

# Declining an Application

**When to decline.** If after a full review your team determines that a candidate is not the right fit for CBM's mentoring program, you decline the application. A declined record is retained permanently in the system — it isn't deleted.

**How to decline.** To record a decline decision:

1. Open the CBM Member record from the dashlet or from the CBM Members list.
2. Select Edit.
3. Set Mentor Status to Declined.
4. Select an Application Decline Reason from the dropdown — this field is required when declining and becomes part of the permanent record.
5. Select Save.

**Notifying the applicant.** The system does not send an automatic notification when an application is declined. After saving, you are responsible for contacting the applicant directly to let them know the outcome. This is done outside the CRM — by email or phone — and the content and tone of that communication is at your team's discretion.

**The record after a decline.** The Contact and CBM Member records remain in the system with Mentor Status = Declined. If a declined applicant attempts to reapply through the website form using the same email address, the system will detect the existing record and block the submission, alerting the Mentor Administrator to handle it manually.

CBM Members > Mentor Admin

Edit ...

Contact Info Mentor Profile Profile Photo Mentor Status Dues Status

Contact Info

Name: Mentor Admin  
Contact: Mentor Admin  
CBM Email: None  
Mentor Start Date: None  
Street: 123 St  
City: None  
Personal Email: mentoradmin@gmail.com  
Mentor Type: Mentor  
Phone: +1 1231231234  
PostalCode: 12345

Mentor Status

- Candidate
- Prospect
- Candidate
- Provisional
- Approved
- Active
- Dormant
- Retired
- Terminated
- Declined

Assigned User: None  
Teams: None  
CBM Email: None  
Accepting New Clients:   
Current Active Clients: 1  
Available Capacity: -1  
Created: Today 12:27 · customa

Mentoring Info History

Assigned Engagements

CBM Members > Mentor Admin

Edit ...

Contact Info Mentor Profile Profile Photo Mentor Status Dues Status

Mentor Status

Felony Conviction:   
TermsAccepted:   
Background Check Completed:   
Background Check Date: None  
Training Completed:   
Training Completion Date: None  
Ethics Agreement Accepted:   
Ethics Agreement Acceptance Date/Time: None  
Departure Reason: None  
Departure Date: None

Declined Reason

- None
- Declined Reason 1
- Declined Reason 2

Assign: None  
Team: None  
CBM: None  
Acce:   
Curre: 1  
Avail: -1  
Creat

Mentoring Info History

Assigned Engagements

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