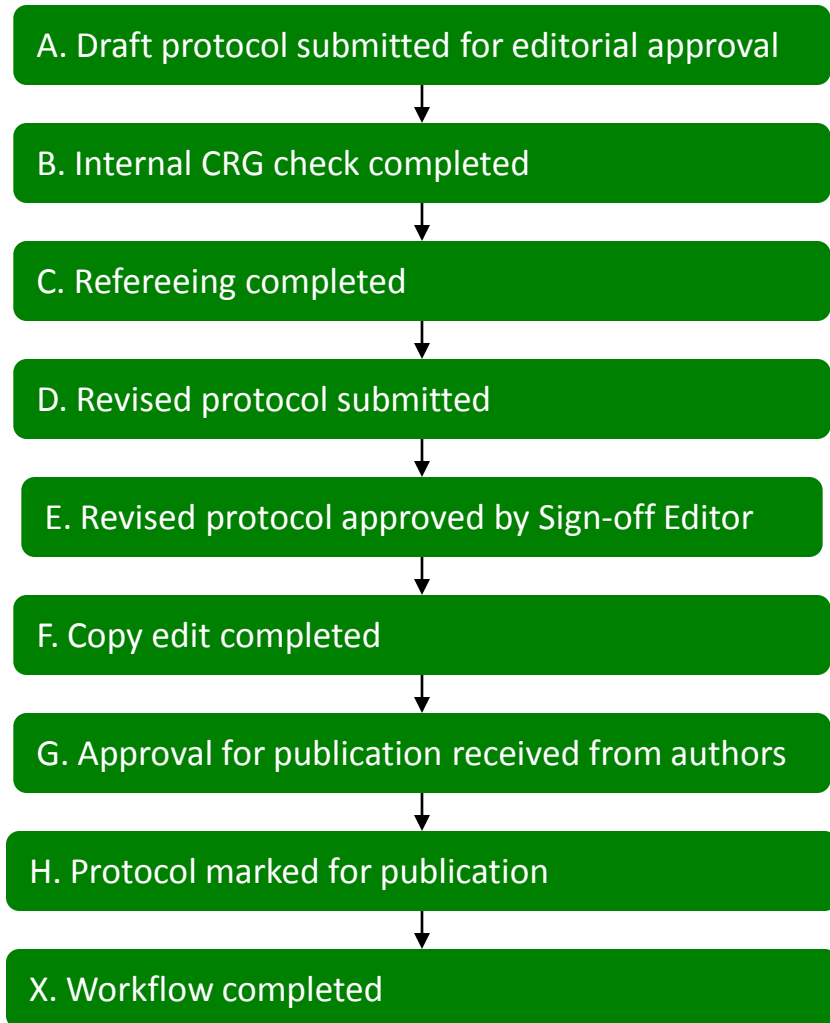


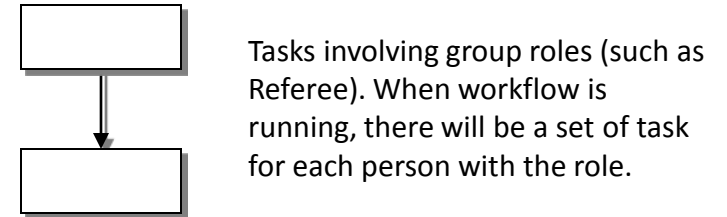
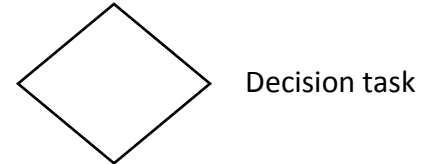
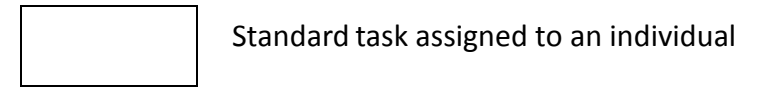
## Protocol Development

Template version: 1.4

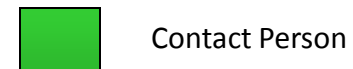
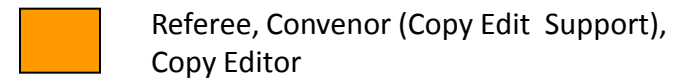
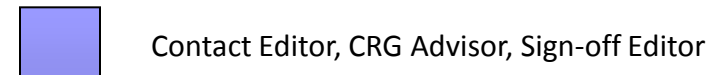
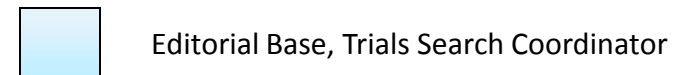
## Milestones



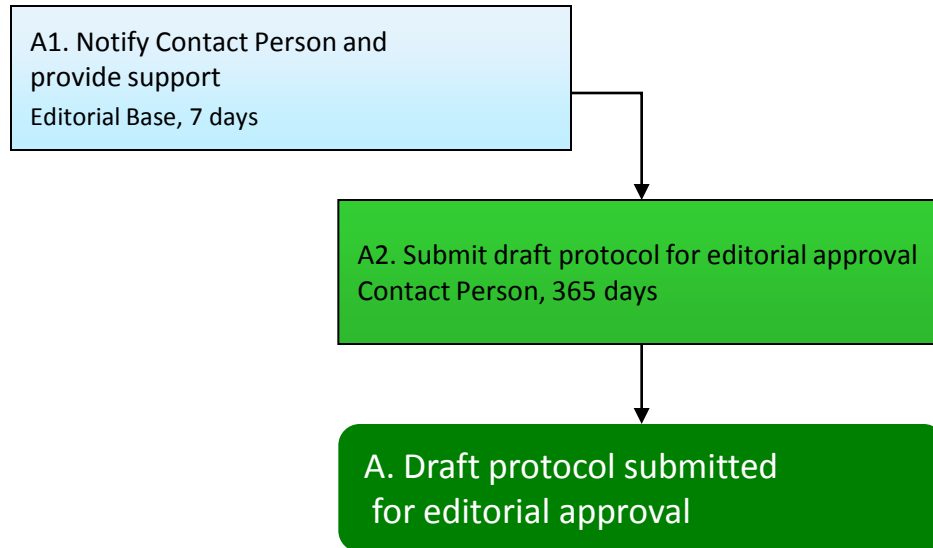
## Legend



### Role colour coding

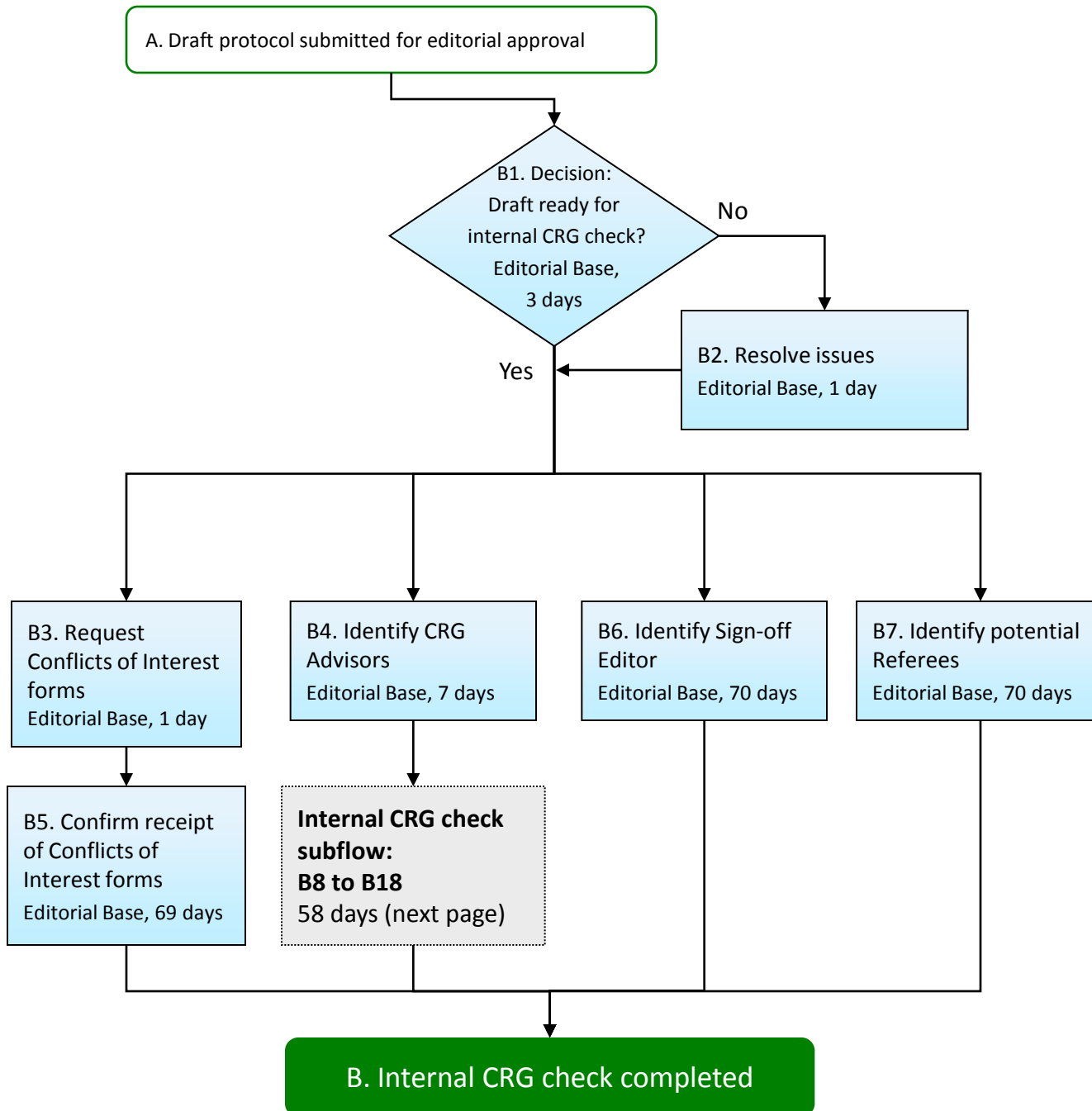


## A. Draft protocol submitted for editorial approval



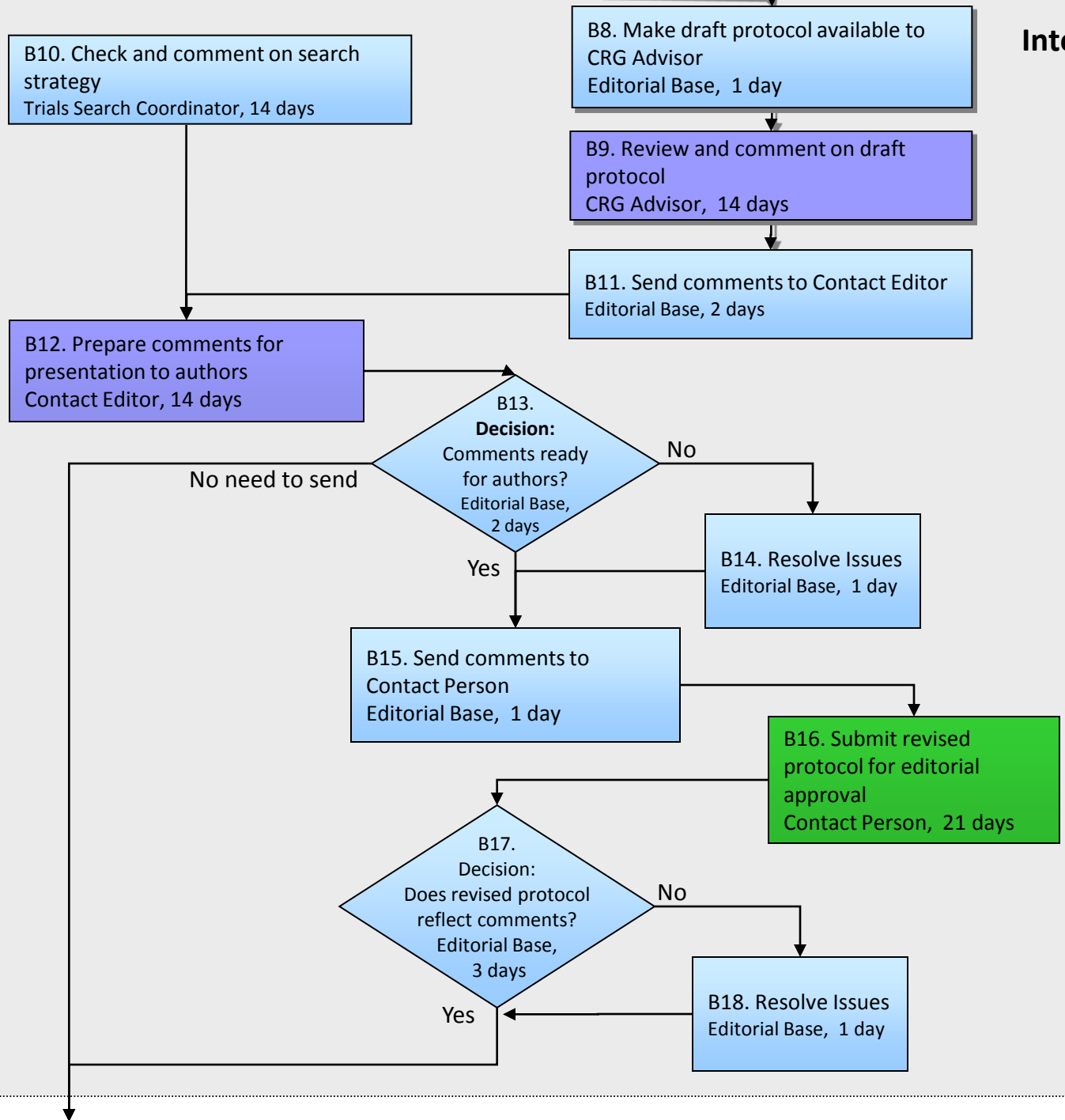
#	Description
A1	Notify the Contact Person that the title has been registered, and that the RevMan file is ready for check-out from Archie. Provide information and support materials tailored to the authors' needs. Create user accounts for authors as needed.
A2	Check the draft protocol into Archie using the 'submit for editorial approval' option. Contact your Review Group's editorial office for assistance if you are unable to do this. <b>Auto-completes.</b>

## B. Internal CRG check completed



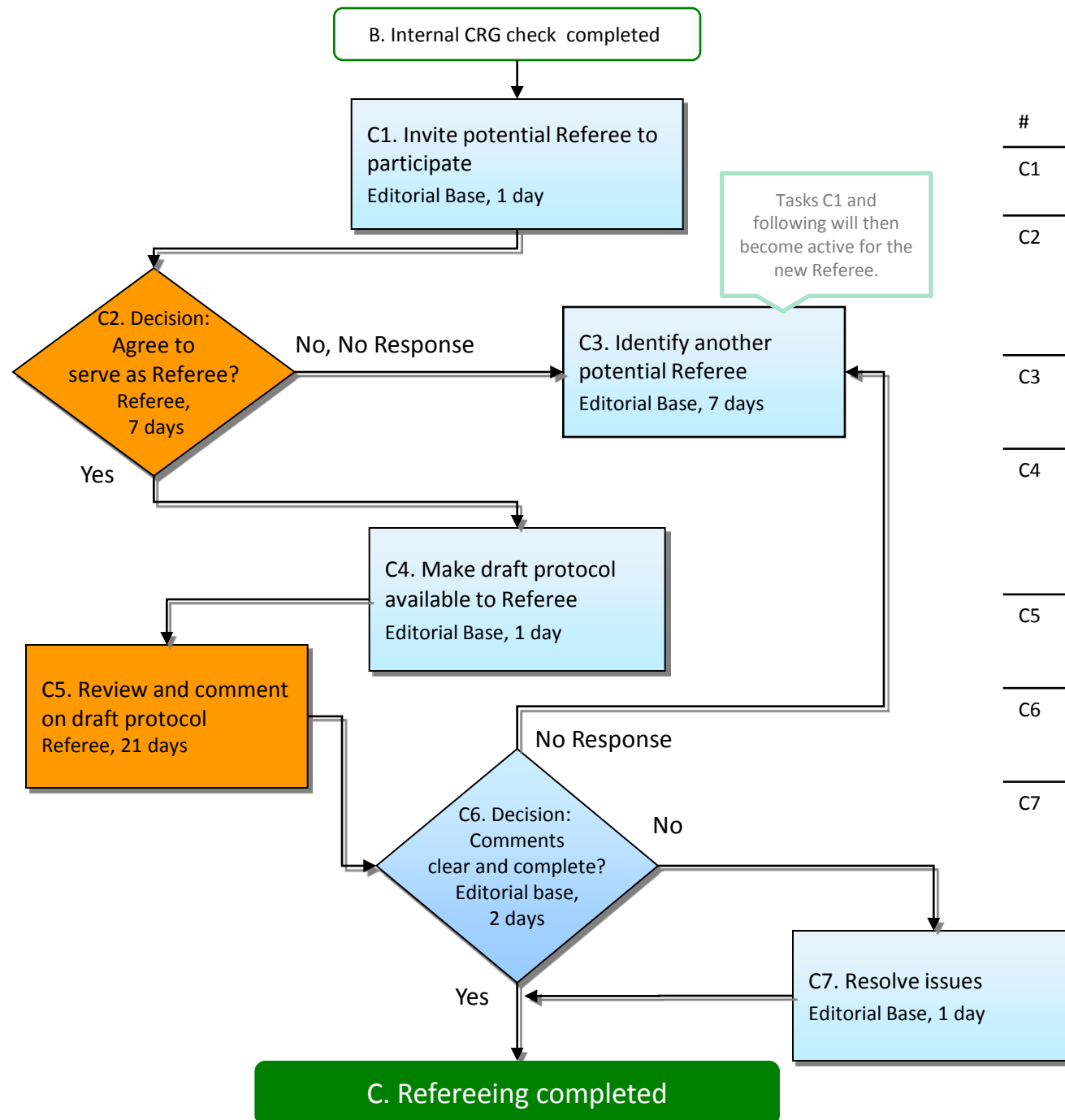
#	Description
B1	Determine whether the draft protocol is ready for an internal CRG check.
B2	Insert workflow tasks as required or take direct action to resolve issues.
B3	Inform all authors of the need to complete/revise Conflicts of Interest forms and specify the date by which the forms are required.
B4	Identify people to conduct an internal check of the draft protocol in accordance with CRG policy (e.g., ME, Contact Editor, other Editors, other members of the editorial base), and assign each the Workflow Role 'CRG Advisor'.
B5	Confirm receipt of completed/revise Conflicts of Interest forms from all authors. <b>Auto-completes.</b>
B6	Identify the person who will be responsible for formally approving the draft protocol before copy editing (e.g., the protocol's Contact Editor or the CRG's Co-ordinating Editor), and assign this person the Workflow Role 'Sign-off Editor'. <b>Auto-completes:</b> if role assigned to other than Workflow Manager.
B7	Identify individuals to be invited to serve as Referees of the draft protocol in accordance with CRG policy, and assign each the Workflow Role 'Referee'.

## Internal CRG check subflow (part of B.)

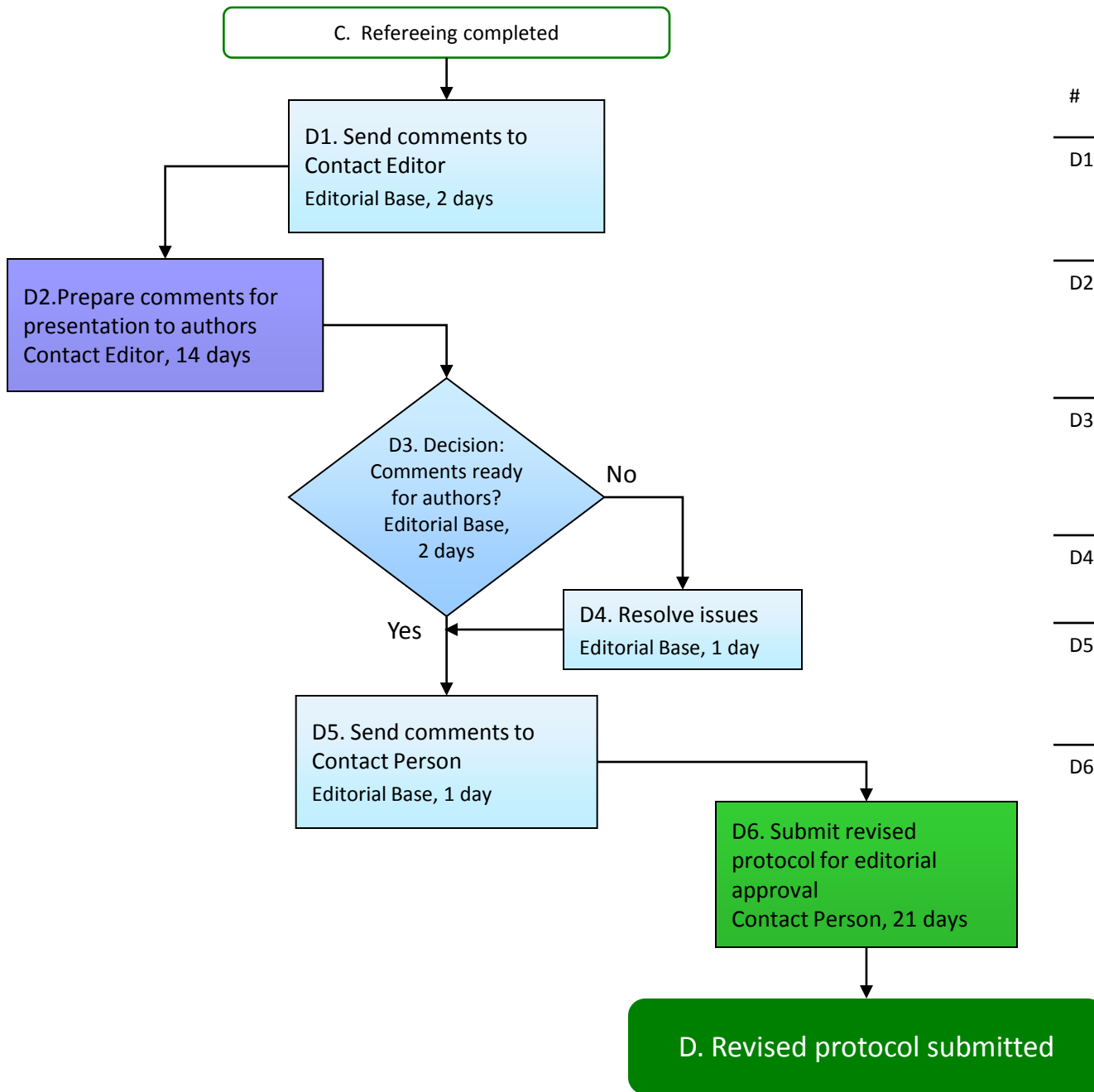


#	Description
B8	Confirm that the Write Phase is set to Editorial. Make the draft available to the CRG Advisor and specify the date by which comments should be returned. If accessing via Archie, confirm that any Document Role required has been assigned.
B9	Review the draft protocol, prepare comments, and submit these to the Review Group's editorial office by the date requested.
B10	Check the search strategy, prepare comments, and submit these to the Review Group's editorial office.
B11	Collect and organize comments from all CRG Advisors in accordance with CRG policy, and send comments to the Contact Editor for review and further processing.
B12	Evaluate the CRG Advisors' comments and prepare them for presentation to the authors in accordance with CRG policy. Confer with the Co-ordinating Editor or others as needed to resolve any significant disagreements among CRG Advisors.
B13	Confirm that the CRG Advisors' comments have been prepared for presentation to the authors in accordance with CRG policy, and that all significant disagreements have been resolved. Use 'No need to send' option if draft is suitable to go to referees.
B14 B18	Insert workflow tasks as required or take direct action to resolve issues.
B15	Send the CRG Advisors' comments to the Contact Person, and ask the Contact Person to prepare and submit a revised version of the protocol. Set Write Phase in Archie to Authoring.
B16	Check the revised protocol into Archie using the 'submit for editorial approval' option. Contact your Review Group's editorial office for assistance if you are unable to do this. <b>Auto-completes.</b>
B17	Determine whether the revised protocol responds adequately to the CRG Advisors' comments. Confer with Contact Editor and/or others, as needed.

## C. Refereeing completed



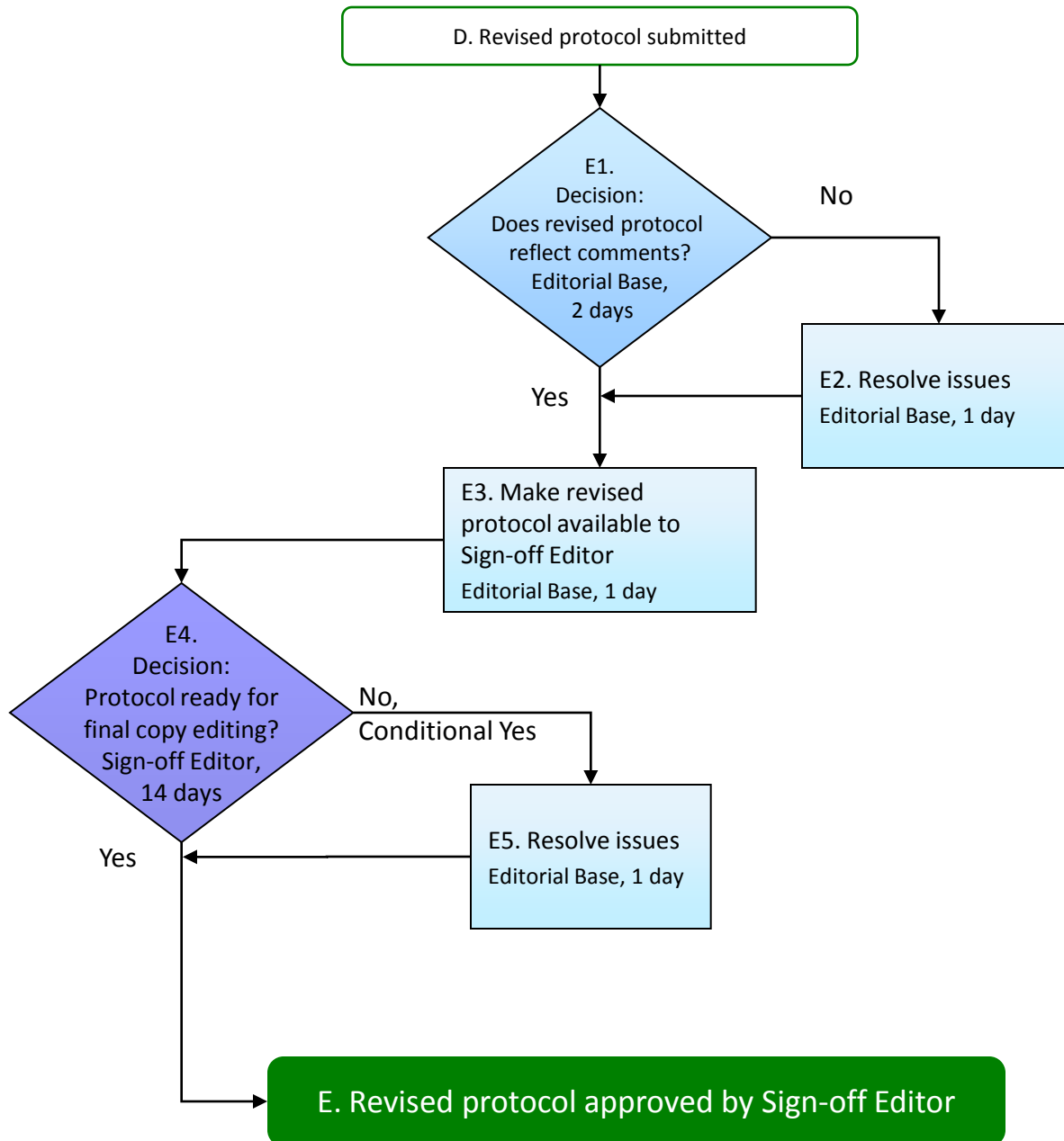
#	Description
C1	Invite the potential Referee to participate, and specify the date by which a reply is requested.
C2	Indicate whether you agree to serve as a Referee of the specified draft protocol. If no response is received by the date of reply requested, staff at the Review Group editorial office may enter 'No response'.
C3	Identify another potential Referee and assign them the Workflow Role 'Referee'. Invite them to participate, and specify the date by which a reply is requested.
C4	Confirm that the Write Phase is set to Editorial. Make the draft available to the Referee and specify the date by which comments should be returned. If accessing via Archie, confirm that any Document Role required has been assigned.
C5	Review the draft protocol, prepare comments, and submit these to the Review Group's editorial office by the date requested.
C6	Determine whether the Referee's comments are clear and complete, or require clarification or expansion, or no response was received.
C7	Insert workflow tasks as required or take direct action to resolve issues.



## D. Revised protocol submitted

#	Description
D1	Collect and organize comments from all Referees in accordance with CRG policy, and send comments to the Contact Editor for review and further processing.
D2	Evaluate the Referees' comments and prepare them for presentation to the authors in accordance with CRG policy. Confer with the Co-ordinating Editor or others as needed to resolve any significant disagreements among Referees.
D3	Confirm that the Referees' comments have been prepared for presentation to the authors in accordance with CRG policy, and that all significant disagreements have been resolved.
D4	Insert workflow tasks as required or take direct action to resolve issues.
D5	Send the Referees' comments to the Contact Person, and ask the Contact Person to prepare and submit a revised version of the protocol. Set Write Phase in Archie to Authoring.
D6	Check the revised protocol into Archie using the 'submit for editorial approval' option. Contact your Review Group's editorial office for assistance if you are unable to do this. <b>Auto-completes.</b>

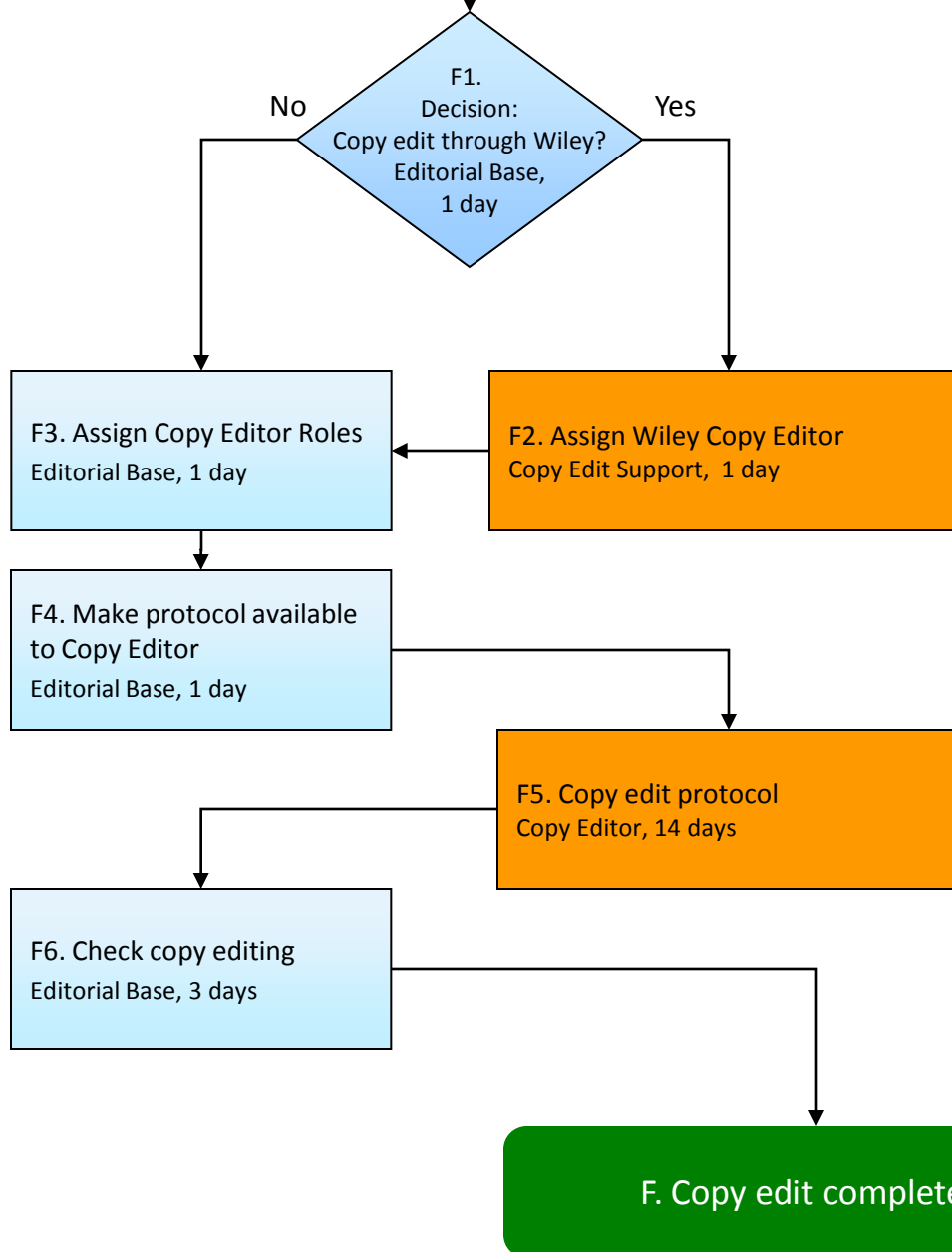
## E. Revised protocol approved by Sign-off Editor



#	Description
E1	Determine whether the revised protocol responds adequately to the Referees' comments. Confer with Contact Editor and/or others, as needed.
E2	Insert workflow tasks as required or take direct action to resolve issues.
E3	Confirm that the Write Phase is set to Editorial. Make the revised protocol available to the Sign-off Editor and specify the date by which a response is requested. If accessing via Archie, confirm that any Document Role required has been assigned.
E4	Decide whether the protocol is ready for final copy editing ('Yes'), or requires further revision ('No' if you want to re-approve the revised version, 'Conditional Yes' if not). Send comments describing suggested changes to the CRG editorial office.
E5	Insert workflow tasks as required or take direct action to resolve issues.



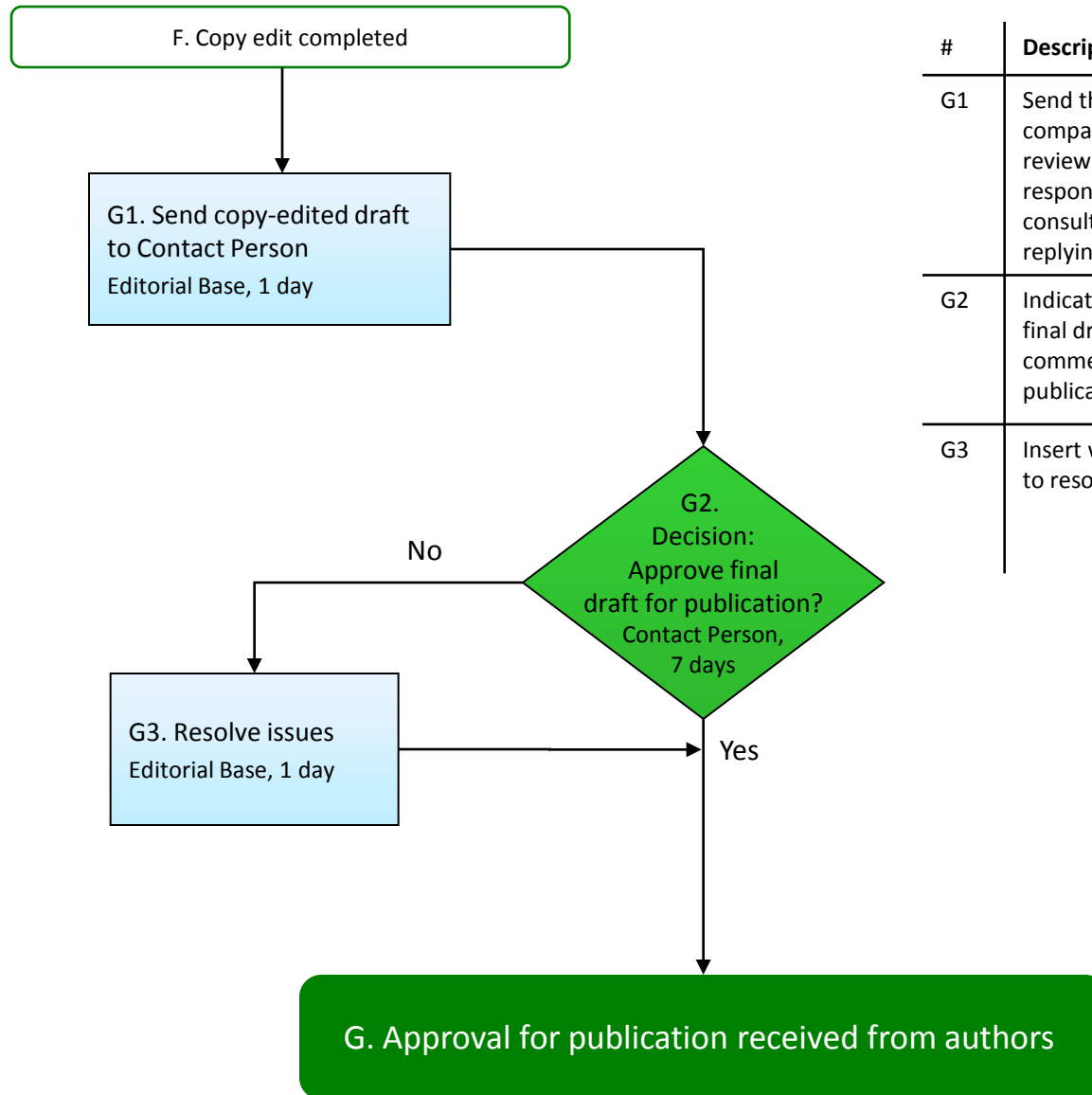
E: Revised protocol approved by Sign-off Editor



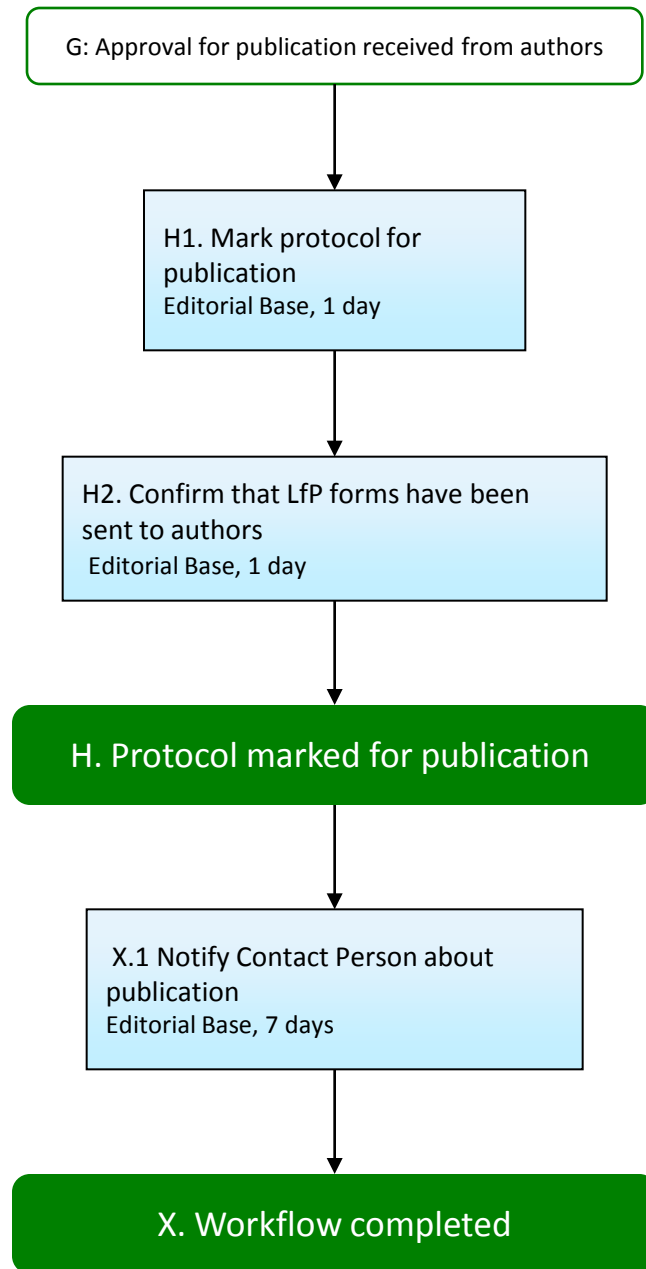
## F. Copy edit completed

Task #	Description
F1	Decide whether to request formal Copy Edit Support through Wiley or to copy edit the protocol within the CRG.
F2	Assign a Wiley Copy Editor to the protocol and inform the CRG editorial office of the Copy Editor's identity.
F3	Confirm that the Workflow and Document Roles 'Copy Editor' have been assigned to the person designated by Wiley Copy Edit Support, or to the person within the CRG who will copy edit the protocol.
F4	Confirm that the Write Phase is set to Editorial. Notify the Copy Editor that the protocol is available in Archie for check-out and copy editing. Specify the date by which copy editing should be completed.
F5	Copy edit the protocol in accordance with the Cochrane Style Guide. When finished, check the protocol into Archie using the 'submit for editorial approval' option. Include a check-in message to the CRG, if appropriate Note: check-in message available only if checking in from RevMan.
F6	Review and accept or reject any copy edits, and complete a final pre-publication check of the protocol. Consult with Sign-off Editor if needed.

## G. Approval for publication received from authors



#	Description
G1	Send the copy-edited draft (and/or a version comparison) to the Contact Person by email for final review and approval. Specify the date by which a response is requested. Ask the Contact Person to consult with other authors as appropriate before replying.
G2	Indicate whether you and your co-authors approve the final draft of the protocol for publication. If 'No', send comments describing any changes needed before publication to the Review Group's editorial office.
G3	Insert workflow tasks as required or take direct action to resolve issues.



## H. Protocol marked for publication (and X)

Task #	Description
H1	Mark the protocol for publication in Archie, and return the Write Phase to Authoring.
H2	Check the Licence for Publication Report to confirm that all authors have Archie user accounts and have been sent the relevant information about Licence for Publication (LfP) forms. <b>Auto-completes</b> (only when LfP forms are required).
X1	When all LfP forms have been submitted, Archie releases the protocol for publication and sends the Contact Person an automatic email with the publication date. <b>Auto-completes</b> (only when LfP forms are required).