

Moving a Candidate Through the Process

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

Candidate → Under Review → Provisional Accepted → Provisional → Approved → Active

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 Accepted .** 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. At this point a CBM Email should be created and issued to the Mentor Candidate. When the email is issued, and the Mentor Candidate successfully logs into the email system, they can be promoted to a Provisional Mentor.
- **Provisional Accepted → Provisional.** When the user has successfully connected to the email system, their status should change from Provisional Accepted to Provisional.
- **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.

Each step is a manual status change you make in the CBM Mentor Admin Application. 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 Mentor Administration App (Test: Test Mentor Admin App Production: Production Mentor Admin App)

1.

Mentor Administration

Review and edit any mentor's profile, status, and details.

Signed in as Admin

Email SetupRefreshSign Out

All statusesAll record statusesAll types

Showing 4 of 4 mentors

Mentor	Mentor Email	Record	Status	Type	Created	Assigned	Ca
Anita Khayat	—	Incomplete	Candidate	Mentor	2026-07-02	—	
Dan Yurman	dan.yurman@cbmentors.org	Complete	Active	Mentor	2026-07-02	—	
Douglas Bower	doug.bower@cbmentors.org	Complete	Active	Mentor	2026-06-24	—	
Sue Marrone	sue.marrone@cbmentors.org	Complete	Active	Subject Matter Expert	2026-07-01	—	

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2. Select the Mentor to be edited, and click on the Mentor name to open the Mentor Details page.

1.

Douglas Bower

DATA COMPLETENESS

MENTORING STATUS

ACCEPTING NEW CLIENTS

EMAIL

PHONE

MAX CAPACITY

Complete

Active

Yes

doug@dougbower.com

(216) 612-4870

5

Profile

Status

Capacity

Expertise

Compliance

Departure

Bio

Status

Active

Type

Mentor

Mentor pause start date

mm/dd/yyyy

Mentor pause end date

mm/dd/yyyy

☒ Accepting new clients

☐ Public profile

Mentor start date

06/01/2026

Status notes

The first official mentor in CBM History!

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3. Find the Mentor Status Tab just below the Mentor Information Banner and click on the Tab.
4. Click on the Status selection text box and select the appropriate status to be assigned to the Mentor.
5. Select Save Changes.

The record updates immediately and the Mentor will be able to perform the newly assigned capabilities.

Detailed instructions for the Changes between each Mentor State/Status are described in the next section.

Revision #4
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Updated 2026-07-02 18:07:55 UTC by Admin