



Advising Access Request

California State University, Monterey Bay
Office of Advising

This form is to be used to request access as **Peer Mentors** or **Professional Staff Advisors** for the **Advising Center** and **Student Assistants** the **Advising Center** and for the **Business Dept. Only**

** All other Student Assistants should use the [Alternate Data Access Form](#)

** **Faculty Advisors** are appointed by the Office of the Provost and do not require this form.

Step 1: Provide Personal Information (All fields required)

Name (please print): _____ PS EmplID (not SSN): _____
Otter ID (Network Logon) _____ Email Address: _____ Campus Phone: _____
Title/Job Function: _____ Department: _____

Step 2: Complete Required Information Security & Privacy Rights Training

Complete **FERPA** and **Data Security & Privacy** online training courses available on SkillPort accessible through MyCSUMB.
For details, visit csumb.edu/it/information-security-awareness-training

Completed the training requirement? Yes No If no, please complete prior to submitting this form.

Step 3: Choose Role

Department Manager approval required for all of the following access roles:

- Peer Mentor** (In person training required, provided by requesting department)
- Professional Staff Advisor** (In person training required, provided by Advising Center)
- Student Assistant** (In person training required, provided by the Advising Center)

Step 4: Choose Access and Complete Training

- OASIS Advisor Center (In person training required.)
- Insight Manager Account (Contact lmartin@csumb.edu for training plan)

Training Officer Signature: _____ Date: _____

Step 5: Approval From Department Manager

Department Manager Signature: _____ Date: _____

Step 6: Approval From Director of Advising, Career, and Student Success Center

Signature: _____ Date: _____

Please route this request to the Office of Advising.