ASSUMPTIONS AND NOTES:

1. In some cases there are multiple affiliations that represent “stages” of a relationship. For each parent class (for example, staff or faculty) the related affiliations could be rolled up and identified by attributes. The main consideration is whether or not “root-level” access control is desired or not.

2. During design and implementation it may turn out that specific examples of membership are mentioned in the notes field (for instance, Auditors, Investigators, Lawyers, DCAA under the affiliate “Regulatory Department”) may be implemented as attributes if required for access control, reporting or auditing.

<table>
<thead>
<tr>
<th>AFFILIATE</th>
<th>EXAMPLE ATTRIBUTES (not comprehensive)</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>Donor, alumni association member</td>
<td>More than two semesters in attendance</td>
</tr>
<tr>
<td>Collaborator</td>
<td></td>
<td>Includes research and business collaborations</td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td>This might include individuals and organizations who work with the University in areas that would fall under unrelated business income tax rules.</td>
</tr>
<tr>
<td>Dependant</td>
<td></td>
<td>Of faculty, staff, wage. Might only be an attribute in relevant databases.</td>
</tr>
<tr>
<td>Educational Program Participant</td>
<td></td>
<td>Including summer and special programs where participation does not connote student status</td>
</tr>
<tr>
<td>Emeritus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty, applicant</td>
<td>leave of absence, pending, current, postdoc, future, recent</td>
<td>Used to provide access prior to the start of employment.</td>
</tr>
<tr>
<td>Faculty, visiting</td>
<td></td>
<td>Includes scholars and fellows. Non-PSU.</td>
</tr>
<tr>
<td>Friend</td>
<td>Donor, alumni association member</td>
<td>The Village (at Penn State) People</td>
</tr>
<tr>
<td>Health Care Professional</td>
<td>Physician, physicians assistant, nurse, staff (staff may need to be more granular: physical therapist, pharmacist and so on)</td>
<td>Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>High school guidance counselor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Independent Contractor</td>
<td></td>
<td>Individuals who perform work for or at the University but who are not employees. Technical representatives who require access to University electronic services are an</td>
</tr>
<tr>
<td>AFFILIATE</td>
<td>EXAMPLE ATTRIBUTES (not comprehensive)</td>
<td>NOTES</td>
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</tr>
<tr>
<td>Independent Contractor, health care</td>
<td></td>
<td>example. This could include fixed-term instructors. Could permit access during gaps in employment or before appointment begins.</td>
</tr>
<tr>
<td>Instructor</td>
<td></td>
<td>Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>Patient</td>
<td></td>
<td>Not PSU faculty</td>
</tr>
<tr>
<td>Regulatory Department</td>
<td></td>
<td>Auditors, Investigators, Lawyers, DCAA</td>
</tr>
<tr>
<td>Retiree</td>
<td>donor</td>
<td></td>
</tr>
<tr>
<td>ROTC</td>
<td>Army, Navy, Air Force</td>
<td></td>
</tr>
<tr>
<td>Staff</td>
<td>leave of absence, pending, current, postdoc, future, recent, donor</td>
<td>Active</td>
</tr>
<tr>
<td>Staff, applicant</td>
<td></td>
<td>Used to provide access prior to the start of employment.</td>
</tr>
<tr>
<td>Staff, furloughed</td>
<td></td>
<td>May have a need to access University resources.</td>
</tr>
<tr>
<td>Staff, visiting</td>
<td></td>
<td>Non-PSU.</td>
</tr>
<tr>
<td>Student</td>
<td>withdrawn, military withdrawn, leave of absence, future, recent, undergrad, grad</td>
<td>Active</td>
</tr>
<tr>
<td>Student, applicant</td>
<td>undergrad, grad</td>
<td></td>
</tr>
<tr>
<td>Student, certificate program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student, former</td>
<td>alumni, non-alumni, in-active student, undergrad, grad, foreign, payment due</td>
<td>For payment of bills; not an alumni because attended less than two semesters.</td>
</tr>
<tr>
<td>Student, health care</td>
<td></td>
<td>Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>Student, prospect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student, visiting</td>
<td></td>
<td>Non-PSU. Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>Student, visiting health care</td>
<td></td>
<td>Non-PSU. Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
<td>Representatives of companies who engage in transactions such as payment draw downs or those who provide services (B&amp;N running the bookstore).</td>
</tr>
<tr>
<td>Supplier, health care</td>
<td></td>
<td>Representatives of companies who engage in transactions</td>
</tr>
<tr>
<td>AFFILIATE</td>
<td>EXAMPLE ATTRIBUTES (not comprehensive)</td>
<td>NOTES</td>
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</tr>
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<td></td>
<td></td>
<td>such as payment draw downs or those who provide services. Permits access to patient records and related private/confidential patient (personal) data.</td>
</tr>
<tr>
<td>Surviving Spouse</td>
<td></td>
<td>Only if access to PSU electronic services is being considered – otherwise, an attribute in relevant databases.</td>
</tr>
<tr>
<td>Trustees</td>
<td>donor</td>
<td></td>
</tr>
<tr>
<td>VIP</td>
<td>donor</td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td>donor, course audit</td>
<td>acting as an agent of the University</td>
</tr>
<tr>
<td>Wage</td>
<td>leave of absence, pending, current, postdoc, future, recent, donor</td>
<td></td>
</tr>
<tr>
<td>Wage, applicant</td>
<td></td>
<td>Used to provide access prior to the start of employment.</td>
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</tbody>
</table>