![Cochrane Effective Practice and Organisation of Care]

Information for editors, associate editors and staff

EPOC roles

Co-ordinating Editors (Co-eds)

EPOC currently has two Co-ordinating editors: Sasha Sheppard (based at the main editorial base in Oxford, UK) and Simon Lewin (based at the Norwegian satellite in Oslo, Norway). The role of Co-eds in Cochrane is outlined here. Key tasks include:

- Assuring the quality of published EPOC reviews
- Managing editorial staff and the editorial team
- Ensuring adequate support for authors
- Managing the EPOC review portfolio
- Engaging with the wider Cochrane Collaboration
- Ensuring adequate infrastructure, support and funding for the review group

Managing Editor (ME)

EPOC has three Managing Editors (ME) and one Assistant Managing Editor (AME). Julia Worswick (ME) and Lucy Gettins (AME) for the main editorial base, Liz Paulsen (ME) at the Norwegian satellite and Emma Tavender (ME) at the Australian Satellite. The role of the Managing Editor is to co-ordinate the entire editorial process from title registration to publication of the final review in accordance with Cochrane guidance. This includes regular correspondence with review authors, peer reviewers, editors and other staff within Cochrane and Wiley.

Trial Search Coordinator (TSC)

EPOC has 2 Trial Search Coordinators. Paul Miller, for the main editorial base and Marit Johansen, located at the Norwegian satellite. The role of the TSC is to provide advice to authors about where to search for relevant studies to include in their reviews, how to develop search strategies and report the search process as well as to provide feedback on authors' search strategies.

Editors and Associate Editors

EPOC has thirteen Editors and thirteen Associate Editors. Their details are available here.

14 October 2015

Editor roles in EPOC

1. *Peer review of titles/protocols/reviews*

   For every review proposal form, protocol and review, one EPOC editor will be asked to review and provide comments which will be returned to the review authors. An editor is chosen based on their areas of interest/expertise and their availability.

2. *Contact Editor (CE)*

   Once a new title is registered with EPOC, a Contact Editor is assigned. The role of the Contact Editor is to give methodological guidance and support to the review authors as they develop their protocol and ultimately the full review. This may include help with and support for defining the scope of the review, planning and implementing the methods used for the review, analysing the review data and writing up the review findings. In providing this support, the CE can also draw on the TSC, the statistical editor, the economics editor and other editors with specific methods or content expertise. The CE works closely with the ME and confers with the Co-Ed if issues arise.

   The CE comments on the draft protocol/review and gives feedback to the review authors and decides when the protocol/review is ready for peer review.

   The CE also is responsible for making sure that the revised protocol/review is revised appropriately in response to peer review comments and that the authors respond adequately to the comments. The Contact Editor approves the final protocol/review for publication.

   If the CE is the lead author of the review or if the CE feels that they have been too closely involved in the review, an additional EPOC editor will be assigned to determine if the peer review comments have been addressed and the review revised accordingly and to approve the protocol/review for publication.

Associate Editor roles in EPOC

The roles of Associate Editors are similar to those of Editors, apart from the following:

- Associate Editors will be linked with an experienced EPOC editor for support in undertaking these roles
- Associate Editors will not be expected to give final approval for the publication of protocols or reviews, but will work with an experienced EPOC editor in making these decisions
- The expectations of Associate Editors in relation to the volume of EPOC work is less than that of Editors (see Expectations of EPOC Associate Editors below).

Expectations of EPOC Editors

Please note that this complements the Collaboration's terms of reference for Cochrane Editors.

EPOC editors must be prepared to:

14 October 2015

- Provide feedback on EPOC title registrations, protocols, reviews and updates. As a minimum, an editor should expect to receive 2 titles registrations, 2 protocols and 2 reviews / updates for comment each year[1]
- Respond promptly to requests from a Managing Editor (ME) or other member of the EPOC editorial team. Where it is not possible to undertake a task (for example, due to other commitments), editors should inform the ME or other member of the editorial team within a week of receiving the request
- Respond promptly (within 1 – 2 weeks) to queries from EPOC review authors, or refer these queries to the appropriate person for a response
- Play a role in wider activities undertaken by EPOC (e.g., prioritizing review topics, representing EPOC at relevant meetings)
- Keep up-to-date with developments in EPOC and Cochrane more widely, including methodological developments and developments in editorial processes

Expectations of EPOC Associate Editors

Please note that this complements the [Collaboration's terms of reference for Cochrane Editors](#).

EPOC associate editors must be prepared to:

- Provide feedback on EPOC protocols, reviews and updates. As a minimum, an associate editor should expect to receive up to 2 protocols or reviews / updates for comment each year
- Respond promptly to requests from a Managing Editor (ME) or other member of the EPOC editorial team. Where it is not possible to undertake a task (for example, due to other commitments), associate editors should inform the ME or other member of the editorial team within a week of receiving the request
- Respond promptly (within 1 – 2 weeks) to queries from EPOC review authors, or refer these queries to the appropriate person for a response
- Attend 2-3 one hour telephone meetings of EPOC associate editors each year

We also hope that EPOC associate editors will:

- Play a role in wider activities undertaken by EPOC (e.g., prioritizing review topics, representing EPOC at relevant meetings)
- Keep up-to-date with developments in EPOC and Cochrane more widely, including methodological developments and developments in editorial processes

Links to resources for EPOC editors and associate editors
- EPOC checklists for protocols, reviews and updates are available and will be sent to you when you agree to act as an editor / associate editor for a protocol, review or update.

---

[1] This may differ across EPOC sites and also for statistical and economics editors.

14 October 2015

- EPOC resources for review authors: http://epoc.cochrane.org/epoc-specific-resources-review-authors
- Cochrane Training has put together some very useful resources for Editors, including resources on publication ethics, editing and peer review feedback http://training.cochrane.org/editors
- Over the next two years Cochrane will be working to establish a set of core competencies for our Editorial teams and design tailored training resources, so keep an eye out for further updates on the main Community news URL https://community.cochrane.org/news/news-events/current-news/new-resource-collection-cochrane-editors
- Information about Cochrane publication policies: http://community.cochrane.org/editorial-and-publishing-policy-resource

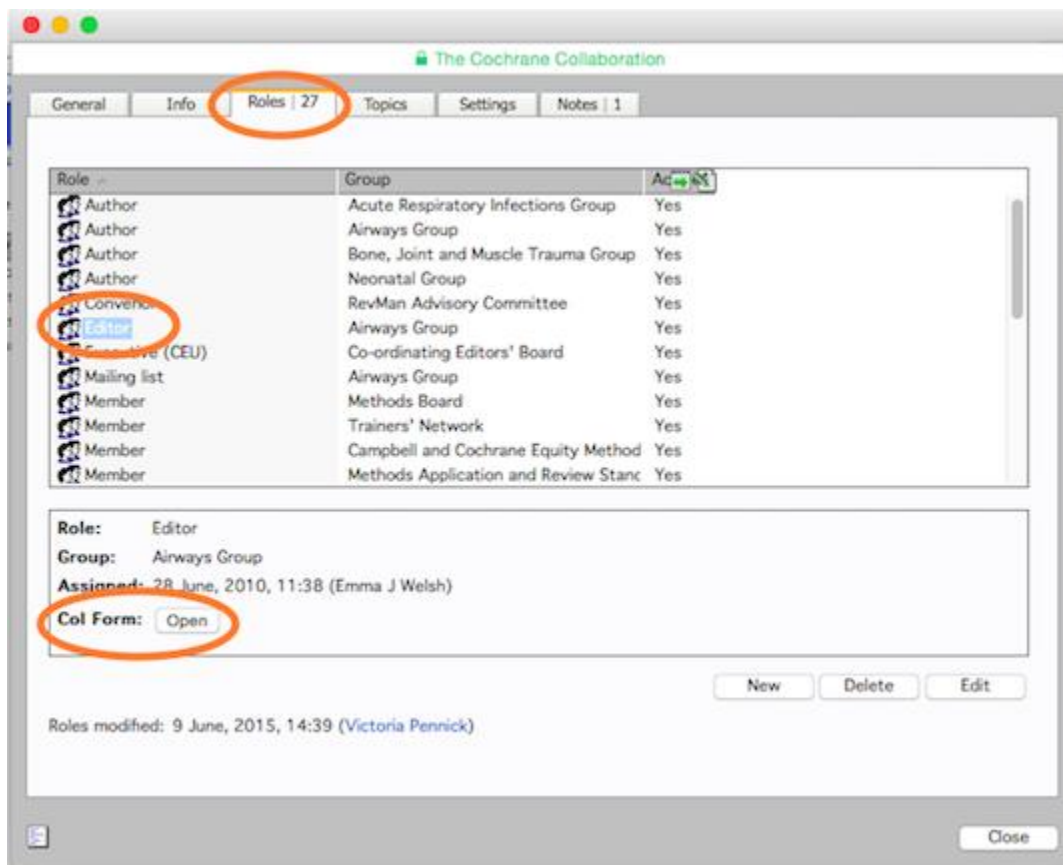# Declarations of interest statements

Editors and the editorial team of each Cochrane Review Group must disclose any potential conflict of interest that they might have, both on their module published in the 'About The Cochrane Collaboration' database in the Cochrane Library and on the Cochrane Review Group website. *For more information, see http://community.cochrane.org/organisational-policy-manual/2112-conflicts-interest-and-cochrane-groups*

A new Archie-based system is in place for people with Cochrane Review Group editorial roles to add or update their conflict of interest declarations.

How to add or update your conflict of interest declaration

To add or update your conflict of interest declaration, follow these instructions (also available in Archie: http://www.cochrane-net.org/imshelp/conflict_of_interest_forms.htm):

1. Log in to Archie, (https://archie.cochrane.org) open your person Properties sheet (click on your name in the blue bar at the top right-hand side of the screen), and go to the Roles tab.

2. Choose one of the relevant roles (e.g. Editor, Statistician) from your list of roles. The conflicts of interest form (CoI form) appears in the Role description under the role table.

14 October 2015

3. Click Open in the CoI form option. The Conflict of Interest form opens.

4. Complete the form and click Save.

5. Click OK to confirm saving.

6. Within an hour, data edited in Archie will be published on cochrane.org <http://cochrane.org/> at http://community.cochrane.org/community/organisation-administration/declarations-interest/crgs-editorial.

(The information for Co-ordinating Editors is available at: http://community.cochrane.org/community/organisation-administration/declarations-interest/co-ordinating-editors.)

Where will your conflict of interest declarations be published?

These are published on the Cochrane Community site:

- Cochrane Review Group editorial teams: http://community.cochrane.org/community/organisation-administration/declarations-interest/crgs-editorial

5

- Co-ordinating Editors: http://community.cochrane.org/community/organisation-administration/declarations-interest/co-ordinating-editors

They will be linked to the Cochrane Editorial and Publishing Policy Resource and may be linked directly from the Cochrane Library in future (currently includes a link to this information for Co-ordinating Editors). The declarations can be grouped by Cochrane Review Group, which means that every group can link to their declarations page from their group website and module in the 'About The Cochrane Collaboration' database.

What if you have more than one role?

If you have more than one role or belong to more than one group, there is no need to edit more than one form in Archie: regardless of a person's editorial role(s) and group(s) they belong to, only one form per person needs to be completed.

How often do you need to update your conflict of interest statement?

Each person will need to update their conflict of interest annually, between 1 January and 31 March. It will be the responsibility of the Cochrane Review Group editorial team to send the annual reminders to the members of the editorial team.

Archie and RevMan

Revman

RevMan 5 is the software used for preparing Cochrane protocols and reviews. It can be downloaded for free from http://tech.cochrane.org/revman/download

Archie

Once a proposed title is accepted, it is registered in Archie. Archie is the Cochrane Collaboration's central server which interacts with RevMan (the software used for preparing Cochrane reviews). Archie stores all authors' contact details, and drafts of every review. The principal feature of Archie and RevMan is version control and secure storage of work. This helps to protect reviews against confusion over primary and secondary versions, and loss of data.

Editing a protocol/review in Archie

Editor permissions in Archie allow you to access and edit a specific protocol/review. In order to edit a protocol/review, you need to "check-out" the most recent version from Archie. This locks the review and prevents anyone else checking out the review (they can still view the draft you have checked out, and download a copy, but they will not be able to check out that version). Only you will be able to check in the review again later. Checking in the review creates a draft that is viewable at any time, and becomes the latest draft available to review authors. This process is explained in the RevMan tutorial (in RevMan).

To *check out* a protocol/review from Archie to RevMan:

1. Open RevMan

2. Choose "File", then "Check out" from the drop down menu

3. You will then see a list of all the Cochrane reviews that you have access to. Click on and highlight the review that you wish to check out

4. Click "OK"

5. You can now edit the protocol/review in RevMan

6. ***Please note that you cannot save a protocol/review in RevMan.*** You must either save the RevMan file locally on your computer or check the edited protocol/review back into Archie.

To *check in* a protocol/review from Revman to Archie:

1. Open the edited protocol/review in RevMan

2. Chose "File", then "Check in" from the drop down menu

3. Write in a version description (for example, "Contact Editor's edits") and click "Finish"

Viewing a protocol/review in Archie

If you would like to access a protocol or review in Archie and will not be editing it you can download it to RevMan.

To download a copy of a protocol/review from Archie to RevMan:

1. Open RevMan

2. Choose "File", then "Check out" from the drop down menu

3. You will then see a list of all the Cochrane reviews that you have access to. Click on and highlight the review that you wish to check out

4. Check off the box that says "Download a copy of the review without locking it for others (not for editing)

5. Click "OK"

6. You can now view the protocol/review in RevMan

Archie workflows

The workflow system in Archie allows Managing Editors and others working in Cochrane Review Group editorial offices manage their work more efficiently and effectively. The workflow system helps CRGs track the progress of individual reviews through the editorial process and notifies authors, editors, and others involved in writing and editing reviews when they need to take action.

For more information about Archie workflows, see http://community.cochrane.org/editorial-and-publishing-policy-resource/ims-workflow-cochrane-reviews

Timelines

Contact Editors and editors are generally requested to return comments on a protocol within 2-3 weeks and a review/update within 3-4 weeks. The deadline may vary according to the size of the review and the number of included studies. If it is not possible to meet a deadline, it is important that editors let the Managing Editor know so that a new deadline can be agreed upon.

Summary of steps in EPOC Editorial process

TITLE

Topic proposal sent to editorial base	• Reviewed first by the ME and Co-ed at Oxford or Oslo • If within the EPOC scope and no overlap, authors requested to complete Review Proposal Form outlining in detail the proposed review

Review Proposal Form (RPF) submitted	• *RPFs sent to Oxford*
	    o RPF reviewed by ME, Co-ed, and other editors asked to comment
	    o If additional input needed, titles are reviewed at Norwegian satellite monthly editors meeting
	    o Co-ed approves the title for registration
	• *RPFs sent to Oslo*
	    o RPF reviewed by ME, Co-ed, and other editors asked to comment
	    o Co-ed approves the title for registration

Title Registered	• Managing editor registers title in Archie, sets up user accounts for authors and send authors information on expectations and resources for protocol/review development • Contact Editor assigned to the review

PROTOCOL

Draft protocol submittted	• Protocols submitted to the main editorial base in Oxford or to the satellite editorial offices in Oslo or Melbourne depending on which office is managing the review • Authors check in draft protocol to Archie for editorial approval • Author checklist submitted with protocol
Internal check by ME and CE	• ME completes checklist • ME either sends this to the CE or returns to the authors *(if major issue that should be sorted out before the CE looks at the protocol)*
	• CE checks out protocol from Archie, makes any suggested edits using track changes and checks the protocol back into Archie • CE completes checklist • Checklist returned to authors with CE comments and edits
Revised draft protocol submitted	• CE decides when protocol is ready for peer review • If CE is also lead author then another EPOC editor will need to sign off
Protocol sent for peer review	• 1 EPOC Editor • 2 external referees • TSC • Statistical Editor • Economics Editor (*if needed*)
Peer review comments sent to authors	• ME collates the comments into a table with a column for the authors to write their response and sends to the CE to check and add any additional comments • ME sends comments to authors
Revised protocol	• Authors submit revised protocol to Archie with a response to the peer review

submitted	comments
	• CE signs off that the revised protocol addresses the comments and approves it for copy-editing
Protocol copy-edited	• All protocols, reviews and updates are copy-edited through Cochrane copy-edit support
Protocol published	• ME marks the protocol for publication in Archie
	• Protocol is released for publication once all authors have approved the License for publication forms
	• ME sends congratulatory note along with expectations for next review submission

REVIEW

Draft review submitted	• Reviews submitted to the main editorial base in Oxford or to the satellite editorial offices in Oslo or Melbourne depending on which office is managing the review
	• Authors check in draft review to Archie for editorial approval
	• Authors are also asked to submit:
	○ Author checklist for reviews
	○ Included studies
	○ Full evidence profiles in an appendix. (Either exported from GRADEpro or provide tables similar to the one in Worksheet #2 in the resource Worksheets for preparing Summary of Findings tables using GRADE)
Internal check by ME and CE	• ME completes review checklist
	• ME either sends this to the CE or returns to the authors *(if major issue that should be sorted out before the CE looks at the protocol)*
	• CE checks out review from Archie, makes any suggested edits using track changes and checks the review back into Archie
	• CE completes review checklist
	• Checklist returned to authors with CE comments and edits
Review sent for peer review	• CE signs off that the review is ready for peer review
	• CE continues as RE unless they prefer that another editor takes on the RE role. CE will need to let the ME know this at this stage!
	• 1 EPOC Editor
	• 2 external peer reviewers
	• TSC
	• Statistical Editor
	• Economic Editor (if needed)
Peer review comments sent to authors	• ME collates the comments into a table with a column for the authors to write their response and sends to the RE to check and add any additional comments
	• ME sends comments to authors
Revised review submitted	• Authors submit revised review to Archie with response to the comments
	• RE signs off that the revised review address the comments and approves it for copy-editing
	• If CE is also contact author another EPOC editor needs to act as RE
Review published	• ME marks the review for publication in Archie
	• Review is released for publication once all authors have approved the License for

14 October 2015

	publication forms • ME sends congratulatory note along with expectations for next review submission (update)

REVIEWS DUE TO BE UPDATED

CE checklist completed	• When a review is due to be updated, the ME will send the updating checklist to the CE and ask them to complete it
CE determines if a new updated protocol is necessary	• ***Minor changes:*** *no significant changes to the inclusion criteria for the review or to the methods (i.e. the methods are congruent with current EPOC standards and are appropriate for addressing the review question)* • The completed CE checklist is sent to the authors • Review authors respond to suggestions from the CE in the checklist. The checklist will be uploaded as a file to Archie • Once the CE approves the planned update, the authors can begin working on the update
	• ***Major changes:*** *significant changes to either the inclusion criteria for the review and / or the methods (e.g. because the methods need to be updated to meet current EPOC standards or to adequately address the review question)* • If major changes, authors will be asked to outline these is an updated protocol (Word document) • Authors should copy the protocol into a Word document and make any edits using track changes • The updated protocol will be reviewed by the ME, CE and other EPOC editors as necessary • Once the CE approves the updated protocol, it will be added to the appendix of the original review and this will be published as an amendment • The authors can then begin work on the update

UPDATES

Draft update submitted	• Updated reviews submitted to the main editorial base in Oxford or to the satellite editorial offices in Oslo or Melbourne depending on which office is managing the review
	• Authors check in draft updated review to Archie for editorial approval
	• Authors are also asked to submit:
	   o Author checklist for updates
	   o Included studies
	   o Full evidence profiles in an appendix. (Either exported from GRADEpro or provide tables similar to the one in Worksheet #2 in the resource Worksheets for preparing Summary of Findings tables using GRADE)

Internal check by ME and CE	• ME completes update checklist • ME either sends this to the CE or returns to the authors *(if major issue that should be sorted out before the CE looks at the protocol)*
	• CE checks out updated review from Archie, makes any suggested edits using

	track changes and checks the updated review back into Archie
	• CE completes update checklist
	• Checklist returned to authors with CE comments and edits
CE determines if external peer review is required	• If more than three new studies are identified for an updated review then the Contact Editor will decide if the review should be externally peer reviewed. If there are new analyses, new methods or a change to conclusions then full peer review may be recommended.
Update sent for peer review	• CE signs off that the update is ready for peer review
	• 1 EPOC Editor
	• 2 external peer reviewers (*if required*)
	• TSC
	• Statistical Editor
	• Economic Editor (if needed)
Peer review comments sent to authors	• ME collates the comments into a table with a column for the authors to write their response and sends to the CE to check and add any additional comments
	• ME sends comments to authors
Revised update submitted	• Authors submit revised update to Archie with response to the comments
	• CE signs off that the revised update address the comments and approves it for copy-editing
	• If CE is also contact author another EPOC editor needs to sign off on the update
Update published	• ME marks the update for publication in Archie
	• Update is released for publication once all authors have approved the License for publication forms
	• ME sends congratulatory note along with expectations for next review submission

14 October 2015