NewGetting Help and Next Steps Page

Where to get help. For anything about **access** — signing in, your password, or not being able to see something you think you need — contact **Sharon Rose** [contact method to be added]. For questions about **how to do your work** — a process, who handles what, or a client situation — your **coordinator** is usually the fastest source.

Your workflow at a glance. You now have the full loop: find your engagements (Section 2), log each session with notes and action items (Section 3), follow up with the client through Google Calendar (Section 4), keep your engagement current (Section 5), and track what's ahead on the calendar (Section 6). Done consistently, these few habits keep your mentoring clear for you, for your client, and for anyone at CBM who may need the picture.

Keep the Introduction handy. This guide builds on the CRM Introduction — what the records are, how to navigate, and why your view is tailored to your role. Keep it nearby as a refresher whenever a term or screen is unfamiliar.

Thank you. Your time as a mentor is what makes CBM's work possible. Keeping your record current is a small part of that, but it's what lets the whole team support you and your client well — thank you.

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