



# Using Editorial Manager/Convey to collect author Declarations of Interest

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**Research Integrity Editor**  
**Cochrane Editorial & Methods Department**

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# Outline

- Convey and collection of author Declarations of Interest (DoI)
- Using Convey as an author
- Editorial teams: using Editorial Manager to check author DoI
- Editorial teams: using Convey to collect/check author DoI
- Resources and support





## Convey



Within Editorial Manager (EM), authors' DoI are requested and completed via Convey, a not-for-profit DoI management system provided by the American Association of Medical Colleges (AAMC).

Convey serves as a central repository where individuals can enter and maintain records of their financial interests.

The individual's records can be used to populate DoI forms required for different reviews or different organisations.

## Collecting author Dols

- Conflict of Interest (CoI) policy for Cochrane Library content (2020) runs in parallel with Commercial Sponsorship policy (2014)
- Authors submitting to EM answer same questions in Convey
- Editorial staff check declarations in line with relevant policy
- DoI are collected at the following time points:
  - Title registration (for reviews) / point at which the decision is made to update (for updates)
  - Annually until publication of the protocol / review / update
  - Just prior to publication of the protocol
  - Just prior to publication of the review / update

## Using Convey as an author



## New submissions

- Submission to EM automatically trigger email from Convey to all authors
- Email from AAMC ([Do\\_Not\\_Reply@aamc.org](mailto:Do_Not_Reply@aamc.org))
- Contains unique URL for authors to submit Dols
- Weekly reminders are sent until the Dol form is completed
  
- **Please note** currently a bug means that automated emails are not triggered for authors who added after submission. In such cases contact [support@cochrane.org](mailto:support@cochrane.org) for assistance.

## Cochrane Review: Declaration of Interest required

 Do\_Not\_Reply@aamc.org  
To Stephanie Boughton

[← Reply](#) [↶ Reply All](#) [→ Forward](#) [⋮](#)

Mon 08/11/2021 13:45

Dear Stephanie Boughton,

You are required to complete a Declaration of Interest in relation to the following submission: COCHRANETRAIN-2021-00566: Using Editorial Manager/Convey to collect author Declarations of Interest.

Please complete your Declaration of Interest within seven days of receiving this email (by 11-15-2021). If you do not complete your Declaration of Interest by this date, it may cause delays in editorial processing of your submission.

Cochrane requires Declarations of Interest from all listed authors when:

- a Cochrane Review or title proposal is submitted to Editorial Manager;
- a Cochrane Review is transferred to Cochrane's Central Editorial Service;
- work begins on a Cochrane Review update;
- you are added as a new author to a Cochrane Review (Declaration required from new author only)

If you have any queries about this Declaration of Interest, please contact [support@cochrane.org](mailto:support@cochrane.org), quoting the ID: COCHRANETRAIN-2021-00566: Using Editorial Manager/Convey to collect author Declarations of Interest.

To facilitate the collection of Declarations of Interest, Cochrane uses Convey, a service run by the Association of American Medical Colleges. Through Convey, you can securely record and maintain your own financial interests and disclosure history. You will be guided through Cochrane's CoI requirements and will submit only the information needed for this declaration. To start the process, please click on the link below.

[Start Disclosure for Cochrane - Aries Integration Beta Test](#)

If you already have a free AAMC account:

- Click the **Start Disclosure for Cochrane - Aries Integration Beta Test** link above, log in with your AAMC username, and start your disclosure.

If you do not have a free AAMC account:

- Click the **Start Disclosure for Cochrane - Aries Integration Beta Test** link above, and then click "Create AAMC Account."
- After you create an account, you will receive a confirmation email from [aamc\\_registration@aamc.org](mailto:aamc_registration@aamc.org).\*\*  
Click on the link provided in the confirmation email to verify/activate your account.
- Once your account is verified, return to this email and click the **Start Disclosure for Cochrane - Aries Integration Beta Test** link above, log in with your AAMC username, and start your disclosure.

*\*\*Check your inbox and spam/junk folders for the AAMC account confirmation email. If you did not receive it, go to [convey.aamc.org](http://convey.aamc.org) and sign in. You will be given the option to correct/change your email and have the confirmation email resent. Please add [aamc.org](http://aamc.org) to your approved senders list.*

If you have questions on how to get started or need any technical support, please contact us at [Contact Convey Support](#) or 202-909-2001.

*Convey has been designed to best support the following modern desktop browsers. If you are not currently using a supported browser, it is strongly recommended that you download or upgrade to a supported browser. If you elect not to upgrade your desktop browser, your experience may not be optimal and you may not be able to fully utilize Convey.*

*We currently support the following browsers:*

# Declaring interests in Convey

- Link in email takes authors to 'Sign in' page
- Author must log in or create account

AAMC

## Sign In

Username

Password

SIGN IN

[FORGOT YOUR USERNAME?](#)

[FORGOT YOUR PASSWORD?](#)

[NEED HELP?](#)

### Don't have an account?

Register for an AAMC account to begin accessing products and services.

[CREATE ACCOUNT](#)



# Step 1: Policy & Instructions

Policy Details

Enter Interests

Additional Questions

Review and Send

## Policy & Instructions

This form is to declare financial and non-financial relationships and activities that may be considered conflicts of interest according to Cochrane's COI policy. If you are in doubt about whether to list a particular relationship or activity, please do so. For more detailed step by step instructions on how to complete your disclosure, click [here](#).

At several time points during the review process, we will ask you to confirm and, if necessary, update your disclosure. All Cochrane Review authors must complete a Declaration of Interest form at the following time points:

- Title registration (for reviews) / point at which the decision is made to update (for updates)
- Annually until publication of the review / update
- Just prior to publication of the protocol
- Just prior to publication of the review/update

On occasion, we may ask authors to disclose further information about reported relationships.

For Cochrane Reviews, the relevant timeframe for interests that should be declared is from 36 months before title registration through to publication of the review. For a review update, the relevant timeframe is from 36 months before work started on the update, through to publication of the updated review.

### Relationships and activities that need to be declared

#### Financial Interests

The policy deems financial interests to be relevant if the payment comes from a commercial organization with a financial interest in the topic of the review. This means that the organization has developed (or is known to be developing), or distributes (anywhere in the world), an intervention or potential comparator related to the topic of the review.

This applies even if the payment was made for work or advice that did not relate to the topic of the review.

#### Non-financial Interests

Non-financial relationships and activities that have a direct and obvious connection to the topic of the review should be disclosed. Declarations of non-financial interests will not prevent participation in the creation of Cochrane reviews.

#### Involvement in clinical studies

Anyone involved in writing a Cochrane Review, should declare whether they have had any direct involvement in the conduct, analysis, and publication of studies that could be included in the specific review.

The **Discloser Identifier** is either your email address or ORCID® ID.

The **Disclosure Purpose** is the name of the journal to which you are submitting. Please type the name of the journal into the box exactly as it is spelled in the official publication, or as otherwise directed.

This organization accepts ORCID ID as your Discloser ID. If you already have an ORCID ID or would like to obtain one, you can retrieve or create it by clicking the ORCID icon above the Discloser ID field. If Convey has previously saved your ORCID ID, it has been used as your Discloser ID. To learn more about ORCID, visit <http://orcid.org>.

#### Discloser Identifier

#### Disclosure Purpose

Select all purposes this disclosure is relevant for:  
 cochrane-train-EM\_COCHRANETRAIN\_342

- Summary of Cochrane's Col policy and instructions for completing DoI form
- Page divided into 2 sections:
  1. Policy & Instructions
  2. Discloser identifier and purpose
- Links to:
  - Col Portal (for policies)
  - Instructions for authors

Cancel

Save and Continue

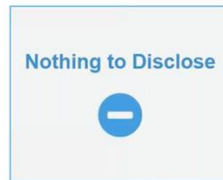
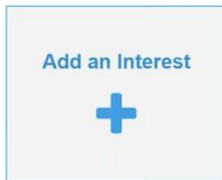
# Step 2: Enter interests

## New user

Disclosure To: University of AAMC



Do you have anything to disclose?



## Returning user



The interests you have stored in Convey have been placed into the list of currently included interests or those interests excluded from this disclosure, based on the requirements of the organization listed above. You can include or exclude any interest from this disclosure.

[Review this organization's policy & instructions](#)

**Interests Included In This Disclosure**

None of the interests listed below should be included in this disclosure. [Add an Interest](#) [Reset Interests](#)

Entity	Type	Interest Held By		
3M	Grant / Contract	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
3M	Consultant	Other	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
3M	Consultant	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
Bayer	Travel	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
Bayer	Other Business Ownership	Other	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
Bayer	Stock	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>

**Interests Not Included In This Disclosure**

Any interests displayed in this section are in your 'My Interests' repository but will not be disclosed to this organization. These interests were either automatically excluded based on this organization's settings or you excluded them from this disclosure. You can include any of these interests in this disclosure by clicking the 'Include' button below.

Entity	Type	Interest Held By	Reason
--------	------	------------------	--------

Enter Interests

Additional Questions

Review this

Review this

## Is this interest related to ...

### a Company or Organization



Stock, Employment, Ownership,  
Consulting, Board Membership,  
Grant, Royalty Income, etc.

### Intellectual Property



Patent (licensed or unlicensed),  
Copyright, Trademark,  
Other Intellectual Property

Policy Details

Enter Interests

Additional Questions

Review and Send

Search for and select an entity

Select an Interest

Add details for the selected interest

1

2

3

### Search for an entity ?



Company or organization (drug or device manufacturer,  
investment firm, clinical laboratory, etc.)

### Previously Selected Entities

Name	State	Country
▶ Bayer		
▶ 3M		
▶ Pfizer		
▶ Microsoft		

Policy Details

Enter Interests

Additional Questions

Review and Send

Search for and select an entity

1

Select an Interest

2

Add details for the selected interest

3

## Select an Interest Type: Bayer



### Professional Services

Employment

Fiduciary Officer

Independent Contractor

Consultant

Data and Safety Monitoring

End Point Review Committee

Expert Witness

Other

### Financial Stake

Stock

Stock Option

Other Securities

Other Business Ownership

### Financial Support

Gift

Travel

Grant / Contract

Royalty and Licenses

**Which button do I select to disclose:**

Membership on corporate or organization board of directors?

Ownership of a company?

Licensed Intellectual property (IP) or royalties from that IP?

Compensation from this entity related to a publication?

Work on a Scientific Advisory Board?

A speaking engagement?

An Investigator or Enroller in a Clinical Trial?

Compensation for editorial work or authorship?

1

2

3

## Bayer: Independent Contractor

### Independent Contractor

**Category**

Consultant


**Description \*****Start Date \***   **End Date \*** **Interest held by \*** Self  Spouse/Partner  Dependent Child  Other**Additional Information** (ex: hourly rate, time commitment, supervisor approval, activity details, title, etc)

\* - denotes a required field

▶ Microsoft	Grant / Contract	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>
▶ Pfizer	Stock	Self	<a href="#">View / Edit</a>	<a href="#">Do Not Include</a>

### Interests Not Included In This Disclosure

Any interests displayed in this section are in your 'My Interests' repository but **will not be disclosed** to this organization. These interests were either automatically excluded based on this organization's settings or you excluded them from this disclosure. You can include any of these interests in this disclosure by clicking the 'Include' button below.

Entity	Type	Interest Held By			Reason 
▶ Microsoft	Consultant	Spouse/Partner	<a href="#">View / Edit</a>	<a href="#">Include</a>	Attributed Interest Not Required

[Back](#) [Save and Continue](#)

# Step 3: Additional questions

## Sending Disclosure To: Cochrane - Aries Integration Beta Test

Disclosure Purpose: cochranetrain-EM\_COCHRANETRAIN\_341

Policy Details

Enter Interests

Additional Questions

Review and Send

The questions on this page have been requested by the organization identified above, and your answers are specific to this disclosure. In the future, you will be able to see your answers by reviewing this submitted disclosure, which can be accessed through your History. Any information that you enter here will not change or add to the interests saved in My Interests for future disclosures.

[Review this organization's policy & instructions](#)

Add an Interest

### Additional Questions

1. For each of the relationships or activities below, please indicate whether you have received payment from a commercial organisation with an interest in the topic of the review within the time period starting 36 months prior to title registration (or when work started in the case of an update) through to publication of the review.

**a.** Employment (If you need to add an interest, return to the previous step and select "Employment")

Required

Yes, as disclosed in the Interests section.  No, I have no relevant interests of this type.

**b.** Payment for expert testimony (If you need to add an interest, return to the previous step and select "Expert Witness")

Required

Yes, as disclosed in the Interests section.  No, I have no relevant interests of this type.

**c.** Leadership or other fiduciary role in other board, society, committee, or advocacy group (If you need to add an interest, return to the previous step and select "Fiduciary Officer")

# Step 3: Additional questions

2. If you selected the interest "Other Business Ownership," please provide the start and end date related to this interest. **Required**

This question does not apply to any of the interests you are including in this disclosure. If you include additional interests in the previous step, you may be required to answer this question.

3. For each of the interests entered below, please indicate whether the payment was received by you personally or your institution.

**3M - Independent Contractor - Consultant**

a. Were these funds received by **YOU** personally?

Yes  No

**3M - Grant / Contract**

a. Were these funds received by **YOU** personally?

Yes  No

**3M - Travel**

a. Were these funds received by **YOU** personally?

Yes  No

**Bayer - Independent Contractor - Consultant**

a. Were these funds received by **YOU** personally?

Yes  No

i. If this payment was made to your institution, did you benefit financially from this payment and/or have access to or control of the funds?

**Required**

Yes  No



# Step 3: Additional questions

## Non financial interests and involvement in included studies

### 4. Declaring non-financial/other interests

This section deals with non-financial relationships and activities that have a direct and obvious connection to the topic of the review or other Cochrane Library content.

Please select all interests that may be seen as relevant to the editor or reader.

a. Published opinions in medical journals, the public press, broadcast and social media relevant to the interventions in the work.

Required

Yes  No

b. Work as a health professional. Required

Yes  No

c. Any affiliation to an organization(including not for-profit) that has a declared opinion or position on the topic.

Required

Yes  No

d. Other. Required

Yes  No

---

### 5.

#### Declaring involvement in eligible studies

Anyone involved in writing a Cochrane Review, should declare whether they have had any direct involvement in the conduct, analysis, and publication of studies that could be included in the specific review.

Were you involved in conducting a study (or studies) that is (are) eligible for inclusion in the work?

Required

Yes  No

# Step 4: Review and send

## Review Disclosure Being Sent to: Cochrane - Aries Integration Beta Test

[Edit](#)

Please review carefully the information on this page that will be submitted to the organization identified at the top of the page. You can return to any step in this disclosure to make changes or click the Edit button next to any section on this page. The section entitled "Interests Not Included in this Disclosure" shows the interests that you have saved in Convey that will not be disclosed to this organization.

Once you submit your disclosure, it cannot be modified or revoked. For questions about making changes to disclosure information after submitting a disclosure through Convey, please refer to the FAQ section.

### Discloser Name

Maria Gerardi

### Discloser Identifier

b6362003-cbaf-4e33-8017-37d3d6def228

### Disclosure Purpose

cochranetrain-EM\_COCHRANETRAIN\_342

## Interests Included In This Disclosure

[Edit](#)
[Go back to summary view](#)

### Company or Organization

Entity	Type	Interest Held By
▼ 3M <i>Contract Start Date:</i> 01/01/2005	Grant / Contract <i>Contract End Date:</i> Ongoing / No Known End Date	Self <i>Additional Information:</i>
▼ 3M <i>Travel Start Date:</i> 02/02/2022	Travel <i>Travel End Date:</i> 08/02/2022	Self <i>Additional Information:</i>
▼ 3M <i>Category:</i> Consultant <i>End Date:</i> Ongoing / No Known End Date	Consultant	Self <i>Description:</i> hfsgfd <i>Additional Information:</i>
▼ Bayer <i>Category:</i> Consultant <i>End Date:</i> Ongoing / No Known End Date	Consultant	Self <i>Description:</i> test <i>Additional Information:</i>

## Editorial teams: using EM to check author DoI



# Viewing authors' declarations in EM

Page: 1 of 1 (5 total submissions) Editor Details - Google Chrome

editorialmanager.com/cochranetrain/EMDetails.aspx?docid=339&ms\_num=COCHRANETRAIN-2021-00244&sectionID=1

## Details for Manuscript Number: COCHRANETRAIN-2021-00244

[Cancel](#)
[Save](#)
[Save and Close](#)

[Conflict of Interest](#)
[Attachments](#)
[Similarity Check](#)
[Manuscript Notes](#)
[Production Notes](#)
[Editors](#)
[Reviewers](#)

Action	Manuscript Number
<a href="#">View Submission</a> <a href="#">Similarity Check/iThenticate Report (64%)</a> <a href="#">Duplicate Submission Check (55%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Send Back to Author</a> <a href="#">Set Final Disposition</a> <a href="#">Assign Editorial Task</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	COCHRANETRAIN-2021-00244
<a href="#">View Submission</a> <a href="#">Similarity Check/iThenticate Report (58%)</a> <a href="#">Duplicate Submission Check (60%)</a> <a href="#">Details</a> <a href="#">Initiate Discussion</a> <a href="#">History</a> <a href="#">File Inventory</a> <a href="#">Classifications</a> <a href="#">Send Back to Author</a> <a href="#">Set Final Disposition</a> <a href="#">Assign Editorial Task</a> <a href="#">Initiate Production</a> <a href="#">Similar Articles in MEDLINE</a> <a href="#">Send E-mail</a> <a href="#">Linked Submissions</a>	COCHRANETRAIN-2021-00245
<a href="#">View Submission</a> <a href="#">Similarity Check/iThenticate Report</a>	COCHRANETRAIN-2021-00372

<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Manuscript Number:</b>	COCHRANETRAIN-2021-00244
<b>Global MS ID:</b>	EM_COCHRANETRAIN_339
<b>Full Title:</b>	Test
<b>Article Type:</b>	Proposal: Intervention Review
<b>Corresponding Author:</b>	✉ <a href="#">Maria Gerardi, Cochrane Central Executive</a> London, UNITED KINGDOM <a href="#">[Proxy]</a>
<b>Corresponding Author E-Mail:</b>	<a href="mailto:mgerardi@cochrane.org">mgerardi@cochrane.org</a>
<b>License for Publication</b>	Green-Open-Access <input type="button" value="v"/>
<b>Conflict of Interest:</b>	<a href="#">View COI Disclosure</a>
<b>Section/Category:</b>	Editorial and Methods
<b>DOI:</b>	<input type="text"/>
<b>Keywords:</b>	
<b>File Inventory:</b>	<a href="#">File Inventory</a>
<b>Attachments:</b>	<a href="#">Attachments</a>

# Viewing authors' declarations in EM

## Author has completed DoI

**Conflict of Interest Disclosures for Manuscript Number: COCHRANETRAIN-2021-00246 "test 3"**

Close

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

Request Updated COI Data

Last Updated: 06/14/2021 10:38:44

Name	Disclosure Status
Maria Gerardi	Jun 14, 2021

Denotes a disclosure includes at least one interest.

## Author has not completed DoI

**Conflict of Interest Disclosures for Manuscript Number: COCHRANETRAIN-2021-00244 "Test"**

Close

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

Request Updated COI Data

Last Updated: 06/14/2021 10:51:50

Name	Disclosure Status
Maria Gerardi	Not Submitted

# Viewing authors' declarations in EM

- Always click on 'Show Full Details' or 'Download PDF'
- Do not rely on information shown under 'Summary of interests' as this will not show the answers to the additional questions section of the Convey form.

**Conflict of Interest Disclosures for Manuscript Number: COCHRANETRAIN-2021-00246 "test 3"**

[Close](#)

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

Request Updated COI Data Last Updated: 06/14/2021 10:49:54

Name	Disclosure Status
Maria Gerardi	Jun 14, 2021

Discloser  
Identifier: [b0362003-cba1-4e03-8017-37d3d6def228](#) Requested Date: Jun 11, 2021

[Show Full Details](#) [Download PDF](#)

Summary of Interests  
3M (Travel),  
3M (Grant / Contract),  
Bayer (Independent Contractor - Consultant),  
Pfizer (Stock),  
3M (Independent Contractor - Consultant)

# Viewing authors' declarations in EM

Show Full Details

Maria Gerardi

**Cochrane - Aries Integration Beta Test**

Identifier: b6362003-cbaf-4e33-8017-37d3d6def228      Purpose: cochrane-train-EM\_COCHRANETRAIN\_342      Jun 14, 2021, 3:23:19 PM


**Summary of Interests**      [Go back to summary view](#)

**Company or Organization**

Entity	Interest Type	Interest Held By
3M	Consultant	Self
Category: Consultant	Contract Description: hfsgfd	End Date: Ongoing / No Known End Date

Close

Close



# Viewing authors' declarations in EM

PDF

Maria Gerardi

Jun 14, 2021 10:23:19 EDT  
Cochrane - Arles Integration Beta Test

Disclosure Purpose: cochrane-train-EM\_COCHRANETRAIN\_342

## Summary of Interests

### Company or Organization

Entity	Type	Interest Held By
3M	Grant / Contract	Self
Contract Start Date: 01/01/2005		Contract End Date: Ongoing / No Known End Date
Additional Information:		
3M	Consultant	Self
Category: Consultant		Description: hfsqfd
End Date: Ongoing / No Known End Date		Additional Information:
3M	Travel	Self
Travel Start Date: 02/02/2022		Travel End Date: 08/02/2022
Additional Information:		
Bayer	Consultant	Self
Category: Consultant		Description: test
End Date: Ongoing / No Known End Date		Additional Information:
Pfizer	Stock	Self
Acquisition Date: 01/01/2022		Divestment Date: Ongoing / No Known Divestment Date
Additional Information:		

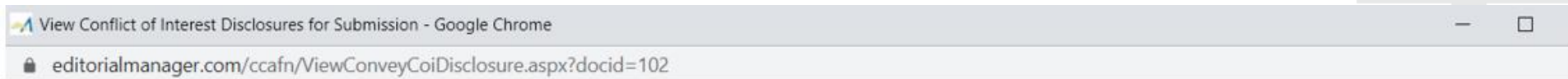
### Additional Questions:

1. For each of the relationships or activities below, please indicate whether you have received payment from a commercial organisation with an interest in the topic of the review within the time period starting 36 months prior to title registration (or when work started in the case of an update) through to publication of the review.
  - a. **Employment** (If you need to add an interest, return to the previous step and select "Employment")  
No, I have no relevant interests of this type.
  - b. **Payment for expert testimony** (If you need to add an interest, return to the previous step and select "Expert Witness")  
No, I have no relevant interests of this type.
  - c. **Leadership or other fiduciary role in other board, society, committee, or advocacy group** (If you need to add an interest, return to the previous step and select "Fiduciary Officer")  
No, I have no relevant interests of this type.
  - d. **Grants or contracts** (If you need to add an interest, return to the previous step and select "Grant/Contract").  
Yes, as disclosed in the Interests section.
  - e. **Patents - planned, issued, or pending** (If you need to add an interest, return to the previous step and select "Patent")  
No, I have no relevant interests of this type.
  - f. **Consulting fees** (If you need to add an interest, return to the previous step and select "Consultant").  
Yes, as disclosed in the Interests section.



# Viewing authors' declarations in EM

- Updates to declarations do not automatically show up in EM
- Refresh DOI information in EM by clicking 'Request Updated COI Data'



## Conflict of Interest Disclosures for Manuscript Number: COCHRANECAFN-2021-0060 "T0123/T0008 Antibiotics for incomplete abortion"

Close

All available Conflict of Interest disclosure information for the authors of this submission is displayed below.

[Request Updated COI Data](#)

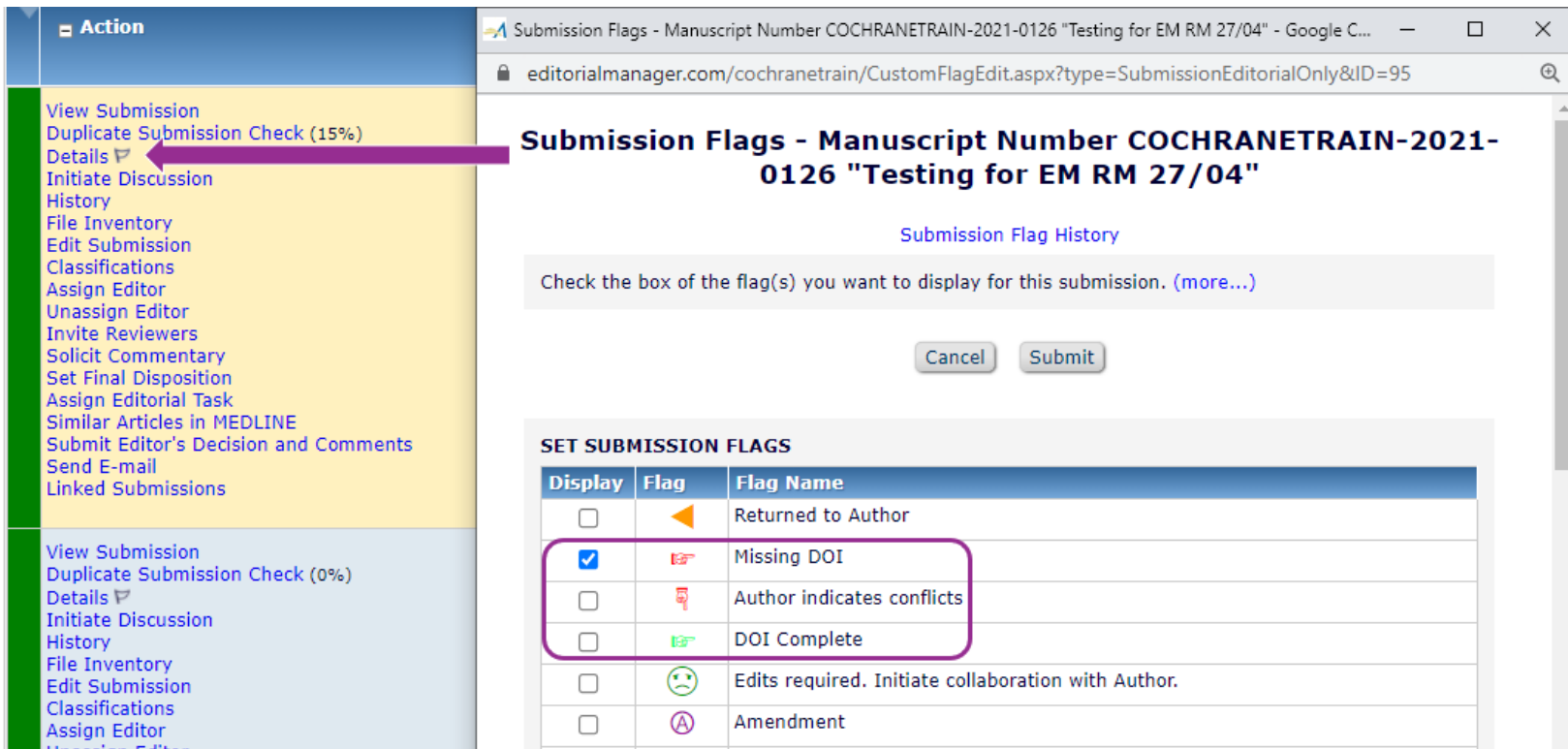
Last Updated: 05/09/2021 10:01:23

Name

Disclosure Status

# Adding flags

- You can add flags to indicate DOI status of a review in EM



**Action**

- View Submission
- Duplicate Submission Check (15%)
- Details
- Initiate Discussion
- History
- File Inventory
- Edit Submission
- Classifications
- Assign Editor
- Unassign Editor
- Invite Reviewers
- Solicit Commentary
- Set Final Disposition
- Assign Editorial Task
- Similar Articles in MEDLINE
- Submit Editor's Decision and Comments
- Send E-mail
- Linked Submissions







**Submission Flags - Manuscript Number COCHRANETRAIN-2021-0126 "Testing for EM RM 27/04"**

Submission Flag History

Check the box of the flag(s) you want to display for this submission. ([more...](#))

Cancel Submit

**SET SUBMISSION FLAGS**

Display	Flag	Flag Name
<input type="checkbox"/>		Returned to Author
<input checked="" type="checkbox"/>		Missing DOI
<input type="checkbox"/>		Author indicates conflicts
<input type="checkbox"/>		DOI Complete
<input type="checkbox"/>		Edits required. Initiate collaboration with Author.
<input type="checkbox"/>		Amendment

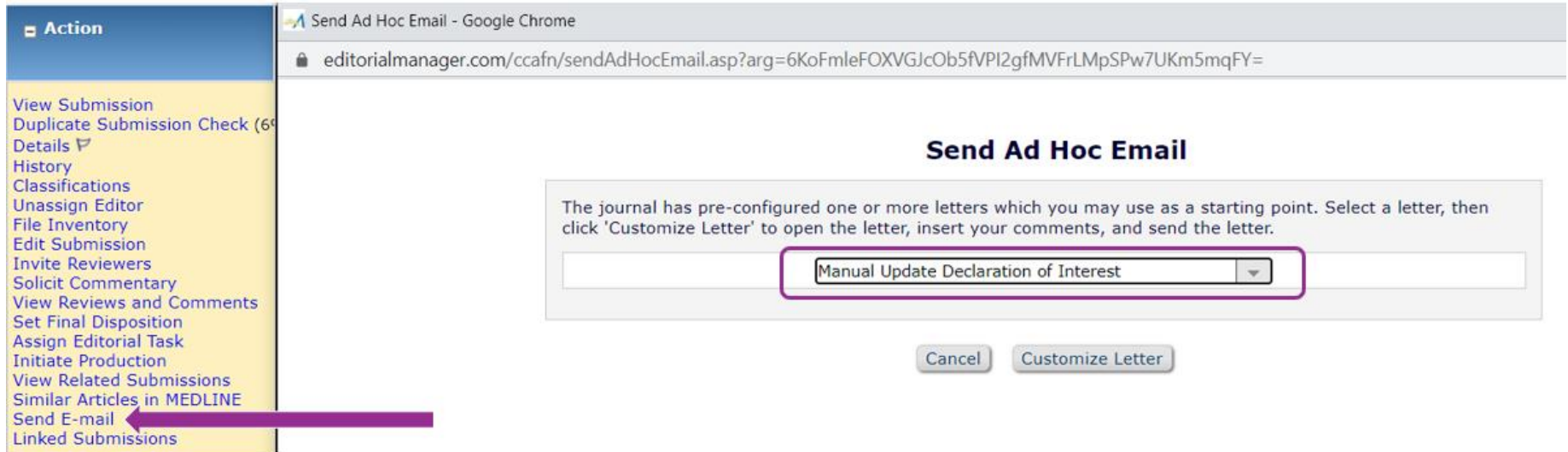
## Annual reminders

- Authors of protocols, reviews and updates in progress, receive an automated annual reminder to review and update their DoI statement
- Authors can use the link in their original request email from Convey to update their interests at any time
- Or they can log into Convey and update the relevant disclosure.
- Authors are also asked to let the editorial team know of any relevant changes by email.
- Changes made in Convey will not automatically be pulled into EM.



# Ad hoc reminders to authors

- Editorial teams can send reminder emails to authors. This email goes to all authors listed on the review and includes a link to update declarations in Convey.



**Action**

- View Submission
- Duplicate Submission Check (6)
- Details ▾
- History
- Classifications
- Unassign Editor
- File Inventory
- Edit Submission
- Invite Reviewers
- Solicit Commentary
- View Reviews and Comments
- Set Final Disposition
- Assign Editorial Task
- Initiate Production
- View Related Submissions
- Similar Articles in MEDLINE
- Send E-mail ←
- Linked Submissions

Send Ad Hoc Email - Google Chrome

editorialmanager.com/ccafn/sendAdHocEmail.asp?arg=6KoFmleFOXVGJcOb5fVPI2gfMVFrLMpSPw7UKm5mqFY=

### Send Ad Hoc Email

The journal has pre-configured one or more letters which you may use as a starting point. Select a letter, then click 'Customize Letter' to open the letter, insert your comments, and send the letter.

Manual Update Declaration of Interest

Cancel Customize Letter

# Editorial teams: using Convey to collect/check author DoI



# Use of Convey by Editorial Teams

- Not required in most cases as DoI are viewable in EM
- Editorial staff need to log on to Convey in following scenarios:
  - Before work begins on a review update
  - For annual reminders for invited submissions where the authors have not yet submitted work to EM
  - A new author joins an existing team who have not yet submitted work to EM
- In these scenarios Convey is used to generate a link to request authors' declarations and to view the declarations



## Access to Convey

- Groups may use one Convey account login for whole editorial team
- When your group starts using EM, please let the Support Team know which email address you would prefer to use to access the system
- Your chosen email address will receive an automated message from [Do\\_Not\\_Reply@aamc.org](mailto:Do_Not_Reply@aamc.org), inviting you to create a Convey account as a Disclosure Manager



# Creating a Discloser List in Convey

- Discloser List created to invite the author team to disclose through Convey
  - Step by step instructions in ME guidance on CoI Portal
1. Log in to Convey and select the **Disclosure Manager** role

Your account has multiple roles in the Convey application

Please select a role to use for this session

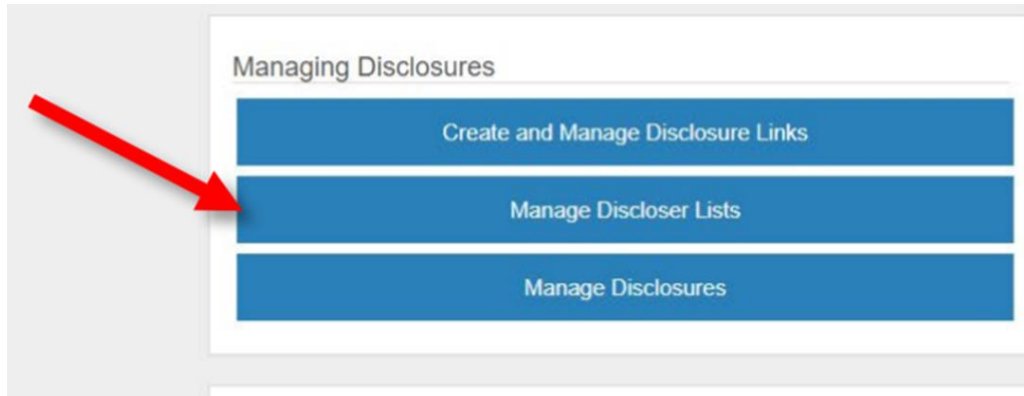
Discloser

Disclosure Manager - Cochrane





2. On the Managing Disclosures screen, select **Manage Discloser Lists**



3. On the Discloser Lists screen, select **Create New List**

### Discloser Lists

Discloser Search i

Last Name	First Name	Email Address	Discloser ID	<input type="checkbox"/> Show archived results
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Discloser List Name	Title	Last Name	First Name	Email	Discloser ID	Request Date	Status
---------------------	-------	-----------	------------	-------	--------------	--------------	--------

List Name

 [Create New List](#)

## 4. Create Discloser List

- Enter the review title in both the **Disclosure List Name** and **Description** fields
- Enter **Disclosure Purpose** using the following naming conventions:
  - For review updates - **Pre-Update-Disclosure**
  - For annual reminders - **Annual-Disclosure**
- Enter your contact details

### Create Discloser List

Discloser List Name

Macrolides for chronic asthma



Disclosure Purpose

Pre-Update-Disclosure

Contact Name

Test ME

Contact Email

testme@cochrane.org

Description (optional)

Macrolides for chronic asthma

- Description, Activity Start Date, Activity End Date, and Disclosure Submission Deadline Date are optional fields
- Turn on Initial Request and Reminder emails in the ‘Automatic Email Distribution’ section
- Click on ‘Create list’

Description (optional)

Activity Start Date (optional)

Month ▾ Day ▾ Year  Clear

Activity End Date (optional)

Month ▾ Day ▾ Year  Clear

Disclosure Submission Deadline Date (optional)

Month ▾ Day ▾ Year  Clear

Automatic Email Distribution

Initial Request  On

If "ON", requests to disclose will be sent by Convey within minutes upon creation of your list, based on the [selected template](#).

Reminder  On

If "ON", reminder emails will be sent every 7 days (from initial contact) based on the [selected template](#).

Cancel

Create List

5. On the Manage Disclosers screen, select 'Add' and enter each author's details. Use the author's email as ID. Click on 'Add & Send Request' to trigger emails to authors.

## Manage Disclosers - Review title

 Automatic Email Distribution is ON for Initial Requests. [Modify Settings](#)

Last Name  x Request Date  Status  Submission Date  Icons  [Add](#) [Import](#)

### Disclosers

You have not added any individuals to this list.  
You may add individuals through the add and import features above.

Show archived disclosers

### Create New Discloser

ID \*

Title

First Name \*

Last Name \*

Middle Name

Suffix

Email \*

6. Notifications: on the Discloser Lists screen, you can select to receive notifications each time an author completes a disclosure related to this list, or a daily summary of new disclosures.

## Discloser Lists

Discloser Search i

Last Name  First Name  Email Address  Discloser ID   Show archived results

Discloser List Name	Title	Last Name	First Name	Email	Discloser ID	Request Date	Status
---------------------	-------	-----------	------------	-------	--------------	--------------	--------

List Name  x [Create New List](#)

Name	Count	Requests Sent	Disclosures Submitted	Contact Name	Real-Time Notification	Summary Notification	
Macrolides for chronic asthma	1	1	0	Test ME	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	- Select Action -

# Viewing author Dol

- Log in as ‘Disclosure Manager’
- Select ‘Manage Disclosers List’ and click on the list

## Discloser Lists

Discloser Search i

Last Name

First Name

Email Address

Discloser ID

Show archived results

Discloser List Name	Title	Last Name	First Name	Email	Discloser ID	Request Date	Status

List Name


[Create New List](#)

Name	Count	Requests Sent	Disclosures Submitted	Contact Name	Creation Date ▲	Real-Time Notification <input type="checkbox"/>	Summary Notification <input type="checkbox"/>	
Review title	2	1	1	Maria Gearardi	6/17/21	<input type="checkbox"/>	<input type="checkbox"/>	- Select Action - ▼
cochranetrain-EM_COCHRANETRAIN_341	2	2	0	Anna Walton	6/14/21	<input type="checkbox"/>	<input type="checkbox"/>	- Select Action - ▼

# Exporting author DoI


- Select the relevant authors using the tick boxes on the left-hand side of the screen
- Click on 'Export Disclosures' button


Manage Disclosers - Review title

 Automatic Email Distribution is ON for Initial Requests. [Modify Settings](#)

Last Name  x Request Date  Status  Submission Date  Icons  [Add](#) [Import](#)

**Disclosers 2**

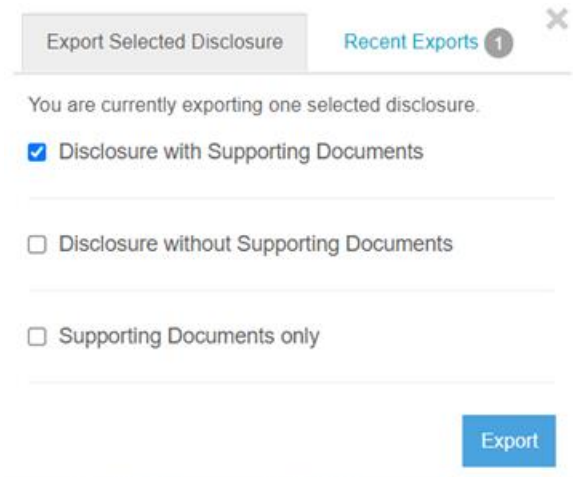
[Send Email](#) [Export Disclosures](#) 

<input checked="" type="checkbox"/>	Title	Last Name	First Name	Email	ID	Request Date	Status	Icons	
<input checked="" type="checkbox"/>	Review title	Gerardi	Maria	mgerardi@cochrane.org	mgerardi@cochrane.org	6/17/21	Submitted 6/17/21		- Select Action -
<input checked="" type="checkbox"/>		Gonthier	Ursula	ugonthier@cochrane.org	ugonthier@cochrane.org		Not Started		- Select Action -

Show archived disclosers

[Discloser Interests Report](#) [Download Disclosers](#)

Select 'Disclosure with Supporting Documents' and click 'Export'. Download the report



Export Selected Disclosure Recent Exports 1 ✕

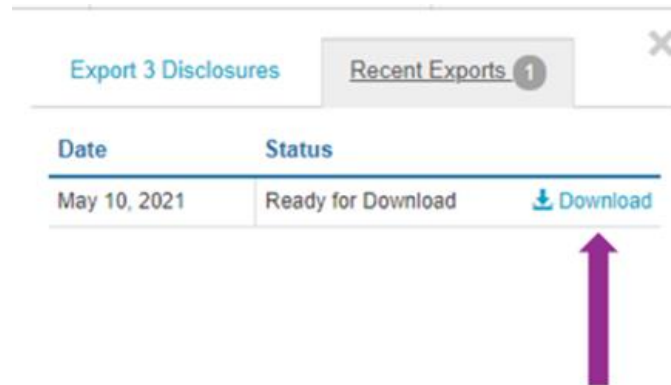
You are currently exporting one selected disclosure.

Disclosure with Supporting Documents

Disclosure without Supporting Documents

Supporting Documents only

[Export](#)



Export 3 Disclosures Recent Exports 1 ✕

Date	Status	
May 10, 2021	Ready for Download	<a href="#">Download</a>

- You can add these as attachments to the File Inventory on the relevant review in Editorial Manager
- When the update is submitted to Editorial Manager the authors will automatically be requested to submit their DoI, which will be visible in Editorial Manager directly



# Resources and support



## Support and resources

- Guidance for Managing Editors – Col portal
  - <https://training.cochrane.org/online-learning/policies/coi-policy/guidance-mes-doi-forms-convey#Section%205>
- Submitting a DoI form: Instructions for authors – Col portal
  - <https://training.cochrane.org/online-learning/policies/coi-policy/doi-form-authors-convey>
- Queries about guidance/Convey/EM – Support Team
  - [support@cochrane.org](mailto:support@cochrane.org)
- Queries about author Col/policy – Research Integrity Team
  - Referral form - <https://training.cochrane.org/online-learning/editorial-policies/coi-policy/referrals-conflict-interest-panel>
  - [colarbiter@cochrane.org](mailto:colarbiter@cochrane.org)



**Thank you**  
**Questions?**

**Trusted evidence.**  
**Informed decisions.**  
**Better health.**

