Getting Started with Mentor Applicant Review

Who this guide is for. This guide is for the CBM Mentor Applicant Review Team, and it assumes you've already read the CRM Introduction — so you know what Contacts and Companies are, how to sign in and navigate, and that what you can see is governed by your User account security. This guide picks up from there and walks you through what the Mentor Review Team does.

The Mentor Review Team reviews applicants who have applied to become CBM mentors and walks each application through the review process — from first look to a decision to approve or decline. You're the bridge between someone expressing interest in mentoring and that person becoming an active, fully trained CBM mentor, available to work with clients.

Prospective mentors apply through a form on the CBM public website. When someone submits the form, the system automatically creates two records: a Contact (the person's file) and a CBM Member record with a Mentor Status of Candidate. You don't create these by hand — they arrive in your queue ready to review.

The CBM Member record carries a number of tabs that contain the applicant's information submitted on the electronic form. The Mentor Profile tab is where most of the application details live: the candidate's Professional Bio, Mentoring Skills, Area of Expertise, Industry Sector, Mentoring Focus Areas, and other information they submitted. This is what you'll read and evaluate when you review an application.

You access the CRM the same way as any user — see "Signing In" in the Introduction. The work in this guide requires Mentor Administration Team permissions — only users set up with that access will see the dashlet and be able to update Mentor Status and related fields. If you're ever unable to sign in, can't see the dashlet, or believe your access isn't set up correctly, contact [SupportContact] [contact method to be added].

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