

Moving a Candidate Through the Process

The status progression. Your team moves each candidate through a sequence of statuses as the review advances. The full path from application to approval is:

Candidate → Under Review → Provisional → Approved → Active

Each step is a manual status change you make on the CBM Member record. There are no automated transitions — every move is your team's deliberate decision.

Advancing the status. To move a candidate to the next status:


1. Open the CBM Member record from the dashlet or from the CBM Members list.
2. Select Edit.
3. Find the Mentor Status field and change it to the appropriate next value.
4. Select Save.

The record updates immediately and the change is recorded in the Stream.

What each step means.

- **Candidate → Under Review.** The application has passed your initial review and is moving forward. Use this when you're satisfied with what the candidate submitted but want a further evaluation step — a second review, a conversation, or additional consideration — before making a final decision.
- **Under Review → Provisional.** The application has passed further review, and the Mentor Candidate has been granted Provisional status to do co-mentoring and complete the required training to be approved.
- **Provisional → Approved.** The candidate has been accepted as a CBM mentor. This is your team's final decision. When you set status to Approved, also set the Mentor Start Date field to today's date — this records when the candidate was formally accepted into the program.
- **Approved → Active.** The candidate is accepting solo mentoring sessions from the Client Assignment Team.

Setting the Mentor Start Date. The Mentor Start Date is set at the same time you move status to Approved. It's on the CBM Member record alongside the Mentor Status field — set both in the same edit and save together.



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CBM Members > Mentor Admin

Edit ⋮

Contact Info
Mentor Profile
Profile Photo
Mentor Status
Dues Status

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

Assigned User
None

Teams
None

CBM Email
None

Accepting New Clients

Current Active Clients
1

Available Capacity
-1

Created
Today 12:27 - customapps

Mentoring Info
History

Assigned Engagements ⋮

No Data

Client Requests ⋮

No Data

CoMentoring Engagements ⋮

No Data

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