

BBE EXTERNAL AFFILIATE APPOINTMENT PROCESS

EXTERNAL AFFILIATE PROCESS/CHECKLIST:

	Request external affiliate forms from division office (Stefany)
	Complete forms and return to division office
	<ul style="list-style-type: none"> Form to Return: External Affiliate Data Sheet
	<ul style="list-style-type: none"> Form to Return: Confidentiality Non-Disclosure Agreement
	<ul style="list-style-type: none"> Form to Return: Patent Agreement
	Division office will review and approve, then send forms to hrinfo@caltech.edu for processing
	HR will send email to division office once external affiliate is set up in system; division will forward to lab contact
	Lab contact must email IMSS security to request system access account and email
	Lab contact must assist external affiliate with obtaining an access account (help.caltech.edu) and UID card (cardoffice@caltech.edu) – if needed
	For access to BBE buildings (key and card access), lab contact must send email to bbeaccess@caltech.edu , and include a scan of the Lab Safety Orientation Checklist

FORMS:

External Affiliate Data Sheet:

	Page 1: Complete items in red
	Page 1: Provide ID if available
	Page 1: External affiliate must sign and date
	Page 2: Complete items in red
	Page 2: Must include start date and end date
	Page 2: Division is BBE and Mail Code is MC 156-29
	Page 2: Add detailed description of guest activity
	Page 2: Sponsor signature bottom of page two

Confidentiality and Non-Disclosure Agreement:

	Page 1: Add external affiliate name
	Page 2: External affiliate date and sign

Patent Agreement:

	Page 1: External affiliate sign and date and Print Name
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For questions, please contact Stefany Nielsen at (626) 395-4700 or snielsen@caltech.edu.

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EXTERNAL AFFILIATE GUIDELINES FROM HR WEBSITE:

<https://hr.caltech.edu/resources/notices-administrative-guidelines/external-affiliates-guidelines>

External Affiliate Description

Caltech maintains formal relationships with other organizations in the scientific and business community. These relationships may be focused on scientific endeavors or they may be more business oriented and in the joint interest of both Caltech and the external organization. In some cases, the employees of these external organizations work on campus alongside Caltech employees. In other situations, Caltech has an agreement with the organization to process their medical and dental benefits. Individuals who work for these organizations are identified for Caltech purposes as External Affiliates.

Caltech External Affiliates Definition

An External Affiliate is an individual whose working group/organization has a formal working relationship with the Institute.

Examples of External Affiliate groups includes: Howard Hughes Medical Institute (HHMI), USGS, California Association for Research in Astronomy (CARA), Caltech Y, Caltech Employees Credit Union (CEFCU), Caltech Childcare Center (CCC), JPL Child Education Center (CEC), Glendale Community College or Pasadena Community College work study students, temp employee agencies, and other organizations that have MOUs or contracts with Caltech.

External Affiliate Process:

Human Resources enters External Affiliate personal, organization and location information into the Oracle HR system for the following reasons:

Access - External Affiliates may be provided access to email, computer systems, buildings or labs, on-campus parking, the library, and other services on an as-needed basis, as determined by the sponsoring Division or Department.

Safety - Many of these organizations' employees are housed on or near campus, so their safety is important to Caltech. Entering the external affiliate's information into Oracle provides Caltech with basic contact information and connects them to our automated security notification system should an emergency arise..

External Affiliate Forms:

Please submit completed documents to Human Resources at HRinfo@caltech.edu.

If the External Affiliate will be on campus for more than ten days, the Division or Department works with the External Affiliate to complete the following forms and forward them to Human Resources at HRinfo@caltech.edu for entry into Oracle.

External Affiliate Data Sheet --- The data sheet includes required personal information and a section describing the external affiliate's proposed activities (which organization, when, what kind of activities, etc). If the External Affiliate has not been at Caltech before, the information in this form will be used to set up a new Oracle record and a Caltech UID will be generated. If the External Affiliate has an existing Oracle record, the information will be used to update the original record.

Confidentiality and Non-Disclosure Agreement for External Affiliate Assignments should be signed by the External Affiliate.

Patent Agreement signed by the External Affiliate.

Other forms may be required by the Division or Department, depending on the activity.

If the individual will be on campus for ten days or less, it is up to the Division or Department to maintain documentation on the individual for safety/security purposes.

External Affiliate assignments can be up to two years. To extend an external affiliate's assignment, please submit a new External Affiliate Data Sheet to Human Resources at HRInfo@caltech.edu.

Division/Departments may contact the Card Office at cardoffice@caltech.edu if External Affiliate requires a Caltech ID card.

When the external affiliate's assignment ends, the Division or Department collects ID card (if applicable) and notifies Human Resources via email (HRInfo@caltech.edu) of the departure. Human Resources will terminate the record in Oracle and access privileges will close.