

After Approval — What Happens Next

Your decision hands off to onboarding. When you set a candidate's Mentor Status to Approved and save the record, your team's work on that application is complete. The candidate moves into the CBM mentor onboarding process — a separate workflow handled by the Mentor Administration team that carries them through the remaining steps before they begin mentoring.

What onboarding covers. Onboarding takes an Approved mentor through the practical steps of joining CBM — things like training, background check, ethics agreement, and setting up their CRM access. When onboarding is complete, the mentor's status moves from Approved to Active.

When the mentor becomes available for client assignment. An approved mentor does not appear in the Client Assignment team's mentor pool until their status reaches Active. The Client Assignment team looks across the CBM Members area for mentors who are open to new clients — only Active mentors with available capacity show up for matching. Your approval decision starts that path; onboarding completes it.

Dormant mentors in your queue. Your dashlet also surfaces mentors with a status of Dormant — previously Active mentors who have become inactive. If a dormant mentor is ready to return, your team can advance their status back toward Active through the same progression. If they are not returning, no action is required and the record remains as is.

The following steps should be taken in the CRM:

1. Change Mentor Status to "Approved"
2. Create a User in the CRM System using the new email as the username.
 1. Username - CBM email addressed
 2. Password - <assign a temporary password and include it in email>
3. Add the new User to the "Mentor Team" team.
4. Set the "Assigned User" on the new Mentor's "CRM Member" record
5. Set the "Assigned User" on the new Mentor's "Contact" record.
6. Discuss a typical Max Client load value, and enter that value into the Mentor Profile.
7. If the Mentor is ready to accept new clients, set the "Accepting New Clients" checkbox.
8. Send the new Mentor a welcome email.

Revision #3

Created 2026-06-17 22:50:30 UTC by Admin

Updated 2026-07-02 13:48:03 UTC by Admin