Workflow template description

Review Development

Template version: 1.4
Milestones

A. Draft review submitted for editorial approval

B. Internal CRG check completed

C. Refereeing completed

D. Revised review submitted

E. Revised review approved by Sign-off Editor

F. Copy edit completed

G. Approval for publication received from authors

H. Review marked for publication

X. Workflow completed

Legend

Standard task assigned to an individual

Decision task

Tasks involving group roles (such as Referee). When workflow is running, there will be a set of task for each person with the role.

Role colour coding

Editorial Base, Trials Search Coordinator

Contact Editor, CRG Advisor, Sign-off Editor

Referee, Convenor (Copy Edit Support), Copy Editor

Contact Person
A. Draft review submitted for editorial approval

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>Perform literature searches in accordance with CRG policy. Forward the results to the Contact Person or incorporate directly into the RevMan file in accordance with CRG policy.</td>
</tr>
<tr>
<td>A2</td>
<td>Check the draft review 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. <strong>Auto-completes.</strong></td>
</tr>
</tbody>
</table>
A. Draft review submitted for editorial approval

B1. Decision: Draft ready for internal CRG check? Editorial Base, 3 days

No

B2. Resolve issues Editorial Base, 1 day

Yes

B3. Request Conflicts of Interest forms Editorial Base, 1 day

B4. Identify CRG Advisors Editorial Base, 7 days

B6. Identify Sign-off Editor Editorial Base, 70 days

B7. Identify potential Referees Editorial Base, 70 days

B5. Confirm receipt of Conflicts of Interest forms from all authors. Auto-completes.

B8 to B17 58 days (next page)

B. Internal CRG check completed

# | Description
--- | ---
B1 | Determine whether the draft review 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 review in accordance with CRG policy (e.g., ME, Contact Editor, other Editors, TSC, other members of the editorial base), and assign each the Workflow Role 'CRG Advisor'.
B5 | Confirm receipt of completed/revised Conflicts of Interest forms from all authors. Auto-completes.
B6 | Identify the person who will be responsible for formally approving the draft review before copy editing (e.g., the review's Contact Editor or the CRG's Co-ordinating Editor), and assign this person the Workflow Role 'Sign-off Editor'. Auto-completes: if role assigned to other than Workflow Manager.
B7 | Identify individuals to be invited to serve as Referees of the draft review in accordance with CRG policy, and assign each the Workflow Role 'Referee'.
**B8. Make draft review available to CRG Advisor**
Editorial Base, 1 day

**B9. Review and comment on draft review**
CRG Advisor, 14 days

**B10. Send comments to Contact Editor**
Editorial Base, 2 days

**B11. Prepare comments for presentation to authors**
Contact Editor, 14 days

**B12. Decision:**
Comments ready for authors? Editorial Base, 2 days

**B13. Resolve Issues**
Editorial Base, 1 day

**B14. Send comments to Contact Person**
Editorial Base, 1 day

**B15. Submit revised review for editorial approval**
Contact Person, 21 days

- No need to send
  - **B12. Decision:**
    Does revised Review reflect comments? Editorial Base, 3 days
  - Yes
    - **B13. Resolve Issues**
      Editorial Base, 1 day
  - **B16. Decision:**
    Does revised Review reflect comments? Editorial Base, 3 days
  - No
    - **B17. Resolve Issues**
      Editorial Base, 1 day
  - Yes
    - **B16. Decision:**
      Does revised Review reflect comments? Editorial Base, 3 days
    - No
      - **B17. Resolve Issues**
        Editorial Base, 1 day
    - Yes
      - **B16. Decision:**
        Does revised Review reflect comments? Editorial Base, 3 days
      - No
        - **B17. Resolve Issues**
          Editorial Base, 1 day
    - Auto-completes

**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 review, prepare comments, and submit these to the Review Group's editorial office by the date requested.

- **B10** 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.

- **B11** 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.

- **B12** 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.

- **B13** Insert workflow tasks as required or take direct action to resolve issues.

- **B14** Send the CRG Advisors' comments to the Contact Person, and ask the Contact Person to prepare and submit a revised version of the review. Set Write Phase in Archie to Authoring.

- **B15** Check the revised review 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. Auto-completes.

- **B16** Determine whether the revised review responds adequately to the CRG Advisors' comments. Confer with Contact Editor and/or others, as needed.

- **B17** Insert workflow tasks as required or take direct action to resolve issues.
C. Refereeing completed

<table>
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<tbody>
<tr>
<td>C1</td>
<td>Invite the potential Referee to participate, and specify the date by which a reply is requested.</td>
</tr>
<tr>
<td>C2</td>
<td>Indicate whether you agree to serve as a Referee of the specified draft review. If no response is received by the date of reply requested, staff at the Review Group editorial office may enter 'No response'.</td>
</tr>
<tr>
<td>C3</td>
<td>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.</td>
</tr>
<tr>
<td>C4</td>
<td>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.</td>
</tr>
<tr>
<td>C5</td>
<td>Review the draft review, prepare comments, and submit these to the Review Group's editorial office by the date requested.</td>
</tr>
<tr>
<td>C6</td>
<td>Determine whether the Referee's comments are clear and complete, or require clarification or expansion, or no response was received.</td>
</tr>
<tr>
<td>C7</td>
<td>Insert workflow tasks as required or take direct action to resolve issues.</td>
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# Description

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<tbody>
<tr>
<td>D1</td>
<td>Collect and organize comments from all Referees in accordance with CRG policy, and send comments to the Contact Editor for review and further processing.</td>
</tr>
<tr>
<td>D2</td>
<td>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.</td>
</tr>
<tr>
<td>D3</td>
<td>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.</td>
</tr>
<tr>
<td>D4</td>
<td>Insert workflow tasks as required or take direct action to resolve issues.</td>
</tr>
<tr>
<td>D5</td>
<td>Send the Referees' comments to the Contact Person, and ask the Contact Person to prepare and submit a revised version of the review. Set Write Phase in Archie to Authoring.</td>
</tr>
<tr>
<td>D6</td>
<td>Check the revised review 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. Auto-completes.</td>
</tr>
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</table>
E. Revised review approved by Sign-off Editor

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<tbody>
<tr>
<td>E1</td>
<td>Determine whether the revised review responds adequately to the Referees' comments. Confer with Contact Editor and/or others, as needed.</td>
</tr>
<tr>
<td>E2</td>
<td>Insert workflow tasks as required or take direct action to resolve issues.</td>
</tr>
<tr>
<td>E3</td>
<td>Confirm that the Write Phase is set to Editorial. Make the revised review 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.</td>
</tr>
<tr>
<td>E4</td>
<td>Decide whether the review 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.</td>
</tr>
<tr>
<td>E5</td>
<td>Insert workflow tasks as required or take direct action to resolve issues.</td>
</tr>
</tbody>
</table>
E: Revised review approved by Sign-off Editor

F1. Decision: Copy edit through Wiley? Editorial Base, 1 day

F2. Assign Wiley Copy Editor Copy Edit Support, 1 day

F3. Assign Copy Editor Roles Editorial Base, 1 day

F4. Make review available to Copy Editor Editorial Base, 1 day

F5. Copy edit review Copy Editor, 14 days

F6. Check copy editing Editorial Base, 3 days

F. Copy edit completed

Task # | Description
---|---
F1 | Decide whether to request formal Copy Edit Support through Wiley or to copy edit the review within the CRG.
F2 | Assign a Wiley Copy Editor to the review 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 review.
F4 | Confirm that the Write Phase is set to Editorial. Notify the Copy Editor that the review is available in Archie for check-out and copy editing. Specify the date by which copy editing should be completed.
F5 | Copy edit the review in accordance with the Cochrane Style Guide. When finished, check the review 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 review. Consult with Sign-off Editor if needed.
G. Approval for publication received from authors

F. Copy edit completed

G1. Send copy-edited draft to Contact Person
Editorial Base, 1 day

G2. Decision: Approve final draft for publication?
Contact Person, 7 days

Yes

G3. Resolve issues
Editorial Base, 1 day

No

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 Cont. Person to consult with other authors as appropriate before replying.

G2 Indicate whether you and your co-authors approve the final draft of the review 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.
G: Approval for publication received from authors

H. Review marked for publication (and X)

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<tr>
<td>H1</td>
<td>Mark the review for publication in Archie, and return the Write Phase to Authoring.</td>
</tr>
<tr>
<td>H2</td>
<td>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. &lt;br&gt; <strong>Auto-completes</strong> (only when LfP forms are required).</td>
</tr>
<tr>
<td>X1</td>
<td>When all LfP forms have been submitted, Archie releases the review for publication and sends the Contact Person an automatic email with the publication date and information on how to activate/manage their complimentary subscription. &lt;br&gt; <strong>Auto-completes</strong> (only when LfP forms are required).</td>
</tr>
</tbody>
</table>

H. Review marked for publication

X. Workflow completed

X.1 Notify Contact Person about publication<br> Editorial Base, 7 days