

# How to Add or Remove a Collaborators and Other Affiliations Information Template Document

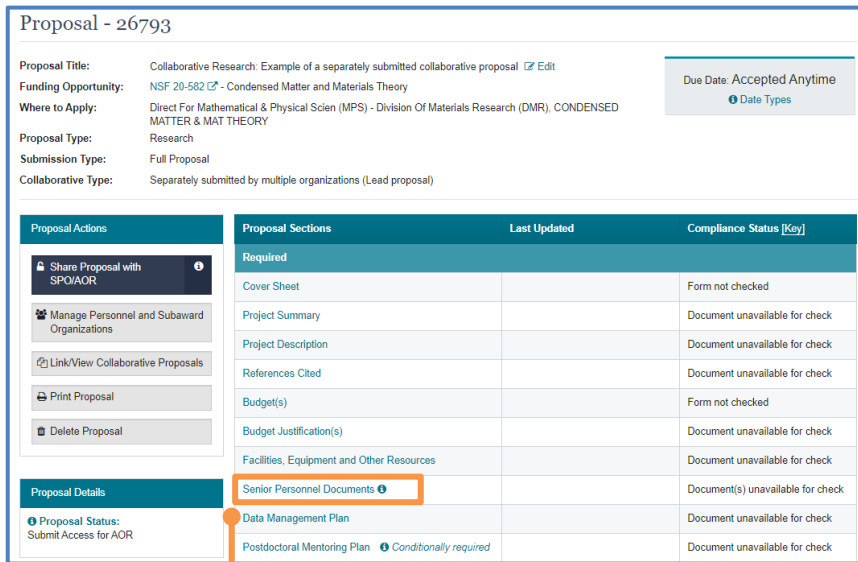
NSF requires that Collaborators and Other Affiliations information must be separately provided for each individual identified as senior project personnel. Follow the steps in this guide to add or remove a Collaborators and Other Affiliations (COA) template document from a Research.gov proposal.

The COA information template is available on the NSF [Collaborators and Other Affiliations Information](#) page. [Frequently Asked Questions \(FAQs\) on Collaborators and Other Affiliations \(COA\) Information Template](#) are also available.

## Adding a COA Information Template Document

- 1 Click the **Senior Personnel Documents** link on the proposal main page or on the left proposal navigation menu.

Sample Proposal Main Page



Proposal - 26793

Proposal Title: Collaborative Research: Example of a separately submitted collaborative proposal [?] Edit

Funding Opportunity: NSF 20-582 [?] - Condensed Matter and Materials Theory

Where to Apply: Direct For Mathematical & Physical Scien (MPS) - Division Of Materials Research (DMR), CONDENSED MATTER & MAT THEORY

Proposal Type: Research

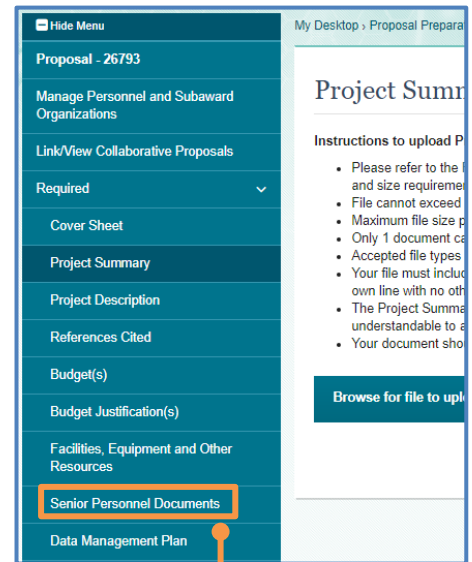
Submission Type: Full Proposal

Collaborative Type: Separately submitted by multiple organizations (Lead proposal)

Proposal Actions	Proposal Sections	Last Updated	Compliance Status [Key]
<ul style="list-style-type: none"> <li>Share Proposal with SPO/AOR</li> <li>Manage Personnel and Subaward Organizations</li> <li>Link/View Collaborative Proposals</li> <li>Print Proposal</li> <li>Delete Proposal</li> </ul>	<b>Required</b>		
	Cover Sheet		Form not checked
	Project Summary		Document unavailable for check
	Project Description		Document unavailable for check
	References Cited		Document unavailable for check
	Budget(s)		Form not checked
	Budget Justification(s)		Document unavailable for check
	Facilities, Equipment and Other Resources		Document unavailable for check
	<b>Senior Personnel Documents</b>		Document(s) unavailable for check
Proposal Details	Data Management Plan		Document unavailable for check
	Postdoctoral Mentoring Plan		Conditionally required

Senior Personnel Documents link

Sample Left Proposal Navigation Menu



Hide Menu

My Desktop > Proposal Preparation

Proposal - 26793

- Manage Personnel and Subaward Organizations
- Link/View Collaborative Proposals
- Required
  - Cover Sheet
  - Project Summary
  - Project Description
  - References Cited
  - Budget(s)
  - Budget Justification(s)
  - Facilities, Equipment and Other Resources
  - Senior Personnel Documents**
  - Data Management Plan

Instructions to upload P...

- Please refer to the f...
- File cannot exceed...
- Maximum file size p...
- Only 1 document ca...
- Accepted file types...
- Your file must includ...
- The Project Summa...
- Your document sho...

Browse for file to upl...

Senior Personnel Documents link

- 2 The Senior Personnel Documents page lists all proposal senior personnel.

- By default, the Principal Investigator appears first and is expanded to show the individual documents.
- Click the Expand all link to see all documents for all senior personnel. Click the Collapse all link to collapse the documents.
- Click the plus sign or minus sign in front of a name to expand or collapse the list of documents for the selected individual.

# How to Add or Remove a Collaborators and Other Affiliations Information Template Document

Expand all and Collapse all links

Minus sign collapses the display of each individual's list of senior personnel documents

Plus sign expands the display of each individual's list of senior personnel documents

My Desktop > Proposal Preparation > Proposal - 26793 > Senior Personnel Documents

## Senior Personnel Documents

Video: How to Manage Senior Personnel Documents

Manage Personnel and Subaward Organizations

Expand all | Collapse all

Personnel Name	Role	Organization												
<div style="border: 1px solid orange; padding: 2px;">-</div> Natalie Pi	Principal Investigator	County University												
<table border="1"> <thead> <tr> <th>Documents</th> <th>Last Updated</th> <th>Compliance Status [Key]</th> </tr> </thead> <tbody> <tr> <td>Biographical Sketch</td> <td>12/29/2020 8:57 AM EST</td> <td>Document unavailable for check</td> </tr> <tr> <td>Current and Pending Support</td> <td></td> <td>Document unavailable for check</td> </tr> <tr> <td>Collaborators and Other Affiliations (Single Copy Document ⓘ)</td> <td></td> <td>Document unavailable for check</td> </tr> </tbody> </table>			Documents	Last Updated	Compliance Status [Key]	Biographical Sketch	12/29/2020 8:57 AM EST	Document unavailable for check	Current and Pending Support		Document unavailable for check	Collaborators and Other Affiliations (Single Copy Document ⓘ)		Document unavailable for check
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+ Sarah Pi	co-Principal Investigator	County University												
+ Noah J Lin	Other Senior Personnel	County University												

**3** Click the **Collaborators and Other Affiliations** link for each listed individual to go to the template document upload page.

Collaborators and Other Affiliations link

My Desktop > Proposal Preparation > Proposal - 26793 > Senior Personnel Documents

## Senior Personnel Documents

Video: How to Manage Senior Personnel Documents

Manage Personnel and Subaward Organizations

Expand all | Collapse all

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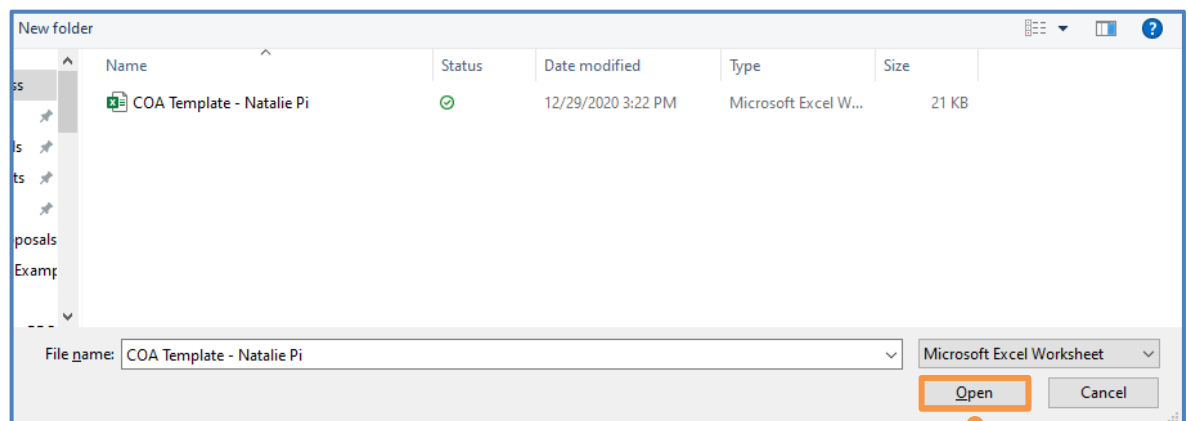
# How to Add or Remove a Collaborators and Other Affiliations Information Template Document (cont'd)

- 4 Follow the Collaborators and Other Affiliations upload page instructions. **Click the Browse... button** to find the completed .xlsx template file to be uploaded.
- The COA information template can also be accessed on the [Collaborators and Other Affiliations Information](#) page. Refer to the [Frequently Asked Questions \(FAQs\) on Collaborators and Other Affiliations \(COA\) Information Template](#) for additional guidance.
  - Be sure to use the current version of the COA template as an outdated template may generate upload compliance check errors.



Use the Browse button to find the completed COA file to upload

- 5 Click the **Open** button to upload the selected file.



Open button

# How to Add or Remove a Collaborators and Other Affiliations Information Template Document (cont'd)

- 6 Review the preview screen to confirm COA content. If the content is correct, click the **Upload File** button to complete the upload. Otherwise click the **Cancel** button.

Preview: Collaborators and Other Affiliations

Please review the information, and if displayed properly, upload your file. Otherwise, cancel and revise your file before uploading again.

Table 1				3 organizational affiliations
1	Your Name:	Your Organizational Affiliation(s), last 12 mo	Last Active Date	
	Pi, Naralie	County University	1/1/2021	
		Test University ABC (adjunct)	1/1/2017	
		Test University DEF (interviewed)	12/12/2016	

Table 2				1 person
2	Name:	Type of Relationship	Optional (email, Department)	Last Active

Use the Upload File button to upload the COA file for the specified individual

- 7 The Research.gov Proposal Submission System performs automated compliance checks before the COA file can be uploaded. If the system detects a compliance issue, an error or warning message displays. The system will not permit the file to be uploaded if an error is detected.

COA template compliance error message example

## Collaborators and Other Affiliations - Natalie Pi

**!** Your file contains the following error(s). Please update your file and try uploading it again.

- An unexpected value was found in your COA template file.
- Table 3, column 1, rows 38, 39, 40, 41, 42, 43, 44 must contain 'G.' or 'T.'

**Step 1: Complete the Collaborators and Other Affiliations Template**

- Download the **required** Collaborators and Other Affiliations template [↗](#) and follow the instructions
- View [Frequently Asked Questions](#) [↗](#) for additional information
- NSF uses the information in this Single Copy Document to manage reviewer selection, and it is not seen by reviewers. For more on potential review conflicts [↗](#) see the PAPPG.

**Step 2: Upload the completed Collaborators and Other Affiliations Template**

- Only one file can be uploaded
- Your file should **not** contain page numbers, as they will be added automatically by the system
- Accepted file types include: .xlsx
- After selecting your template file, a preview will be displayed for your confirmation
- Maximum file size permitted is 10 MB

[Collaborators and Other Affiliations \(PAPPG\) \[↗\]\(#\)](#)  
[Video: How to Upload a Collaborators and Other Affiliations Document](#)

# How to Add or Remove a Collaborators and Other Affiliations Information Template Document (cont'd)

- 8 A success message displays after a compliant COA template has been uploaded and a PDF file has been created.

### Collaborators and Other Affiliations - Natalie Pi

✔ Your file has been uploaded successfully. ✕

**Step 1: Complete the Collaborators and Other Affiliations template**

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**Step 2: Upload the completed Collaborators and Other Affiliations template**

- The template must be saved in .xlsx format
- After selecting your template file, a preview will be displayed for your confirmation
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[Collaborators and Other Affiliations \(PAPPG\)](#)

[Video: How to Upload a Collaborators and Other Affiliations Document](#)

Browse for file to upload

COA Template - Natalie Pi.pdf  Delete

- 9 The Compliance Status column on the Senior Personnel Documents page shows No issue(s) found for a successfully uploaded COA document.

### Senior Personnel Documents

[Video: How to Manage Senior Personnel Documents](#)

Expand all | Collapse all    Show:     [Manage Personnel and Subaward Organizations](#)

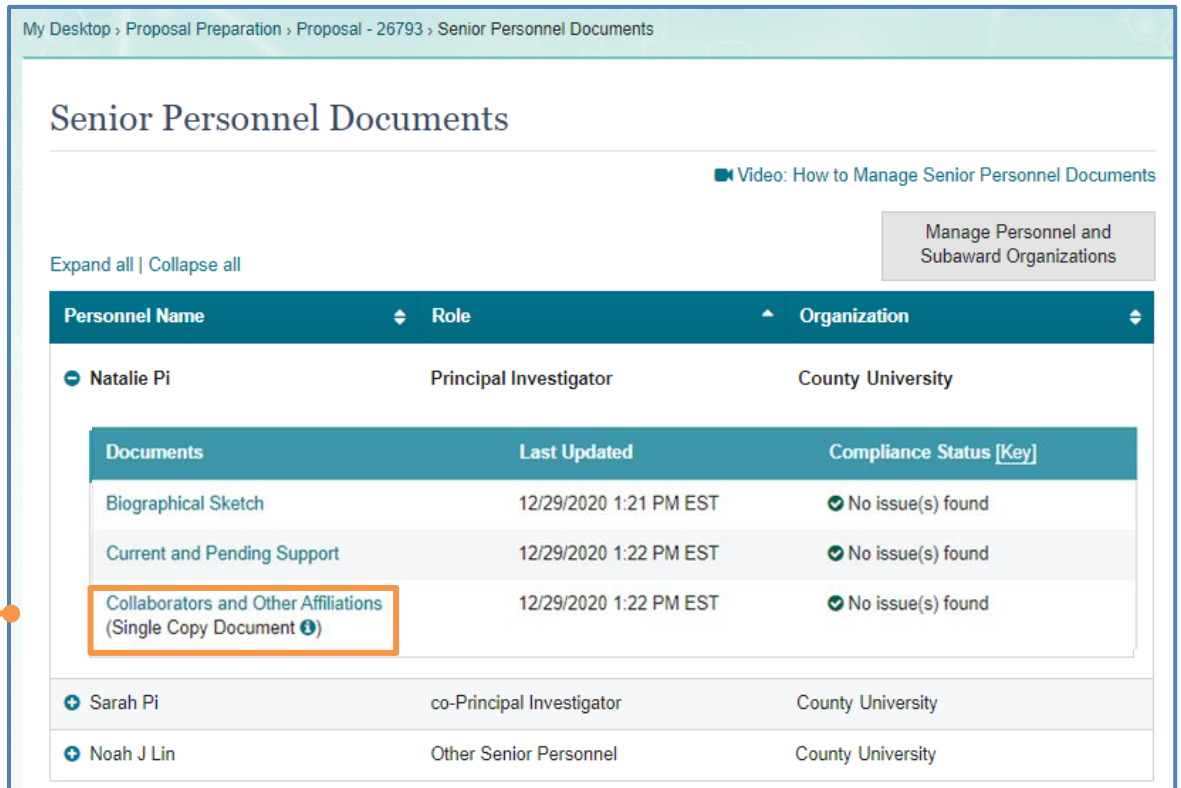
Personnel Name	Role	Organization (Prime/Subaward)
Natalie Pi	Principal Investigator	County University
Documents	Last Updated	Compliance Status <span style="font-size: small;">[Key]</span>
Biographical Sketch	12/29/2020 1:21 PM EST	<span style="color: green;">✔</span> No issue(s) found
Current and Pending Support	12/29/2020 1:22 PM EST	<span style="color: green;">✔</span> No issue(s) found
Collaborators and Other Affiliations (Single Copy Document )	12/29/2020 1:22 PM EST	<span style="color: green;">✔</span> No issue(s) found

Compliance status for uploaded COA document



## Removing an Uploaded COA Information Template Document

- 1 To remove an uploaded COA document, **click the Collaborators and Other Affiliations link** for the listed individual on the Senior Personnel Documents page.



My Desktop > Proposal Preparation > Proposal - 26793 > Senior Personnel Documents

### Senior Personnel Documents

Video: How to Manage Senior Personnel Documents

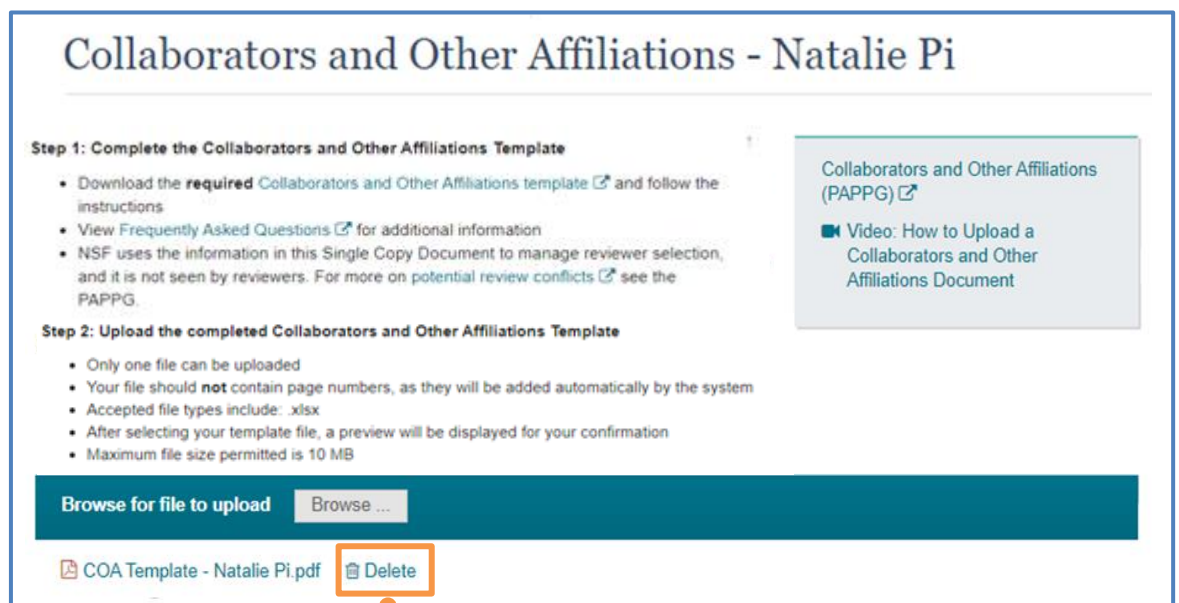
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Expand all | Collapse all

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Collaborators and Other Affiliations link

- 2 Select the **Delete button** to remove an uploaded COA document for the listed individual.



### Collaborators and Other Affiliations - Natalie Pi

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Collaborators and Other Affiliations (PAPPG)

Video: How to Upload a Collaborators and Other Affiliations Document

Browse for file to upload

COA Template - Natalie Pi.pdf

Delete button

## Helpful Resources

- **Help within the Proposal System**

Inline help features such as tooltips and links to relevant [Proposal & Award Policies & Procedures Guide](#) sections are included throughout the Research.gov Proposal Submission System.

- **Research.gov About Proposal Preparation and Submission Page**

Bookmark <https://www.research.gov/research-web/content/aboutpsm> to quickly access Frequently Asked Questions (FAQs), video tutorials, and how-to guides.

- **Research.gov Proposal Preparation Demo Site**

All demo site users are automatically given the PI role for demo site purposes, in order to perform the proposal preparation functions that a PI can do in the actual system. See the demo site FAQs on the Research.gov [About Proposal Preparation and Submission](#) page left navigation menu for information on demo site access and features.

- **Proposal Preparation FAQs**

FAQs organized by topic are available on the Research.gov [About Proposal Preparation and Submission](#) page left navigation menu.

- **Video Tutorials**

Videos demonstrating key proposal preparation steps are available on the Research.gov [About Proposal Preparation and Submission](#) page [Video Tutorials](#) section.

- **Automated Proposal Compliance Checks**

Automated proposal compliance checks triggering an error message will stop proposal submission to NSF, whereas checks triggering a warning message will still allow proposal submission. Expanded compliance checking in Research.gov helps to reduce administrative burden for the research community and NSF staff, as well as minimizes return without review proposals. Refer to the [Automated Compliance Checking of NSF Proposals](#) page for the current automated Research.gov proposal checks.

- **Adding and Managing User Roles**

To request a user role, please see the [Add a New Role job aid](#). After a user role is requested, the organization's Administrator will receive the request electronically to approve or disapprove it. Additional information about adding and managing user roles can be found on the Research.gov [About Account Management](#) page.

- **NSF Help Desk**

IT system-related and technical questions may be directed to the NSF Help Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) or via [rgov@nsf.gov](mailto:rgov@nsf.gov).