

The following information regarding collaborators and other affiliations (COA) must be separately provided for each individual identified as senior project personnel. The COA information must be provided through use of this COA template.

Please complete this template (e.g., Excel, Google Sheets, LibreOffice), save as .xlsx or .xls, and upload directly as a Fastlane Collaborators and Other Affiliations single copy doc. Do not upload .pdf.

Please note that some information requested in prior versions of the PAPPG is no longer requested. **THIS IS PURPOSEFUL AND WE NO LONGER REQUIRE THIS INFORMATION TO BE REPORTED.** Certain relationships will be reported in other sections (i.e., the names of postdoctoral scholar sponsors should not be reported, however if the individual collaborated on research with their postdoctoral scholar sponsor, then they would be reported as a collaborator). The information in the tables is not required to be sorted, alphabetically or otherwise.

There are five separate categories of information which correspond to the five tables in the COA template:

COA template Table 1:

List the individual's last name, first name, middle initial, and organizational affiliation in the last 12 months.

COA template Table 2:

List names as last name, first name, middle initial, for whom a personal, family, or business relationship would otherwise preclude their service as a reviewer.

COA template Table 3:

List names as last name, first name, middle initial, and provide organizational affiliations, if known, for the following:

- The individual's Ph.D. advisors; and
- All of the individual's Ph.D. thesis advisees.

COA template Table 4:

List names as last name, first name, middle initial, and provide organizational affiliations, if known, for the following:

- Co-authors on any book, article, report, abstract or paper with collaboration in the last 48 months (publication date may be later); and
- Collaborators on projects, such as funded grants, graduate research or others in the last 48 months.

COA template Table 5:

List editorial board, editor-in chief and co-editors with whom the individual interacts. An editor-in-chief must list the entire editorial board.

- Editorial Board: List name(s) of editor-in-chief and journal in the past 24 months; and
- Other co-Editors of journal or collections with whom the individual has directly interacted in the last 24 months.

The template has been developed to be fillable, however, the content and format requirements must not be altered by the user. This template must be saved in .xlsx or .xls format, and directly uploaded into FastLane as a Collaborators and Other Affiliations Single Copy Document. Using the .xlsx or .xls format will enable preservation of searchable text that otherwise would be lost. It is therefore imperative that this document be uploaded in .xlsx or .xls only. Uploading a document in any format other than .xlsx or .xls may delay the timely processing and review of the proposal.

This information is used to manage reviewer selection. See Exhibit II-2 for additional information on potential reviewer conflicts.

1 Note that graduate advisors are no longer required to be reported.

2 Editorial Board does not include Editorial Advisory Board, International Advisory Board, Scientific Editorial Board, or any other subcategory of Editorial Board. It is limited to those individuals who perform editing duties or manage the editing process (i.e., editor in chief).

List names as Last Name, First Name, Middle Initial. Additionally, provide email, organization, and department (optional) to Fixed column widths keep this sheet one page wide; if you cut and paste text, set font size at 10pt or smaller, and To insert *n* blank rows, select *n* row numbers to move down, right click, and choose Insert from the menu.

You may fill-down (ctrl-D) to mark a sequence of collaborators, or copy affiliations. Excel has arrows that enable sorting. For "Last Active Date" and "Last Active" columns, dates are optional, but will help NSF staff easily determine which information remains relevant for review. "Last Active Date" and "Last Active" columns are optional, but will help NSF staff easily determine which information remains relevant for review.

All new COAs need to have numbers in the blue bar of Column A. In former templates there were letters where the numbers now are. Please ensure you are using the correct COA Template.

Table 1: List names as last name, first name, middle initial, and provide organizational affiliations, if known, for the following:

1	Your Name:	Your Organizational Affiliation(s), last 12	Last Active Date
	Alphaman, Alan K	Test University XYZ	
		Test University ABC (adjunct)	1/1/2017
		Test University DEF (interviewed)	12/12/2016

Table 2: List names as last name, first name, middle initial, for whom a personal, family, or business relationship would otherwise preclude their service as a reviewer.

R: Additional names for whom some relationship would otherwise preclude their service as a reviewer.

to disambiguate common names

2	Name:	Type of Relationship	Optional (email, Department)	Last Active
R:	Alphaman, Alexander	Family		

"Last Active" refers to when the individual last collaborated with the person on a professional basis. You may leave this column blank if interactions are ongoing.

Table 3: List names as last name, first name, middle initial, and provide organizational affiliations, if known, for the following.

G: The individual's Ph.D. advisors; and
T: All of the individual's Ph.D. thesis advisees

Notice! Postdoc Sponsors and Scholars advised is no longer needed. These people may be recorded in table 4 if they are co-authors or

3	Advisor/Advisee Name:	Organizational Affiliation	Optional (email, Department)
G:	Alphaman2, Alice	Test University XYZ	Department X
T:			

Table 4: List names as last name, first name, middle initial, and provide organizational affiliations, if known, for the following:

A: Co-authors on any book, article, report, abstract or paper with collaboration in the last 48 months (publication date may be later); and

C: Collaborators on projects, such as funded grants, graduate research or others in the last 48 months.

to disambiguate common names

4	Name:	Organizational Affiliation	Optional (email, Department)	Last Active
A:	Alphaman3, Adam	Test University 1234	example@example.com	1/1/15
A:				
C:				

Table 5: List editorial board, editor-in chief and co-editors with whom the individual interacts. An editor-in-chief must list the entire editorial board.

B: Editorial Board: List name(s) of editor-in-chief and journal in the past 24 months; and

E: Other co-Editors of journal or collections with whom the individual has directly interacted in the last 24 months.

to disambiguate common names

5	Name:	Organizational Affiliation	Journal/Collection	Last Active
B:	Alphaman4, Ann	Test University XYZ	Journal ABC	1/1/17
E:				