



CRM Advise Access Form

Please email the completed form to Michigan Tech IT at it-help@mtu.edu. Questions? Call 906-487-1111.

Contact Information

First Name/Preferred First Name

Last Name

M Number

User ID

Office Phone

Department

Title/Position

Role Selection

☐ New CRM Account

☐ Change Existing Account

☐ Same Access As:

Note: Pick one role from this section and then provide the Team name that you will be a part of.

☐ System Admin

☐ System Customizer

☐ Advisor

☐ Advisor All Students Access

☐ Case Managers

☐ Case Managers All Student Access

☐ Communication Plan Manager

☐ Success Manager

Team Name

Applicant Certification

Access privileges are issued to staff members with the understanding that they will use the information thus obtained only in the conduct of their official duties, and that no information will be disclosed to other persons who do not have a need to know. In addition, access to, and disclosure of, student information is governed by a federal law – the Family Educational Rights and Privacy Act (FERPA). By requesting access to the Banner System, staff members are accepting responsibility for knowing and complying with FERPA. I certify that I understand my responsibilities as an authorized user of the Banner System.

Supervisor Approval

The above applicant's duties require access to the Banner system and data. I realize that it is my responsibility to have my staff read and understand FERPA guidelines.

Applicant Signature

Applicant Name (printed)

Supervisor Signature

Supervisor Name (printed)

Date

Date