Patriot Connect Access Request form instructions for Academic Advisors

- **Employee Type:** select if you are faculty, staff, or student/wage employee
- **Access Type:** select Patriot Connect CRM
  - Do not select Marketing Cloud Access unless mass marketing is a part of your job. If you send bulk emails to your advisees, this would be done through Distributed Marketing, which is part of the Patriot Connect CRM. Most academic advisors will not select Marketing Cloud Access.
- **Account Type:**
  - If you are brand new to Patriot Connect CRM, select New Account
  - If you have an account in Patriot Connect CRM but need to make changes due to a change in role, select Modify Existing Account

Fill in all of the required fields in the next section.

Appointment Scheduling

If you are an academic advisor or have academic advising as part of your job and meet with students one-on-one, then you will be a **Service Resource** in Patriot Connect. If you have an admin role that does not meet with students one-on-one, then you would not be a Service Resource and do not need to fill this section out. Examples of those who would need to be Patriot Connect users but not Service Resources might include those who only manage appointments and check-ins, run reports, or supervise service resources but do not meet one-on-one with students themselves.

Information for Service Resources within Undergraduate Academic Advising:

Service Resource Name: For most people this will be your first and last name.

Service Resource Description: Please check with the other Service Resources in your Service Territory (location) to see what they use for their descriptions for consistency.

Service Territories and Membership Information: Almost everyone in Undergraduate Academic Advising has only one (primary) Service Territory. Your Service Territory is your unit (department, office, or school). Please note that a Service Territory may have both Undergraduate Academic Advising and Graduate Academic Affairs service resources in one, so if you advise for both undergraduate and graduate in your unit, you would still only have one Service Territory.

Success Team(s) and Role(s) for scheduling student assignments: Success Teams for Undergraduate Academic Advising are by program (e.g. Psychology Major Advising, Biology Minor Advising, etc.). If a major is offered with multiple degree options (e.g. BA and BS), these would still fall under one Success Team. List every major, minor, and certificate for which you advise and be sure to include “Major Advising”, “Minor Advising”, or “Certificate Advising” as part of the Success Team name. Your Success Team Role will be the same for each Success Team, so you only need to list one, unless you advise for both undergraduate and graduate as graduate will have different roles.

Optional: **Waitlist Assignment (for drop-ins):** Please check with your unit to see if a drop-in waitlist was set up for your unit in your Service Territory. If there is a waitlist, you will need to enter the name of it. If you listed a secondary Service Territory, please note that you can only be assigned to a waitlist for your primary Service Territory.

Read the Confidential Statement.

Complete the form by signing and submitting.

Supervisor Instructions:

Role: For your supervisee, you will most likely select the Staff role for your unit. If your supervisee also supervises advisors, select the Manager role for your unit.

Profile: Select Base Staff Access.

Additional Permissions:

Academic Advisors will need:

- Mass Emailing out of CRM (unless they never send a bulk email to their advisees)
- Automatic Outlook Calendar Syncing
- Manual Outlook Email Logging (so they can manually sync an email from outlook to a student’s Patriot Connect profile; this is recommended but optional)
- SMS 1:1 (unless they never plan to send students a text)
- SMS Bulk (unless they never plan to send a bulk text to students)

Any users who are not Service Resources will most likely not need any additional permissions unless they send mass emails on behalf of advisors or their unit.

Marketing Cloud Access permissions are only for users who selected Marketing Cloud Access because they are responsible for Marketing in their unit (creating templates, reports, journeys, etc.).