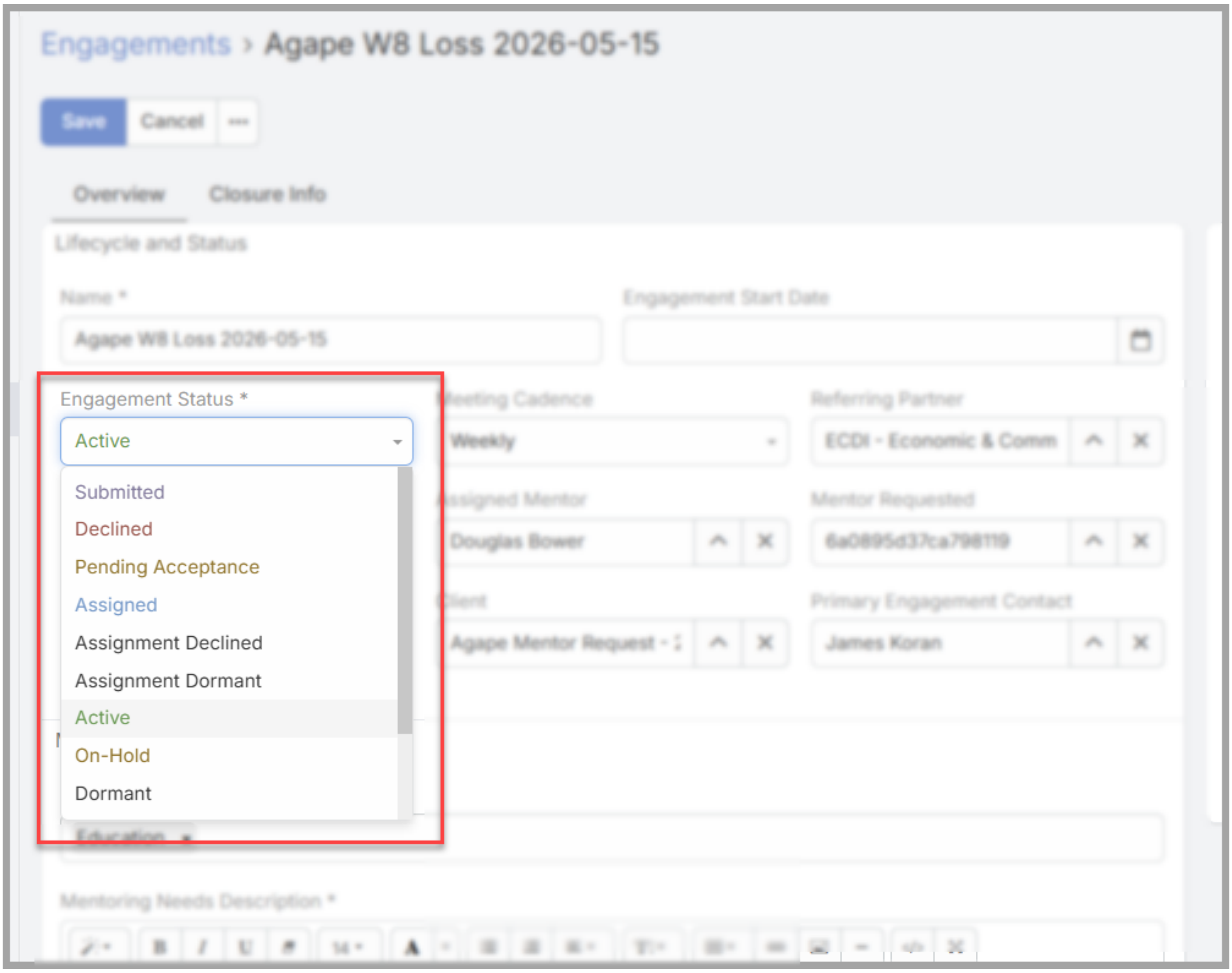
Keeping Your Engagement Current

Most of your record-keeping happens session by session (Section 3). Between sessions, there are two things you may want to keep up to date on the engagement itself — its status and any notes — and both are largely at your discretion.

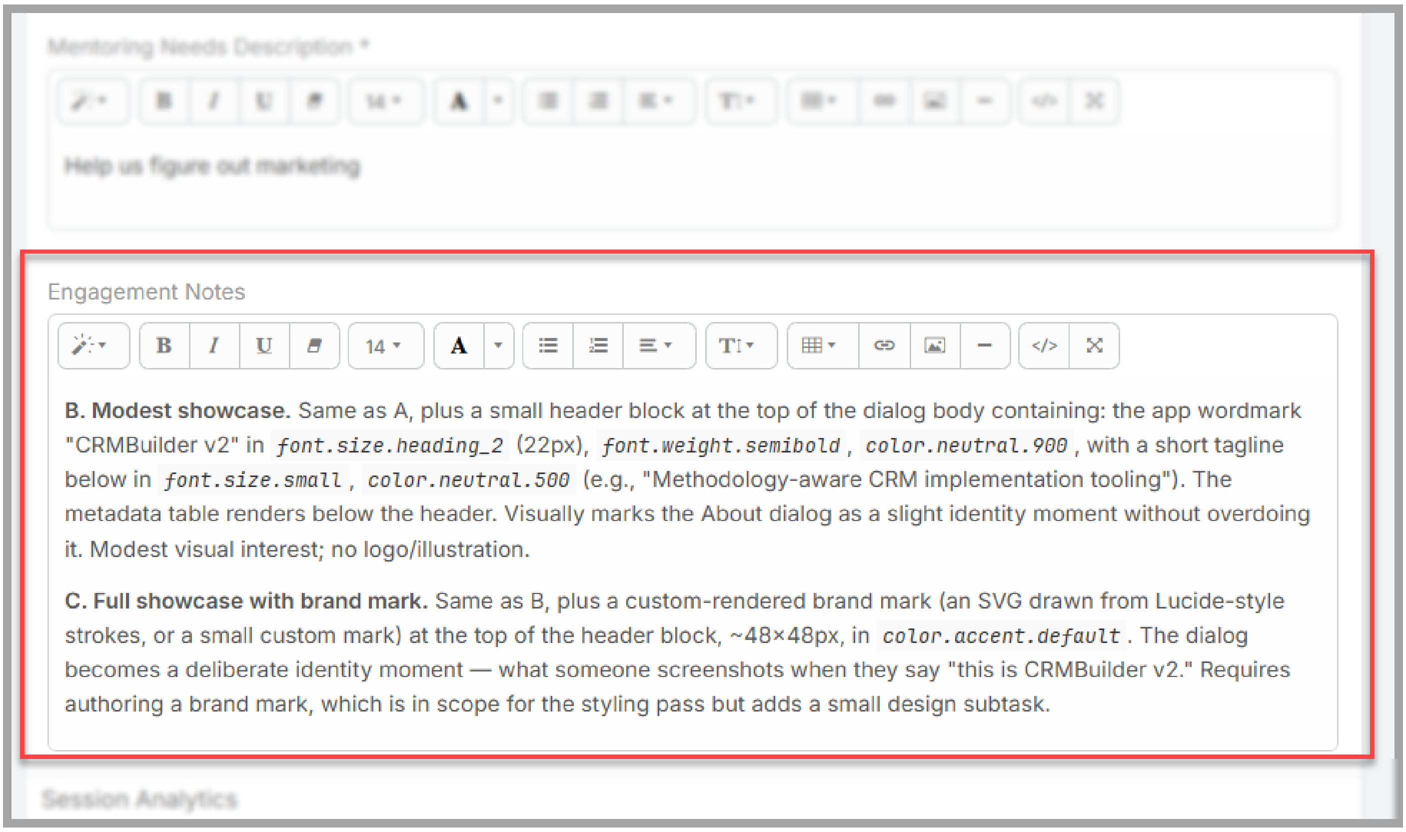
Status. An engagement stays **Active** while you're working with the client. You can change that when the situation shifts:

- Move it to **On Hold** if the mentoring pauses for a while.
- Move it to **Complete** when the engagement has run its course.

This is your call as the mentor, and updating it keeps coordinators informed about where the relationship stands. To change it: open the engagement, select **Edit**, set the **Engagement Status**, and **Save**.



Notes. Where you keep your notes is up to you. You can record developments on the **engagement** itself, or keep them on the individual **Sessions** as you go. Either works — choose whatever keeps your record clear and easy to pick up later. Many mentors keep the meeting-by-meeting detail on the Sessions and use the engagement only for the bigger picture.



Adding a co-mentor, or stepping off an engagement. You can also change who's mentoring an engagement. To bring in a **co-mentor**, add them to the engagement's **Assigned Mentor** and **Assigned Users** fields; for them to see the client's people and record, they'll also need to be the **Assigned User** on the engagement's contacts and the client (your Client Assignment team can help with this). To **step off** an engagement and hand it to someone else, remove yourself from those fields once another mentor is in place — that transfers the client to them.

In short. Move an engagement to On Hold or Complete when the situation calls for it, and keep your notes wherever suits you — on the engagement or on its Sessions. The aim is simply a record that you, a coordinator, or another mentor could pick up and understand.

Revision #1
Created 2026-06-17 21:08:41 UTC by Admin
Updated 2026-06-17 21:09:58 UTC by Admin