Kicking off the next steps in partnership:

partnerships@plos.org

https://plos.org/resources/for-institutions/institutional-account-participants/
Agenda

- Partnerships team and key contacts/emails
- Ensuring author eligibility to participate in the PLOS agreement
- Submission instructions for authors
- Monthly Reports
- Communication to authors
- Librarian Welcome Pack
Meet the team
PLOS Partnerships Team: partnerships@plos.org

Sara Rouhi
Director, Strategic Partnerships,
PLOS
srouhi@plos.org
New agreements, changing agreements, exploring new models, exploring new forms of partnership

Kelsey McMahon
Customer Care Coordinator,
PLOS
partnerships@plos.org
Invoices, billing, reports, contact information, CCC RightsLink, general inquiries
Setting up your account and author eligibility
Implementation is set based by title/billing system

PLOS Internal Billing system via Editorial Manager

RightsLink Platform

Aiming to identify unified billing solution in 2023 for implementation by 2024.
At submission, author-provided metadata indicates if the accepted manuscript is eligible

Submissions instructions for Editorial Manager (9 Titles)

1. Author profile should use institutional email
2. Author profile should select Ringgold ID
3. Once submitting, at payment step, authors should choose “My institution will pay all or part of my fee.”
4. At payment step, authors should choose their institution from the drop down menu.

Detailed instructions on next slide and later in this presentation.
Detailed author instructions for Flat Fee and Global Equity titles

Questions about author instructions or billing? authorbilling@plos.org

Author Instructions

PLOS ONE, PLOS Computational Biology, PLOS Pathogens, PLOS Neglected Tropical Diseases, PLOS Genetics, PLOS Digital Health (NEW!), PLOS Climate (NEW!), PLOS Water (NEW!), PLOS Global Public Health (NEW!)

EXCLUDES:
- PLOS Medicine
- PLOS Biology
- PLOS Sustainability and Transformation (NEW!)
How does PLOS verify author eligibility?

1. Author selection of institution in Publication Fees step
2. Author self-affiliation in their Editorial Manager profile (Ideally they choose a Ringgold PID)
3. PLOS derived fuzzy matching for institution names
4. Monthly accepted manuscripts reports sent to institutions.
How does your institution verify eligibility?

Institutions will receive a monthly accepted manuscripts (MAM) report showing the following for every paper accepted in the previous month:
- author metadata
- article metadata
- DOI
- FundRef ID (open text box)

Institutions have 14 days to approve/deny the papers listed in the report.

Contact institutionalbilling@plos.org to accept/deny papers attributed to the agreement and copy partnerships@plos.org.
You can review author eligibility monthly via the Monthly Accepted Manuscript (MAM) report

If nothing is accepted in the last month, MAM will be empty

<table>
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<tr>
<th>Document</th>
<th>Name</th>
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Metadata fields included: *internal PLOS fields*
- Document Number (internally generated metadata from Editorial Manager)
- Document Name (internally generated metadata from Editorial Manager)
- Account (Customer name)
- Gross Amount (refers to APC)
- Discount (refers to some monthly pay-as-you-go customers)
- Paid by Institution (refers to some monthly pay-as-you-go customers)
- PLOS Paid By Author (refers to remaining amount author paid, per some monthly pay-as-you-go customers)
- Item (internally generated metadata from PLOS billing system)
- Author Details - (internally generated paper ID from Editorial Manager)

Metadata fields included: *externally facing metadata (except italics)*
- First Name
- Last Name
- Institution
- Organization/Department
- Billing Address
- Phone
- Email
- Manuscript Number
- Title
- ISSN
- DOI
- Product (refers to journal)
- Original Submission Date
- Final Decision Date
- Funding Disclosure

Monthly report FAQ here: https://docs.google.com/document/d/1yetbQWG4dKL4uP6DIPwv1Ba7fAqQ8K9LiQj4z4B_34/edit?usp=sharing

View a sample report here.
What happens if an author makes a mistake?

If authors do not follow instructions they may receive an invoice for an APC at acceptance. They or the library can:

1. Email institutionalbilling@plos.org
2. Email partnerships@plos.org

We will verify their eligibility, rescind the invoice and attribute the paper to the institutional agreement.

*This happens from time to time and is not a big deal and quickly handled.*
CAP journals: No action for authors until papers are accepted

Community Action Publishing titles piloting RightsLink platform:

- Still submit via Editorial Manager
- No action for authors
- Option to “view a quote” generated by RightsLink showing what is owed if they’re accepted

With highly selective titles the time to publication is usually longer and fewer papers are accepted.

Institutions may go several months before receiving notification of a published manuscript.
Detailed author instructions for Community Action Publishing titles (with billing via RightsLink)

RightsLink Platform

Authors with billing questions should email authorbilling@plos.org
PLOS Medicine, PLOS Biology & PLOS Sustainability and Transformation offer a “quote” view

ALL authors (regardless of CAP participation status) will have the same experience when submitting via Editorial Manager:

1. At submission they are given a summary of publication fees and the option to view a “quote” of their expected fees.
2. They take no action until the paper is accepted.
Should authors select “View Publication Fees” they will be redirected to a “Quote” from CCC that takes into account their agreement terms. The quote approximates their fees based on their agreement type and institutional affiliation.
When an author’s paper is accepted, the library receives a notification.

If you do not wish to accept/reject these papers in real time, you can set up “automatic approvals” via the RightsLink platform.

(See question #6 in RightsLink FAQ for libraries).
CAP journals: At acceptance, author prompts approval in RightsLink

If authors do not follow instructions they may receive an invoice for an APC at acceptance. They or the library can:

1. Email institutionalbilling@plos.org
2. Email partnerships@plos.org

We will verify their eligibility, rescind the invoice and attribute the paper to the institutional agreement.

*This happens from time to time and is not a big deal and quickly handled.*

You will also see accepted papers from RightsLink in the Monthly Accepted Manuscript report.
Step-by-step instructions for authors

(Demo: view in presentation mode)
Author eligibility is explained in submission guidelines for all journals...
Authors should visit our site to confirm which journals are covered by their agreement. This will update January 1.

BOOKMARK THIS LINK! https://plos.org/resources/for-institutions/institutional-account-participants/
To be eligible for APC-free publishing with PLOS you must

1. Log into Editorial Manager with your university email
2. Make sure your author profile is affiliated with your institution
3. Declare your affiliation at the payment step
4. Contact PLOS if you have questions

Check our website to ensure your institution participates:
https://plos.org/resources/for-institutions/institutional-account-participants/
1. Log into Editorial Manager

All submissions start in the PLOS submission platform, Editorial Manager. Login with your author login or your ORCID.
Each author has an account profile: “Update my information”
Scroll to “Personal information” and update:

1. Your email to your university email
2. Link your ORCID to your account
Scroll to “Institution Related Information”
1. Find your institution/department in the drop down
2. If you type an institution not in the dropdown, you’ll be asked if you want to proceed. *Go back and choose an ID from the dropdown.*
3. *Choosing an institution from the drop down critical to verifying your eligibility.*
Begin your submission: Save and continue later any time...
Once you begin your submission, you can move around using the top level navigation; saving your work as you go.
Declare your affiliation during the submission at the payment step

Payment is covered in the “Additional information” section
Within the Additional Information navigation, declare your affiliation during the submission at the payment step.

Scroll down to “Publication Fee.”

Select “My institution will fully pay.”
Select your institution and continue with your submission. There will be no further prompts.

Declare your affiliation during the submission at the payment step. This step is critical to verifying your eligibility.

Institutional Account Program

The institutions below have agreed to be invoiced directly for some or all of the publication fees for some or all PLOS journals. For specifics of your institution, visit this list of participating institutions: https://www.plos.org/institutional-account-participants.

Institutions reserve the right to accept or reject who they fund per their internal funding policies. For fees which the institution declines to pay, PLOS will invoice the corresponding author.

Please select a response
- University of Herfortshire - C000UH
- Abertay University - C00DAU
- Amsterdam University of Applied Sciences - C01872
- Bangor University - IB0164
- Bayer AG - C00BAG
- Bielefeld University - C01013
- Bill & Melinda Gates Foundation - C01888
- Brunel University - C01035
- Cardiff Metropolitan University - C000CM
Questions?

Librarian Welcome Pack has several instruction guides for authors.
Reports
Two reports for partners - details here

1. COUNTER usage stats - LibLynx
2. Monthly accepted manuscripts - PLOS billing team

FAQ here: https://docs.google.com/document/d/1yetbOWG4dkU4uPj0DPwbT8a7fAgO8K9L/4J4J48L_34/edit?usp=sharing
You can review author eligibility monthly via the Monthly Accepted Manuscript (MAM) report.

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- DOI
- Product (refers to journal)
- Original Submission Date
- Final Decision Date
- Funding Disclosure

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This is a sample and has been anonymized.

Monthly report FAQ here: https://docs.google.com/document/d/1yetbOWG4dKk4uP1QDRwbl8a7faQbK9LgLQ4j4R_34/edit?usp=sharing

View a sample report [here](https://docs.google.com/document/d/1yetbOWG4dKk4uP1QDRwbl8a7faQbK9LgLQ4j4R_34/edit?usp=sharing).
PLOS also partners with OA Switchboard


Currently we only provide the P1 reports but are hoping to expand our partnership.
Outreach and comms to your authors
1. PLOS will contact all authors who have ever published with us from your org.

2. We have dedicated materials for library use.

3. We have dedicated author-facing materials.

4. We need your logo if you’re able to share! Please email it to partnerships@plos.org
Librarian Welcome Pack/Promotional Toolkit

- Materials to promote agreement to your authors available Feb 1
  - social banner images (examples on previous slide)
  - example social media wording for Twitter, Facebook & LinkedIn

- Website and Editorial Manager will not update until Feb 1.
  - Authors already in pipeline and accepted on or after Feb 1 will be captured manually and will receive NO invoice.
  - Authors who try to submit before Feb 1 will not see their institution on the website or in the Editorial Manager payment section.
Next steps

1. Review your approval/notification settings in RightsLink
2. Look for your first monthly accepted Manuscript report in mid-March
3. Bookmark our institutional partners page: https://plos.org/resources/for-institutions/institutional-account-participants/
4. Save important email addresses: partnerships@plos.org
5. Contact the Partnerships team with questions!