|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Table A: List your Last Name, First Name, Middle Initial, and organizational affiliation (including considered affiliation) in the last 12 months. | | | | |
| **A** | **Your Name:** | **Your Organizational Affiliation(s), last 12 mo** | **Last Active** |  |
|  | [[Last Name], [First Name] [Initial of: [Middle Name]]] | [Your Organization] |  |  |

Screen: ***Work History***

Items: All records

Criteria:

1.***Report End Date minus 1 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not [Your Organization]

Screen: ***Consulting***

Items: All records

Criteria:

1.***Report End Date minus 1 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not [Your Organization]

Screen: ***Professional***

Items: All records

Criteria:

1.***Report End Date minus 1 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not [Your Organization]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | [Organization] | [Record End Date] |  |
|  |  | [Client/Organization] | [Record End Date] |  |
|  |  | [Organization/Committee/Journal] | [Record End Date] |  |
|  |  |  |  |  |
| Table B: List names as Last Name, First Name Middle Initial, and provide organizational affiliations, if known, for the following. | | | | |
| G: | Your PhD Advisor(s) |  |  |  |
| T: | All your PhD Thesis Advisees |  |  |  |
| P: | Graduate Advisors |  |  |  |
| **B** | **Advisor/Advisee Name:** | **Organizational Affiliation** | **Optional (email, Department)** |  |

Screen: ***Degrees*** > ***Advisor Information***

Items: All rows

Criteria:

1.***First Name***, ***Middle Name/Initial***, ***Last Name*** at least one has a value

Screen: ***Directed Student Learning (e.g., theses, dissertations)***

Items: All records

Criteria:

1.***Involvement Type*** contains one of the substrings: "*Dissertation*", "*Doctoral*" and ***Report Start Date*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and ***Student First Name***, ***Student Last Name*** at least one has a value

Screen: ***Directed Student Learning (e.g., theses, dissertations)***

Items: All records

Criteria:

1.***Involvement Type*** is one of: "*Postdoctoral Research Supervision*", "*Postdoctoral Supervision*" and ***Report End Date minus 5 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and ***Student First Name***, ***Student Last Name*** at least one has a value

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| [P]: | [[Last Name], [First Name] [Initial of: [Middle Name/Initial]]] | [Institution] |  |  |
| [T]: | [[Student Last Name], [Student First Name]] | [Your Organization] |  |  |
|  |  |  |  |  |
| Table C: 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 last 48 months; publication date may be later). | | | |
| C: | Collaborators on projects, such as funded grants, graduate research or others (in last 48 months). | | |  |
| **C** | **Name:** | **Organizational Affiliation** | **Optional (email, Department)** | **Last Active** |

Screen: ***Publication*** > ***Authors/Editors/Translators***

Items: All rows

Criteria:

1.***Report End Date minus 4 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not ***Role*** contains the text "*Editor*" and not **Current User** and ***Last Name*** at least one has a value

Screen: ***Contracts, Fellowships, Grants and Sponsored Research*** > ***Investigators***

Items: All rows

Criteria:

1.***Report End Date minus 4 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not **Current User** and ***Last Name*** at least one has a value

Screen: ***Research Activity*** > ***Collaborators***

Items: All rows

Criteria:

1.***Report End Date minus 4 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and not **Current User** and ***Last Name*** at least one has a value

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| [A]: | [[Last Name], [First Name] [Initial of: [Middle Name/Initial]]] | [Institution/Company] |  | [Record End Date] |
| [C]: | [[Last Name], [First Name] [Initial of: [Middle Name/Initial]]] | [Your Organization] |  | [Record End Date] |
| [C]: | [[Last Name], [First Name] [Initial of: [Middle Name/Initial]]] | [Institution/Company] |  | [Record End Date] |
|  |  |  |  |  |
| Table D: List editorial board, editor-in-chief and co-editors with whom you interact. An editor-in-chief should list the entire editorial board. | | | | |
| B: | Editorial board: Name(s) of editor-in-chief and journal (in past 24 months). | |  |  |
| E: | Other Co-Editors of journals or collections with whom you directly interacted (in past 24 months). | | |  |
| **D** | **Name:** | **Organizational Affiliation** | **Journal/Collection** | **Last Active** |

Screen: ***Publication*** > ***Authors/Editors/Translators***

Items: All rows

Criteria:

1.***Report End Date minus 2 year(s)*** to ***Report End Date*** (dates must exist) overlaps with ***Record Start Date*** to ***Record End Date*** (***Record Start Date*** must exist; if only ***Record Start Date*** exists: ongoing included) and ***Role*** contains the text "*Editor*"

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| E: | [[Last Name], [First Name] [Initial of: [Middle Name/Initial]]] | [Institution/Company] | [[Journal Name]] | [Record End Date] |
|  |  |  |  |  |
| Table E: List persons 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. | | | |
| **E** | **Name:** | **Organizational Affiliation** | **Optional (email, Department)** | **Last Active** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |