# Getting Help and Next Steps

Where to get help. For anything about access — signing in, your password, or not being able to see the dashlet or a record you think you need — contact Sharon Rose [contact method to be added]. For questions about how to do your work — which status to use, how to handle an unusual application, or what a field means — your lead or a colleague on the Mentor Applicant Review Team is usually the fastest source.

Your workflow at a glance. Working from the Mentor Applicant Review dashlet, you find applications at Candidate status and review the Mentor Profile tab — Professional Bio, Area of Expertise, Mentoring Skills, and the other fields the candidate submitted (Section 3). You move candidates forward through Candidate → Provisional → Approved, setting the Mentor Start Date when you approve (Section 4). If a candidate isn’t the right fit, you set status to Declined, record the Application Decline Reason, and notify the applicant directly (Section 5). Approved candidates move into onboarding and become available to the Client Assignment team once they reach Active status (Section 6).

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. The mentors you approve are the foundation of everything CBM does for its clients. The care your team puts into reviewing each application is what ensures CBM’s mentor roster stays strong — thank you.

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