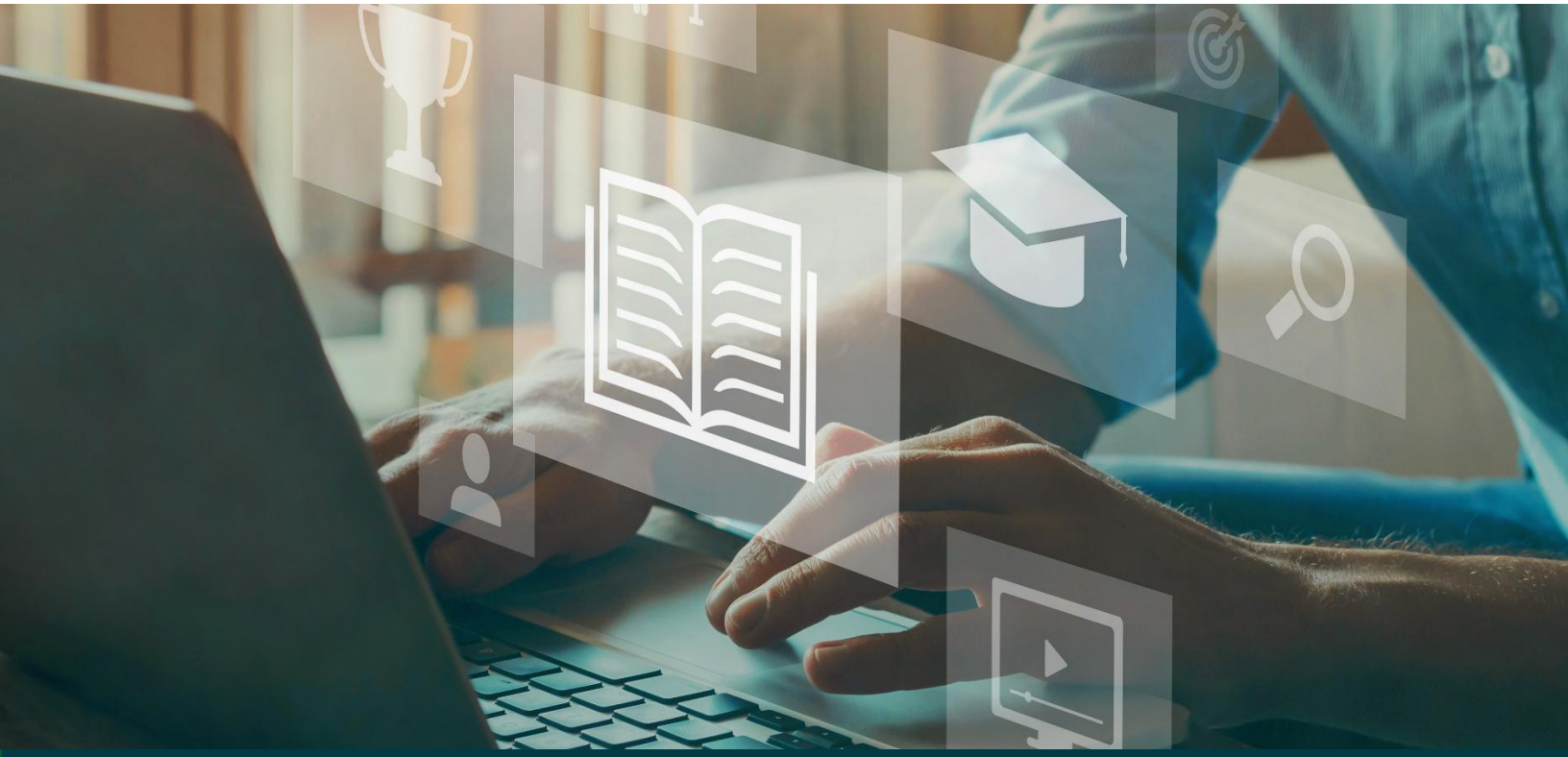
WILEY Research Exchange



Research Exchange Review

User Guide

Version 28.0

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Introduction

About the Review Module

The Review module is Research Exchange's dedicated environment to manage the Peer Review Process. The module supports key steps in the process of evaluating and reviewing manuscripts by bringing editors, reviewers, and editorial assistants together in a single platform.

This guide contains step-by-step instructions for navigating the Research Exchange Review module. It will address the following key topics:

- **The Review module** – how to access and use the Research Exchange Review module to manage assigned manuscripts
- **Assigning and Inviting Editors and Reviewers** – how to assign and invite editors and reviewers to handle the peer review process for new and revised manuscripts
- **Making editorial recommendations and decisions** – how to make decisions on manuscripts at each stage of the peer review process
- **Accessing Support** – how to find help and supporting documentation

Editorial Models & Workflows

Please be aware that Research Exchange Review can accommodate multiple standard editorial workflows and models. For this reason, some of the functions described here may not be relevant to every journal. For additional information on each workflow, please see the Editorial Models & Workflows guidance.

Key Manuscript Stages

Research Exchange is a harmonized submission, screening, and peer review platform. The manuscript moves through four key stages in the platform on its journey to publication. This document focuses on **stage three.**

Stage One	Submission 	The process starts when an author submits the manuscript using **Research Exchange Submission.**
Stage Two	Screening 	The manuscript automatically enters Research Exchange Screening. Initial **Submission Checks** are carried out**.** These checks ensure the manuscript meets the journal's standards for scope, quality, and integrity. Revisions are also screened before returning to peer review.
Stage Three	Peer Review 	If the article type requires peer review, the manuscript automatically enters Research Exchange Review. At this point, the workflow can vary depending on the journal's editorial model. Article types that do not require peer review will move straight to Quality Checks. This, or other configurations, can be requested through a Wiley representative, who will raise a Journal Operational Change Tracker (JOCT) ticket.
Stage Four	Quality Checks 	When the review process is complete, the manuscript passes back into Research Exchange Screening for post-acceptance **Quality Checks** to prepare the manuscript for production. These Quality Checks involve validating the peer review process and requesting any missing information.

When Quality Checks are complete, the manuscript is ready to move into the **Production** workflow.

Steps in the Peer Review Process

Step	Models/Workflows	Definition	Standard Role Mapping
Pre-Peer Review Step 1	2-tier, 3-tier	Review the manuscript and decide if it is suitable to move to the next step in the process, or if it should be rejected, transferred, or revised.	Triage Editor
Pre-Peer Review Step 2	3-tier	Review the manuscript and decide if it is suitable to move to the next step in the process, or if it should be rejected, transferred, or revised.	Triage Editor
Peer Review	1-tier, 2-tier, 3-tier	Invite peer reviewers to review the manuscript, and make decisions or recommendations based on the editorial model configuration.	Handling Editor
Post-Peer Review Step 1	2-tier, 3-tier	Review the manuscript after peer review and make decisions or recommendations based on the editorial model configuration.	Triage Editor
Post-Peer Review Step 2	3-tier	Review the manuscript after peer review and make decisions or recommendations based on the editorial model configuration.	Triage Editor

User Roles and Permissions

Research Exchange Review has multiple system roles to support a variety of editorial roles. Users can hold more than one system role on a Journal Editorial Board, but only one per manuscript.

All roles will be configured before journal migration. If you need to make any adjustments, please contact a Wiley representative for assistance. Click the link to view the system roles available and the tasks they can carry out in the platform, to help with editorial role mapping: Research Exchange Roles and Responsibilities

Roles

With access to Review, users will be able to:

- View submissions that require editorial action, ensuring timely progression through the peer review workflow
- Assign or invite appropriate Editors to manage the review process
- Identify and invite qualified reviewers to evaluate submissions, supporting a rigorous and credible peer review process
- Assess reviewer feedback and manuscript quality to determine suitability for publication at key decision and recommendation points

Research Exchange supports multiple editorial roles within the platform. Throughout this guide, **role tags** indicate which users can complete each task. Refer to the key below to quickly identify which system role tag relates to the equivalent editorial role.

Research Exchange System Role	Equivalent Editorial Role	Access to Review Module
Editorial Assistant	Editorial Assistant Managing Editor Journal Administrator	Yes
Journal Manager	Wiley Peer Review Teams Editorial Assistant Journal Administrator Managing Editor	Yes
Triage Editor (Associate Editor roles in Research Exchange follow Triage Editor instructions)	Editor-in-Chief or equivalent	Yes
Academic Editor	Associate Editor or equivalent	Yes

Lead Guest Editor	Editor-in-Chief or equivalent on Special Issues	Yes
Guest Editor	Associate Editor or equivalent on Special Issues	Yes

Role Permissions

Throughout this guide, **role tags** indicate which users can complete each task. Refer to the key below to quickly identify the tasks relevant to each role.

Key Task	Applicable to Role
Access manuscripts from the dashboard	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers
Make an initial recommendation	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*
Make an initial decision	Triage Editors, Academic Editors, Lead Guest Editors, Editorial Assistants*, Journal Managers*
Assign a Handling Editor	Triage Editors, Lead Guest Editors, Editorial Assistants*, Journal Managers*
Invite Peer Reviewers	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*
Make a final decision	Triage Editors, Academic Editors, Lead Guest Editors, Editorial Assistants, Journal Managers
Make a final recommendation	Academic Editors, Guest Editors, Editorial Assistants, Journal Managers
Handle revised manuscripts	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*

Important Note: Acting on Behalf of an Editor

In the Review module, Editors will manage certain tasks. Users with an **Editorial Assistant** or **Journal Manager** system role can carry out these tasks on behalf of editors from their dashboard.

Getting Started in the Review Module

Logging In or Creating an Account

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Reviewers, Editorial Assistants, Journal Managers

When Submission or Revision Checks are complete, a manuscript will automatically move into the Review module.

To access the Review module, follow and bookmark this link: review.wiley.com.

To log in or create an account, follow the step-by-step instructions in the QuickStart Guide. If there are problems logging in:

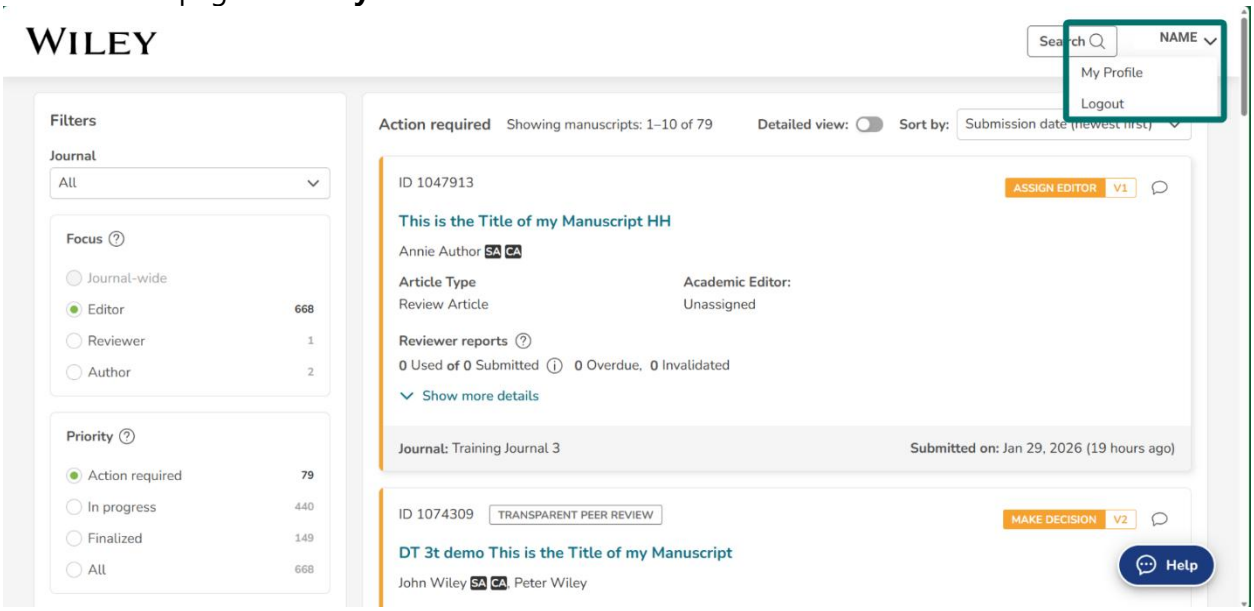
- Ensure the browser is up to date. Research Exchange Review supports Chrome, Edge, Safari, and Firefox. Other browsers, including Internet Explorer, are not supported.
- Clear the cache and remove cookies from the browser.
- Open a new browser window in private or incognito mode.
- Contact the support team at reviewhelp@wiley.com.

Managing your Research Exchange Account

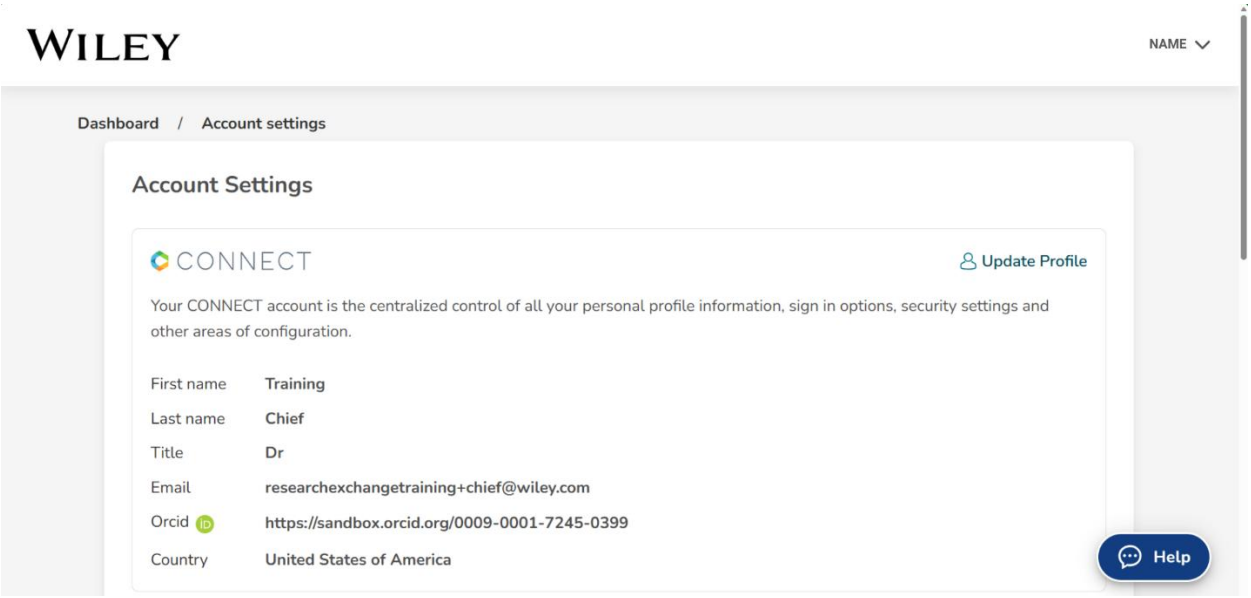
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Reviewers, Editorial Assistants, Journal Managers

When a user logs in to Research Exchange Review, they will arrive at the **Dashboard**. From the dashboard, the user can access and edit their profile information by following these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.



2. The **Account Settings** page is displayed. Within the account settings, your CONNECT profile will be embedded.



Updating your Email Notification Settings

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Reviewers

Editors can manage their email notifications directly within their Research Exchange Review Account. This allows editors to reduce high volumes of system-generated emails by turning optional notifications on or off, while ensuring essential workflow notifications remain enabled. Editorial Assistants and Journal Managers can see these notifications, though they are not relevant to their role. Adjusting preferences does not affect their email settings or those of journal editors. Editors must set their own email notification preferences.

Email notification types are displayed and organised into the following categories:

- Invitations and Assignments
- Responses to Invitations
- Review Process
- Make Decision or Recommendation
- Task Notifications
- Confirmation Emails

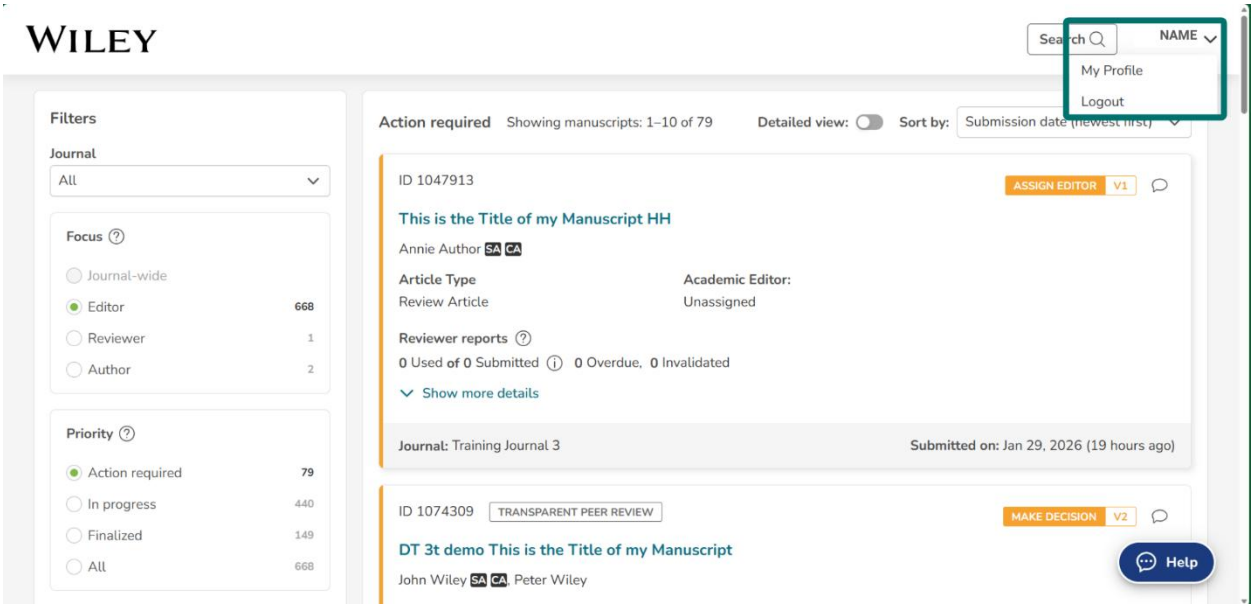
Each category includes a combination of essential and optional email notifications. All notifications are enabled by default.

Essential email notifications inform editors of actions they must take or updates that directly affect the progress of a manuscript. **Essential notifications remain always on and cannot be disabled.** This ensures that editors do not miss critical workflow events or actions, helping to prevent delays and keep manuscript processing moving efficiently.

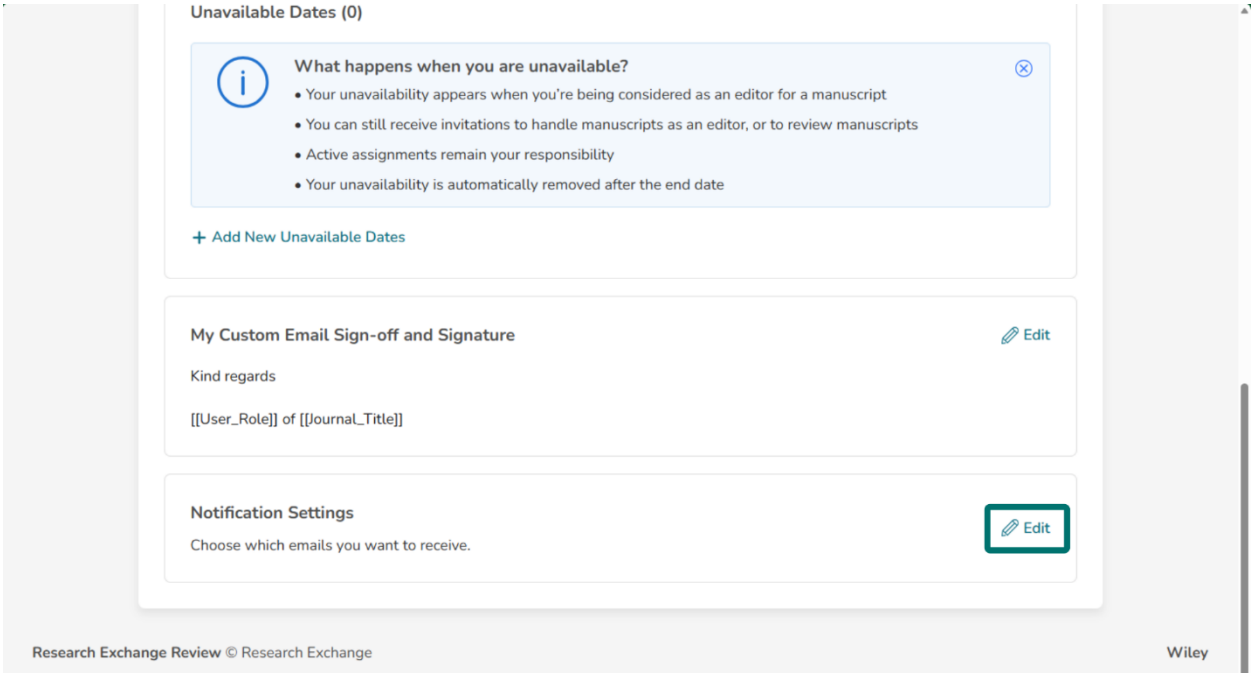
Optional email notifications provide updates, confirmations, and general information about workflow activity. These notifications do not require immediate action and can be turned on or off based on individual preference.

To manage notification settings, follow these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.

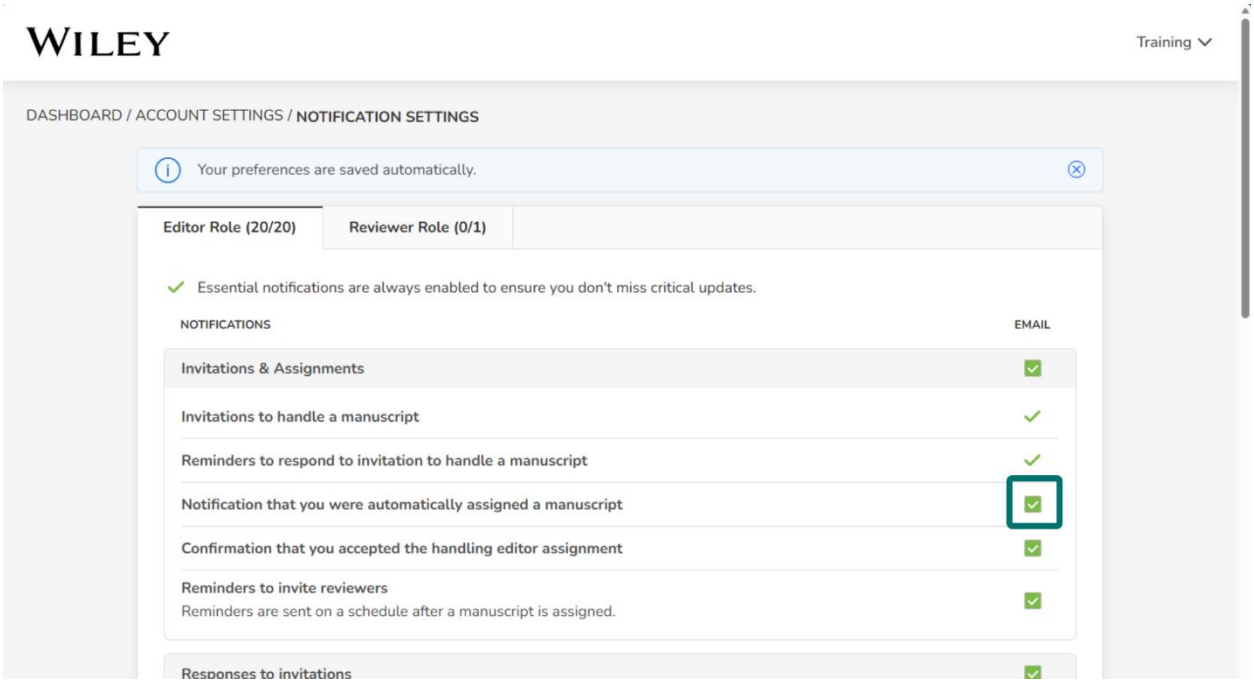


2. From the Account Settings page, click the Edit button next to the Notification Settings heading.

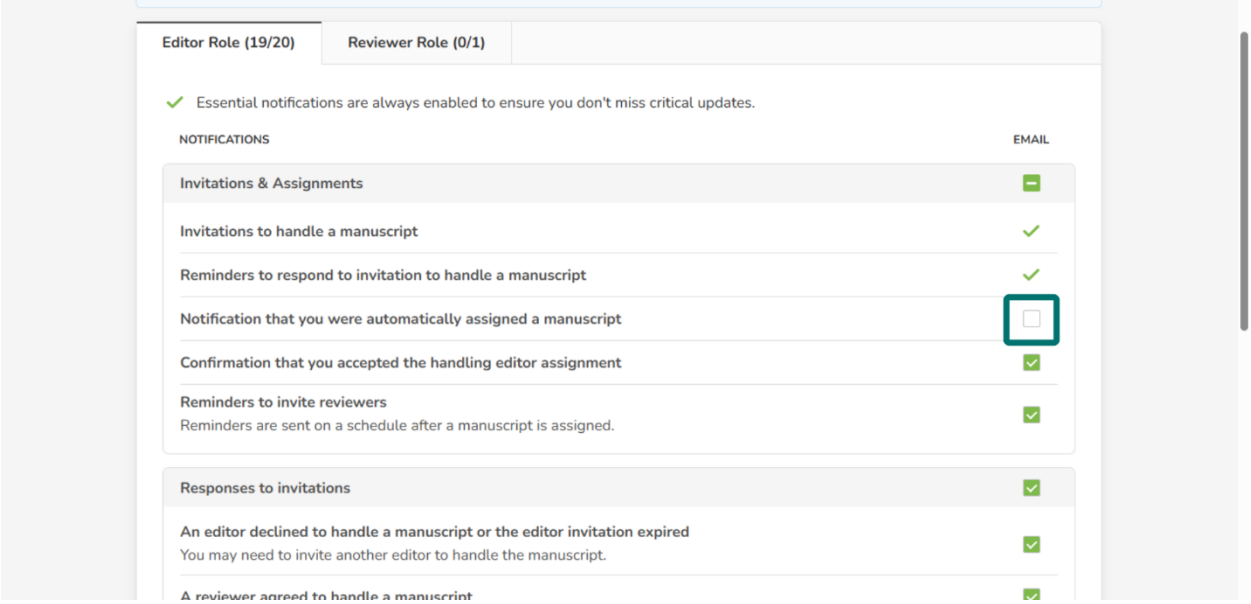


3. All emails will initially be enabled. Click the green checkbox next to the email to turn off that specific email. To turn off all emails in a category, use the green checkbox next to the category title. Your changes are saved immediately, and the number on the Editor tab updates to show

how many notifications are still enabled.



4. To re-enable any emails, click the box again so that the tick appears.



Managing optional email notifications

All optional email notifications include a link in the email footer that directs editors to the Notification settings in their Research Exchange Review profile. This allows editors to quickly update their preferences as part of their day-to-day email activity.

List of Notification Settings Available

Category: Invitations & Assignments

Email Notification	Available Action
Invitations to handle a manuscript	None
Reminders to respond to invitation to handle a manuscript	None
Notification that you were automatically assigned a manuscript	Toggle on/off
Confirmation that you accepted the handling editor assignment	Toggle on/off
Reminders to invite reviewers	Toggle on/off

Category: Responses to Invitations

Email Notification	Available Action
An editor declined to handle a manuscript or the editor invitation expired	Toggle on/off
You may need to invite another editor to handle the manuscript.	Toggle on/off
A reviewer agreed to handle a manuscript	Toggle on/off

Category: Review Process

Email Notification	Available Action
A reviewer report has been submitted	Toggle on/off
A reviewer report is overdue	Toggle on/off

Category: Make decision or recommendation

Email Notification	Available Action
Manuscript is ready for decision or recommendation A manuscript you are handling has met your specified requirements for notification and/or the minimum journal requirements for making a decision or recommendation.	None
Reminders that a manuscript is ready for decision or recommendation	Toggle on/off

Category: Task notifications

Email Notification	Available Action
New comment tags	None
Authors have returned a revised version of a manuscript you handled	Toggle on/off
A 'reject' decision' has been rescinded on a manuscript you handled *A manuscript you handled has been re-opened, likely following an author's appeal. Action may be needed.*	Toggle on/off
A senior editor has returned your recommendation with comments	Toggle on/off

Category: Confirmation Emails

Email Notification	Available Action
Confirmation of final decision on a manuscript you handled *Confirmation of the decision to publish or reject.*	Toggle on/off
A manuscript assigned to you has been withdrawn	Toggle on/off
You have been removed from an editorial role on a manuscript	Toggle on/off
New comments and replies to manuscripts	Toggle on/off

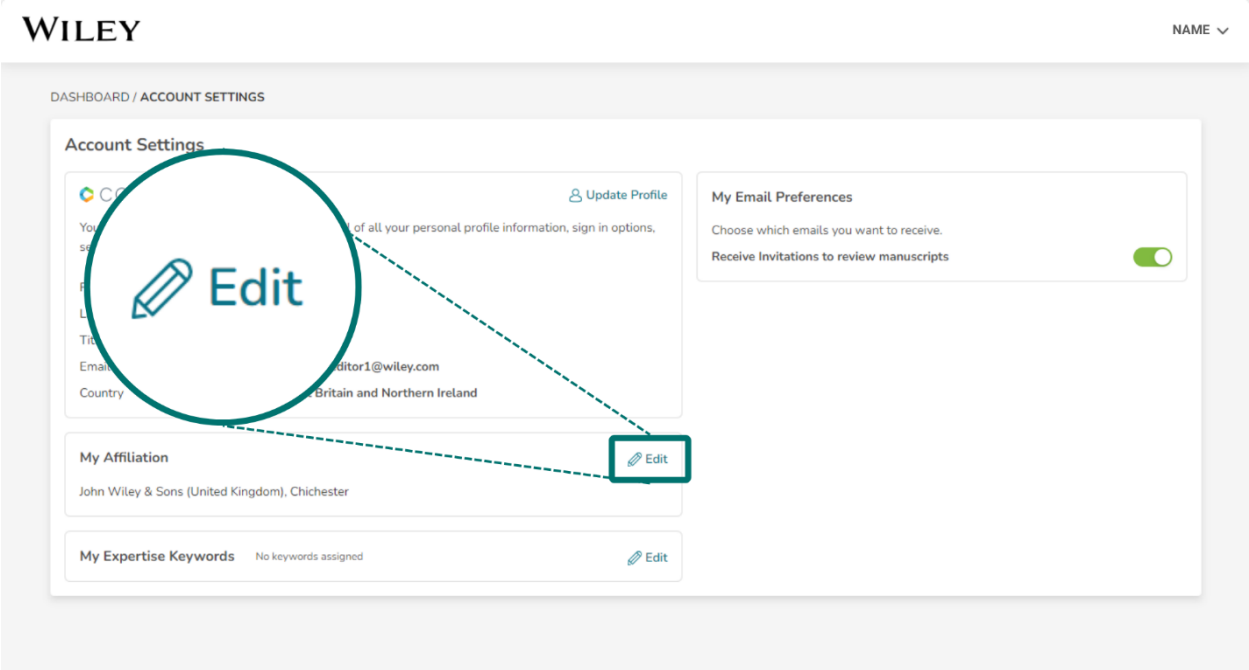
Updating your Affiliation Details

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

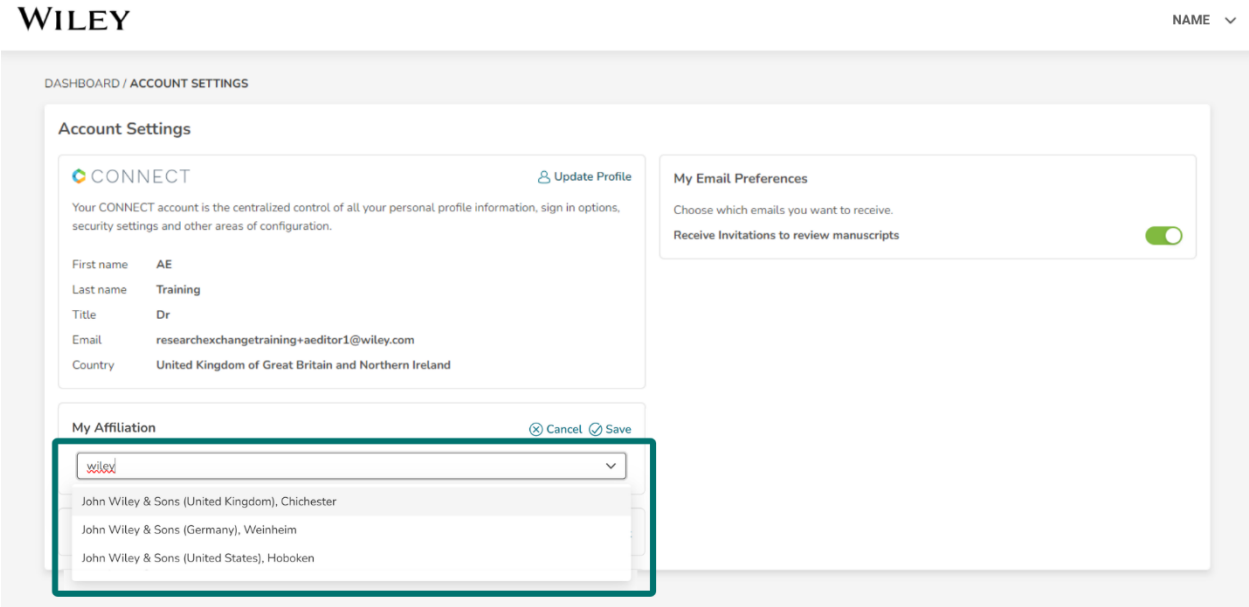
To view and edit affiliation details, follow these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.

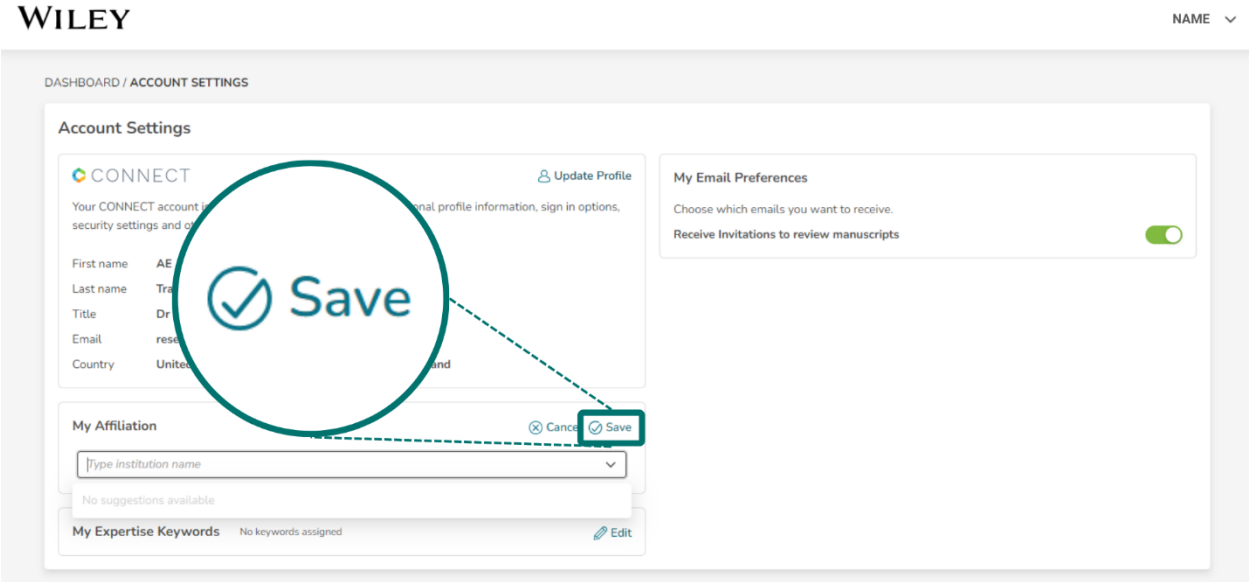
2. From the **Account Settings** page, the current affiliation is listed under the **My Affiliation** heading. To change affiliation, click the **Edit** link.



3. Type the name of the affiliation into the search box. Suggestions will appear below the text field. Select a suggested option from the list.



4. Click the **Save** button to change the affiliation.



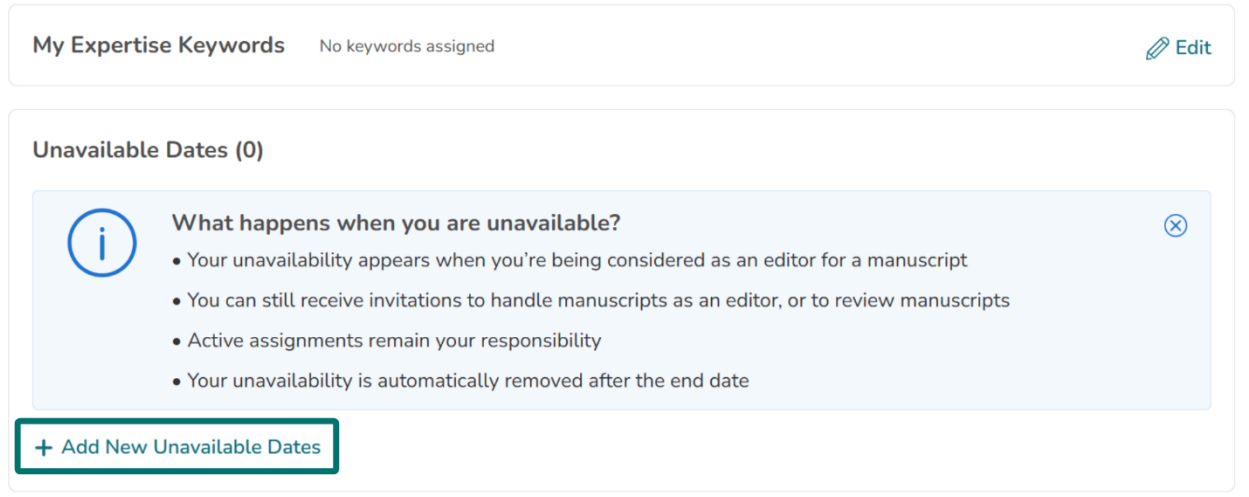
Recording Availability and Out-of-office Periods

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

Editors can note their availability and out-of-office dates to avoid assignments during absences. These dates are visible to other editors and admins on the journal, allowing for better assignment decisions.

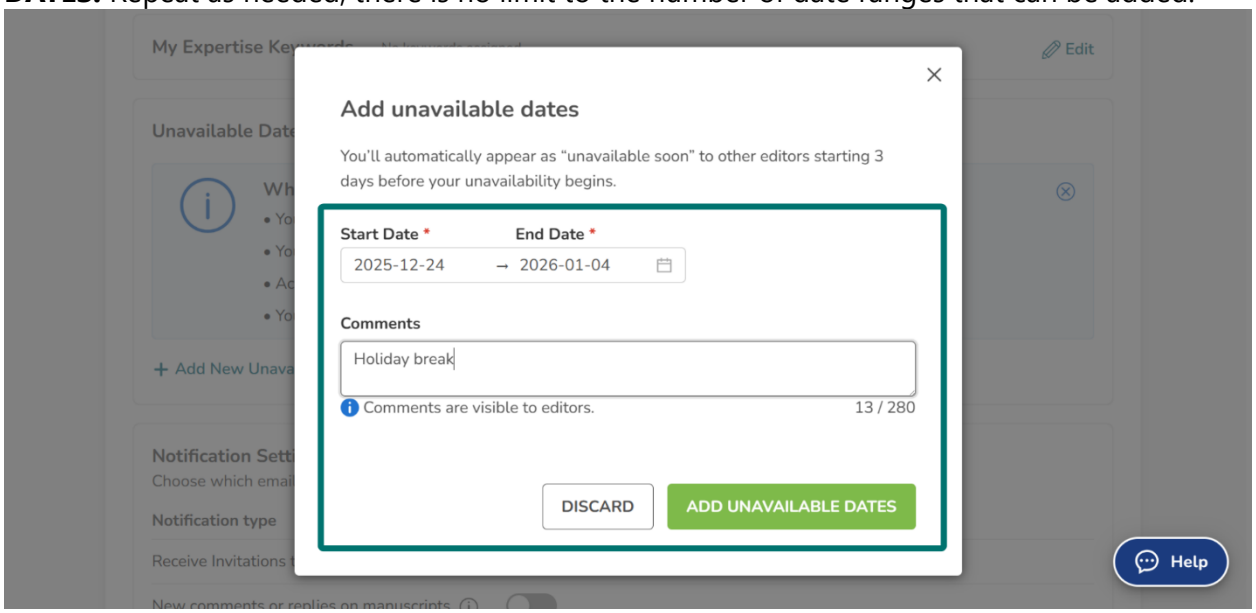
To update your profile, follow these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.
2. From the **Account Settings** page, click the **Add New Unavailable Dates button underneath the Unavailable Dates heading.**

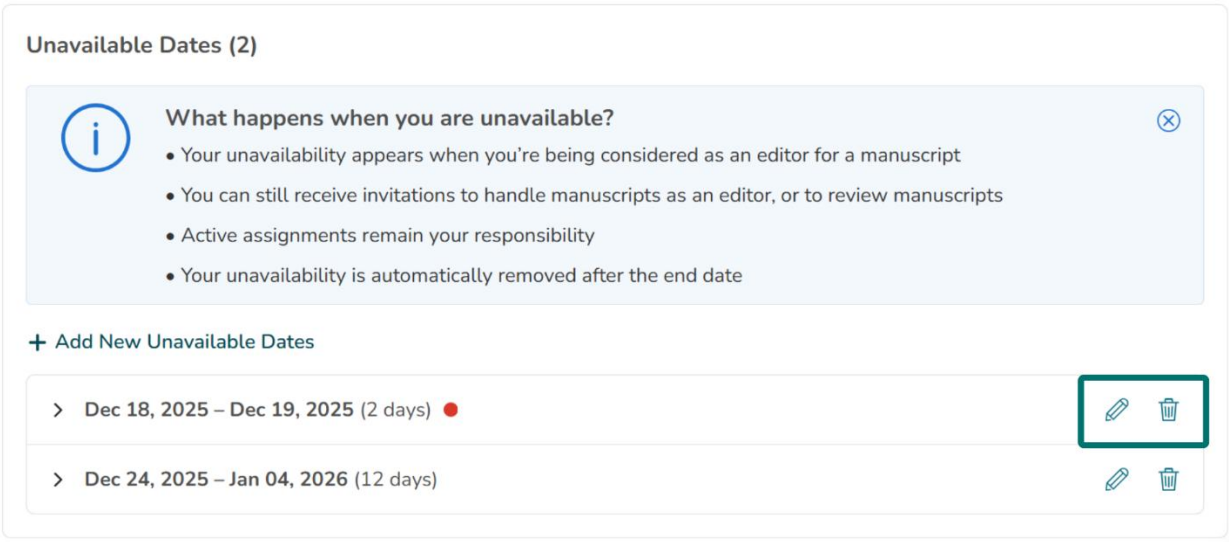


3. Type or use the calendar to enter the start and end dates (YYYY-MM-DD). Add any comments, if necessary; these will be visible to editors and admins. When ready, click **ADD UNAVAILABLE**

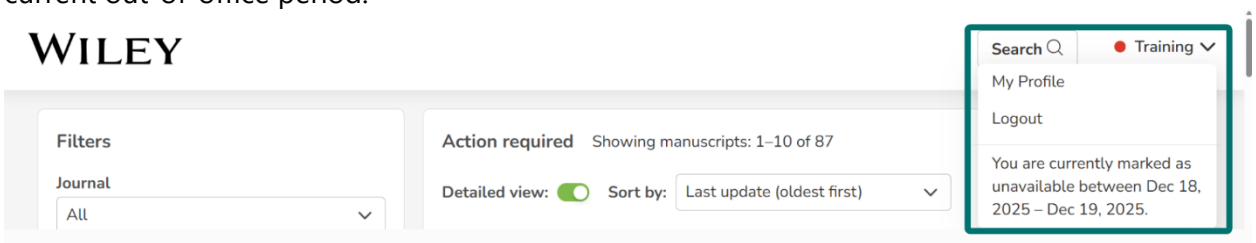
DATES. Repeat as needed; there is no limit to the number of date ranges that can be added.



4. The dates will be listed in this section. Dates with a red dot next to them indicate that the editor is not currently available. Dates can be edited by clicking the pencil icon or deleted by clicking the dustbin/trash icon.



5. During out-of-office dates, a red dot will appear next to your name in the Review module to indicate you are not available. Hovering over your name will display information about the current out-of-office period.



What happens when you are unavailable?

- You'll automatically appear as 'unavailable soon' to other editors starting 3 days before your unavailability begins.
- Your unavailability appears when you're being considered as an editor for a manuscript. You may still be assigned or invited if manually overridden.
- Automatic assignment or invitation will not occur.
- You can still receive invitations to handle manuscripts as an editor, or to review manuscripts.
- Active assignments will remain your responsibility.
- Your unavailability is automatically removed after the end date.

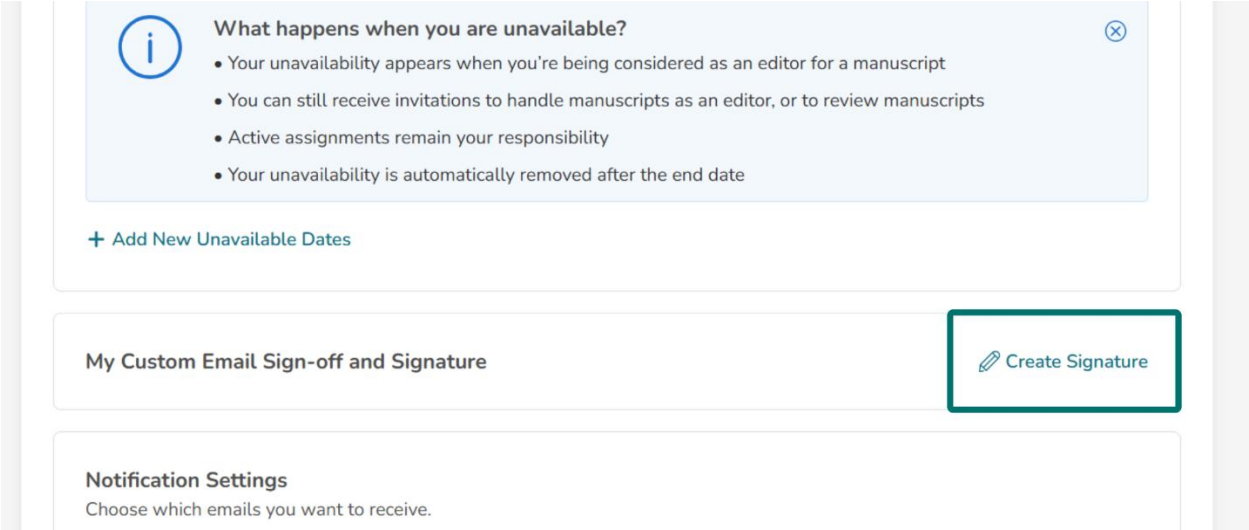
Customizing Email Signatures

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

Editors can customize their signature at their user profile level to give senders more flexibility and control over communicating with transparency about their identity, role on the manuscript, and affiliations.

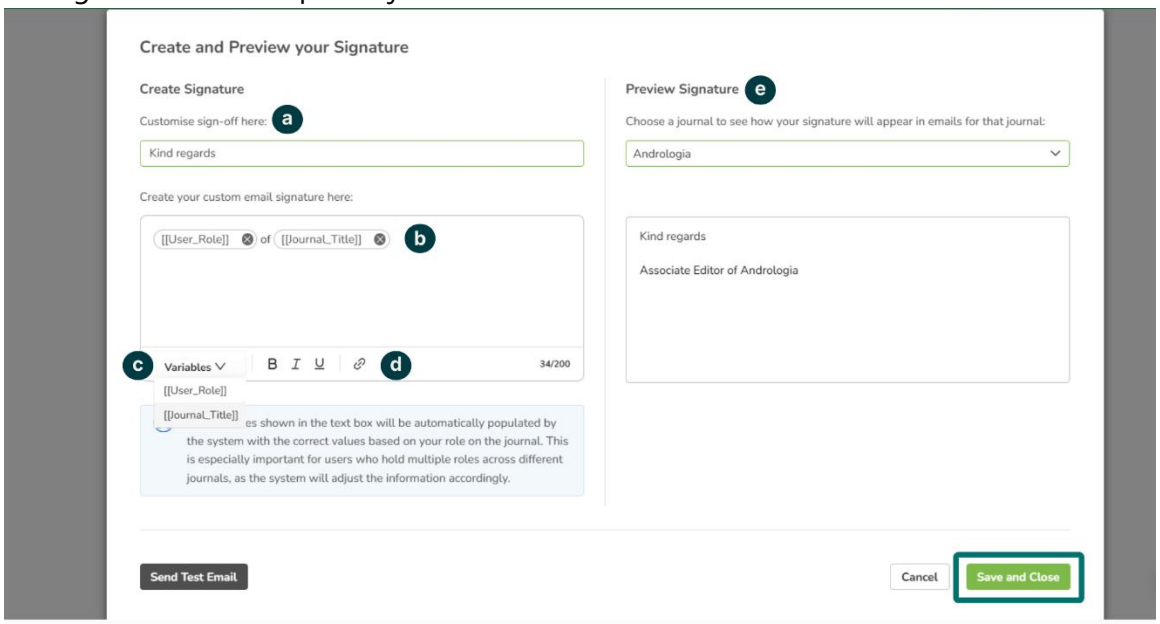
To customize an email signature, follow these steps;

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.
2. Scroll down to the **My Custom Email Sign-Off and Signature** section. Click **Create Signature**.

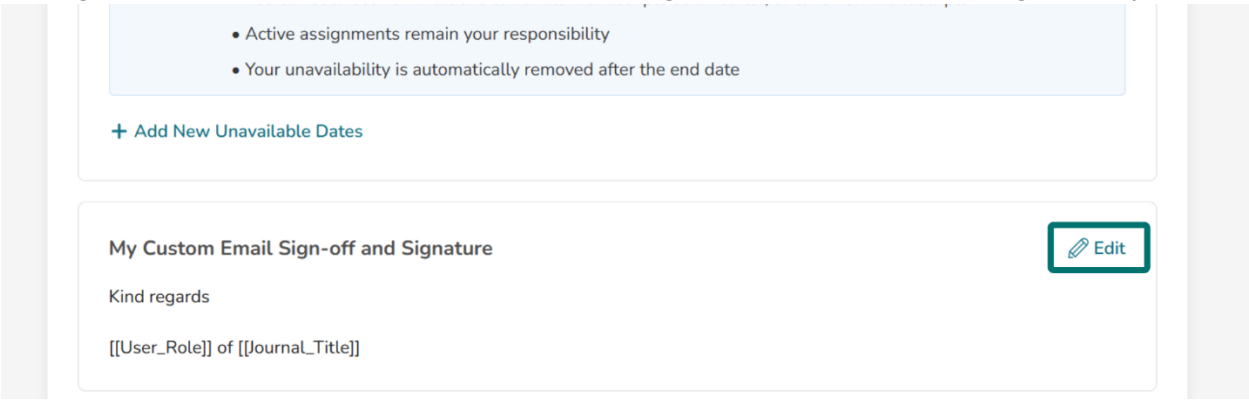


3. Create and preview your signature. Click **Save and Close** once complete.
    a. Customise the sign-off
    b. Add additional text to the signature by typing into the text box
    c. Add variables to the signature. A variable is a placeholder where the information will pull in dynamic content. For example, if an editor works on multiple journals, the journal title variable ensures that the email will reflect the correct journal the communication is in relation to.
    d. Text can be bold, italic, underlined, or turned into a link

e. The signature preview will be displayed on the right. Changing the 'Journal' will preview the signature for that specific journal



4. The signature is visible from the Account Details Page. Click **Edit** to make changes at any time.



Key Information about Email Signatures

- **The system uses the sender's custom signature automatically.** When an email is sent from the system, it will use the custom signature of the editor who is taking the action. *For example:*
  - A Handling Editor's signature is used when sending an *Invitation to Review*.
  - A Decision-making Editor's signature is used when sending a *Decision Letter*.
- **The "sender" is the person signing the email, not the email address it comes from.** Even though the email appears to come from the journal office address, the name and signature shown are for the editor who sent it.
- **Signatures don't automatically change when someone acts on an editor's behalf.** If a Journal Manager, Editorial Assistant, or Admin sends a decision for an editor, their details won't be added to the signature automatically. A "Sent on behalf of" note is being worked on. Until then, signatures can still be edited before sending, and anyone acting on behalf of an editor should manually add this note to the signature if needed.

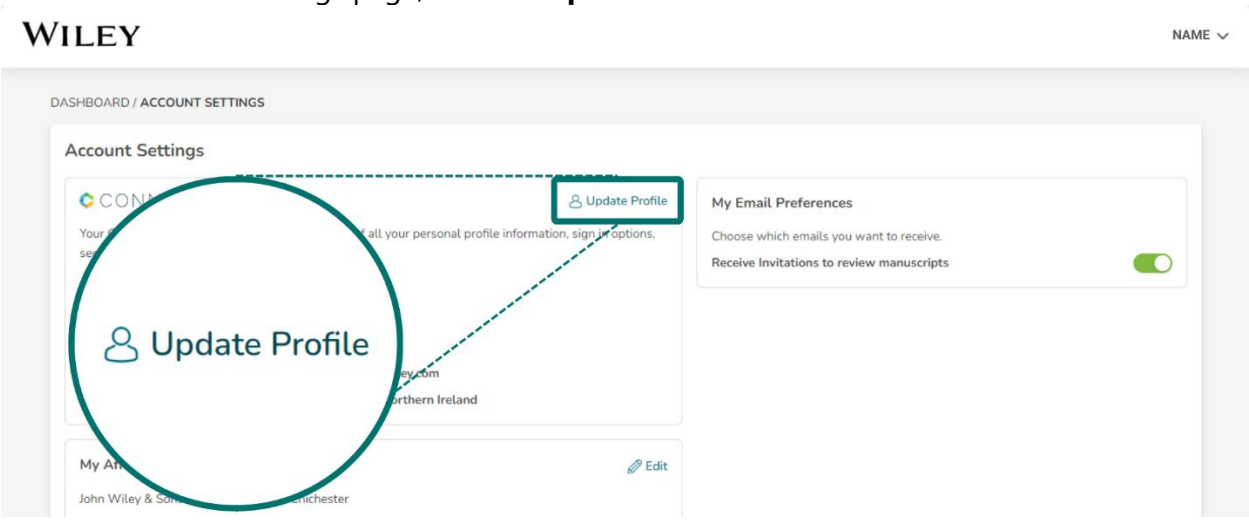
- **Custom signatures fully replace the default signature.** If a custom signature has been set up by an administrator, it will replace the entire default signature in the email template, including the sign-off.
- **Role titles come from the journal's editorial board.**
  The role shown in the signature (for example, Chief Editor or Handling Editor) matches the role the user holds on that journal.
- **There is a standard format.** The signature included in decision letters will always reflect the decision-making editor and follow this format. Where there is no customized signature saved to an editor's account, emails sent by a system user will consistently sign off in this format.
  Kind Regards,
  [[SENDER_TITLE]] [[SENDER_GIVENNAME]] [[SENDER_SURNAME]]
  [[JOURNAL_NAME]]

Updating your CONNECT Profile Details

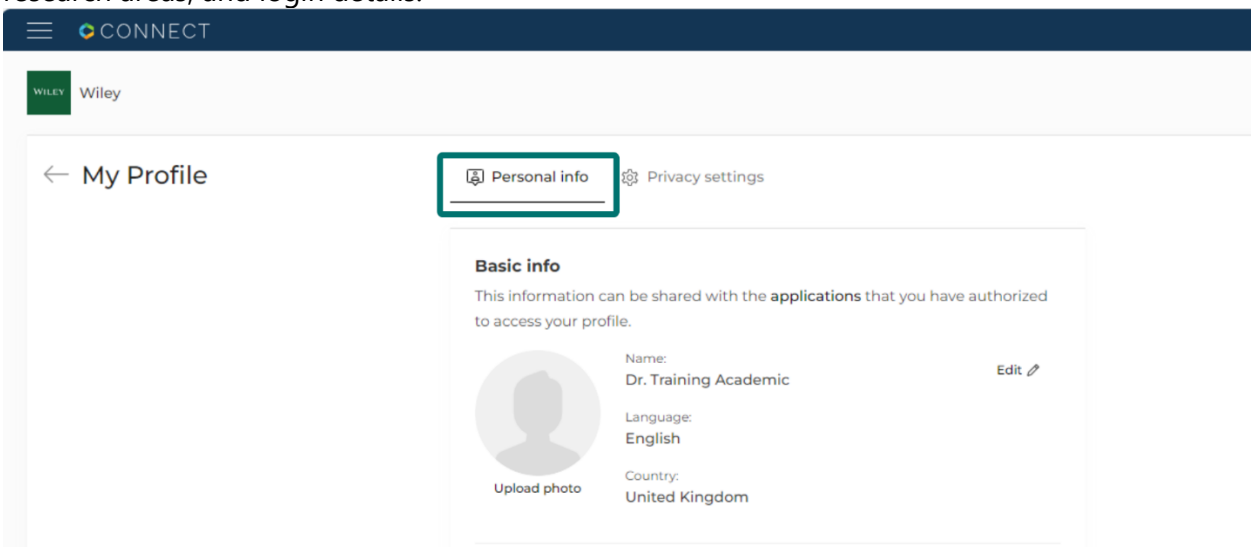
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

To view and edit the CONNECT profile details, follow these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. **Click My Profile**.
2. From the Account Settings page, click the **Update Profile** link.



3. Profile information will be displayed. Select the **Personal Info** tab to edit personal details, research areas, and login details.

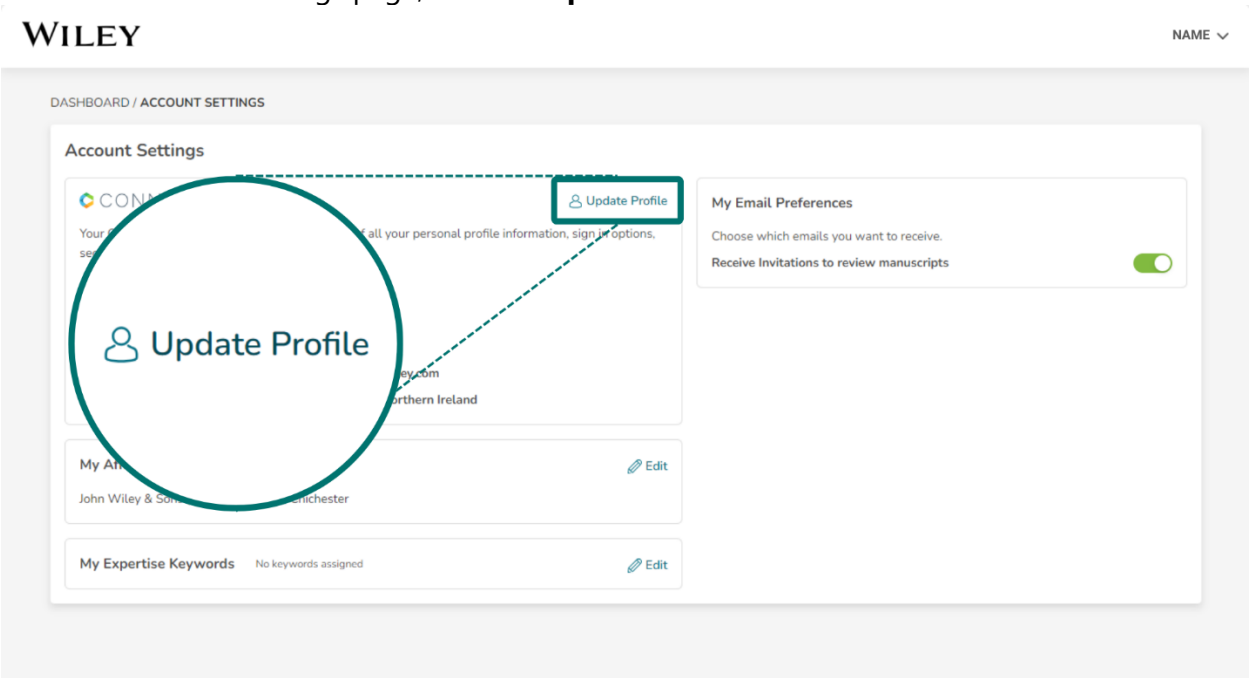


Updating your Email Addresses in your CONNECT Profile

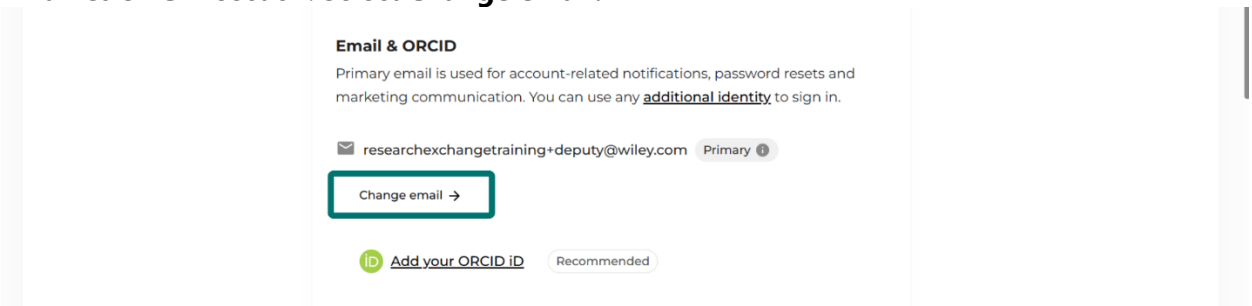
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

To view and edit an email address, follow these steps:

1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click My Profile.
2. From the Account Settings page, click the **Update Profile** link.



3. The profile information will be displayed. Select the **Personal Info tab** and navigate down to the **Email & ORCID** section. Select **Change email.**



4. The new email account must be added and verified before the email address is changed. This can be done by entering the new email address and receiving the verification code via email.
5. Once the new email has been verified using the verification code, that email will become the primary email address on the account.
6. To change the primary email address, these instructions should be followed. If an email account already associated with the system is used to verify, when the send code button is clicked, the system will recognize that the email is already associated with the account and the option to Make it primary will be offered. (Note: to be given the option to Make it primary, send code must be clicked.)

Updating your Expertise & Areas of Interest in your CONNECT Profile

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

To view and edit an email address, follow these steps:

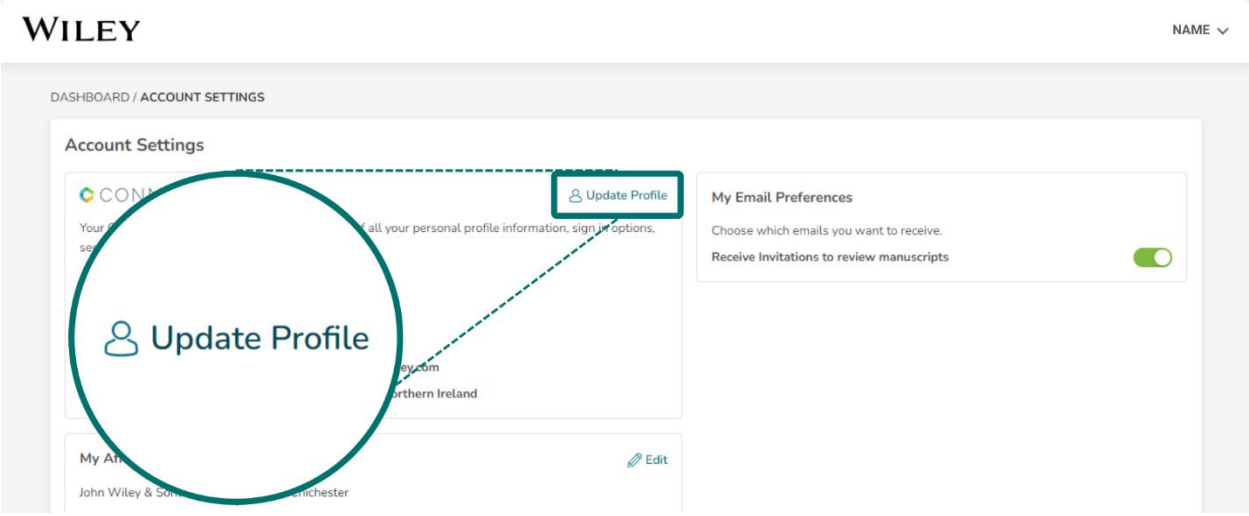
To add your areas of expertise to your CONNECT profile, follow these steps available on the Getting Started page of the Research Exchange Knowledge Hub.

Linking your ORCID ID to your CONNECT Profile

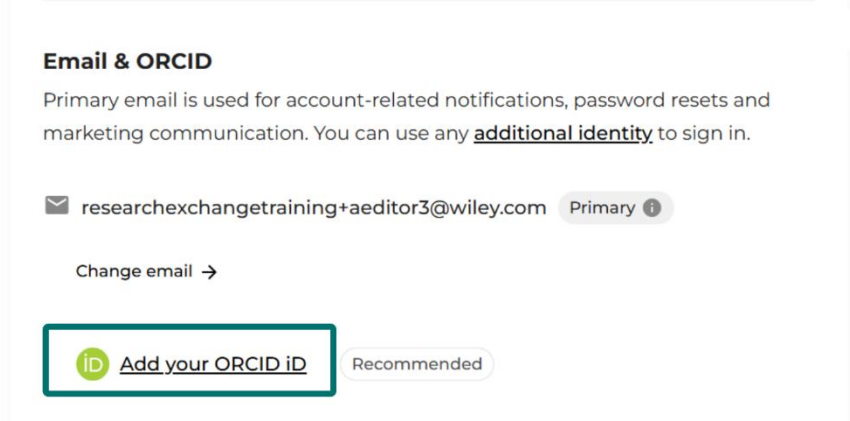
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

To add an ORCID iD to the profile, follow these steps:

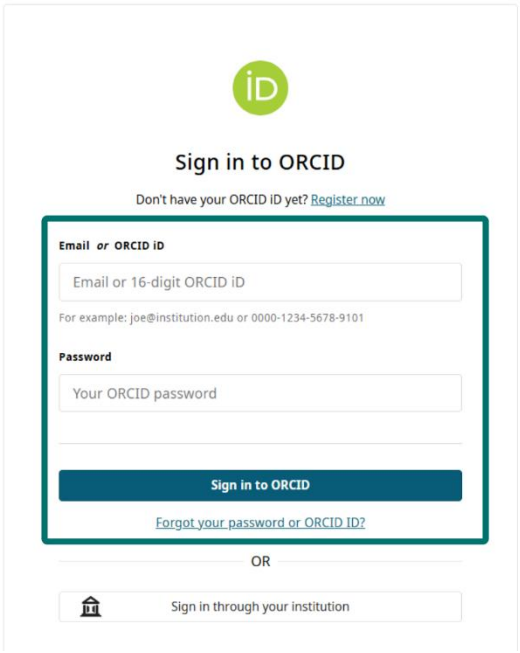
1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.
2. From the Account Settings page, click the **Update Profile** link.



3. The profile information will be displayed. Select the **Personal Info tab** and navigate down to the **Email & ORCID** section. Select **Add your ORCID iD.**



4. Sign in to the ORCID site with an email or ORCID iD and password. Then, follow the steps to link your profile.



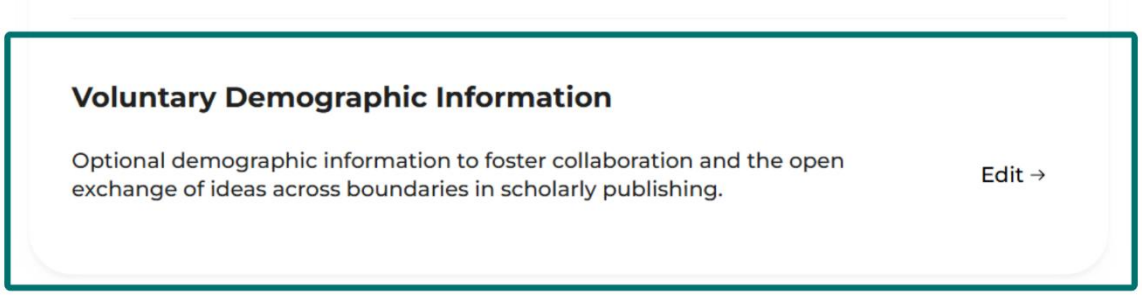
Recording Voluntary Demographic Information in CONNECT

Applicable to:	Authors

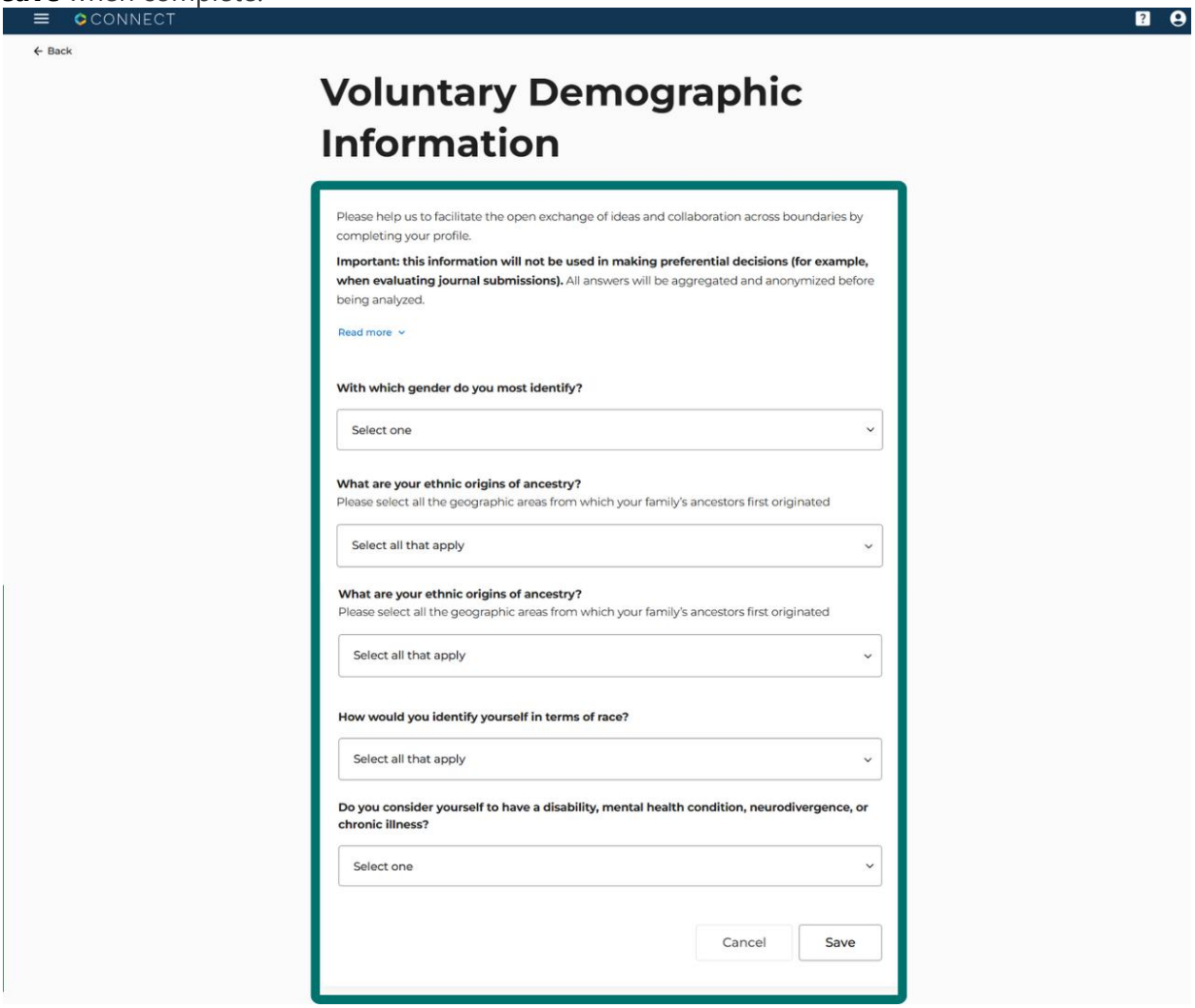
Users submitting manuscripts can choose to answer four demographic questions in their CONNECT account, following standards set by the Joint commitment for action on inclusion and diversity in publishing. Demographic data is kept private and linked only to profiles, not to manuscript submissions or journal decisions, ensuring responses are not shared with editors, reviewers, or staff.

To record answers to these questions, follow these steps:

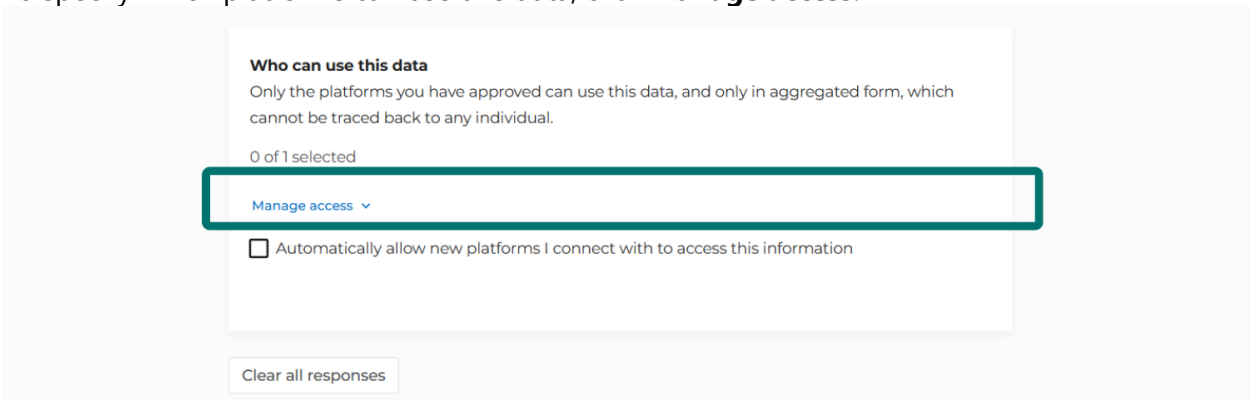
1. When logged into the Review module, select the down arrow next to your name in the top right corner of the page. Click **My Profile**.
2. From the Account Settings page, click the **Update Profile** link. Then click the Edit button underneath the Voluntary Demographic Information heading.



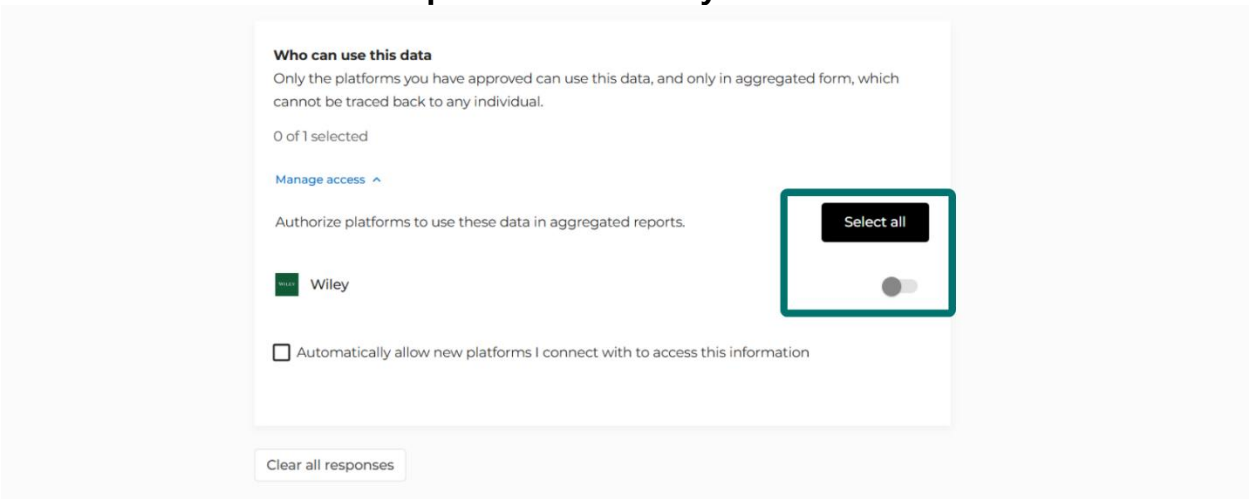
3. **Answer each question** or select **read more** for additional information regarding this data. Click **save** when complete.



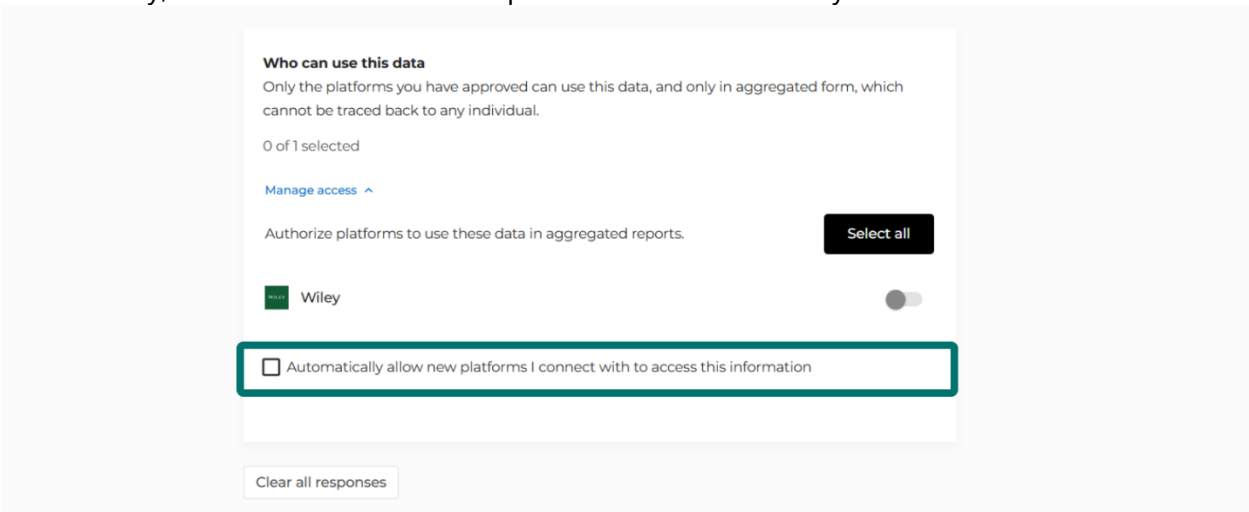
4. To specify which platforms can use this data, click **manage access**.



5. Choose **select all** or **select each platform individually**.



6. Alternatively, tick the box to allow new platforms to automatically access this information.



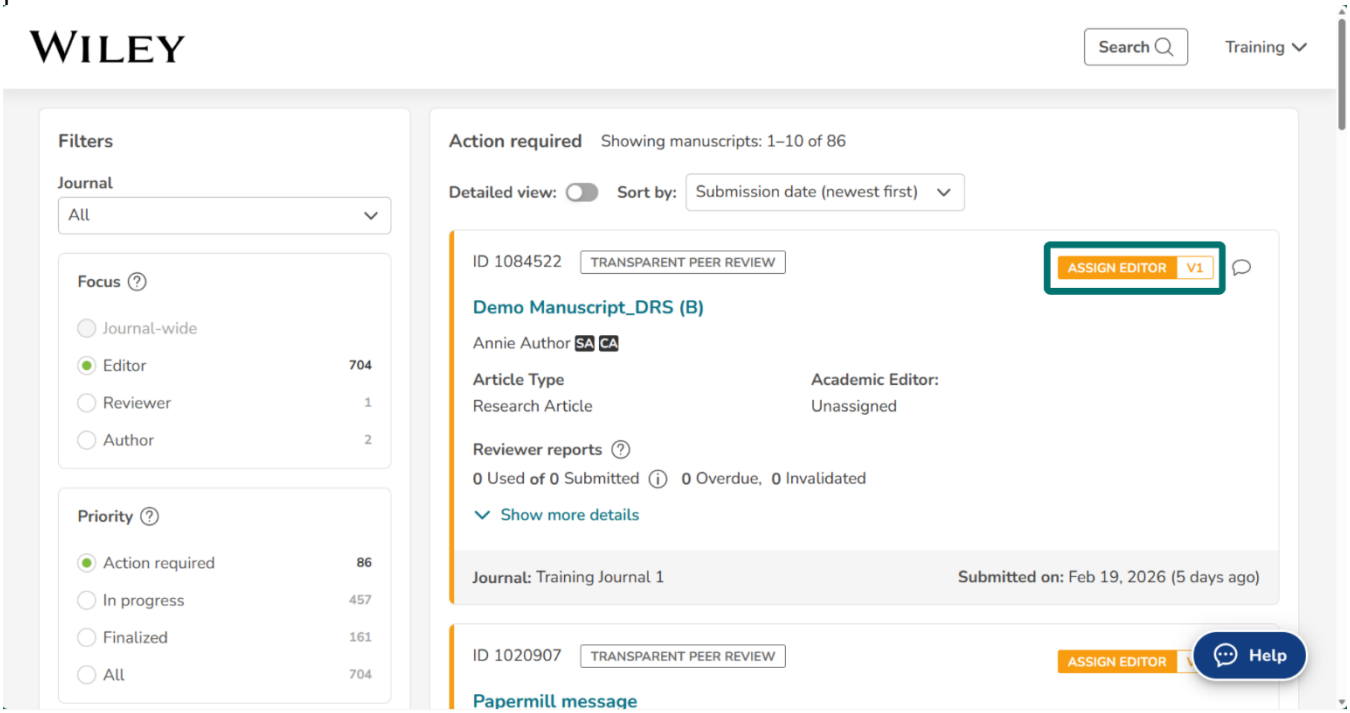
Review Module Dashboard Navigation

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

By default, a list of manuscripts assigned to the user will be displayed on the dashboard. Each manuscript is presented on its own tile.

On the right of each tile, a label indicates the next action or decision to take. In the example below, the label indicates that the next action is to assign an editor to handle the next step in the peer review

process.



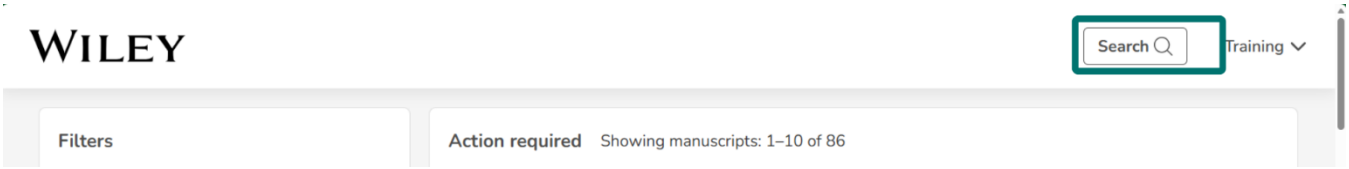
Search for a Manuscript

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The Search feature lets users quickly locate a specific manuscript from the Review dashboard without relying on filters like Status or Priority. Search results are limited to manuscripts available to your role.

Click the **Search** button at the top of the list to search for a manuscript by:

- Manuscript Title
- Manuscript ID (this can be found in the invitation email)
- Journal Name (this is useful when working across multiple journals)



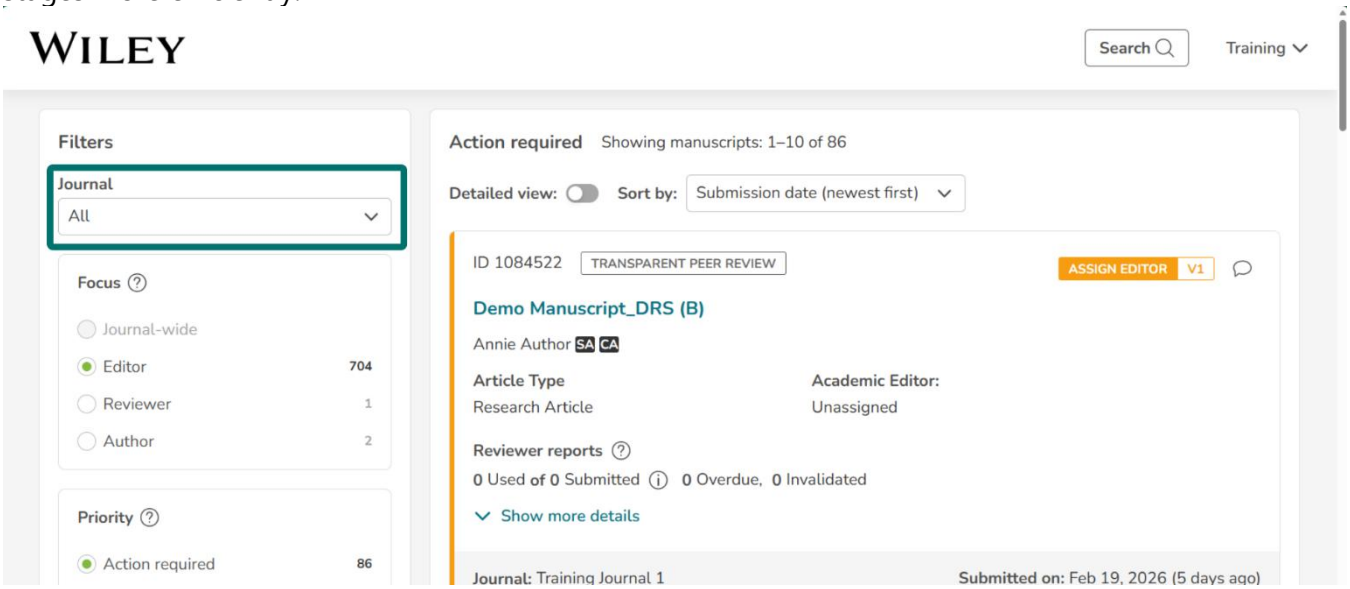
Sort by Journal

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

To sort by manuscripts submitted to a specific journal, use the **Journal** filter. There is the option to;

- View manuscripts from all journals at once
- View manuscripts from one specific journal at a time

The drop-down list displays all journals where the user is on the editorial board. If working on a large portfolio of journals, the journal name can be typed into the drop-down search box, and the results will show you a refined search. By selecting a specific journal, the filter options below may differ. It will also show additional filters available to the specific journal, allowing users to locate manuscripts in different stages more efficiently.



Sort by Focus (Role-Specific)

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors

The Focus filter lets users switch between different “views” of the Review dashboard based on their role in the system. This is shown only when users have more than one role; it remains hidden for users with a single role.

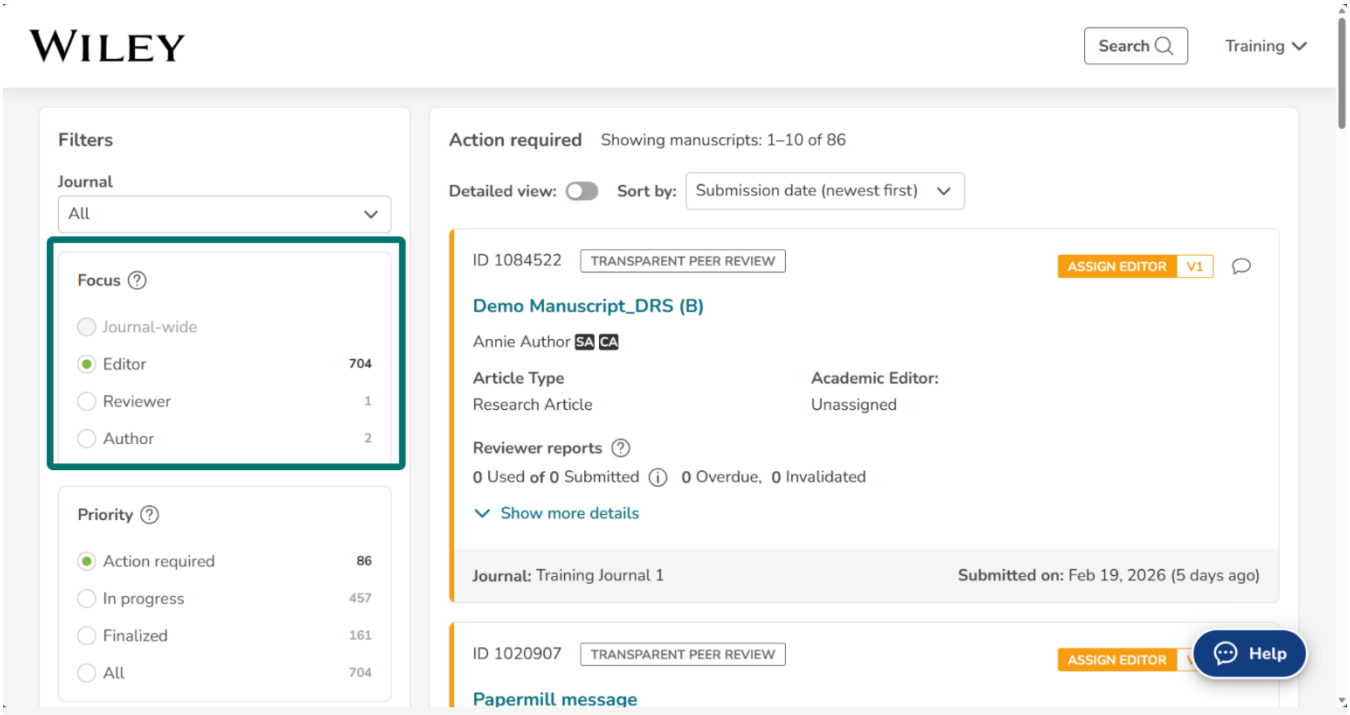
The filter controls which manuscripts appear by filtering them according to how they are involved with them (for example, as an Editor, Reviewer, or Journal Manager). It is especially important for users who hold more than one role in Review (for example, Editor on one journal and Reviewer on another). Instead of mixing everything together, the filter lets you intentionally “focus” on one role at a time, so the dashboard only shows the manuscripts relevant to that role.

The Focus filter sits high in the filter hierarchy, because it determines the fundamental set of manuscripts being worked on. Other filters (Journal, Status, Article Type, Other Properties, etc.) refine results within the selected Focus.

Focus options;

- **Journal-wide** – All manuscripts submitted to the journal. For Editors with Observing or Full Access capability enabled, Editorial Assistants, and Journal Managers. (Please note, when selected users will only see manuscripts with a final decision made within the last two years).

- **Editor** – Only assigned manuscripts. For editors with an assigned role on the manuscript (e.g., handle peer review, initial triage)
- **Reviewer** – Manuscripts for peer review. For reviewers or editors invited to peer review for a journal.
- **Author** – All authored manuscripts. For reviewers or editors who have submitted their own papers for publication.



Permission to View All Manuscripts (Observing Capability)

The 'Journal-wide' filter option under the 'Focus' heading will not be displayed if 'Observing Capability' is not switched on. This capability allows editors to view all manuscripts submitted to the journals they are board members of. To request these additional permissions, please reach out to your Wiley representative.

Permission to Take Action on All Manuscripts (Full Access Capability)

The 'Journal-wide' filter option under the 'Focus' heading will also not be displayed if 'Full Access Capability' is not switched on. This capability allows editors to take action on all manuscripts submitted to the journals they are board members of, even if they are not assigned to them. To request these additional permissions, please reach out to your Wiley representative.

Sort by Priority

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

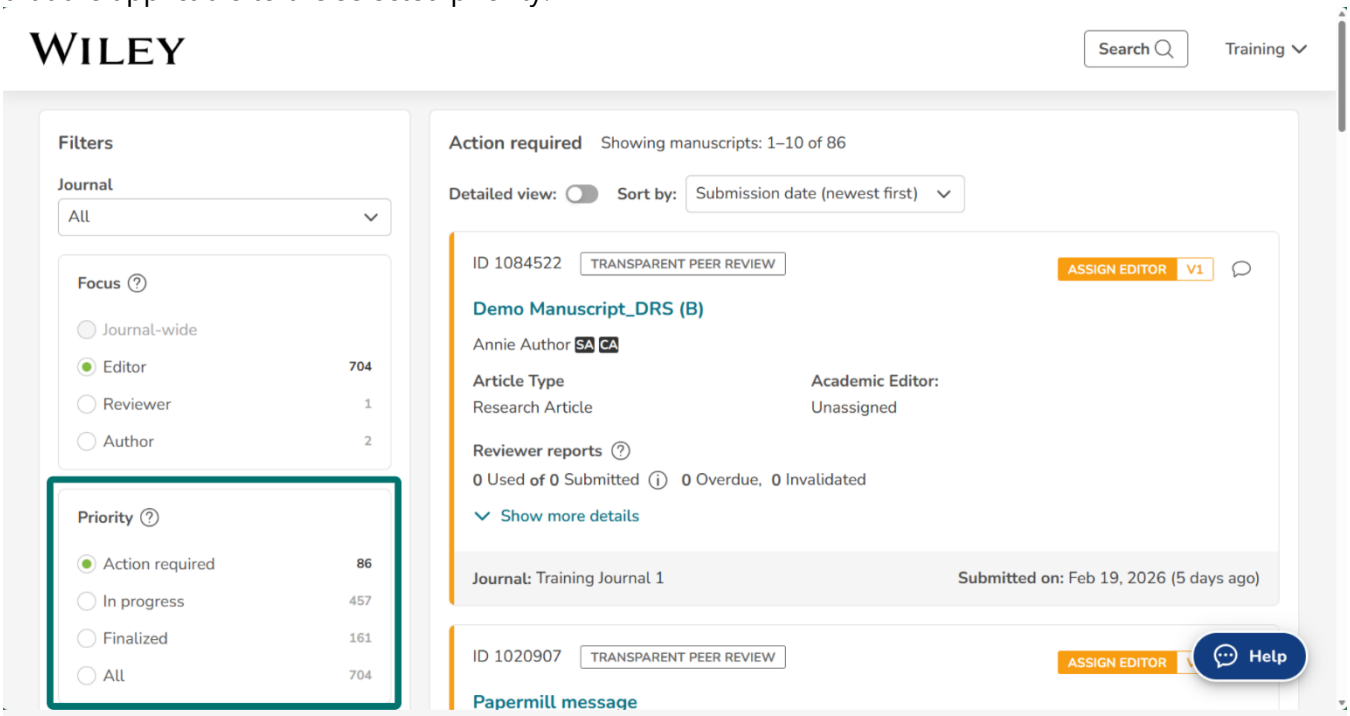
The Priority filter groups manuscripts on the Review dashboard by what stage they are at, specifically whether they need immediate action, are waiting on action from others, or are already complete. It is

designed to help users triage their workload quickly. Each Priority option displays a count of manuscripts within that category and these counts update dynamically based on other filters such as Journal, Focus, and Status.

To refine the list by category, choose from one of the single selection options:

- **Action required** – This is the automatic default. It will display manuscripts that require action from the user
- **In progress** – All manuscripts that are awaiting action by others
- **Finalized** – All manuscripts where a final decision has been made
- **All** – All manuscripts from the above three options

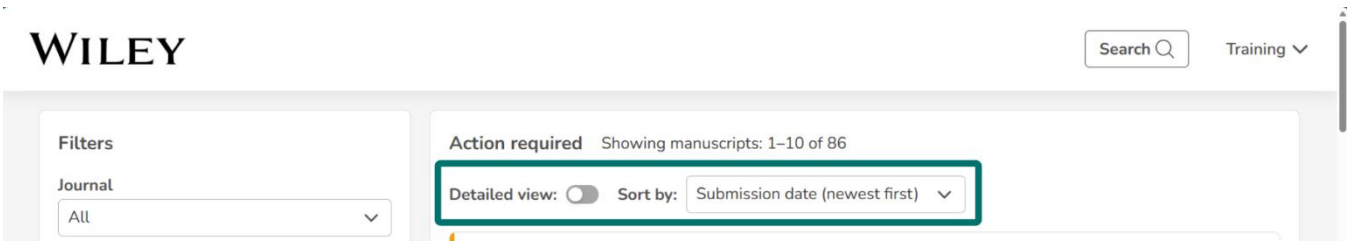
When the priority is modified, the Status options displayed will automatically adjust to reflect only those that are applicable to the selected priority.



Sort by Updated Date or Submission Date

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

To change the order of the list from **Newest first** to **Oldest first**, click the downward arrow below the **Sort by** heading and select an option from the dropdown list.

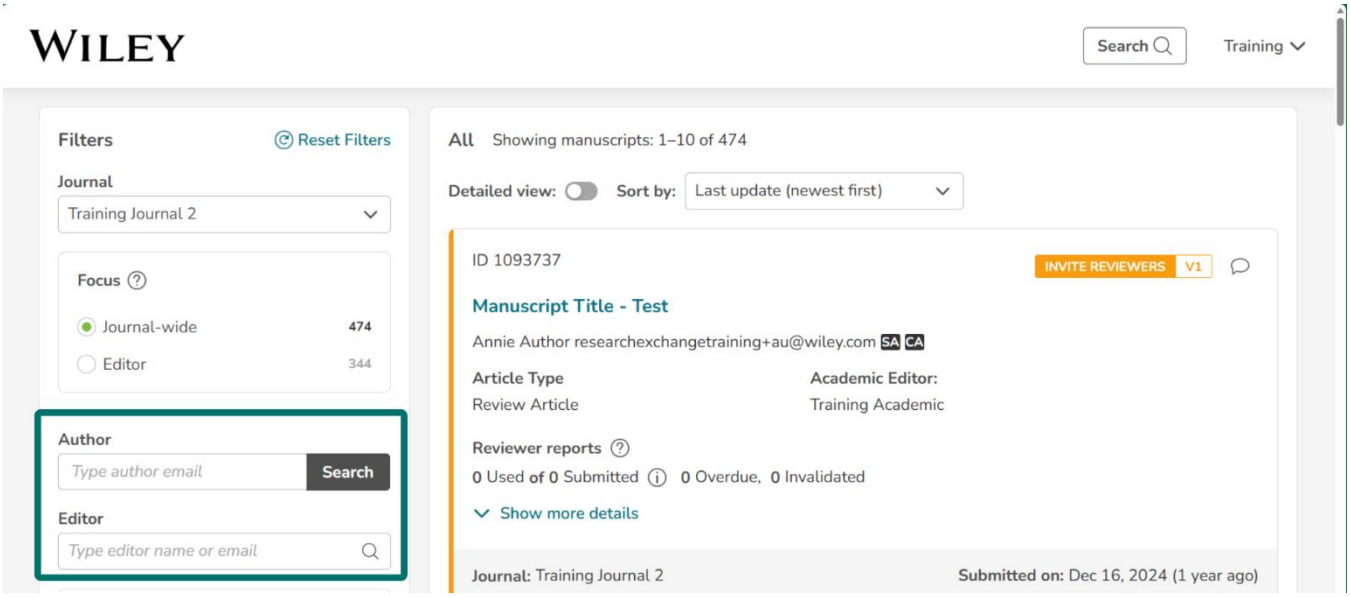


Sort by Author or Editor

Applicable to:	Editorial Assistants, Journal Managers, Full Access Capability, Observing Capability, Traige Editors, Academic Editors, Lead Guest Editors, Guest Editors

Search by Author and Search by Editor are advanced search filters on the Review dashboard that let users find manuscripts linked to a specific author email address and editor name or email address, rather than browsing by status or priority alone.

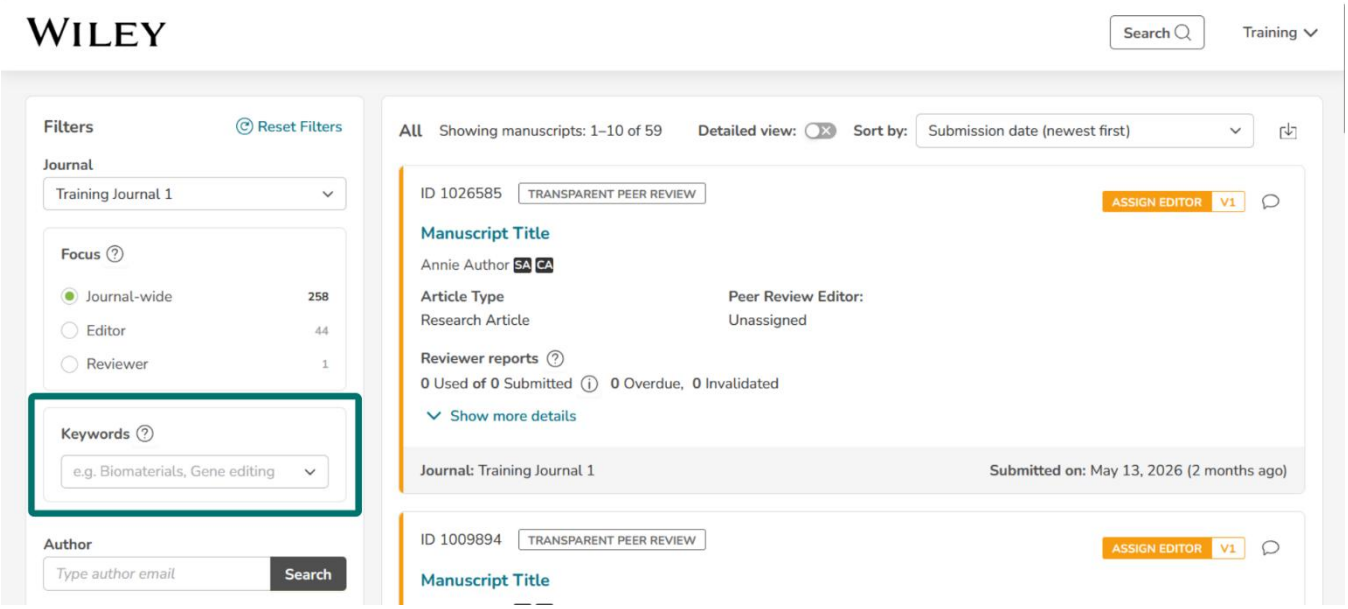
They are only visible when a journal is selected from the Journal filter. It is not visible when the journal filter is set to 'All'.



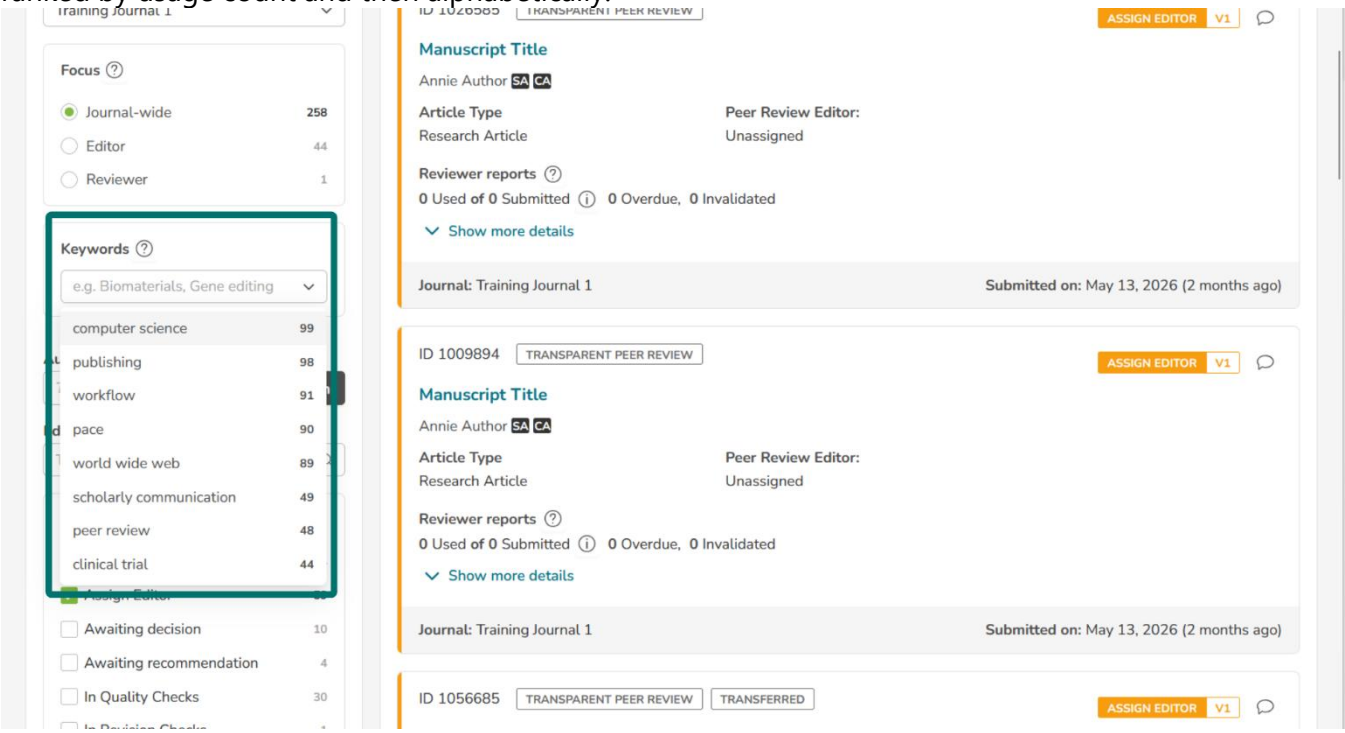
Filter by Keywords

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

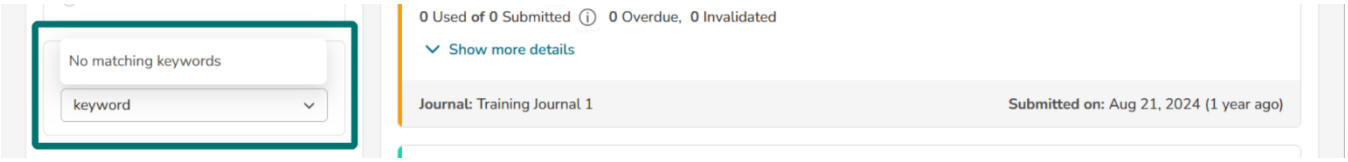
The Keywords filter allows users to filter manuscripts on their dashboard by selected keywords, helping them find relevant submissions more quickly and improving efficiency in high-volume workflows.



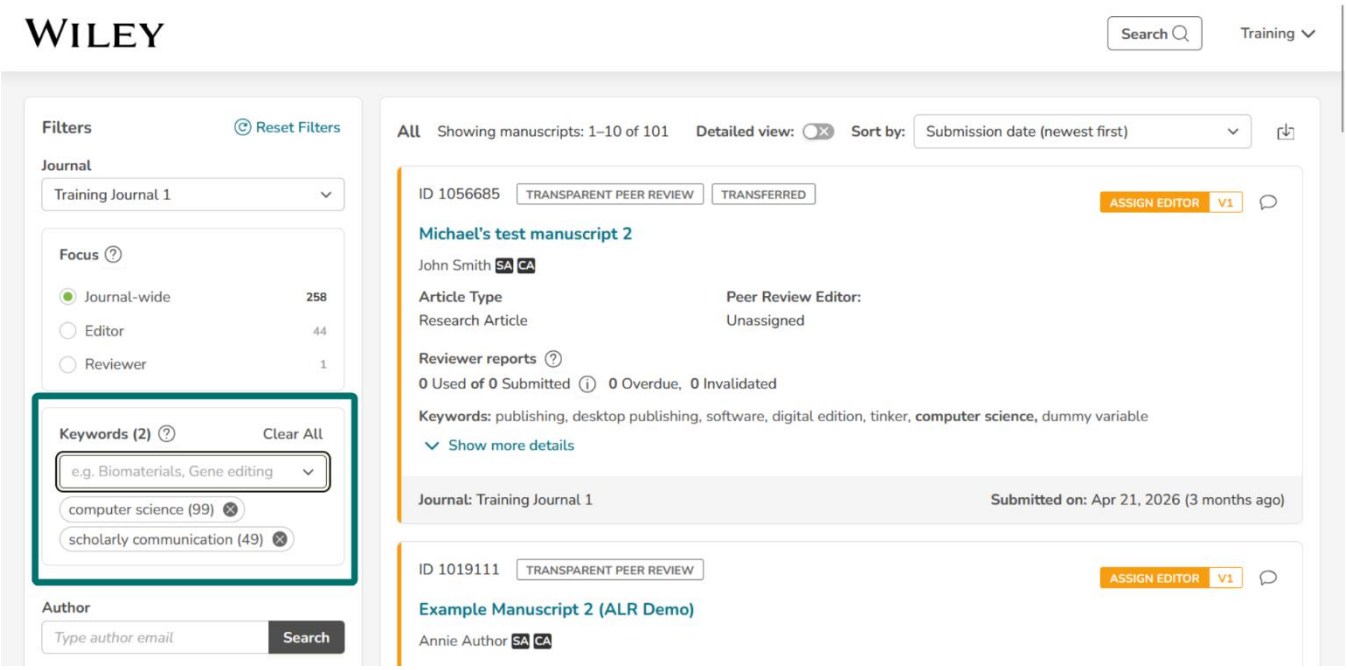
The 100 most commonly used keywords are available in the drop-down list for quick multi-selection, ranked by usage count and then alphabetically.



Users can also search the list for specific keywords, displaying matching results in the drop-down list or a ‘no results found’ message.



Applying the filter returns only manuscripts that match the selected keyword or keywords. Selected keywords appear below the filter and can be removed individually by clicking the cross icon.



Filter by Status

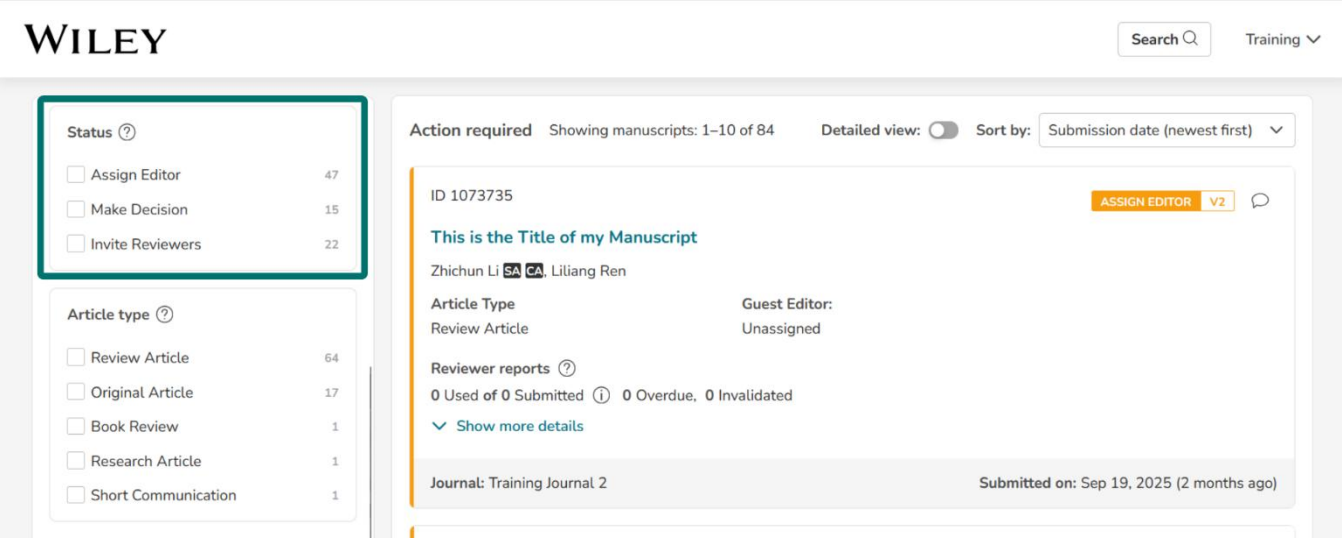
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The Status filter lets users refine their dashboard view by the exact workflow stage of a manuscript.

To refine the list by **Status**, select options from the list. The Status filter supports multi-selection, allowing users to view multiple workflow stages at once

Each list of statuses is linked to a chosen priority. So, if a user chooses the priority as **Action Required**, the available status options to choose from will be specific to manuscripts that require action. If they choose **In Progress** as the priority, then the status options will be specific to manuscripts that are in progress and do not require their action.

For a full list of status options, choose the Priority category **All**.



Available Statuses

Some additional status filters are available to help editors manage their work and monitor the status of manuscripts active in the journal(s). These may include:

- Action required
  - Assign Editor
  - Respond to Invite
  - Invite Reviewers
  - Make Decision
  - Make Recommendation
- In Progress
  - Editor Assigned
  - Invitation Pending
  - Reviewers Invited

    - Under Review
    - Revision Requested
    - Revision QA
    - Make Decision
    - QA
    - Submitted
    - Pending Approval
    - Awaiting decision
    - In Screening
- Finalized
    - Accepted: Awaiting Checks
    - Accepted: Exported
    - Rejected
    - Withdrawn

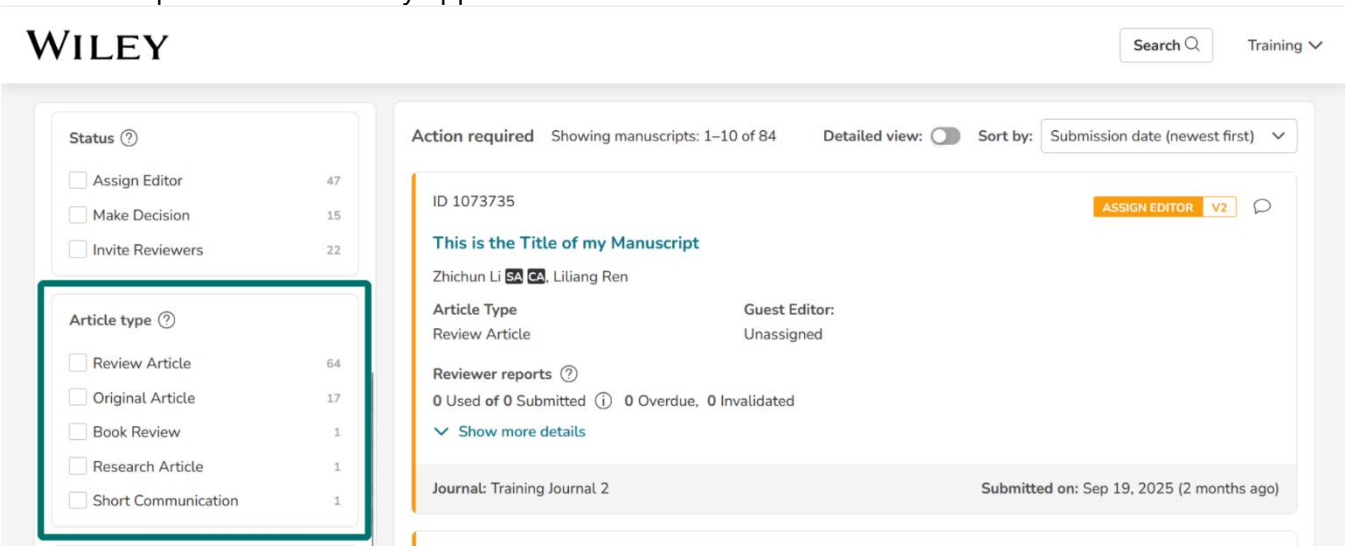
Please note, some of these statuses are only available to certain roles. This will be dependent on the workflow and who is responsible for handling peer review, recommendations, or decisions.

Filter by Article Type

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The Article Type filter lets users refine the Review dashboard to show only manuscripts of specific article types, such as Research Article, Review Article, or other journal-configured types. It is a secondary refinement filter, used after higher-level filters like Focus, Priority, and Status, to help users narrow large result sets to the types of submissions they are interested in.

The Article Type filter only shows article types that exist in the current dashboard view with a count, showing how many manuscripts of that type are currently visible. If a user only has manuscripts of one article type, only that type is displayed and as more article types become available to the user, additional options automatically appear.



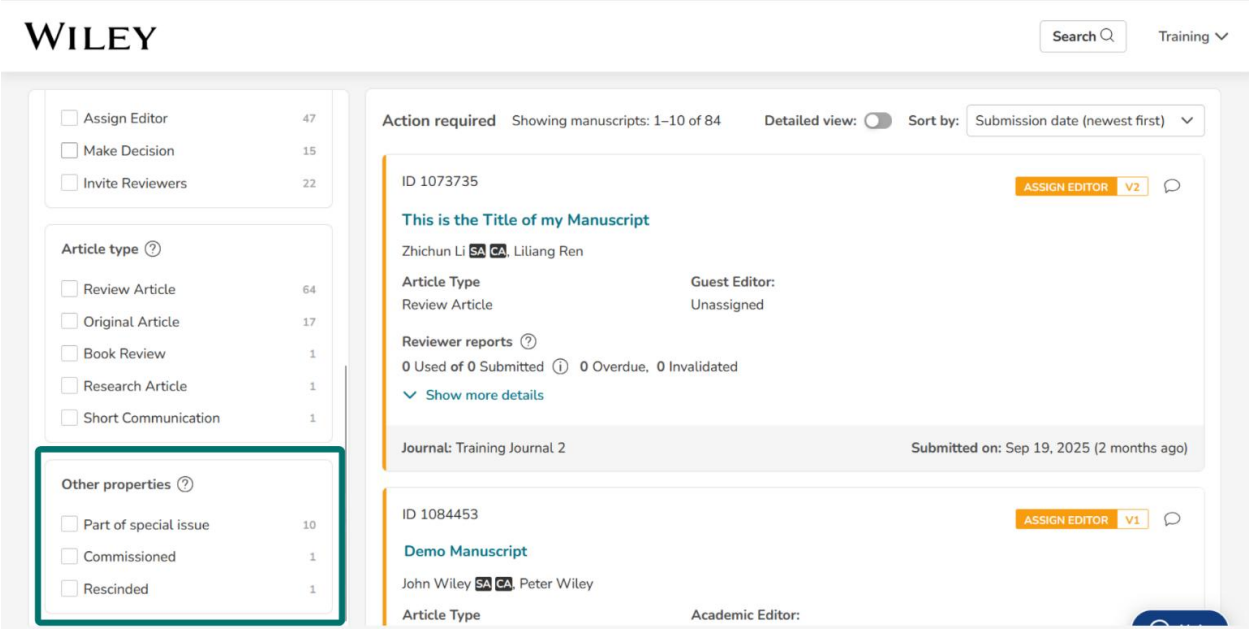
Filter by Other Properties

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The Other Properties filter lets users refine the Review dashboard based on specific characteristics of a manuscript, rather than its workflow stage or article type. It groups together important “flags” or attributes that cut across the editorial workflow, helping users quickly identify manuscripts with particular handling or policy considerations.

The filter only appears when at least one visible manuscript matches at least one of the properties. If none of the manuscripts in view have these attributes, the Other Properties filter is hidden. Each property displays a count, showing how many manuscripts in the current view have that property. The following properties may be visible;

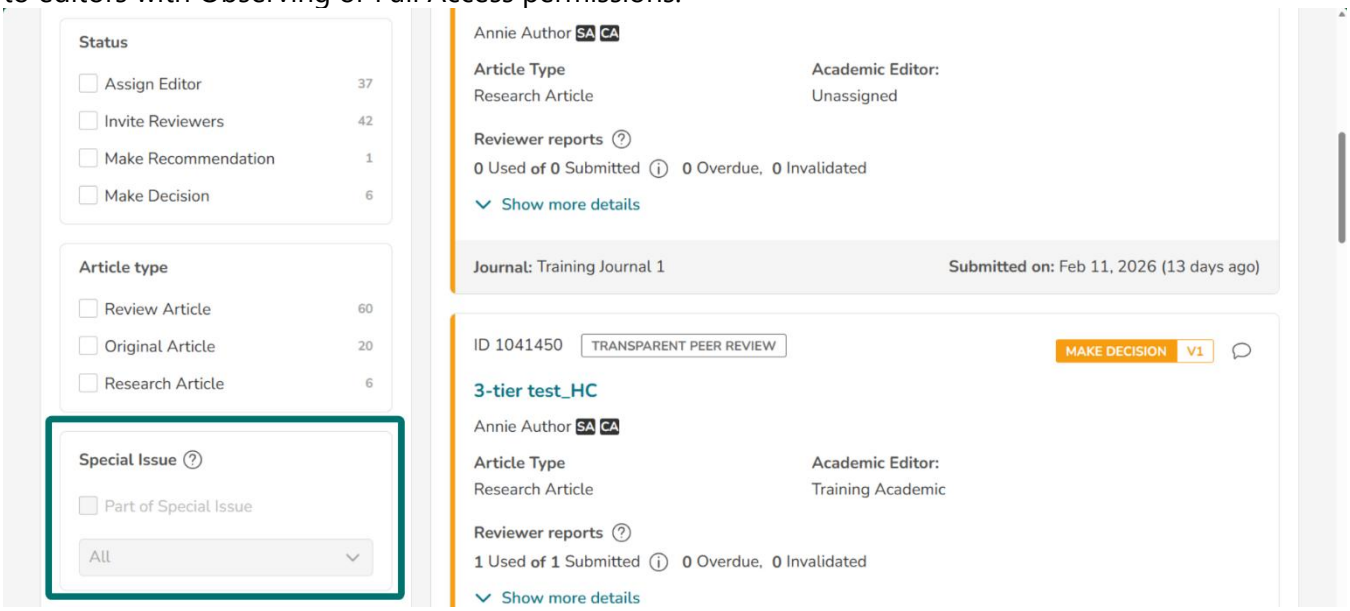
- Commissioned
- Transferred
- Transparent Peer Review
- APC Edited
- Rescinded



Filter by Special Issues

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

This section enables users to filter manuscripts based on their association with special issues and the specific special issue to which they belong. To apply the Special Issue filter, users must first select a journal using the Journal filter, regardless of the number of journals managed. This feature is available to editors with Observing or Full Access permissions.



Download the Dashboard as a CSV File

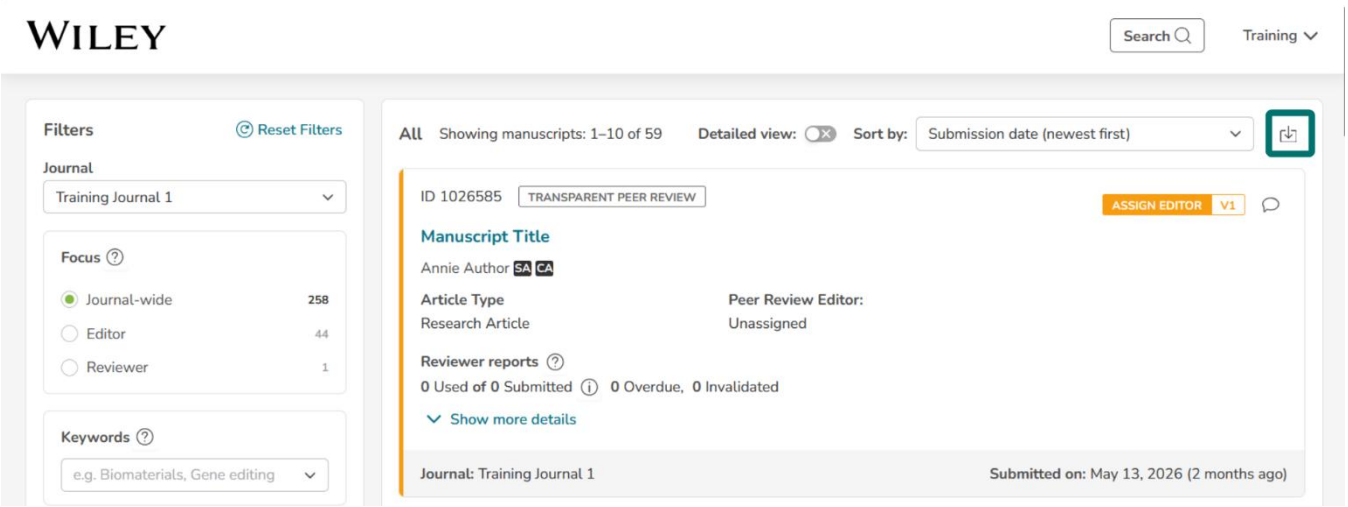
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The download icon is located at the top right of the dashboard, alongside the sort and view controls.

Use this feature to export the current dashboard view as a spreadsheet-style .csv file, for example to work with manuscript data outside the system or share a specific list of manuscripts with a colleague.

Selecting the icon downloads all manuscripts currently in view, including manuscript ID, journal name, assigned editor, and reviewer counts. Apply dashboard filters, such as Journal, Status, or Article Type, before downloading to limit the file to a specific subset of manuscripts.

Only manuscripts already accessible to the user are included in the download. Store downloaded files securely, as they may contain manuscript and reviewer information.



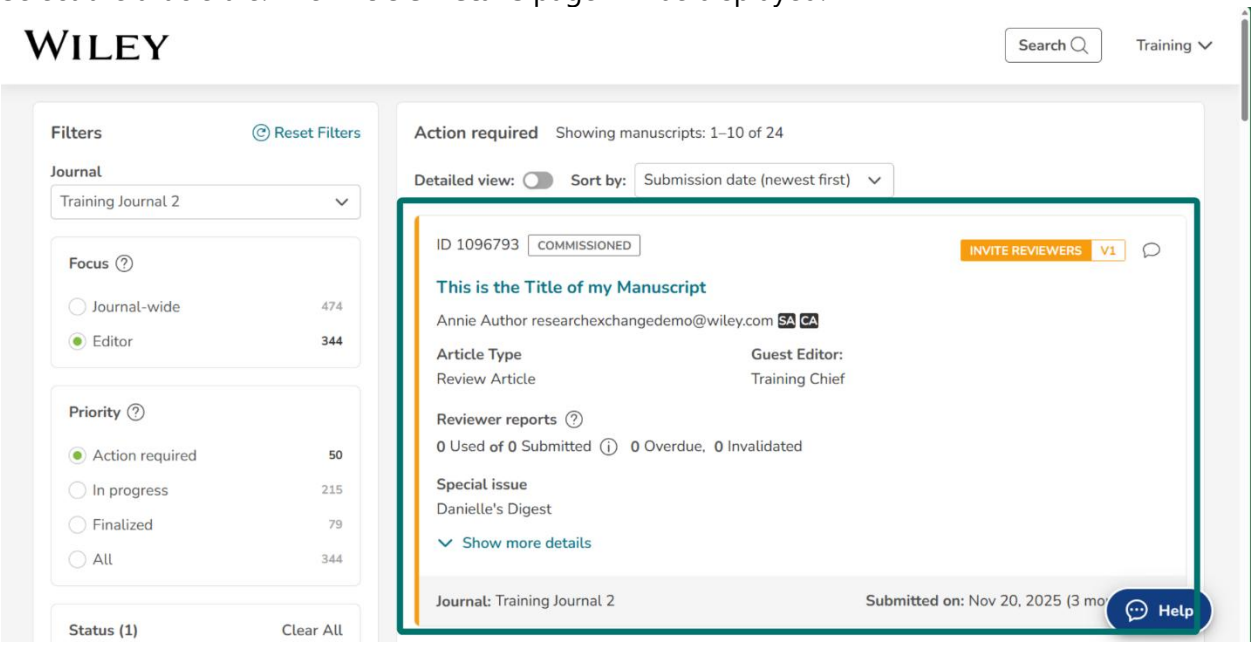
Accessing Manuscripts

Accessing Article Details

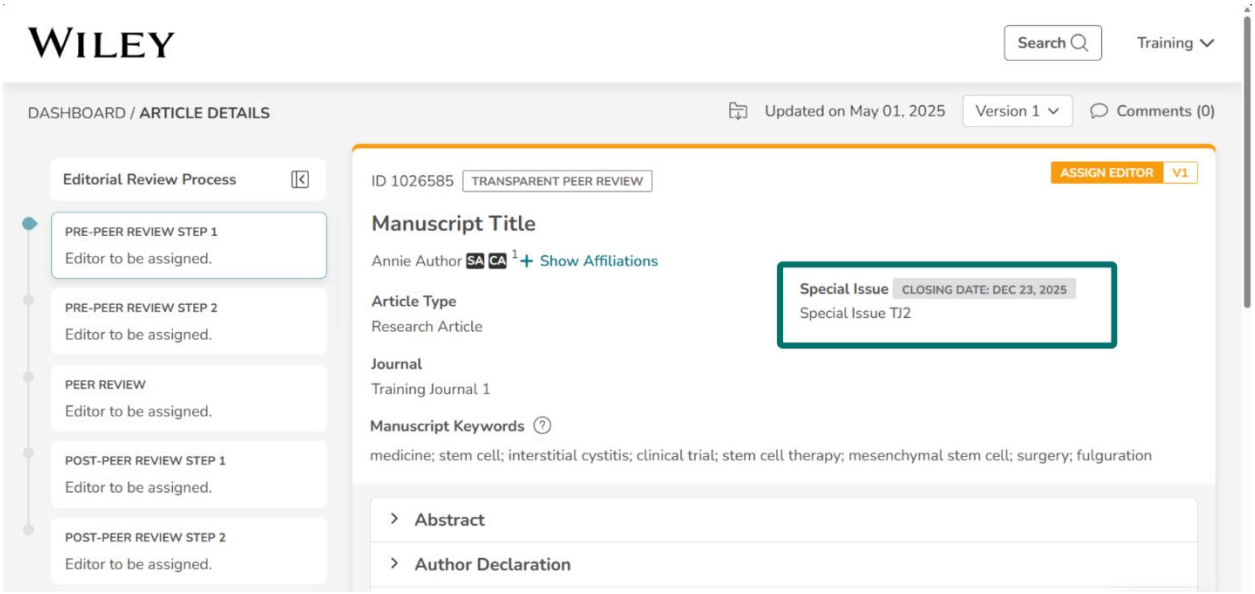
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

To access the **Article Details** and view the manuscript, follow these steps;

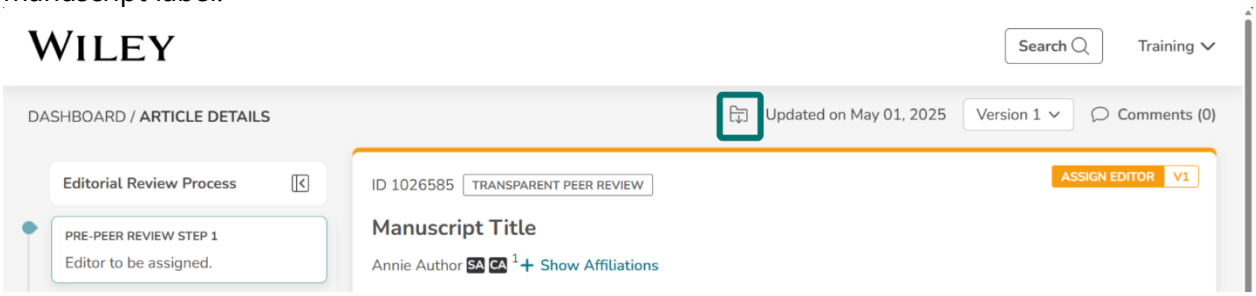
1. Select the article tile. The **Article Details** page will be displayed.



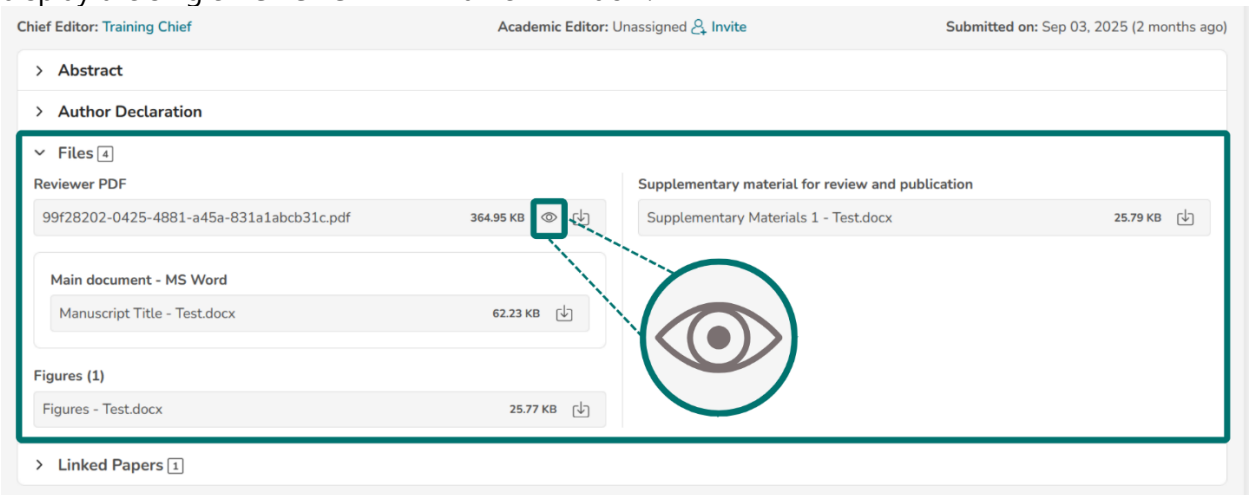
2. At the top of the **Article Details page, there** will be key details about the submission, including;
    a. Manuscript ID
    b. Title
    c. Author name(s) and affiliations (Clicking **Show Affiliations** will detail the authors' affiliations to help identify potential conflicts of interest.)
    d. Article type
    e. Journal name
    f. Submission date
    g. Roles required on the manuscript, who is assigned to those roles, and any roles that need to be assigned
    h. Special Issues will detail the special issue name and closing date
    i. Abstract
    j. Author declarations (including responses to AI disclosure statements)



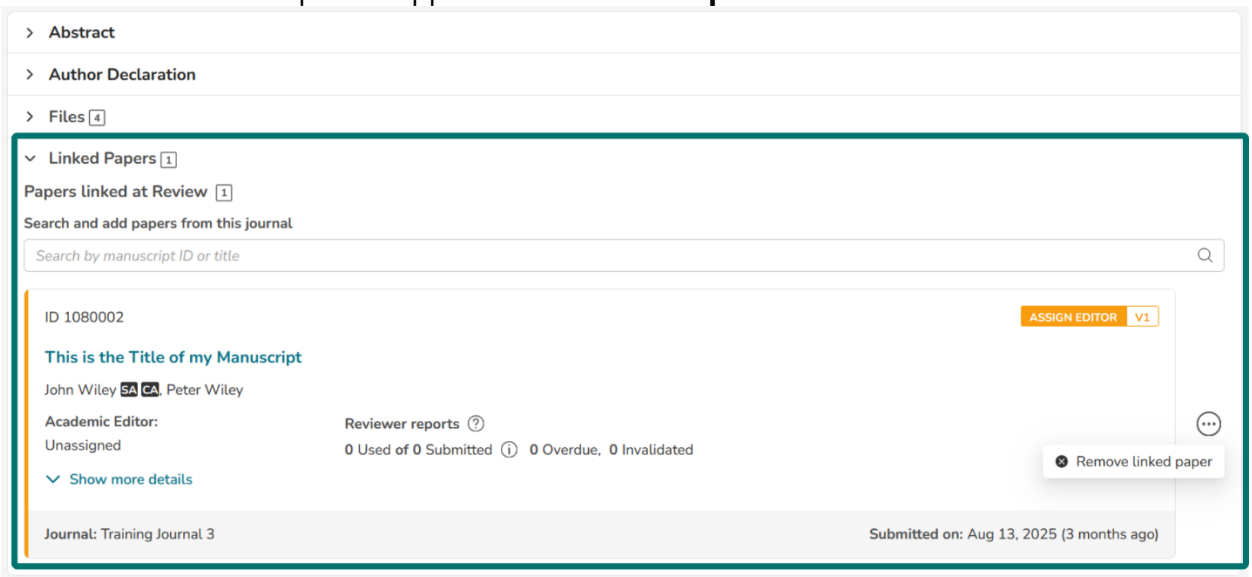
3. To download all the manuscript files in one go, click the **download files icon** above the manuscript label.



4. Or you can download each file individually from the **Files** section. Clicking the **eye icon** will display the single **Reviewer PDF** in a new window.



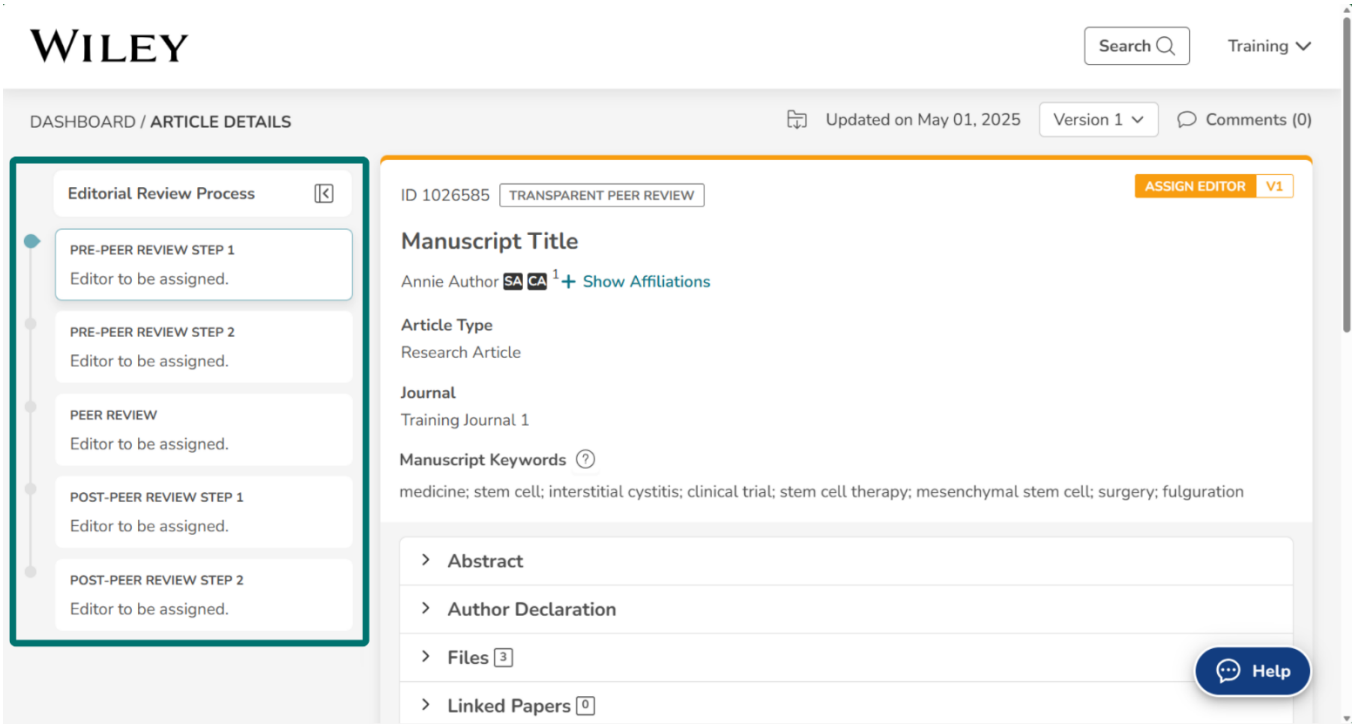
5. If the author has linked the manuscript to previously published papers during submission, the links to those manuscripts will appear in the **Linked Papers** section.



Editorial Review Process Side Panel

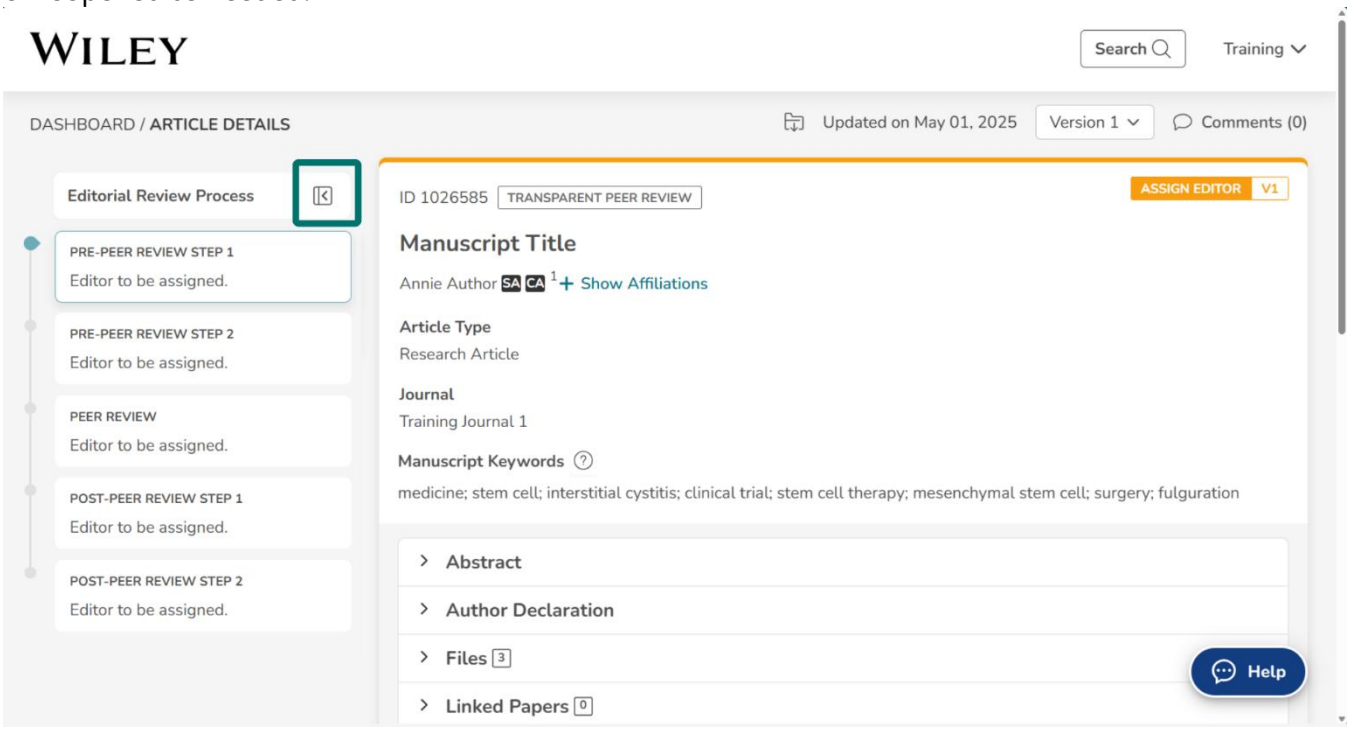
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

The Editorial Review Process side panel appears on the Article Details page for every manuscript and is applicable to editors, editorial office staff, journal managers, and administrators who are responsible for monitoring or progressing submissions through the editorial workflow. The side panel provides a clear, visual overview of where a manuscript sits in the editorial and peer review process and what action is required next.



The panel displays all steps in the configured workflow. The number of steps indicates whether the manuscript is following a one-tier workflow (peer review only), a two-tier workflow (with at least one pre-peer review step), or a three-tier workflow (with at least two pre-peer review steps).

A blue marker highlights the current step and indicates the action needed to move the manuscript forward. As editors are assigned, their names appear next to the relevant steps. Completed steps are clearly marked as the manuscript progresses. The side panel updates automatically and can be hidden or reopened as needed.



Conversation Tool

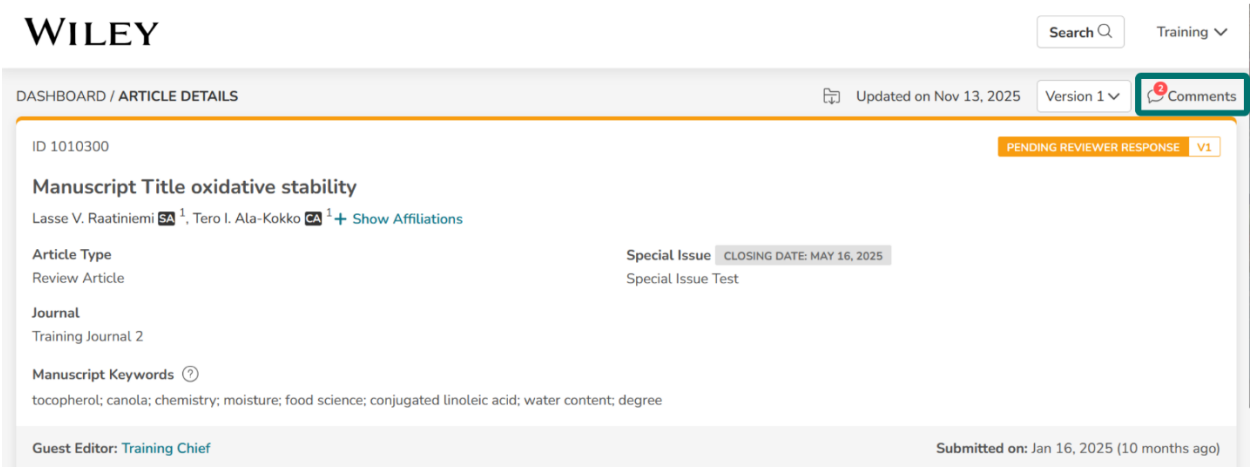
Applicable to:	Editors with an assigned role on the manuscript, Editorial Assistants, Journal Managers, Full Access Capability, Observing Capability

The conversation tool is available on all manuscripts and is identified by a conversation icon on the manuscript tile in the dashboard. New and unread comments will be highlighted with a red number bubble. Once acknowledged, comments will not be shown again as new.

The tool enables users to discuss manuscripts directly within the manuscript records, creating a permanent archive of all editorial discussions. Editors who are not assigned to the manuscript but have observing capability enabled will only be able to view comments.

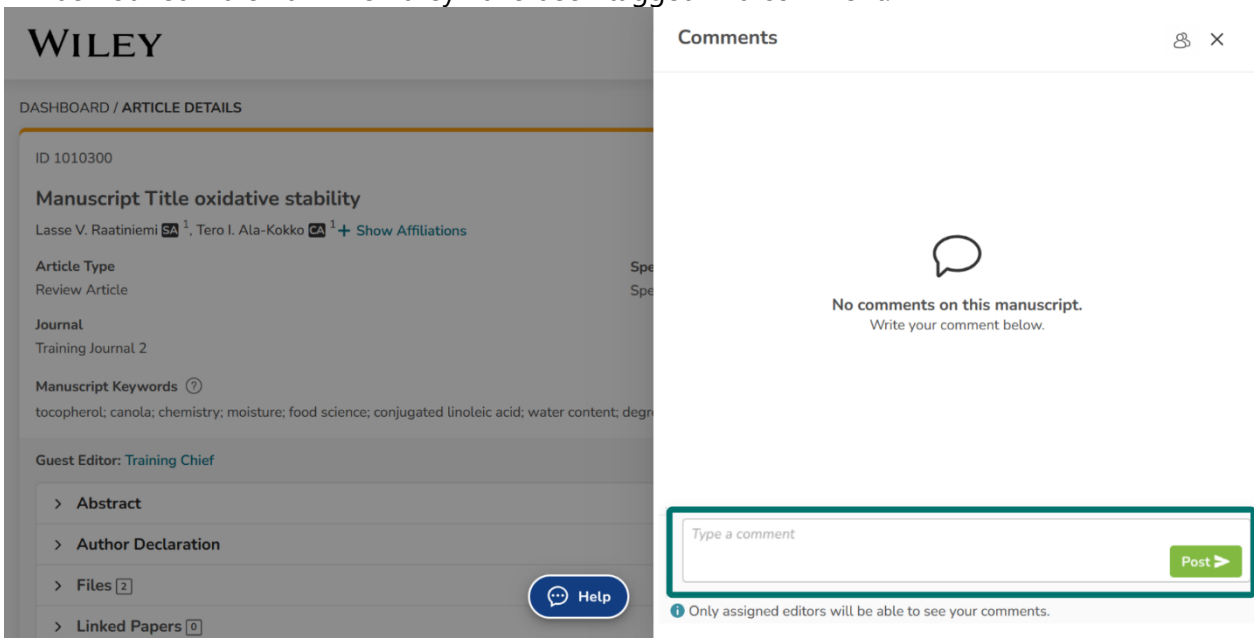
To use the conversation tool, follow these steps:

1. From the **article details page**, click **Comments** above the manuscript label.



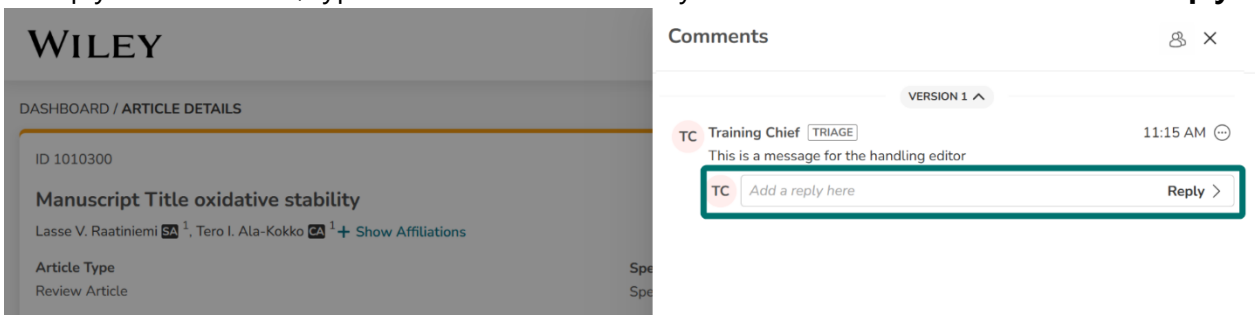
2. The conversation section will appear. Type comments in the free text box, and click **Post**. Please note that comments cannot be deleted once posted, they can only be edited. Assigned editors, editors with Observing or Full Access Capability, Journal Managers, and Editorial Assistants can tag each other in the comments by using an **@** symbol before typing their name**.** Tagged users

will be notified via email when they have been tagged in a comment.



3. Comments will include the following;
    a. name of the user who posted the comment,
    b. their role on the manuscript,
    c. the time posted, which changes to the date after a day has passed,
    d. the time/date it was edited.

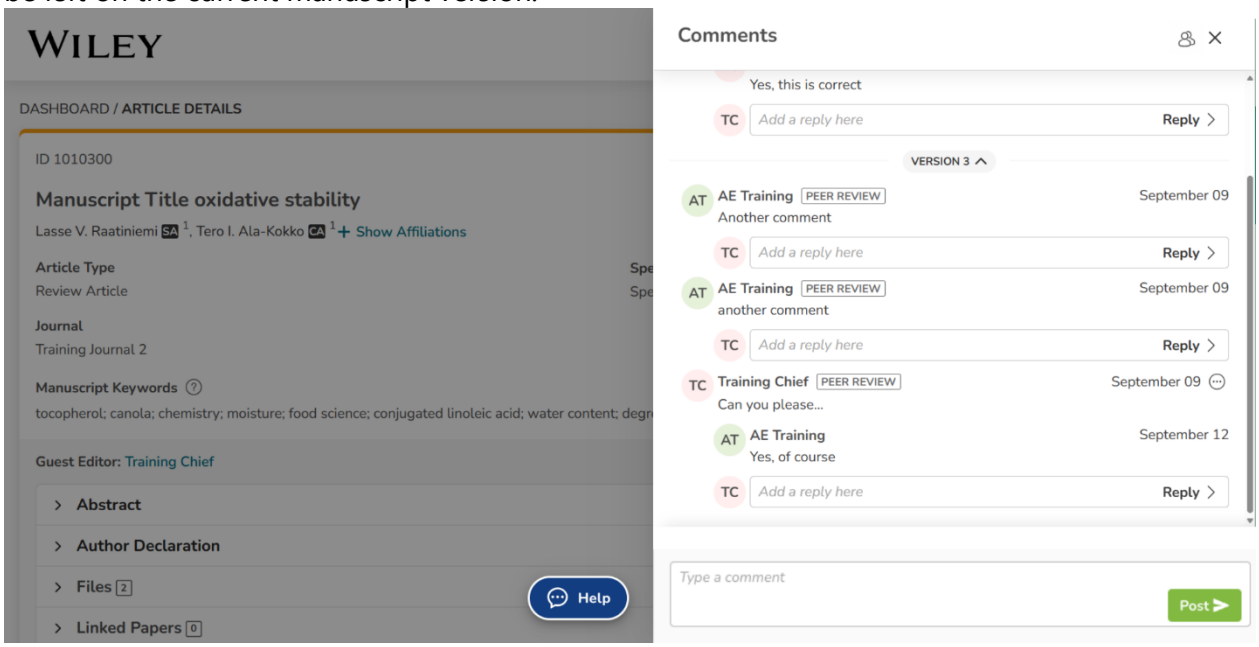
To reply to a comment, type into the text box directly underneath the comment and click **reply**.



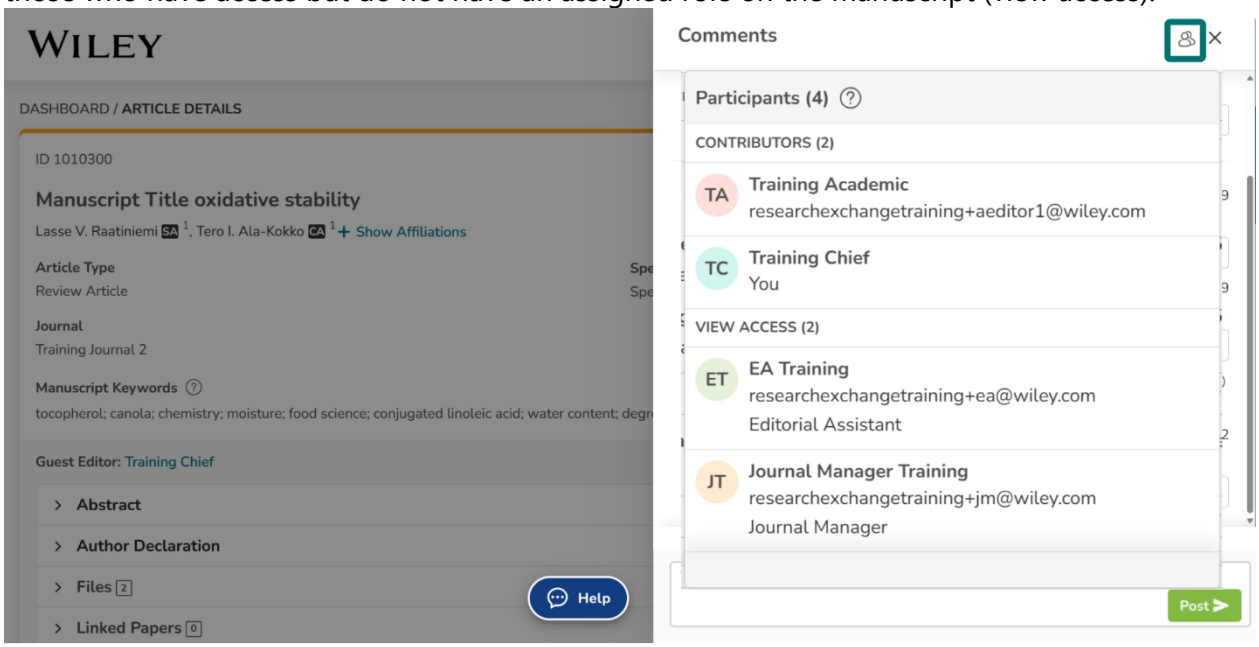
4. Click the circle with the ellipses and select **edit** to make changes to the original comment.



5. Comments are divided by the version of the manuscript they were made on. Comments can only be left on the current manuscript version.



6. Click the **people icon** to view contributors (users with an assigned role on the manuscript) and those who have access but do not have an assigned role on the manuscript (view access).

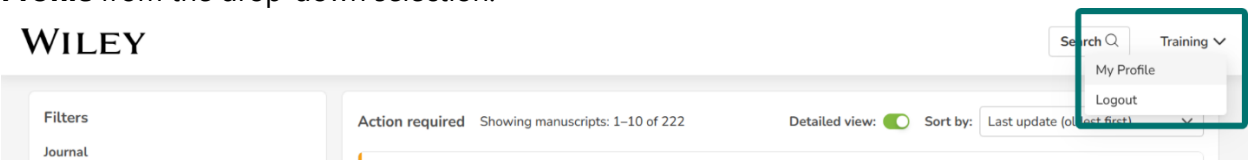


Update Email Preferences for the Conversation Tool

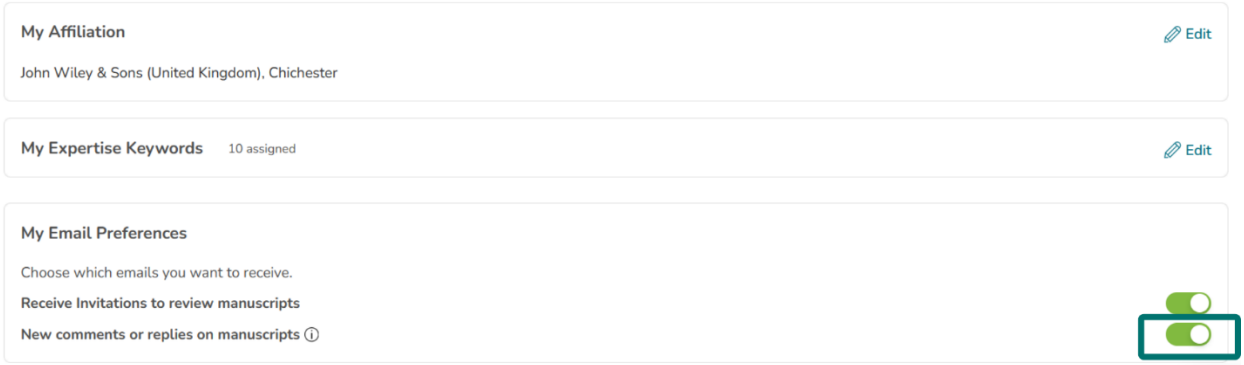
Editors can now manage their email preferences for conversation messages in their Research Exchange profile. By default, new comments or replies on manuscripts will be switched on, meaning editors will receive emails for each new comment added to the conversation tool on a manuscript.

To switch email notifications off for new comments or replies on manuscripts, follow these steps:

1. From the **dashboard**, **select your name** in the top right corner of the screen and select **My Profile** from the drop-down selection.



2. Scroll down to the **My Email Preferences** section. Locate the **New Comments or replies on the manuscript** setting and **use the slider to switch them off**. Notifications will stop on all manuscripts from the time it was switched off. These can be switched back on at any time following the same instructions.



Access email preferences via email notifications

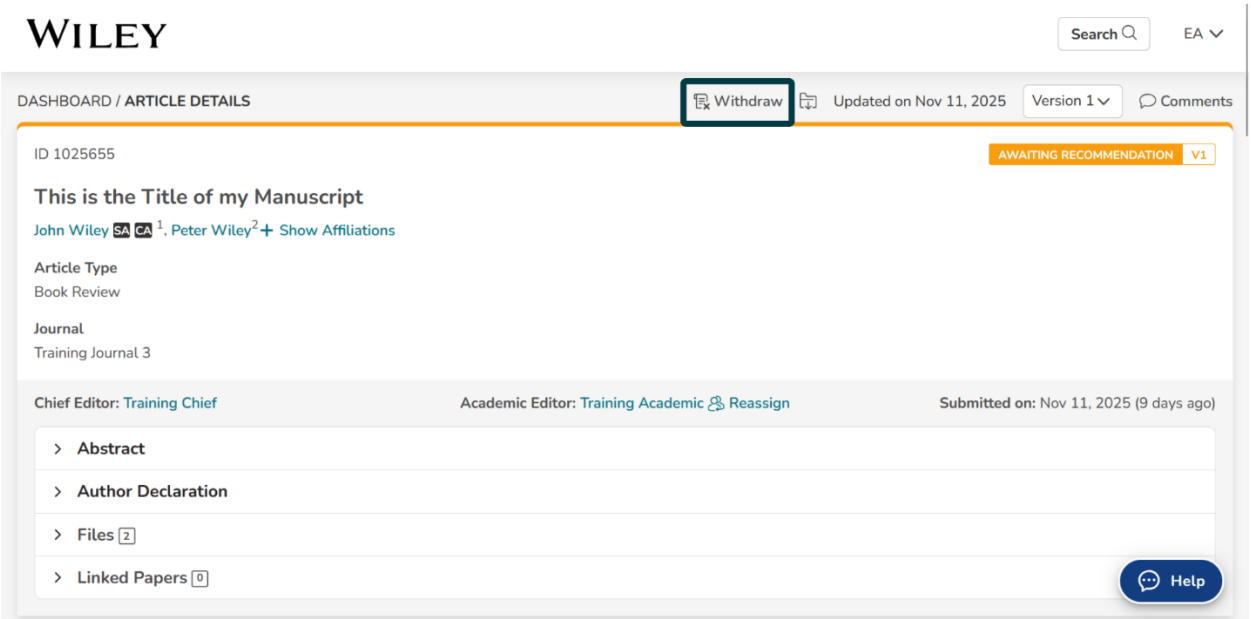
Every email notification includes a hyperlink to the email preferences page in Research Exchange Review so that preferences can be updated quickly and easily.

Withdrawing a Manuscript on Behalf of an Author

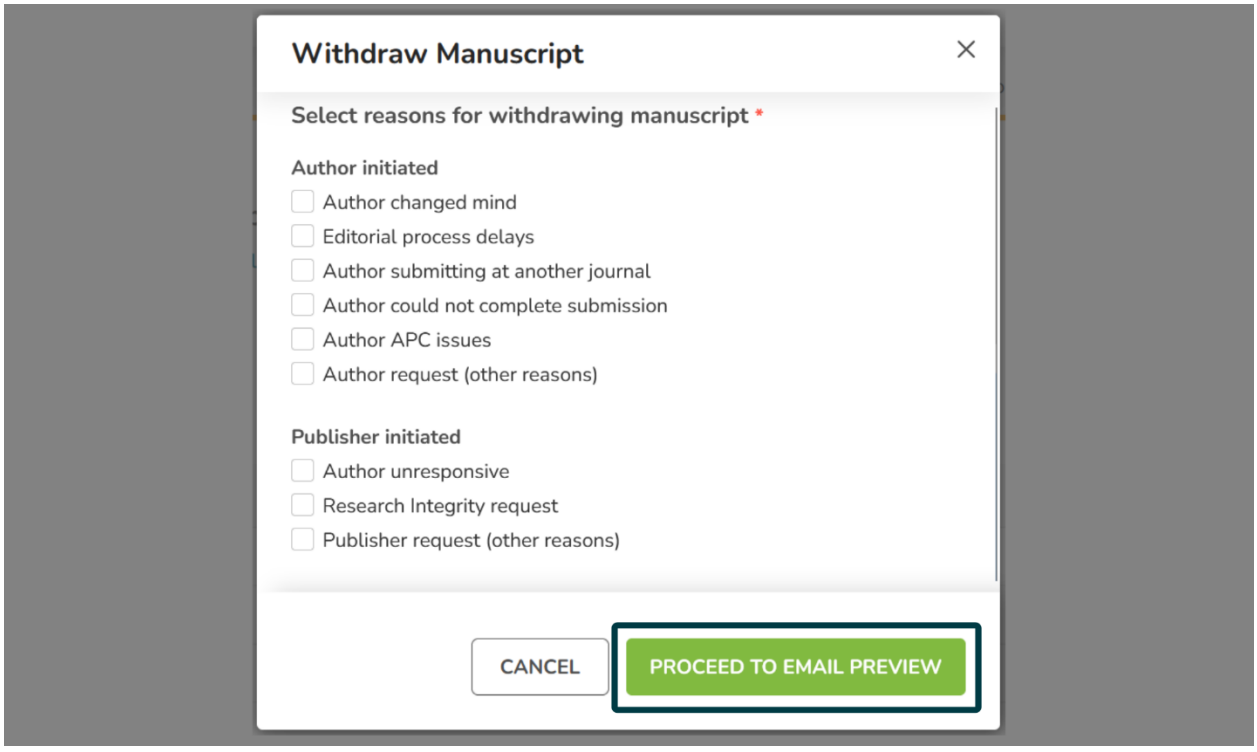
Applicable to:	Editorial Assistants, Journal Managers

To withdraw a manuscript on an author's behalf in the Review module, follow these steps:

1. From the **Article Details** page, click the **Withdraw** button in the top bar.



2. A pop-up confirmation panel will appear. Choose the reason for the withdrawal and click **PROCEED TO EMAIL TEMPLATE**.



3. An email template will appear. Click the **SEND EMAIL** button. The author will be notified by email that the manuscript has been withdrawn.

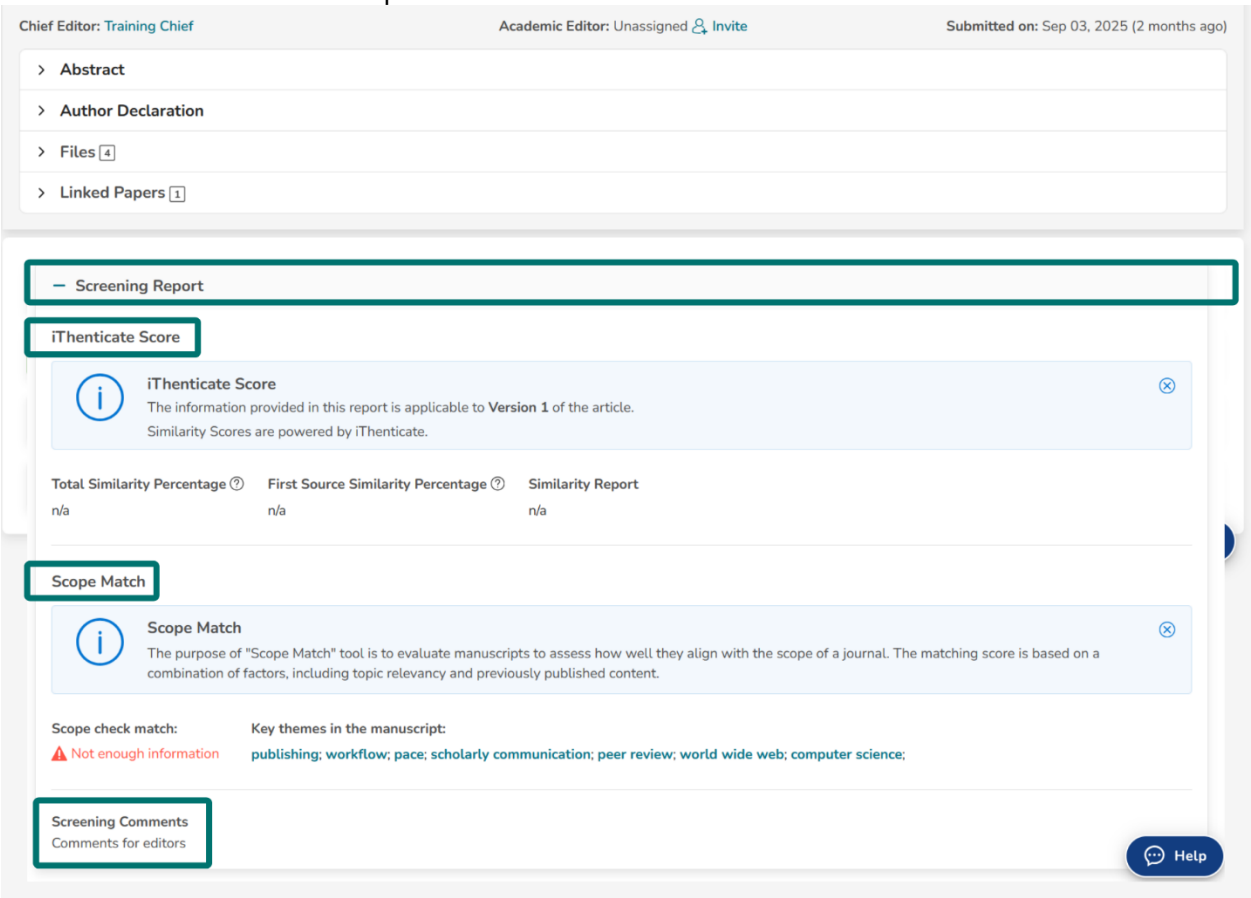
Accessing Screening Reports in the Review Module

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

Following the submission of a manuscript, **Submission Checks** are carried out to ensure the manuscript meets the standards for scope, quality, and integrity required by the journal. The only submission checks visible in the Review module are **iThenticate** and **Scope Match**. Any additional checks that yielded relevant results should be noted by the screener in the **Screening Comments** section.

To access information about the results of the **iThenticate** and **Scope Match** reports or to see the **Screening Comments**, follow these steps:

1. From the **Article Details** page, click on the **Screening Report** heading to display the results of the initial Submission Checks process.



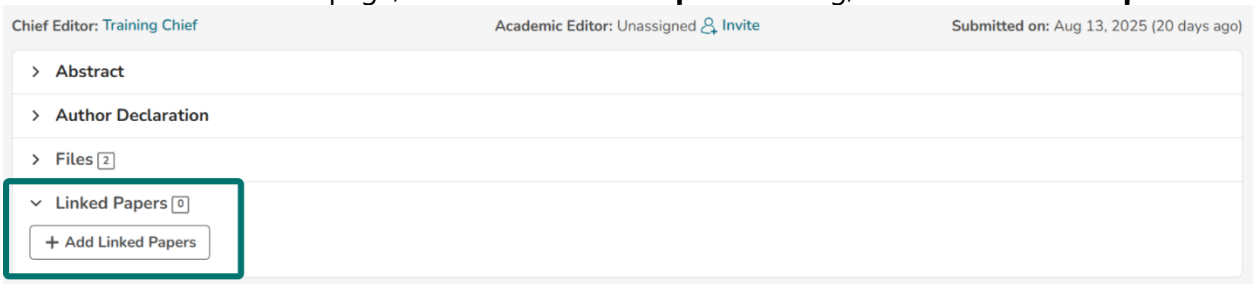
2. Here, the results of the iThenticate Report and Scope Match can be found, as well as any comments that were included during the Submission and Revision Checks process.

Linking to Manuscripts in Peer Review

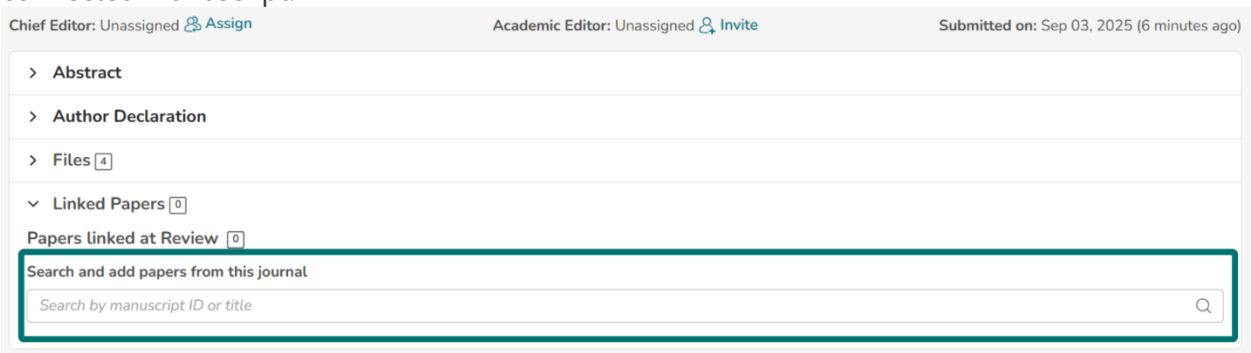
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

To link the manuscript to related manuscripts that are going through the peer review process, follow these steps:

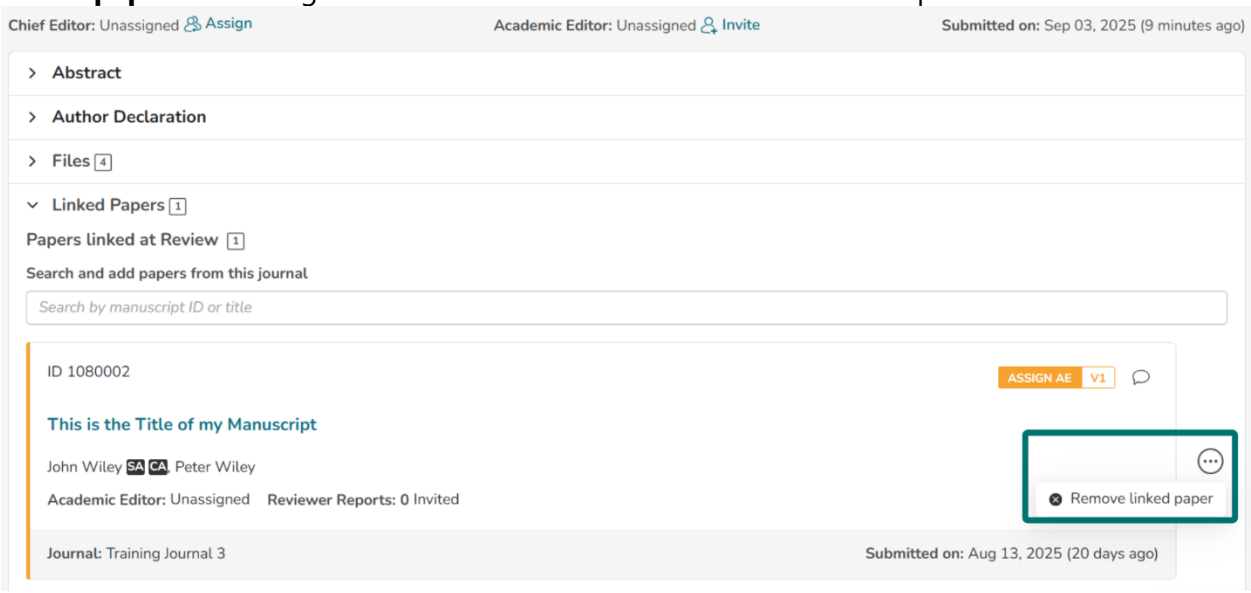
1. From the **Article Details** page, under the **Linked Papers** heading, click **Add Linked Papers**.



2. **Search** for the manuscript by ID or Title. **Select** the manuscript. Multiple manuscripts can be linked. The link is bi-directional, so a reciprocal link is automatically established on each connected manuscript.



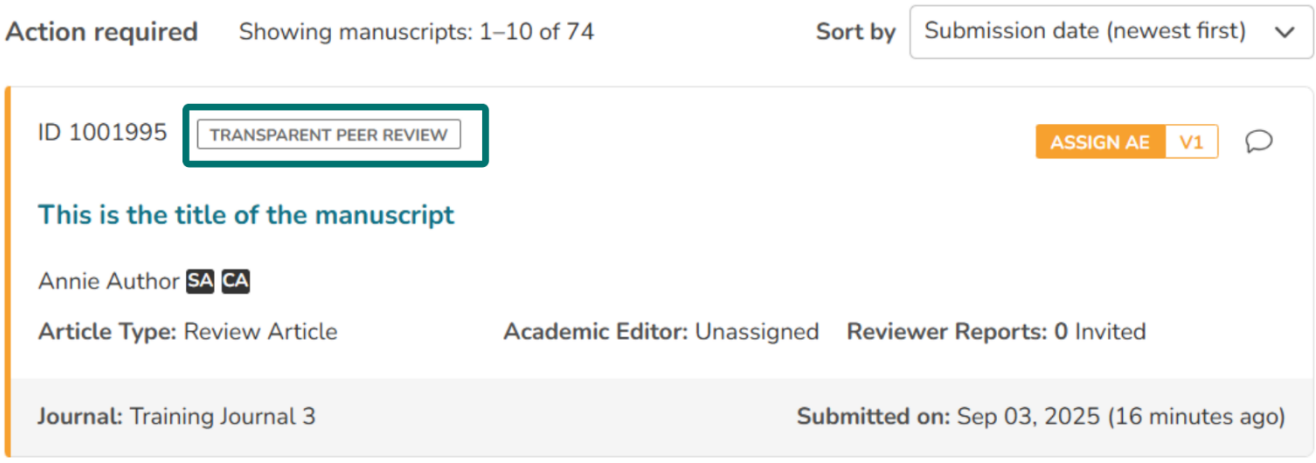
3. To remove a linked manuscript, click the **circle icon with the ellipsis** inside and select **Remove linked paper**. Removing a link will remove the link from both manuscripts.



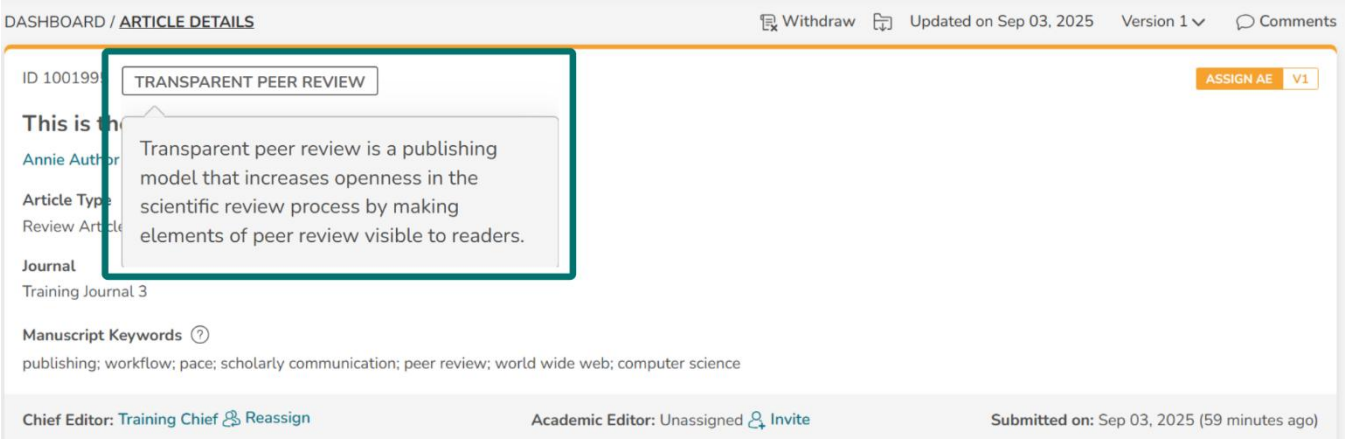
Transparent Peer Review

For manuscripts that are participating in Transparent Peer Review (TPR), editors, admins, and reviewers will be notified in the following ways;

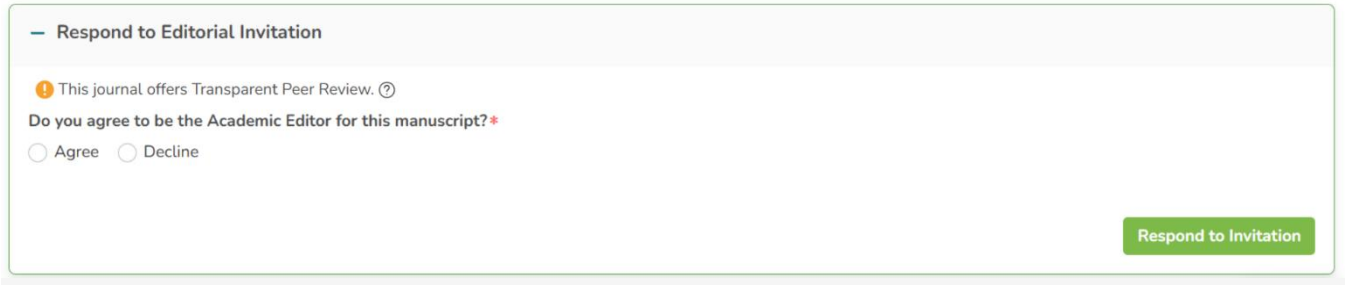
The manuscript will have a label on the dashboard.



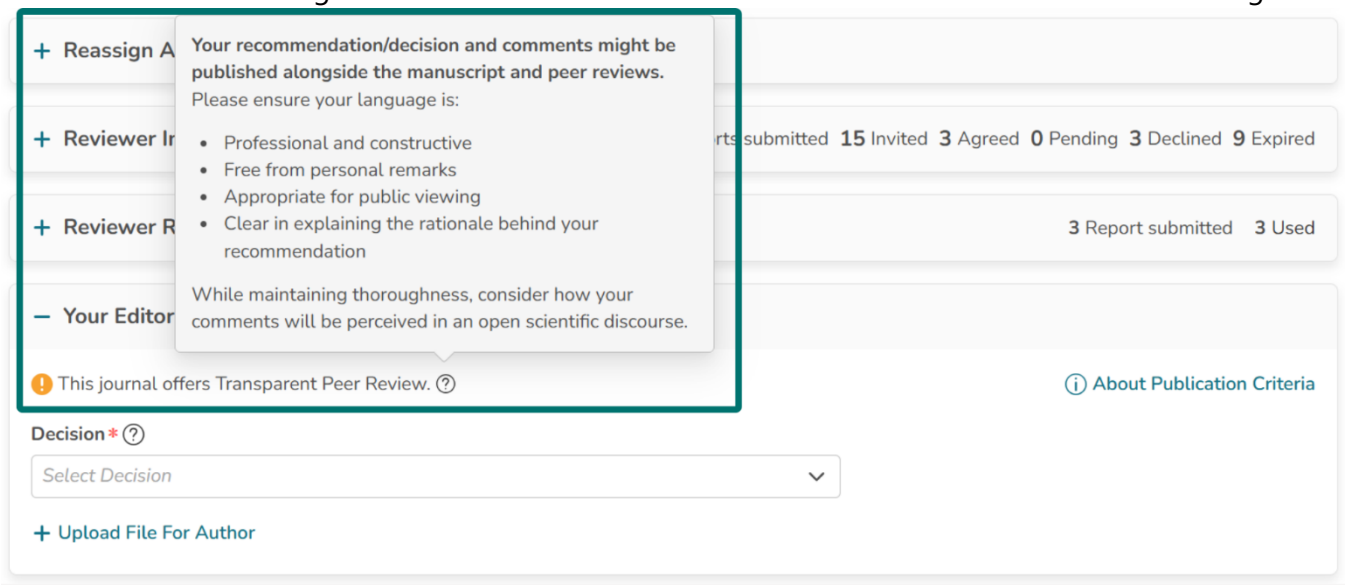
The manuscript will have a label on the article details page.



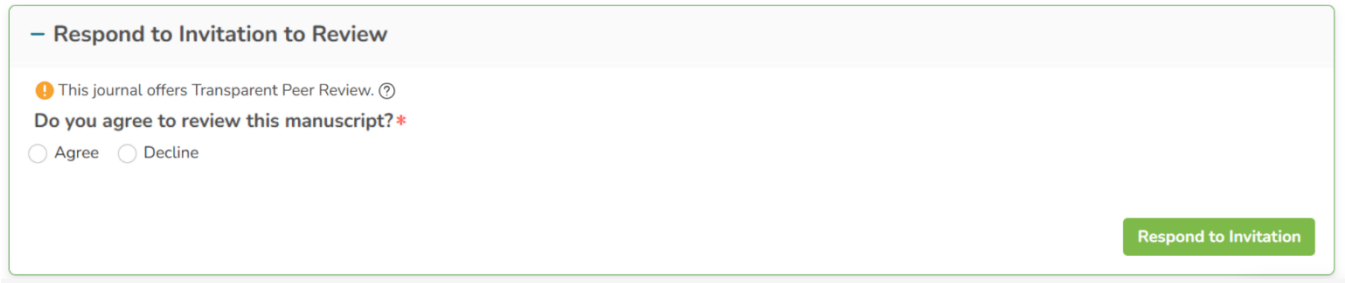
Editors responding to invitations to handle the manuscript will be shown an alert before they accept or decline.



Editors or admins making recommendations or decisions will be shown an alert before submitting.



Reviewers responding to invitations to review the manuscript will be shown an alert before they accept or decline.

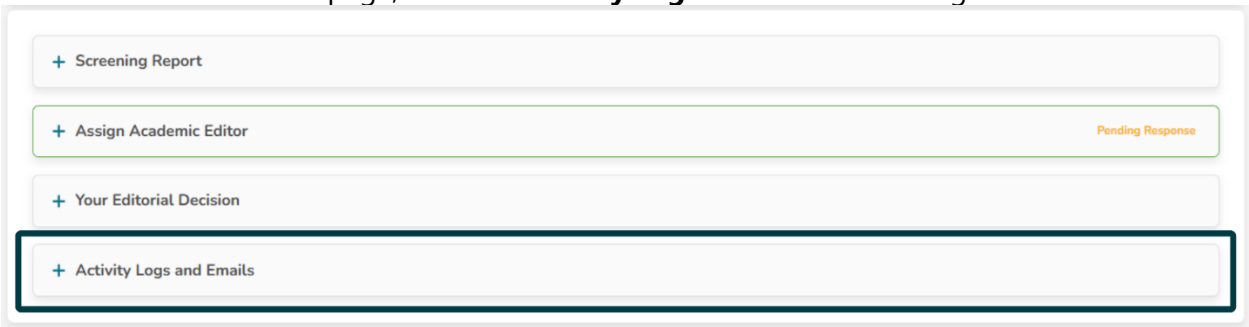


Activity Logs and Emails

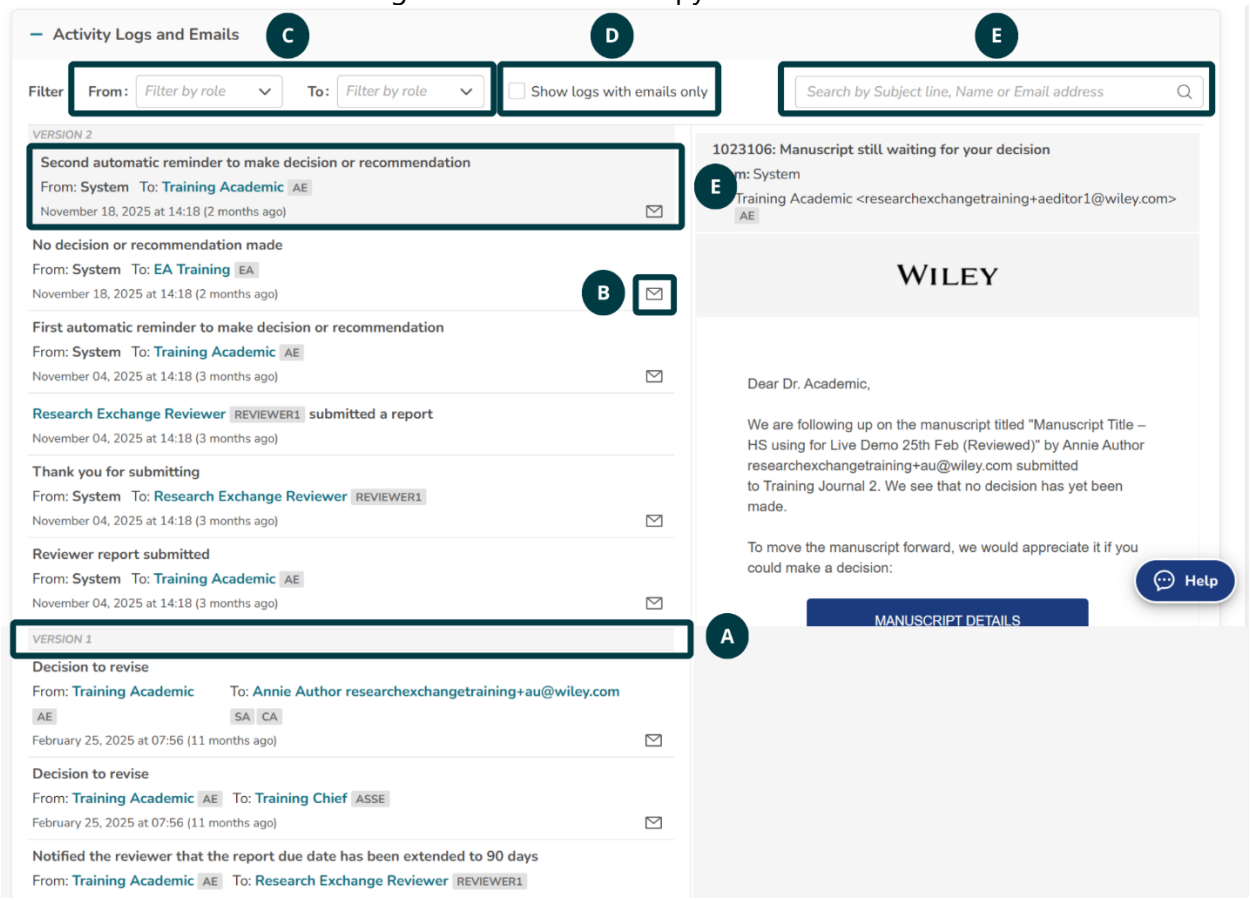
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

From the Article Details page, the user can view all actions, decisions, and emails sent during the review process in the **Activity Logs and Emails** section. To access the log, follow these steps:

1. From the **Article Details** page, click the **Activity Logs and Emails** heading.



2. The list will provide a comprehensive summary of all actions, decisions, and emails related to this manuscript. It will include details on who performed the action, who was the recipient, the date and time, and whether it was an email. Entries are organized by manuscript version.
3. The log can be filtered in the following ways:
    a. Search for actions and emails grouped by manuscript version number
    b. Search for emails in the log marked with an email icon
    c. Use the "From" and "To" selection to find actions, emails, and decisions by role
    d. Show logs with emails only
    e. Search by Subject line, Name, or Email
    f. Click on a line in the log to view the email copy

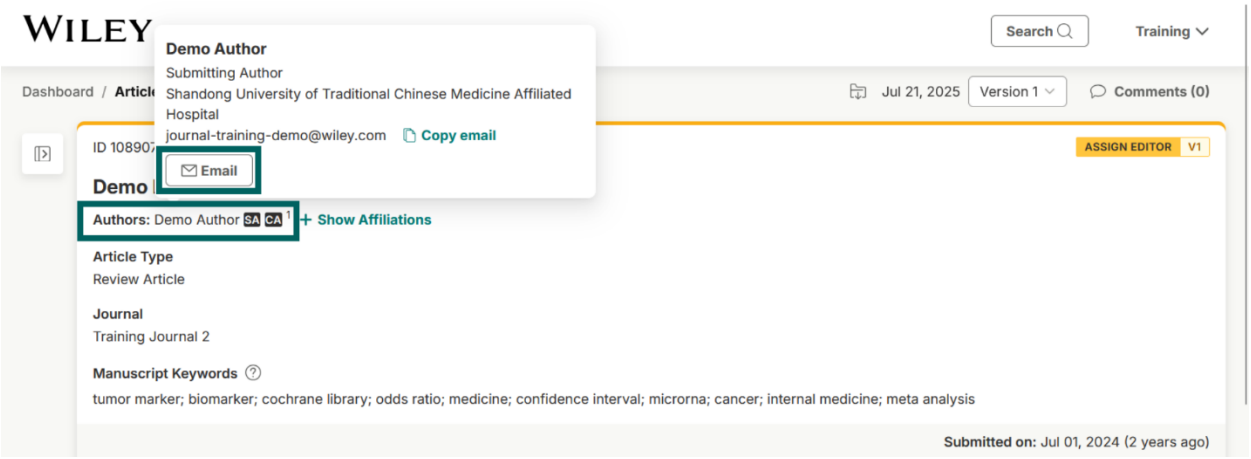


Emailing Editors, Authors, and Reviewers

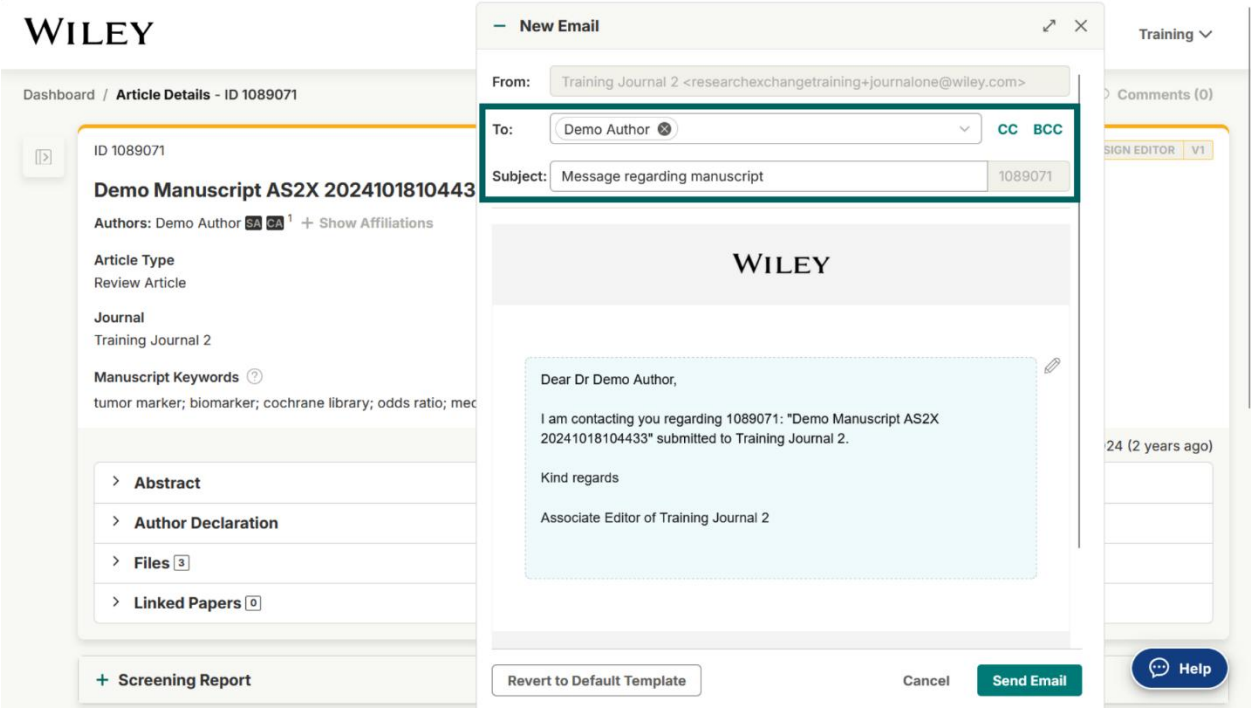
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants, Journal Managers

From the Article Details page, users can email editors, authors, and reviewers directly in the platform. To send an email and log it in the activity log, follow these steps:

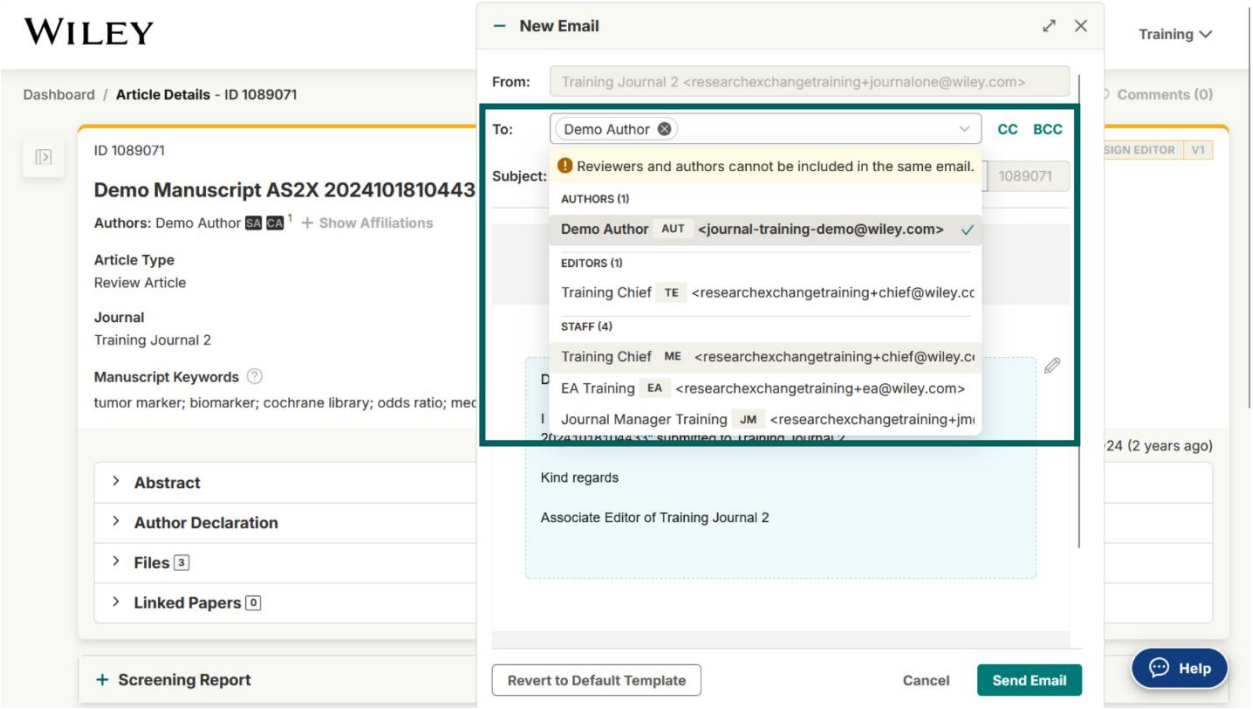
1. From anywhere on the **Article Details** page, hover over an editor's, author's, or reviewer's name and click **Email**.



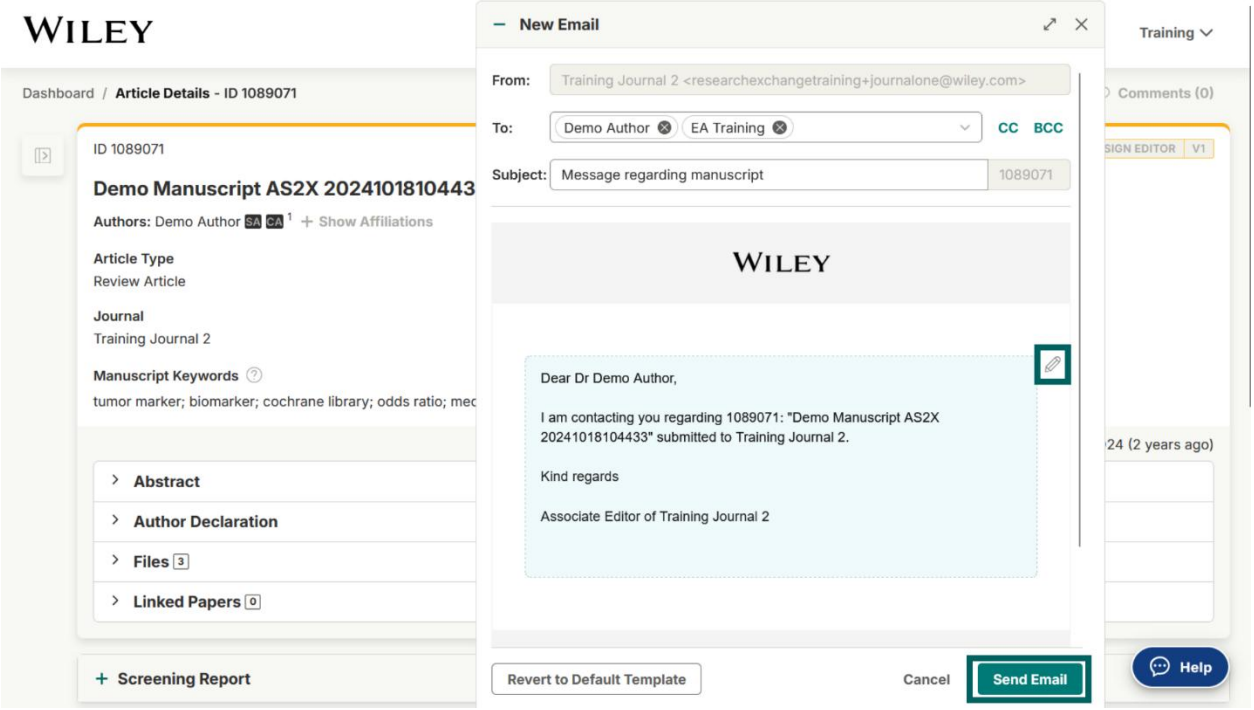
2. A compose email pop-up appears on the page. The **From field** is automatically populated with the journal mailbox linked to the journal in Research Exchange and cannot be edited. The **To field** is automatically populated based on the name selected on the Article Details page. Click **CC** or **BCC** to add recipients in those fields. The **Subject field** is automatically populated with an editable message and the manuscript ID, which cannot be edited.



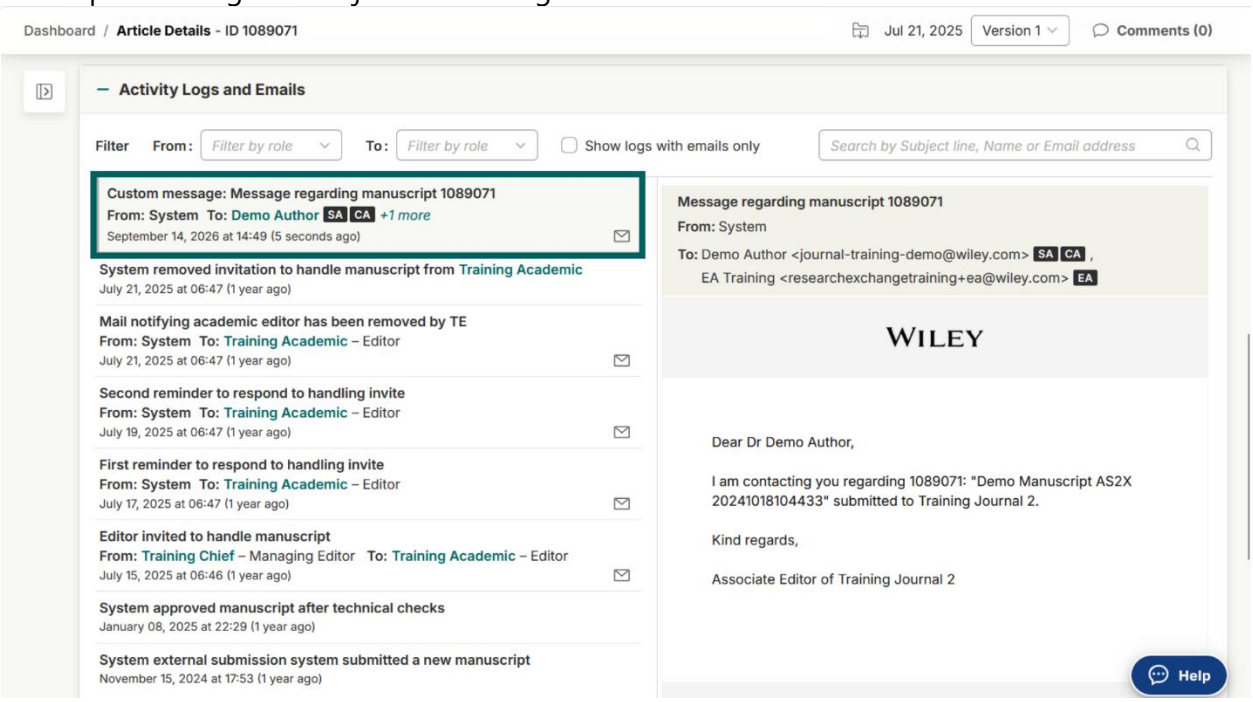
3. Clicking inside the **To, CC, or BCC field** will display a drop-down list with recipients related to the manuscript. Clicking their names will add them to the recipient list. Clicking the cross next to each name will remove them from the recipient list. The platform will suppress any actions that may violate peer-review anonymity rules, so authors and reviewers of the same manuscript cannot be added in the same email.



4. The draft text in the body of the email can be edited without restriction by clicking the pencil icon. Rich-text is available, including Bold, Italic, Underline, Strike-through, Color, Highlighting, Numbered Lists. Screenshots can be added to the email by copying and pasting them into the box. When ready, click **Send Email**.



5. After the email has been sent, it is automatically logged in the Activity Logs and Emails section. From here, the sender, recipients, timestamps, subject and body will be recorded. Recipients do not need to log in to Research Exchange to reply. They can respond from their own mailbox and the response will go to the journal's configured mailbox.



Eligible Senders

Any assigned editor on the manuscript, editors with Full Access capability, Editorial Assistants, and Journal Managers can initiate an email from within the platform. Reviewers and authors cannot initiate an email from within the platform.

Eligible Recipients

- Authors
- Assigned editors and invited editors
- Reviewers with a pending or accepted invitation status. E*xpired or declined invitations cannot be emailed*.
- Reviewers with an overdue or submitted report status.
- Editorial Assistants and Journal Managers can only be included in the CC and BCC fields.

Eligible Manuscripts

Emails can be sent from the Article Details page of any manuscript in the Review module, except those that have a Rejected, Accepted: Awaiting Checks, and Accepted: Exported status.

Managing APC Edits and Manual Price Overrides

Applying an Article Processing Charge (APC) Edit

Applicable to:	Editorial Assistants, Journal Managers

About APC Waivers

APC Waivers are only applicable for authors accepted to publish in fully open-access journals. Each waiver reduces the APC to $0.

Wiley does not currently offer waivers or discounts for authors publishing open access in a hybrid journal.

Each journal is allocated a specific number of APC waivers that can be applied at an editor's discretion. The number of waivers available in each calendar year is set by the **Publishing Strategy** team. Discounts applied by the author in Submission are displayed here.

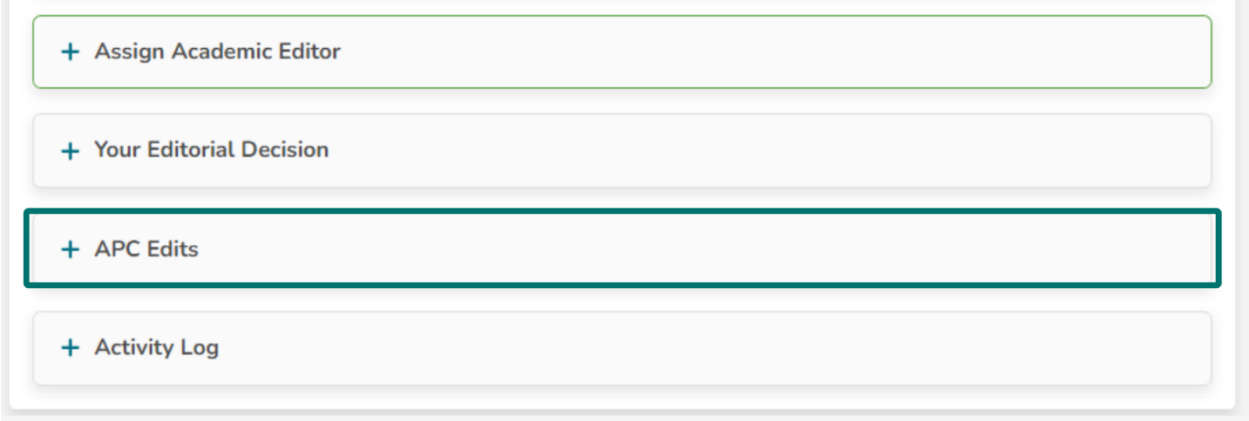
Applying APC Waivers

These can be applied at any time after screening is complete and before an editor makes a final acceptance decision. APC waivers should not be requested after a manuscript has been accepted. Doing so can delay the application of the waiver and may result in authors receiving payment reminders during this period.

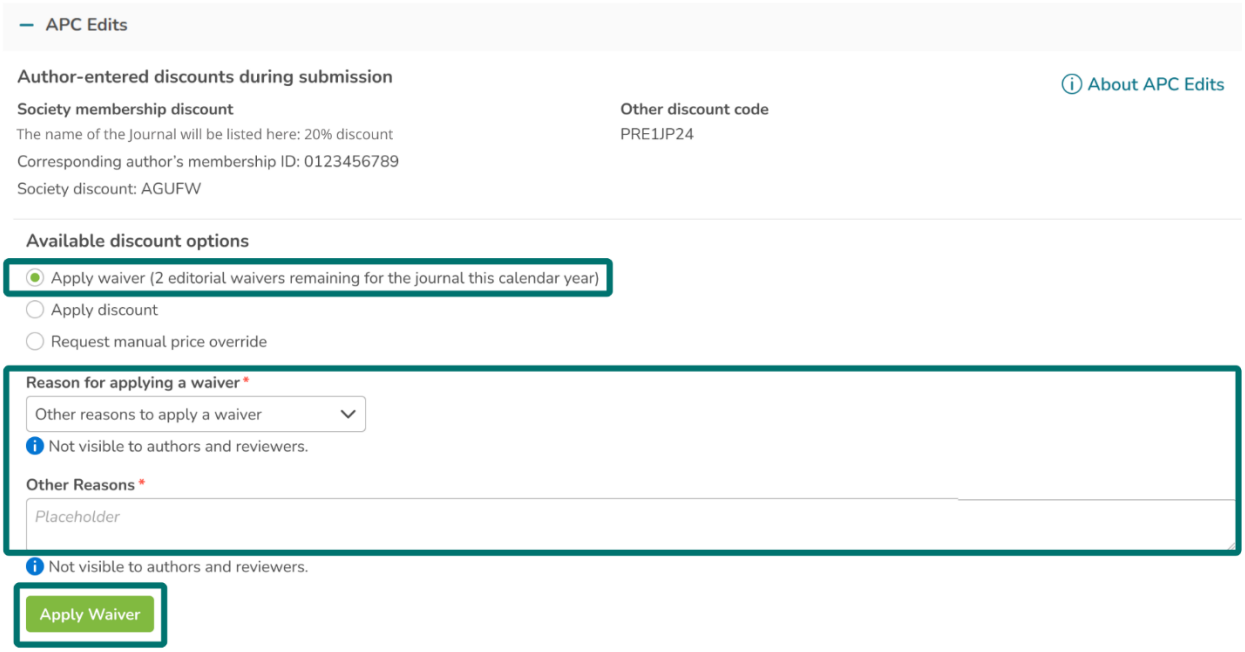
Any changes that need to be made after an editor has accepted the manuscript, an email must be sent to cs-openaccess@wiley.com. In this email, include all relevant information and select a reason for applying a waiver: invited by editor, contractually agreed, part of a special issue, or other. If "other", specify details and provide a code if available.

If an editor requests a waiver to be applied, follow these steps:

1. From the **Article Details** page, click the **APC Edits** section heading.



2. Under the **Available discount options** heading, select the **Apply Waiver** radio button. The number of waivers remaining for the current calendar year is displayed next to the **Apply Waiver** option.
3. If there are waivers remaining, choose an option from the dropdown list labeled **Reason for applying a waiver**. Available reasons include:
    a. Invited by editor
    b. Contractually agreed
    c. Manuscript is part of a Special Issue
    d. Other reasons to apply a waiver (If **Other reasons to apply a waiver** is chosen, the reason must be documented in the text box labelled **Other Reasons**.)
4. To apply the waiver, click the **Apply Waiver** button.



5. A pop-up confirmation panel will appear. To confirm the decision, click the **APPLY WAIVER** button.
6. The label **APC EDITED** will appear in the APC Edits section and at the top of the article details page to show that the APC has been edited.



Authorizing Waivers

Waivers are applied with no requirement for authorization. An automatic email is generated and sent to the author to inform them that the APC has been waived.

No Waivers Remaining

If an editor requests an APC waiver and there are no waivers remaining, additional waivers can be requested from the APC Pricing team.

To do this, get in touch with the Wiley Peer Review Performance contact who will submit a Journal Operational Configuration Tracker ticket (JOCT) under APC Pricing General > Waivers and Discounts.

If the APC Pricing team agrees to an increased cap, the Wiley contact can raise a JSM support ticket for the Research Exchange Review team.

If they agree to a one-off waiver exception, a Manual Price Override for the manuscript can be requested (see the following section for details).

In both cases, the JOCT ticket number should be included so that the responder can verify approval by the APC Pricing team.

Requesting a Manual Price Override

Applicable to:	Editorial Assistants, Journal Managers

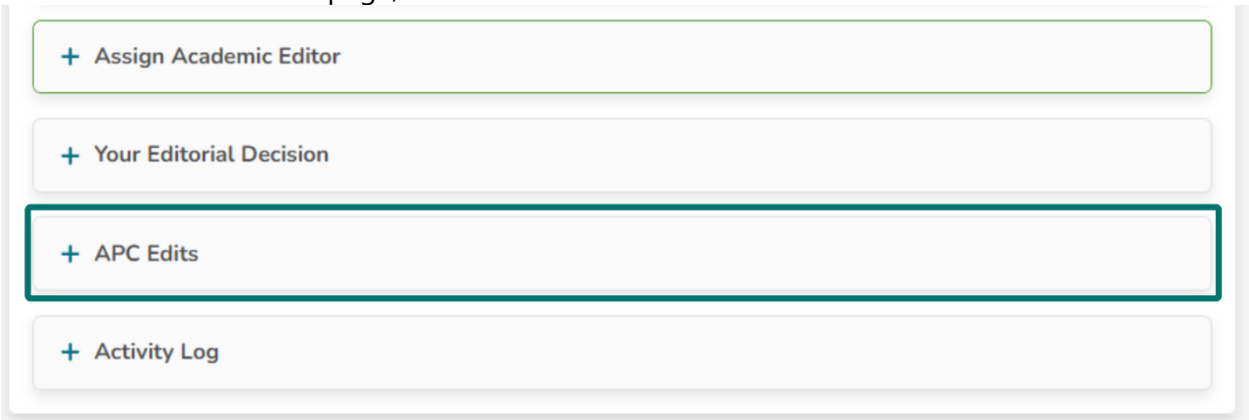
About Manual Price Overrides

APCs are calculated automatically using data gathered during submission. Rarely, there is an exceptional circumstance (such as a pre-agreed co-publication or sponsorship), and the APC needs to be updated using the manual price override. Most manuscripts will require no action, including geographic waivers/discounts and TA coverage, which are automatically applied.

Manual Price Overrides should only be applied in exceptional circumstances. Manual Price Overrides are only available for authors accepted to publish in our fully open-access journals.

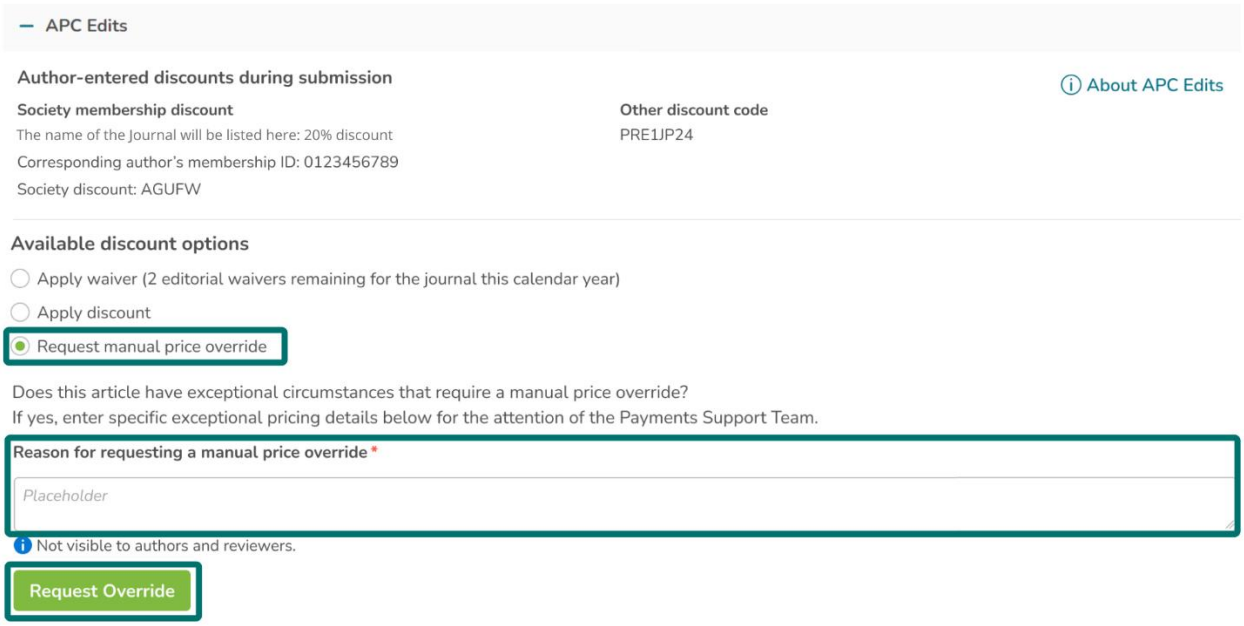
To request a manual price override, follow these steps:

1. From the **Article Details** page, click the **APC Edits** button.



2. Under the **Available discount options** heading, select the **Request manual price override** radio button.
3. Type the reason for the request into the text box labelled **Reason for requesting a manual price override**. Include the JOCT ticket number if this exception has already been approved by the APC pricing team.

4. Click the **Request Override** button.



5. A pop-up confirmation panel will appear. To confirm the decision, click the **REQUEST OVERRIDE** button.
6. The label **APC EDITED** will appear in the APC Edits section and at the top of the article details page to show that the APC has been edited.



Authorizing Manual Price Overrides

Manual price override requests will automatically pass to Customer Services for a decision. If the request is approved, Customer Services will inform the author that the APC has not been applied.

Manual override decisions do not affect the number of waivers remaining for the journal for the current year.

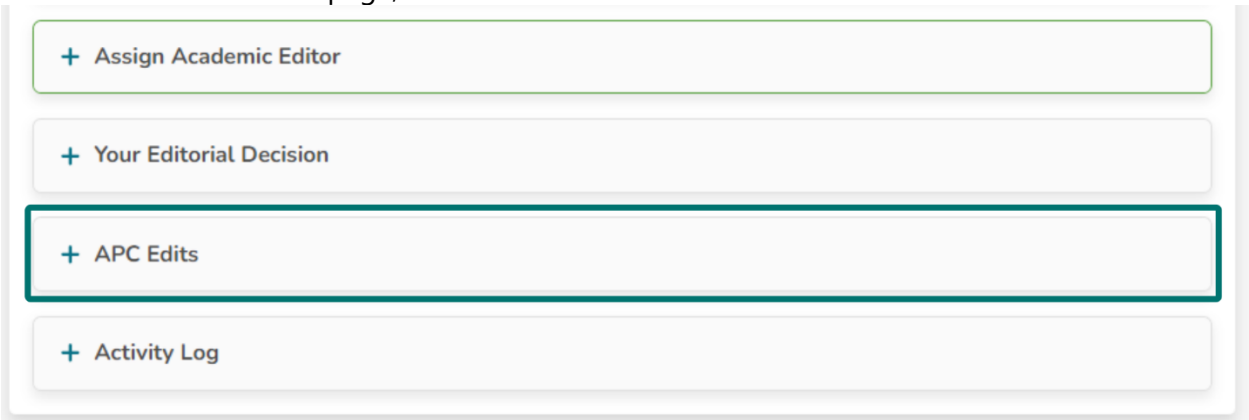
Applying APC Discount Codes for Export to Price Proposal

Applicable to:	Editorial Assistants, Journal Managers

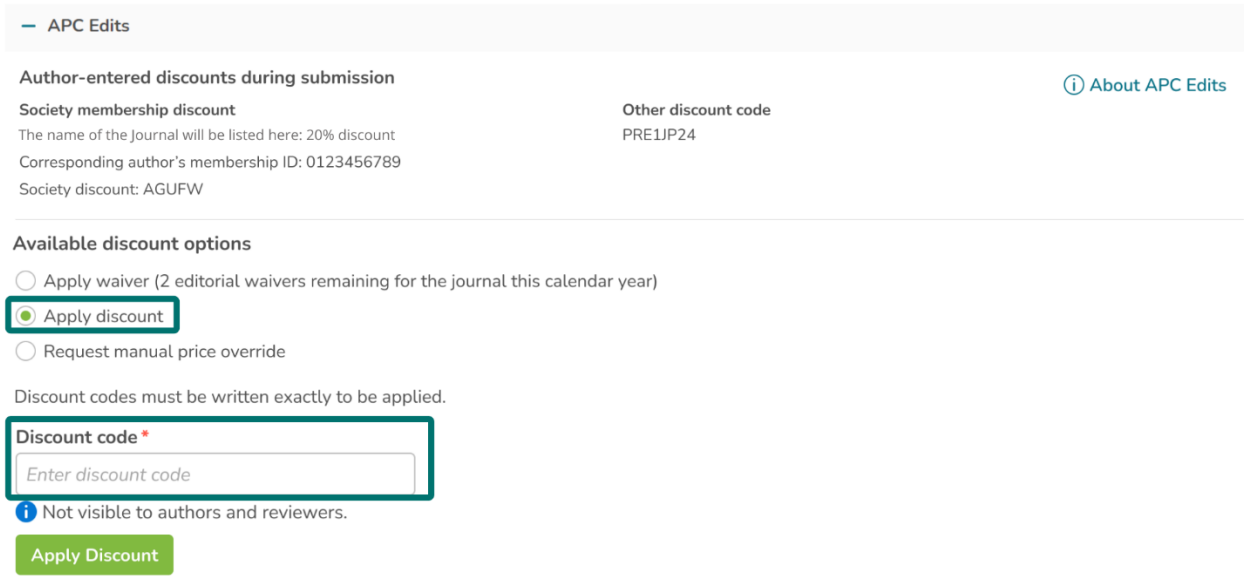
APC discount codes can be entered directly within the manuscript workflow and exported downstream to the price proposal system in Viax to ensure accurate billing.

To apply an APC discount code, follow these steps:

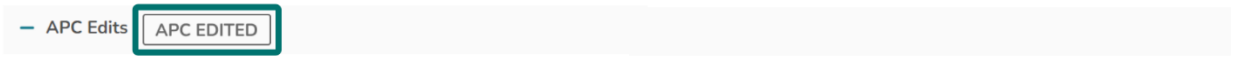
1. From the **Article Details** page, click the **APC Edits** button.



2. Under the **Available discount options** heading, select the **Apply discount** radio button.
3. Type the discount code into the text box using numbers and letters to a maximum of 20 characters.
4. Click the **Request Override** button.



5. A pop-up confirmation panel will appear. To confirm the decision, click the **APPLY DISCOUNT** button.
6. The label **APC EDITED** will appear in the APC Edits section and at the top of the article details page to show that the APC has been edited.



Authorizing APC Discount Codes for Export to Price Proposal

After the discount code is entered, a message will confirm its application. If the code fails to apply, an error message is shown at the top of the page. The APC Edited label appears in the APC edits section heading and at the top of the article details page. All entries of discount codes are documented in the manuscript's activity log for auditing and tracking purposes.

Manuscript Assignment and Invitation

Workflow Configuration: Assignment vs Invitation

There are four ways manuscripts can be initially added to an editor's dashboard:

1. Automatic Invitation
2. Automatic Assignment
3. Manual invitation
4. Manual Assignment

This will change based on the configuration of your workflow and can be checked by someone with a Journal Manager role or by contacting your Wiley representative. The following options are available for one and two-tier workflows at each stage of the process.

Workflow	Pre-peer Review Step 1	Pre-Peer Review Step 2	Pre-peer Review Step 1	Post-Peer Review Steps
1-tier	Not applicable	Not applicable	Automatic Invitation Manual Assignment Manual Invitation	Not applicable
2-tier	Automatic Assignment Manual Assignment	Not applicable	Manual Assignment Manual Invitation	Automatic Assignment of Pre-Peer Review Editor
3-tier	Automatic Assignment Manual Assignment	Manual Assignment	Manual Assignment Manual Invitation	Manual Assignment

Automatic Invitation

Applicable to:	Academic Editors, Guest Editors

Once a manuscript has been approved in Screening, it automatically moves into the Review module to begin the peer review process.

For 1-tier workflows and special issue workflows that involve only one editor, the platform will **automatically invite an editor** from the journal's editorial board.

Editor Expertise Keywords

The platform employs algorithms to extract and generate keywords from the manuscript. For Academic or Guest Editors, Research Exchange uses their keywords automatically generated by the system, to match them to the manuscript's keywords. In Research Exchange Review, expertise keywords are automatically assigned when an editor or reviewer is added to the platform. Expertise keywords are based on the editor or reviewer's contributions to previous publications. This information is drawn from external databases, such as Web of Science (WoS).

Editor Manuscript Assignments Calculation

Additionally, for journals with multiple editors, it considers each editor's current assignments, prioritizing those with the lowest current assigned manuscripts to ensure an equitable distribution of invitations.

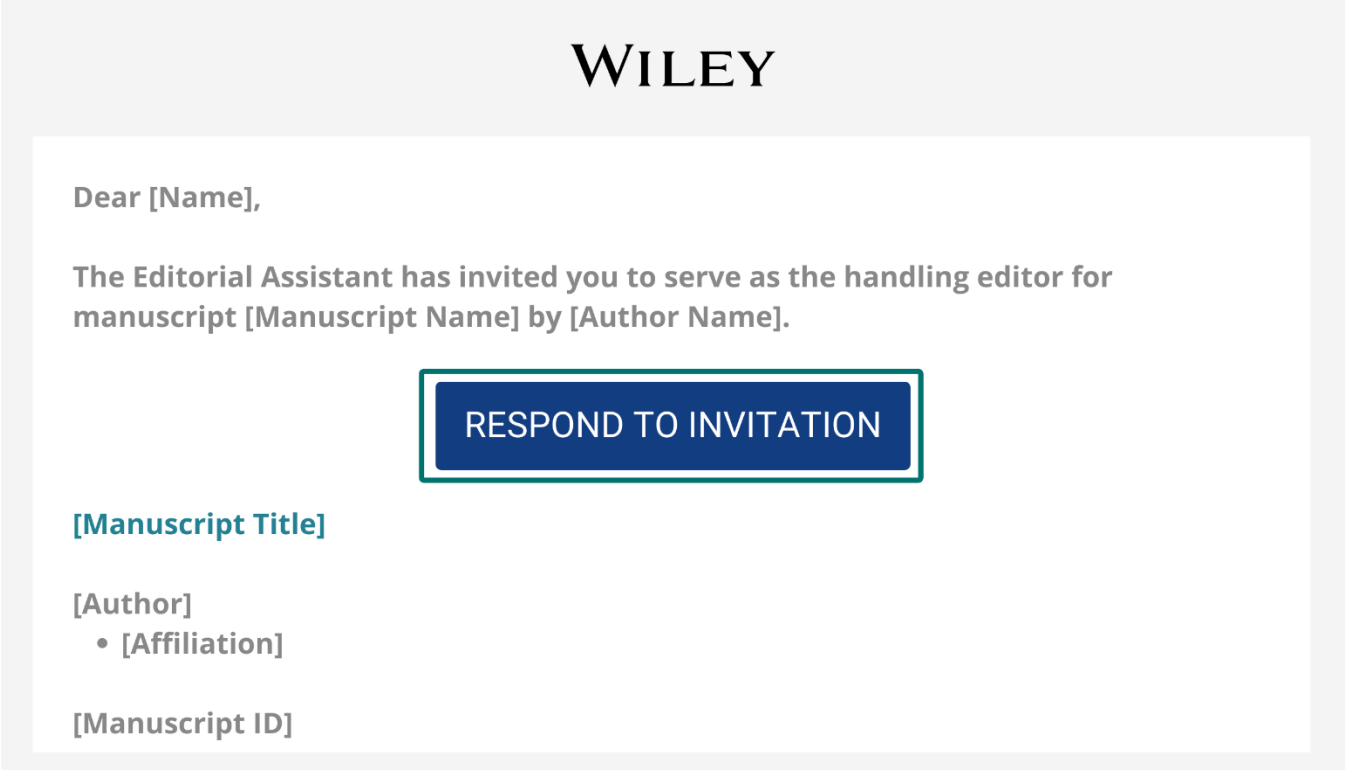
Information about an editor's current assignments is gathered for a single journal. So, if an editor is assigned to manuscripts for more than one journal, this will not be reflected in their current assignment figures.

It will also take into account all manuscripts that they are assigned to that require their action, regardless of what stage of the process they are in, and any pending invitations. Manuscripts where the editor had a role in the process, but no current action, will not be included in the assignment calculation, but can be found in the 'in progress' dashboard.

This is a snapshot of assigned manuscripts at a given moment, not a true workload measure that accounts for task complexity, effort differences across manuscript stages, or cumulative contributions over time.

Receiving a manuscript by automatic invitation

Once the manuscript has successfully passed the submission checks and received approval from the Editorial Assistant, the editor will be notified via email to handle the manuscript. Clicking the **ACCEPT INVITATION** button will take the editor to the Review module's login page to view the manuscript.



If unable to handle the manuscript, the editor can decline the invitation. The Editorial Assistant will be informed, and they will be able to invite a new editor.

Automatic Assignment

Applicable to:	Triage Editors, Lead Guest Editors

Once a manuscript has been approved in Screening, it automatically moves into the Review module to begin the peer review process.

Editor Expertise Keywords

The platform employs algorithms to extract and generate keywords from the manuscript. For Academic or Guest Editors, Research Exchange uses their keywords automatically generated by the system, to match them to the manuscript's keywords. In Research Exchange Review, expertise keywords are automatically assigned when an editor or reviewer is added to the platform. Expertise keywords are based on the editor or reviewer's contributions to previous publications. This information is drawn from external databases, such as Web of Science (WoS).

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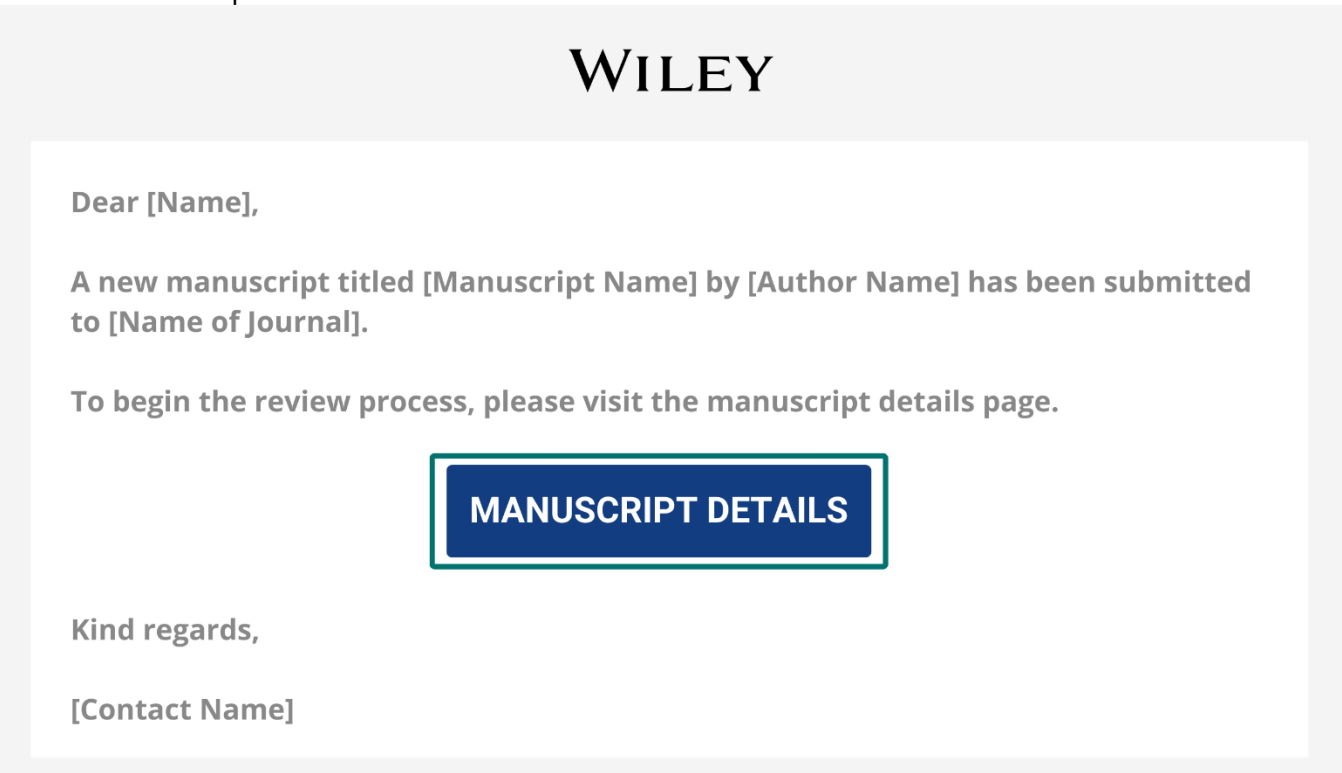
It will also take into account all manuscripts that they are assigned to that require their action, regardless of what stage of the process they are in, and any pending invitations. Manuscripts where the editor had a role in the process, but no current action, will not be included in the assignment calculation, but can be found in the 'in progress' dashboard.

This is a snapshot of assigned manuscripts at a given moment, not a true workload measure that accounts for task complexity, effort differences across manuscript stages, or cumulative contributions over time.

Receiving a manuscript by automatic assignment

When a new manuscript has been submitted to the journal, the editor will receive an email notification. Clicking the **MANUSCRIPT DETAILS** button will take the editor to the Review module's login page to

view the manuscript.



If the editor is unable to handle the manuscript, they can either reassign it to another editor or let the Editorial Assistant or Journal Manager know that it needs reassigning.

Manual Invitation

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Full Access Editors

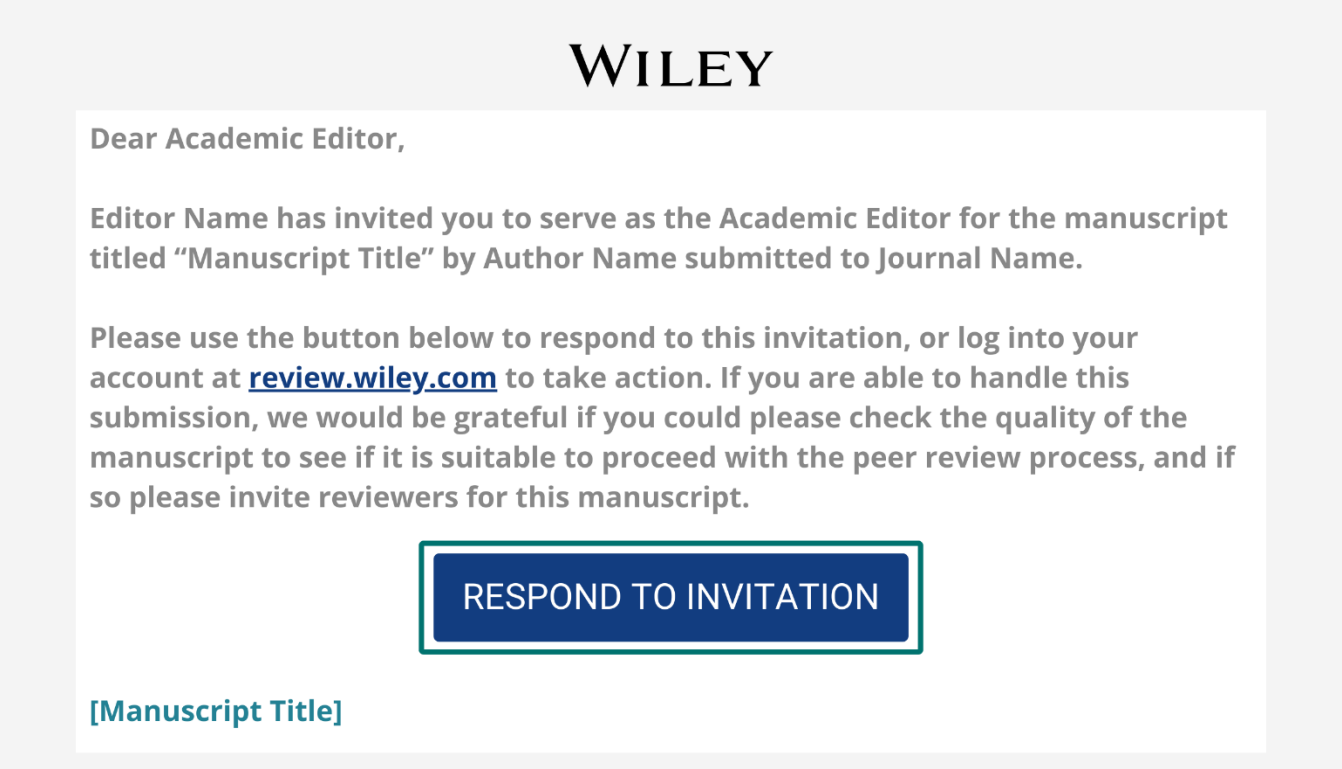
Once a manuscript has been approved in Screening, it automatically moves into the Review module to begin the peer review process.

In workflows with two editors, the second editor — usually the Academic Editor or Guest Editor — is always manually invited by the first editor, usually the Triage Editor or Lead Guest Editor.

Receiving a manuscript by manual invitation

When an editor is invited to work on a manuscript, they will receive an email request from the journal. To help them decide whether to agree or decline, the email will provide details, including the names of the authors, the title of the paper, and the research abstract.

Clicking the **RESPOND TO INVITATION** button will take the editor to the Review module's login page to view the manuscript. There, they will be able to accept or decline the invitation.



If the editor declines to handle the manuscript, the inviting editor will be informed so they can invite a different editor.

Manual Assignment

Applicable to:	Editorial Assistants, Journal Managers, Full Access Capability

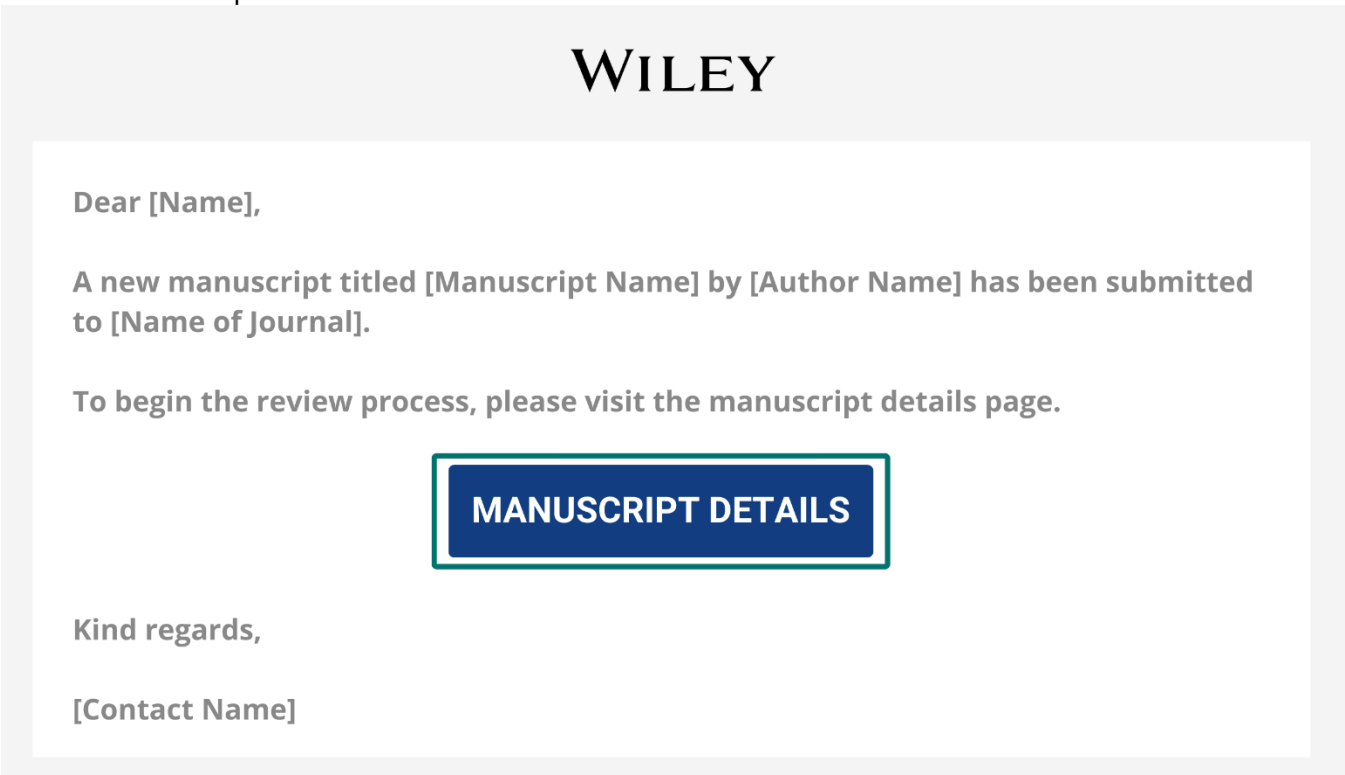
Once a manuscript has been approved in Screening, it automatically moves into the Review module to begin the peer review process.

In workflows with two editors, the first editor — usually the Triage or Lead Guest Editor — will need to be manually assigned. The manuscript will remain unassigned until this task is completed by someone with an Editorial Assistant or Journal Manager role. Editors with the Full Access capability enabled will also be able to carry out this task.

Receiving a manuscript by manual assignment

When a new manuscript has been assigned to them, the editor will receive an email notification. Clicking the **MANUSCRIPT DETAILS** button will take the editor to the Review module's login page to

view the manuscript.



If the editor is unable to handle the manuscript, they can either reassign it to another editor or let the Editorial Assistant or Journal Manager know that it needs reassigning. Editors with Full Access capability will also be able to reassign the manuscript.

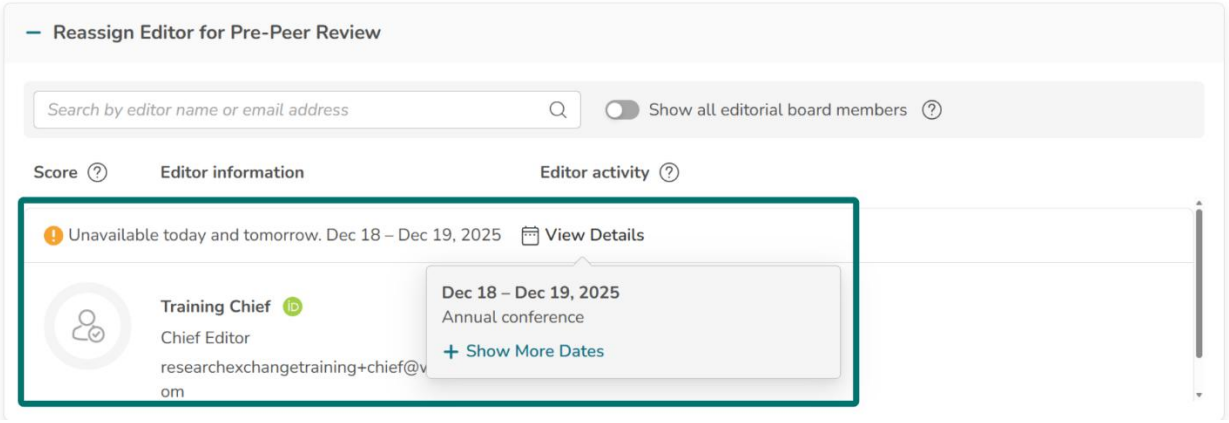
Assigning or Inviting Unavailable Editors

Applicable to:	Triage Editors, Lead Guest Editors, Full Access Editors, Editorial Assistants, Journal Managers

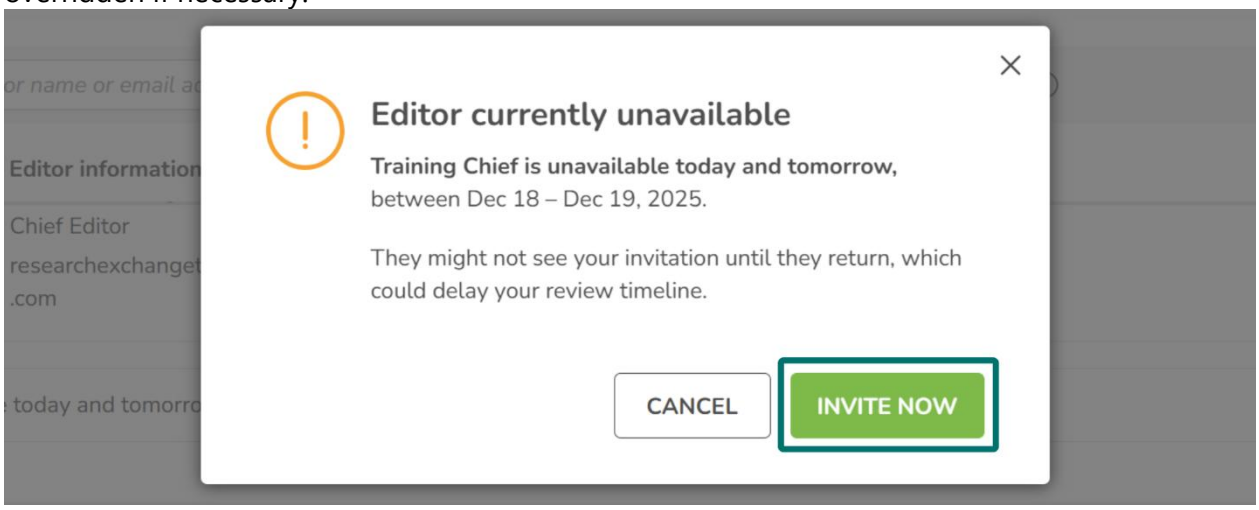
Editors can note their availability and out-of-office dates to avoid assignments or invitations during absences. These dates are visible to other editors and admins on the journal, allowing for better assignment decisions. To view editor out-of-office dates and override them to assign manuscripts, follow these steps:

1. Editor availability information will appear during the manual assignment or invitation steps. Clicking **View Details** will show more details about the current out-of-office period. Clicking

Show More Dates will show all upcoming dates the editor will not be available.

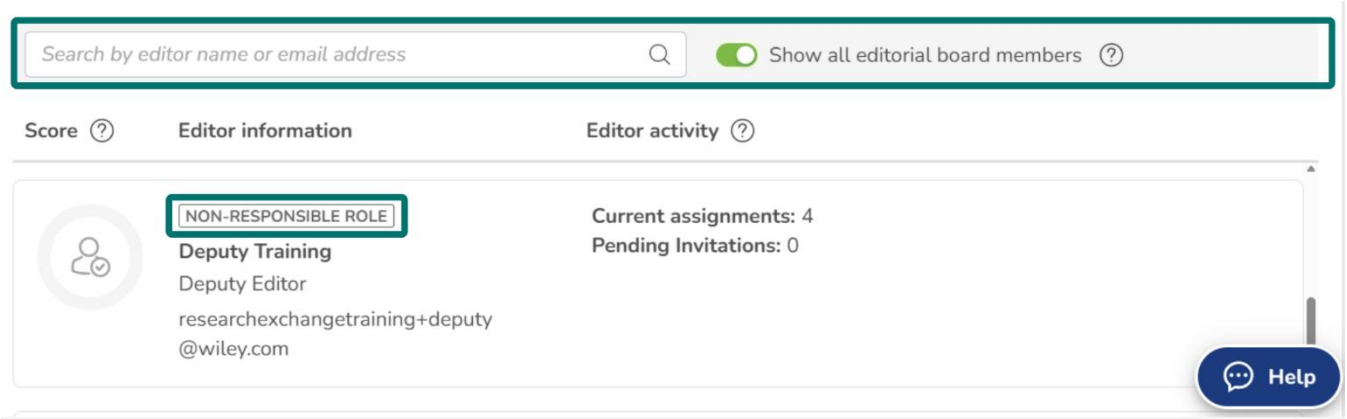


2. The editor can still be assigned or invited. A warning message will appear, but this can be overridden if necessary.



Assigning or Inviting Editors from the Journal Board with a 'non-responsible role'

At each step in the peer review process, users with an Editorial Assistant or Journal Manager system role will be able to assign editors who may not typically be responsible for that step in the process. When assigning or inviting an editor, they can toggle to see the entire editorial board and choose an editor from the board with a 'non-responsible role'.



Managing Users on the Journal Board

Adding users, removing users, or assigning editorial roles to the board can only be completed by someone with a Journal Manager system role. Instructions for Journal Managers can be found here. Otherwise, contact your Wiley representative for support.

Assigning and Reassigning Editors to Manuscripts

Assigning an Editor to Handle the Pre-Peer Review Step 1

Applicable to:	Editorial Assistants, Journal Managers, Full Access Capability

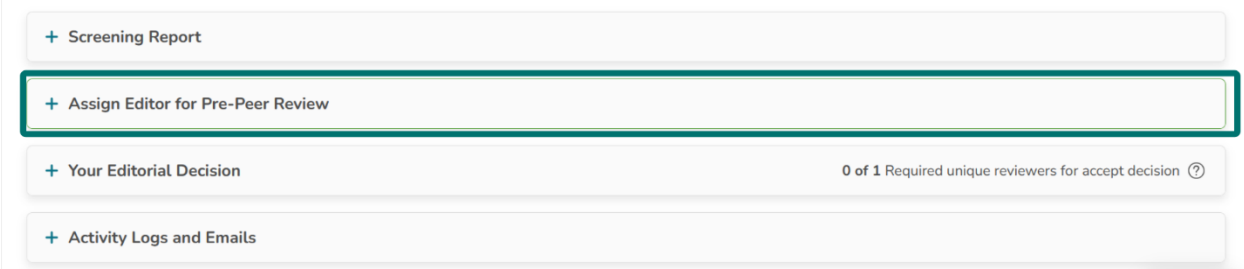
Once a manuscript has been approved in Screening, it automatically moves into the Review module to begin the peer review process.

For 2-tier and 3-tier workflows, there is the option to manually assign the first editor in the process to handle Pre-Peer Review step 1, usually the Triage or Lead Guest Editor. And for 3-tier workflows, there is the option to manually assign a second editor in the process to handle the Pre-Peer Review Step 2.

The manuscript will remain unassigned until this task is completed by someone with an Editorial Assistant or Journal Manager role. Editors with Full Access can complete this task by either assigning an editor from the list or selecting 'Assign myself'.

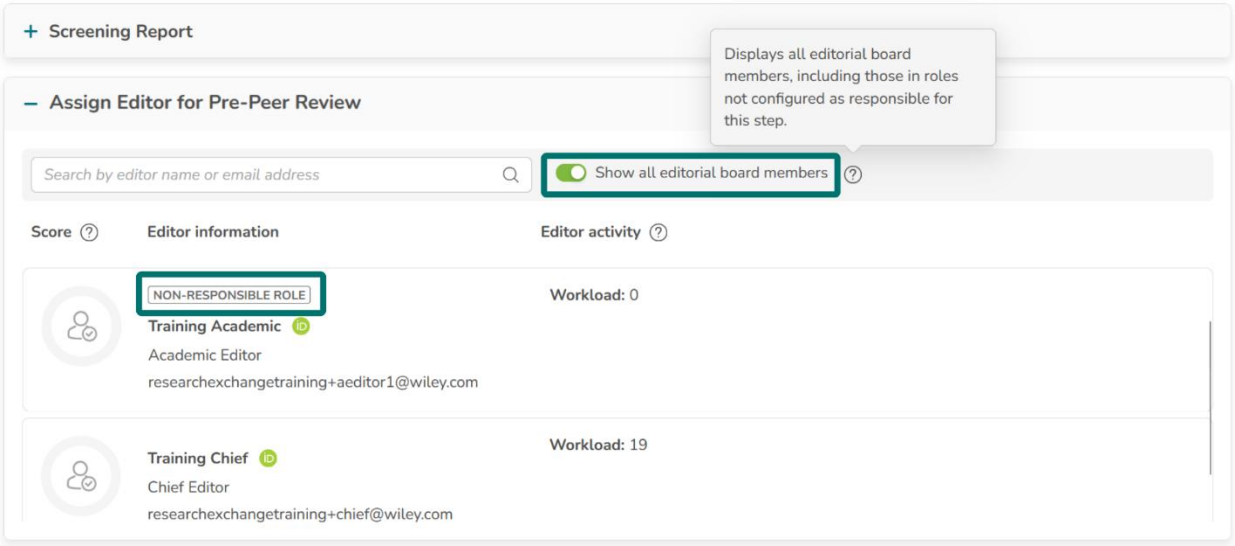
To assign an editor to handle the Pre-Peer Review step, follow these steps:

1. From the **Article Details** page, click the **Assign Editor for Pre-Peer Review** heading. A list of potential editors appears; use the search function to find a specific name or email if needed. (Editors with Full Access capability will not be able to toggle to see the whole editorial board.)

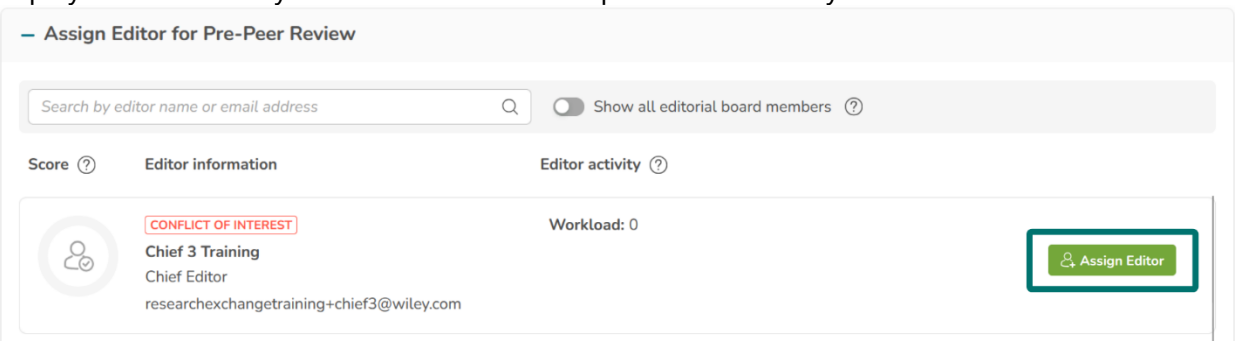


2. Use the toggle to display all editorial board members, including those in roles not configured as responsible for this step in the process. They will have a 'Non-Responsible Role' label above their name. (Editors with Full Access capability will not be able to toggle to see the whole

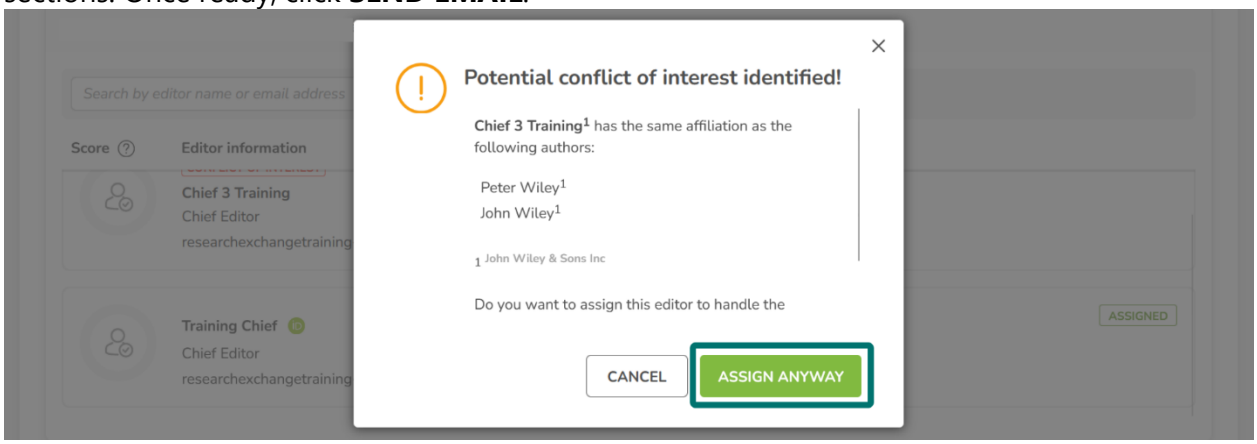
editorial board.)



3. To assign an editor from the list, hover over their name and click the **Assign Editor** button. Their current workload for the journal is displayed to help make a decision. Some journals will also display the editor's keywords based on related publication history.



4. If a conflict of interest is detected, a pop-up will display relevant details. To continue with the assignment, click the **ASSIGN ANYWAY** button. The email template will appear, with editable sections. Once ready, click **SEND EMAIL**.



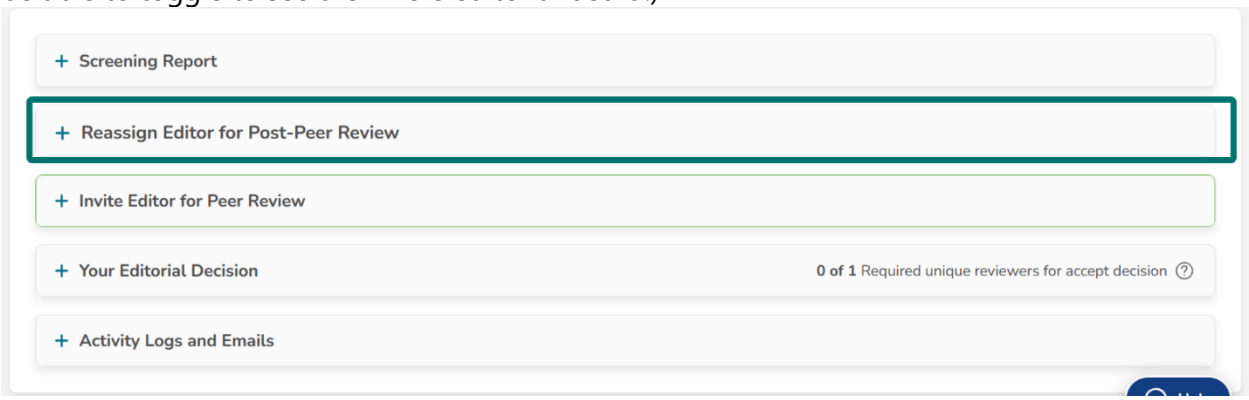
The editor will now receive an email notification to let them know that a manuscript has been assigned to them. On the article details page, the editor is marked with the label **Assigned**.

Reassigning an Editor to Handle the Post-Peer Review Step 1 and 2

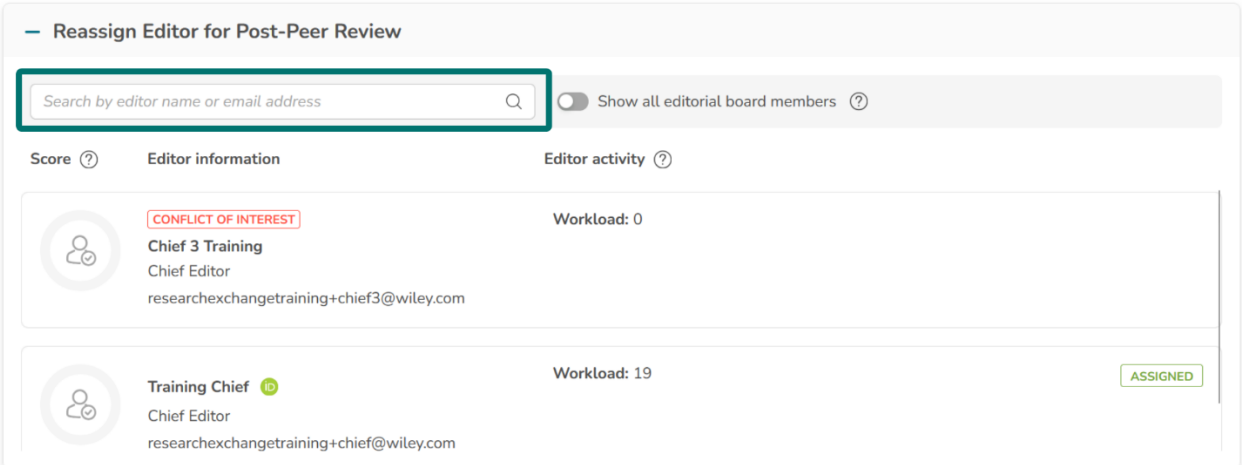
Applicable to:	Editorial Assistants, Journal Managers, Full Access Capability

After the peer review step is complete, the manuscript will automatically pass to the next step in the process. If the workflow is configured with a Post-Peer Review Step 1 or Post-Peer Review Step 2, the editor assigned to those steps can be reassigned by following these steps:

1. From the **Article Details** page, click the **Reassign Editor for Post-Peer Review** heading. A list of potential editors appears; use the search function to find a specific name or email if needed. The current editor is marked with the label **Assigned**. (Editors with Full Access capability will not be able to toggle to see the whole editorial board.)

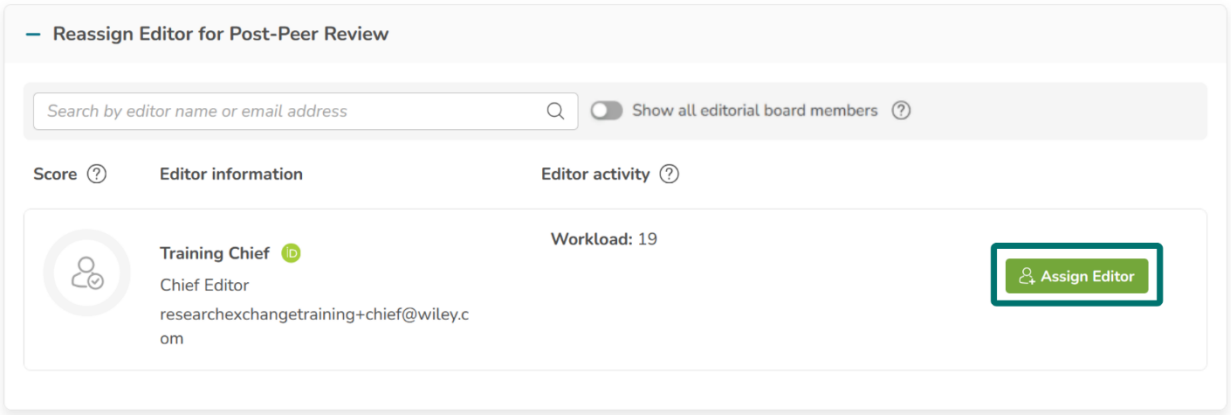


2. Use the toggle to display all editorial board members, including those in roles not configured as responsible for this step in the process. They will have a 'Non-Responsible Role' label above their name. (Editors with Full Access capability will not be able to toggle to see the whole editorial board.)

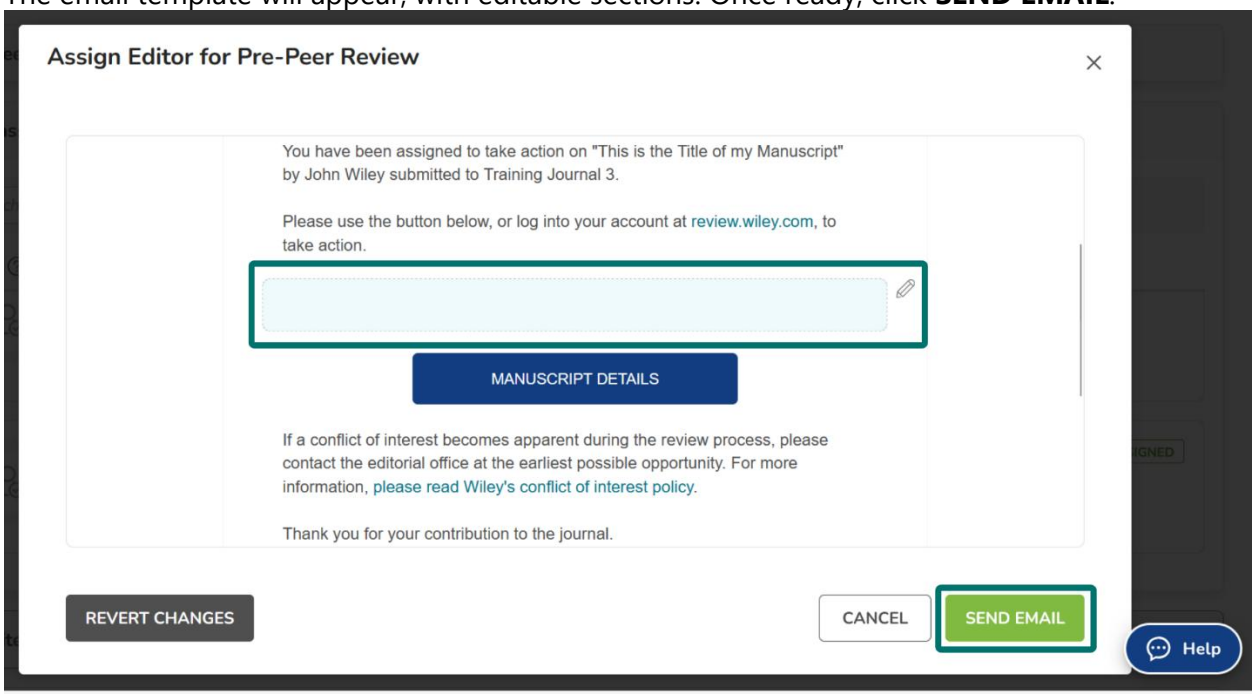


3. To assign a new editor from the list, hover over their name and click the **Assign Editor** button. Their current workload for the journal is displayed to help make a decision. Some journals will also display the editor's keywords based on related publication history. Editors with Full Access

can complete this task by either assigning an editor from the list or selecting 'Assign myself'.



4. If a conflict of interest is detected, a pop-up will display relevant details. To continue with the assignment, click the **ASSIGN ANYWAY** button.
5. The email template will appear, with editable sections. Once ready, click **SEND EMAIL**.=



The editor will now receive an email notification to let them know that a manuscript has been assigned to them. On the article details page, the new editor is marked with the label **Assigned**. There is no limit to the number of times a manuscript can be reassigned. If a Triage or Lead Guest Editor was removed from the manuscript, they can be reassigned the manuscript if needed, provided there are no conflicts of interest, and they are still active on the journal's editorial board.

Removing Triage Editors during the Peer Review Process

When a Triage Editor is removed from the journal board, their access will be limited to manuscripts that have not progressed to the Peer Review Step. Manuscripts currently in the peer review process will, upon completion, be reassigned to an active Triage Editor on the journal board.

Assigning an Editor for the Peer Review Step

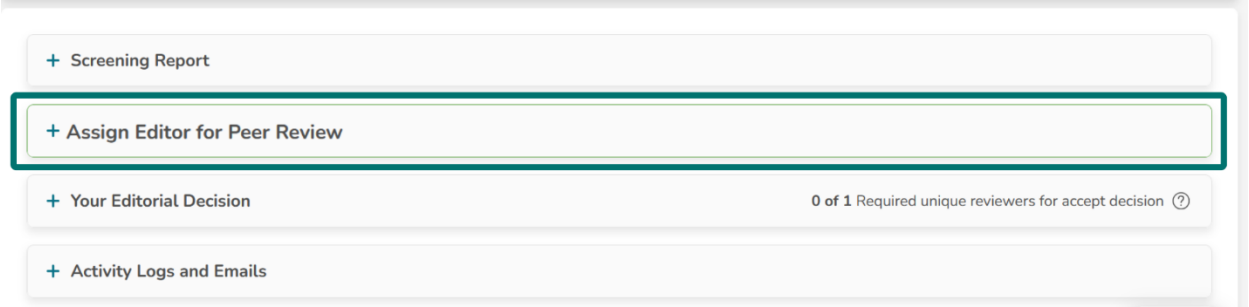
Applicable to:	Editorial Assistants*, Journal Managers*, Full Access Capability, Triage Editors, Lead Guest Editors

Once a manuscript has been assigned to the first editor in the two-tier workflow to handle the Pre-Peer Review step, the second editor needs to be assigned.

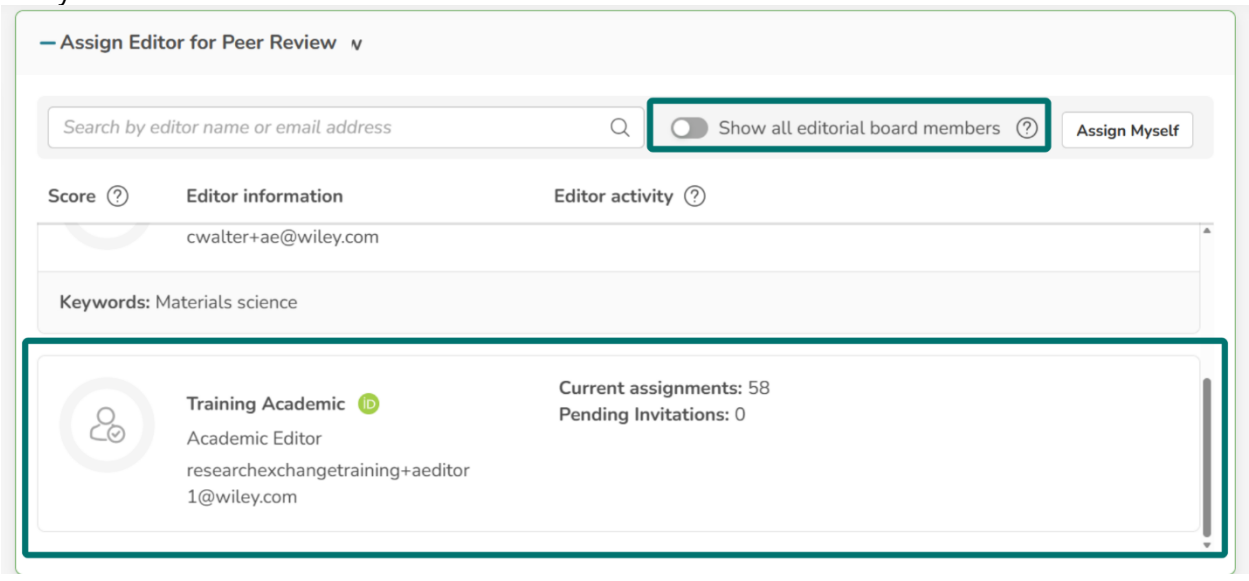
In 2-tier workflows, editors handling the Pre Peer Review Step can choose to assign an editor from the list or assign themselves to carry out this role. Editors with Full Access can complete this task by either assigning an editor from the list or selecting 'Assign myself'.

In 3-tier workflows, editors handling the Pre-Peer Review Step 2 can choose to assign an editor from the list or assign themselves to carry out this role. Editors with Full Access can complete this task by either assigning an editor from the list or selecting 'Assign myself'.To assign an editor to handle the Peer Review step, follow these steps:

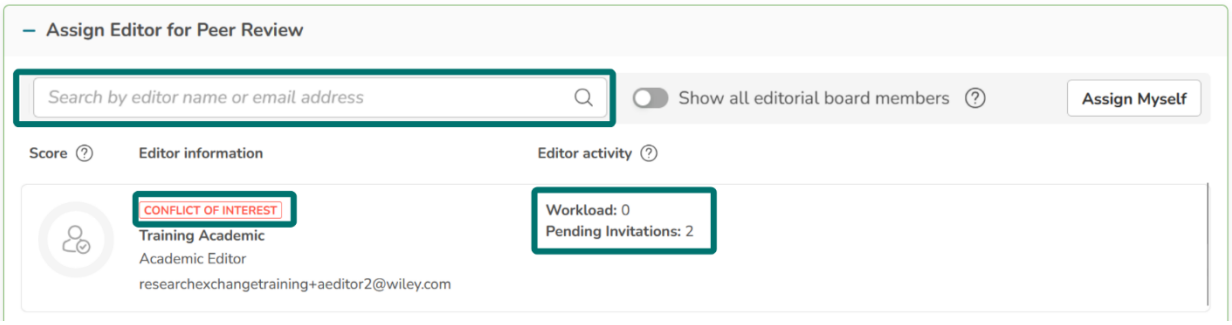
1. From the **Article Details** page, click on the **Assign Editor for Peer Review.**



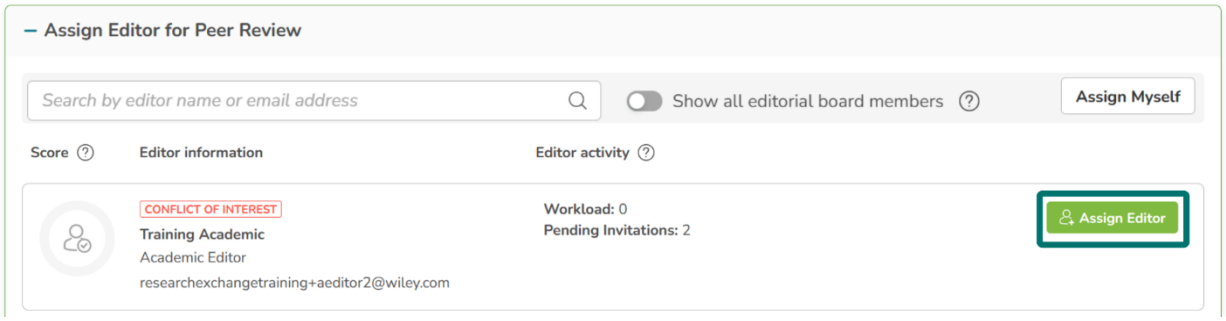
2. Potential Editors with suitable roles to carry out the Peer Review step are listed for assignment. Alternatively, users with an Editorial Assistant or Journal Manager system role can use the toggle to choose an editor from the board who doesn't typically carry out the Peer Review Step. This list is populated when the journal is set up. If someone needs to be added to the Editorial Board, this can be done by someone with a Journal Manager system role or by reaching out to the Wiley contact.



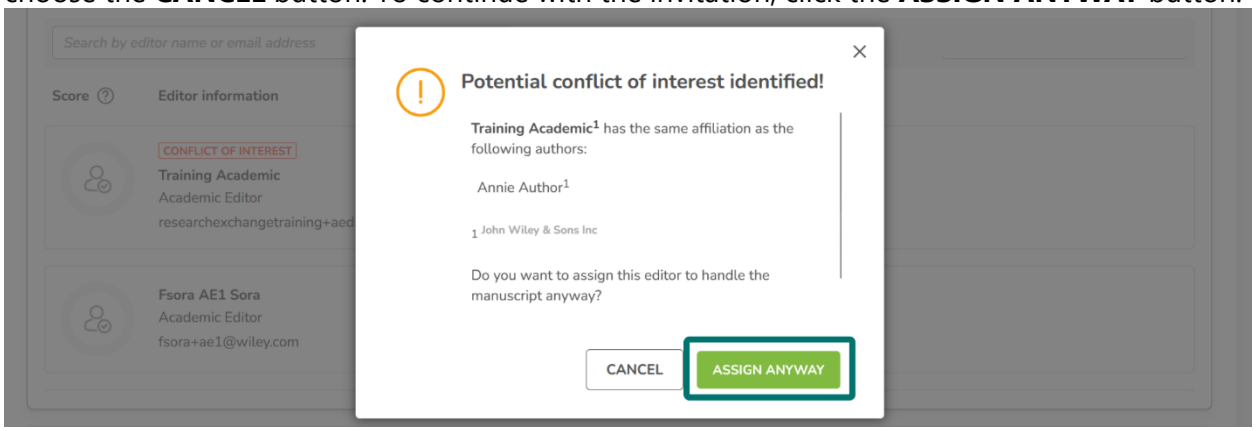
3. Use the search function to find a specific editor by name or email.
4. If a potential conflict of interest exists, a label will appear next to the editor's name. Hovering over the label will reveal information about the conflict of interest identified. Consider selecting an alternative Editor if the conflict of interest cannot be managed.
5. Consider each editor's workload by checking the number of manuscripts currently allocated to them and the number of pending invitations. If an editor is working on multiple manuscripts in Research Exchange Review, this could delay the process. Some journals will also display the editor's keywords based on related publication history.



6. To invite an Editor from the list, hover over their name and click the **Assign Editor** button. Alternatively, Editors can choose 'Assign myself' to carry out the Peer Review step.

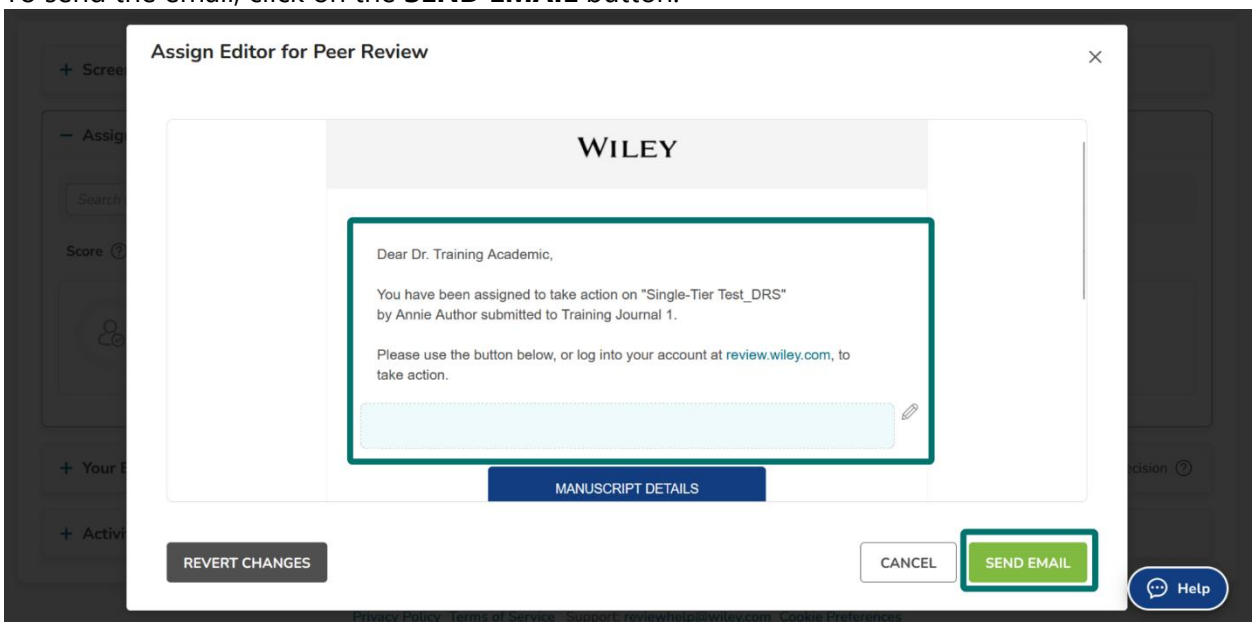


7. If a potential conflict of interest exists, a pop-up window will appear. To cancel the invitation, choose the **CANCEL** button. To continue with the invitation, click the **ASSIGN ANYWAY** button.

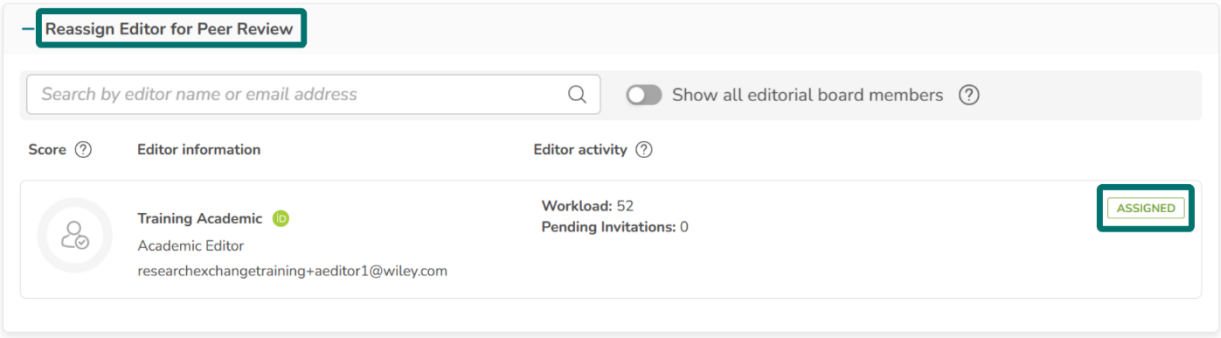


8. A draft email is automatically generated. The user can choose to edit the text in the blue box to give more context or to add a personal message. This personal touch may start a dialogue and encourage the editor to engage with the process. To edit the message, choose the **pencil icon**.

To send the email, click on the **SEND EMAIL** button.



9. The editor will receive an email confirming they have been assigned to handle the manuscript. On returning to the Article Details page, the status will show as ASSIGNED next to the assigned editor's name. The section heading will update to Reassign Editor for Peer Review.**Peer Review**.



Acting on behalf of an Editor

In the Review module, Editors will manage the peer review process and make recommendations or decisions. Users with an **Editorial Assistant** or **Journal Manager** system role can carry out these tasks on behalf of editors from their dashboard.

Assigning yourself to Handle the Peer Review Step

Applicable to:	Triage Editors, Lead Guest Editors, Full Access Capability

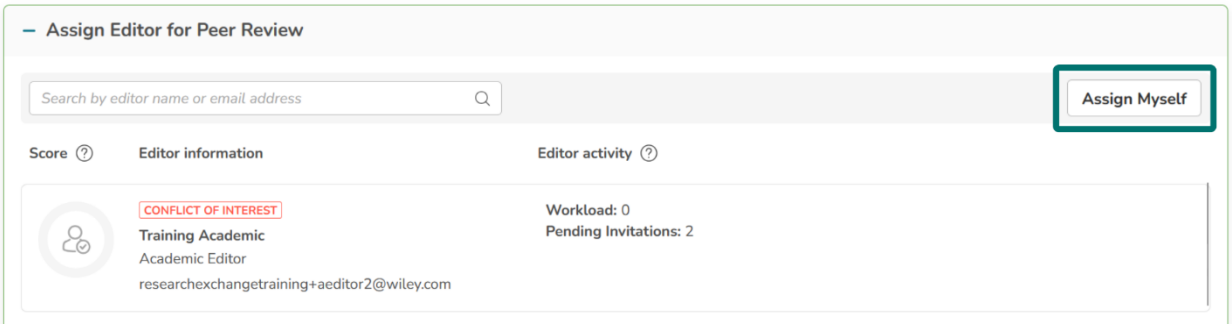
Editors tasked with assigning or inviting an Academic or Guest Editor to handle the Peer Review step can assign themselves instead of inviting another board member. Editors with Full Access can complete this task by either assigning an editor from the list or selecting 'Assign myself'.

To do this, follow these steps:

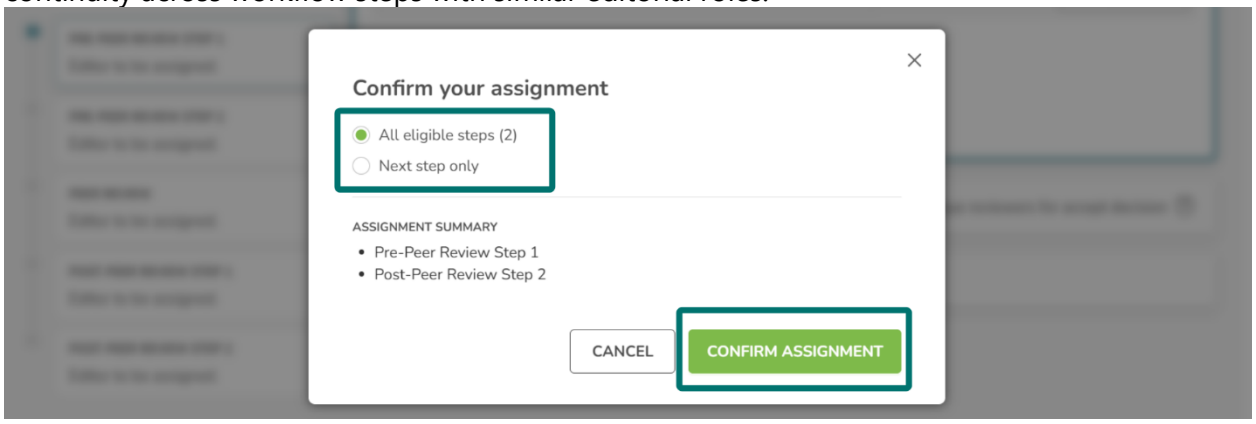
1. From the **Article Details** page, click the **Assign Editor for Peer Review** heading.



2. Select the button labelled **Assign myself.**



3. A pop-up window will appear. To confirm the choice, click the **ASSIGN** button. For three-tier workflows, the Review module will identify if there are multiple steps that an editor can self assign themselves to. Editors will have the option to assign themselves to the next step only, or to multiple steps in the process. This reduces repetitive assignment actions and helps maintain continuity across workflow steps with similar editorial roles.



If an editor opts into future activities, they will be automatically assigned as the manuscript reaches each selected step. Pre-assignment continues even if the editor's Out-of-Office status is enabled, ensuring assignments are not blocked by availability settings. If another editor later pre-assigns themselves to the same activity, the most recent pre-assignment takes precedence and overrides the earlier one. If a pre-assigned editor is removed from an activity, they are also removed from any future activities they were pre-assigned to on that manuscript.
Pre-assignments are retained across manuscript versions, so assignments remain consistent if a new version is created.

What happens next?

Once confirmed, the status of the manuscript will change, and the next step is to invite a minimum number of peer reviewers to evaluate the manuscript. For more information, please see the Handling Peer Review section.

What happens after a Triage or Lead Guest Editor assigns themselves to handle the Peer Review step?

- The two-tier structure is maintained as configured on self-assignments actioned after 24 November 2025.
- For self-assignments before this date, the manuscript will convert to a single-tier workflow for the remainder of its time in the Review module. This means there will be no recommendation step.
- The editor who self-assigned will be required to provide a recommendation and then make a final decision as they are taking on both editor roles on the manuscript.
- Full Access Editor permissions will provide override capability. When it is rolled out, Editors-in-Chief with these elevated permissions will be able to make direct decisions, overriding the editorial model.

Inviting and Reinviting Editors to Manuscripts

Inviting an Editor to Handle the Peer Review Step

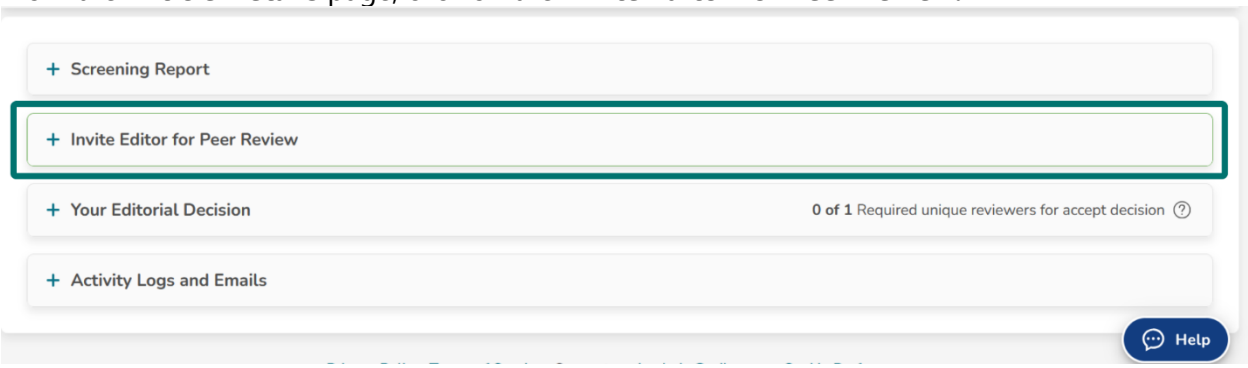
Applicable to:	Triage Editors, Lead Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

Once a manuscript has been assigned to the first editor in the two-tier workflow to handle the Pre-Peer Review step, the second editor needs to be invited.

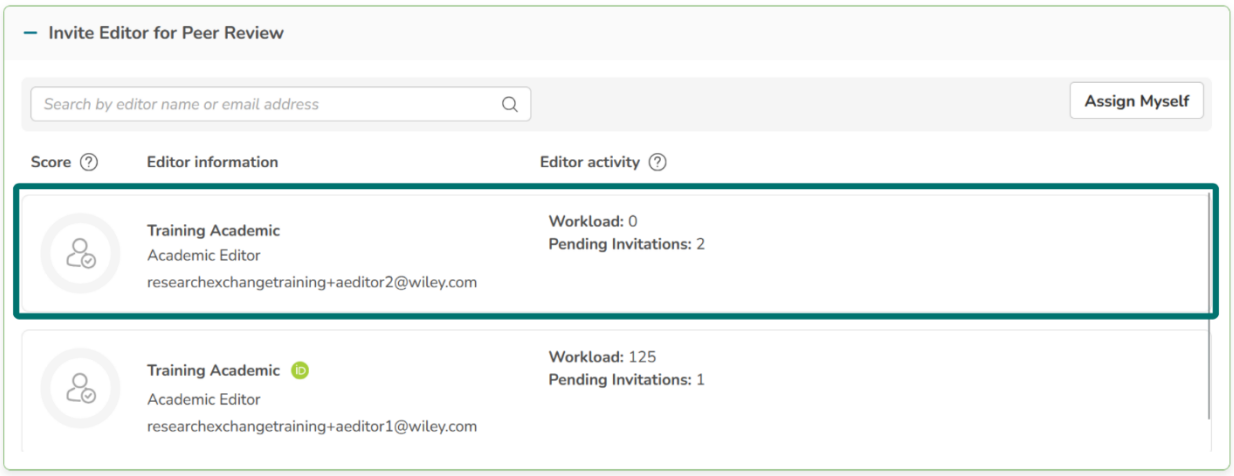
For two-tier workflows, there is the option for the first editor, usually the Triage or Lead Guest Editor, to invite the second editor, usually the Academic or Guest Editor, to handle the Peer Review step. Alternatively, they can choose to assign themselves to carry out this role. Editors with Full Access can complete this task by either inviting an editor from the list or selecting 'Assign myself'.

To invite an editor to handle the Peer Review step, follow these steps:

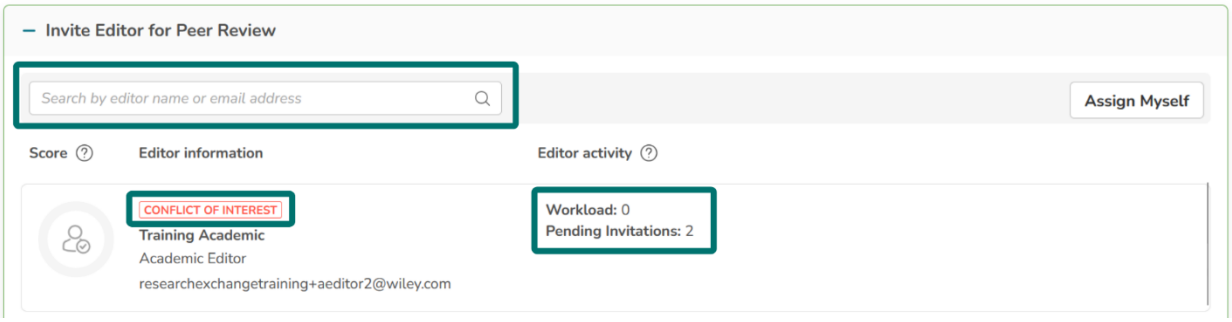
1. From the **Article Details** page, click on the **Invite Editor for Peer Review.**



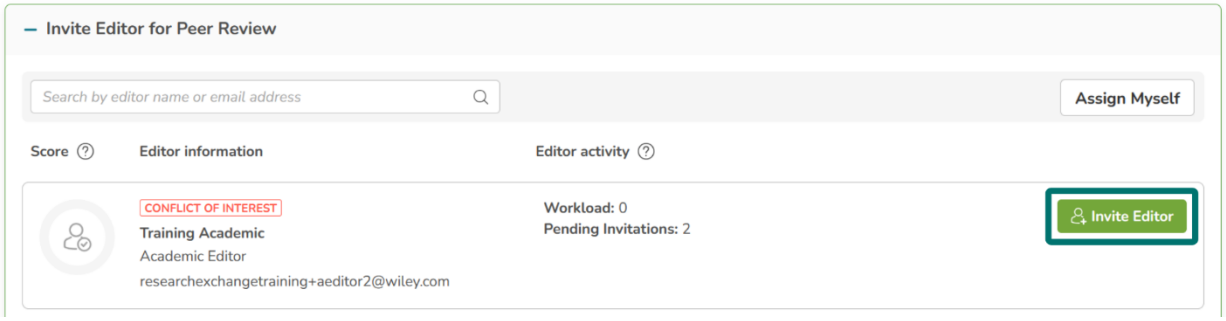
2. Potential Editors are listed under the heading **Journal Editorial Board**. This list is populated when the journal is set up. If someone needs to be added to the Editorial Board, this can be done by someone with a Journal Manager system role or by contacting the Wiley representative.



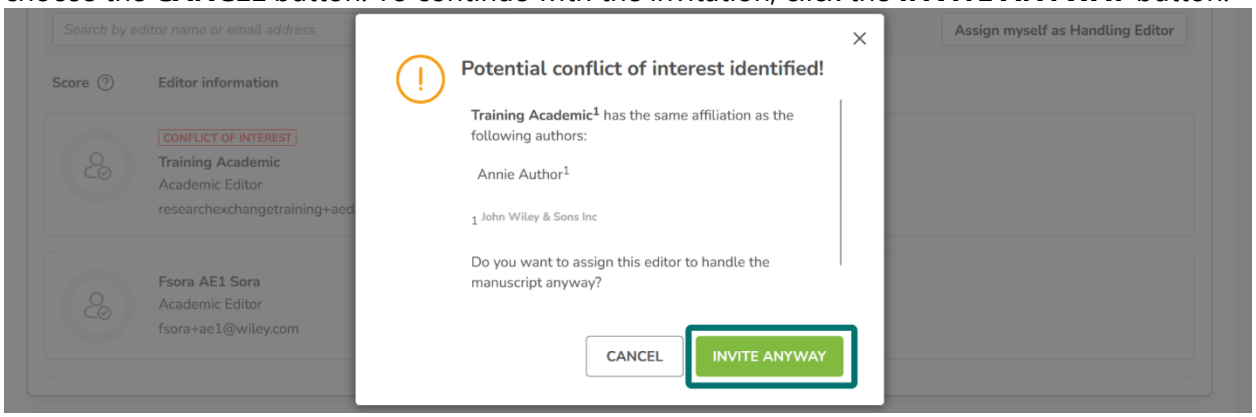
3. Use the search function to find a specific Journal Editorial Board member by name or email.
4. If a potential conflict of interest exists, a label will appear next to the editor's name. Hovering over the label will reveal information about the conflict of interest identified. Consider selecting an alternative Editor if the conflict of interest cannot be managed.
5. Consider each editor's workload by checking the number of manuscripts currently allocated to them and the number of pending invitations. If an editor is working on multiple manuscripts in Research Exchange Review, this could delay the process. Some journals will also display the editor's keywords based on related publication history.



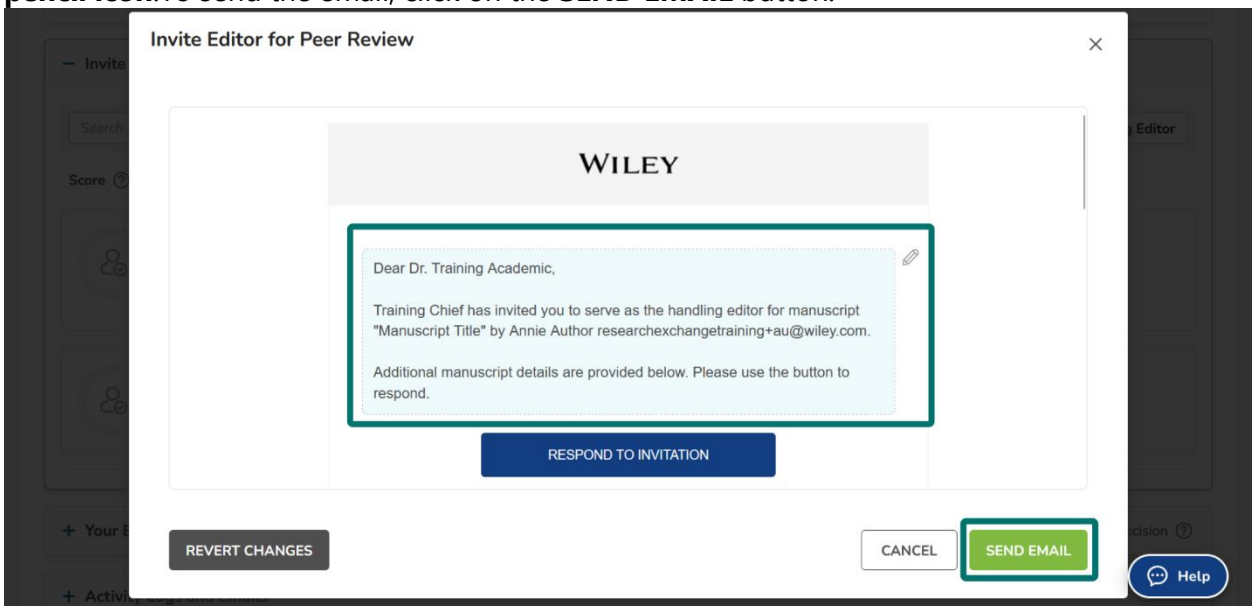
6. To invite an Editor from the list, hover over their name and click the **Invite Editor** button. Alternatively, Editors can choose to assign themselves by clicking the 'Assign myself' button.



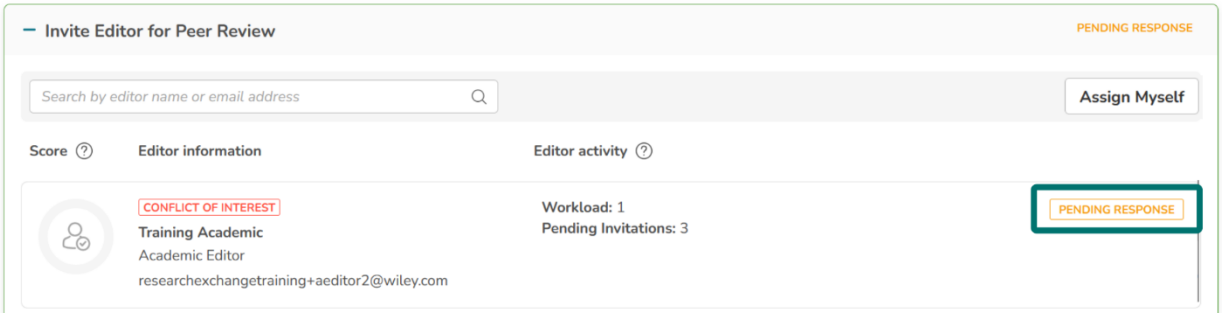
7. If a potential conflict of interest exists, a pop-up window will appear. To cancel the invitation, choose the **CANCEL** button. To continue with the invitation, click the **INVITE ANYWAY** button.



8. A draft email invitation is automatically generated. The user can choose to edit the text in the blue box to give more context or to add a personal message. This personal touch may start a dialogue and encourage the Editor to engage with the process. To edit the message, choose the **pencil icon**.To send the email, click on the **SEND EMAIL** button.



9. The Academic Editor will receive an email invitation to handle the manuscript and can choose to AGREE or DECLINE. On returning to the Article Details page, the invitation status will show as PENDING RESPONSE next to the invited editor's name.

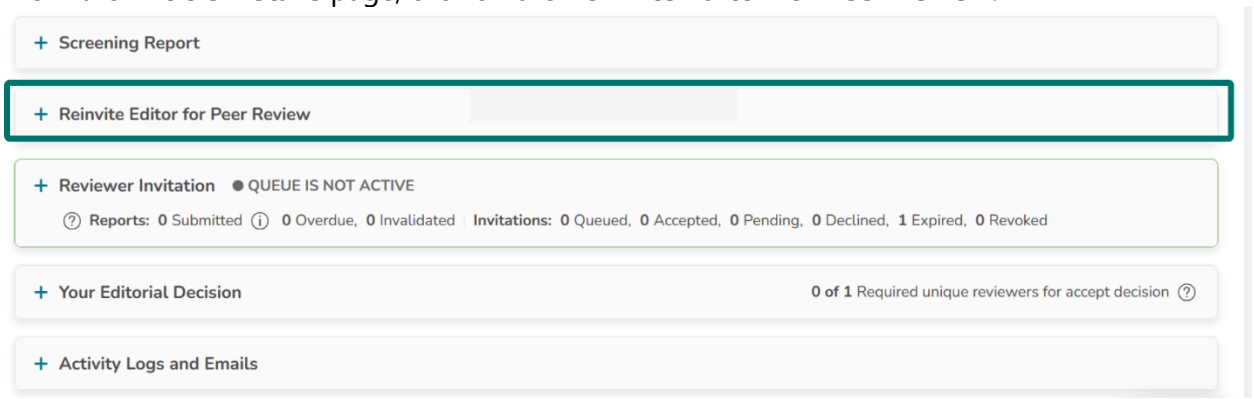


Reinviting an Editor to Handle the Peer Review Step

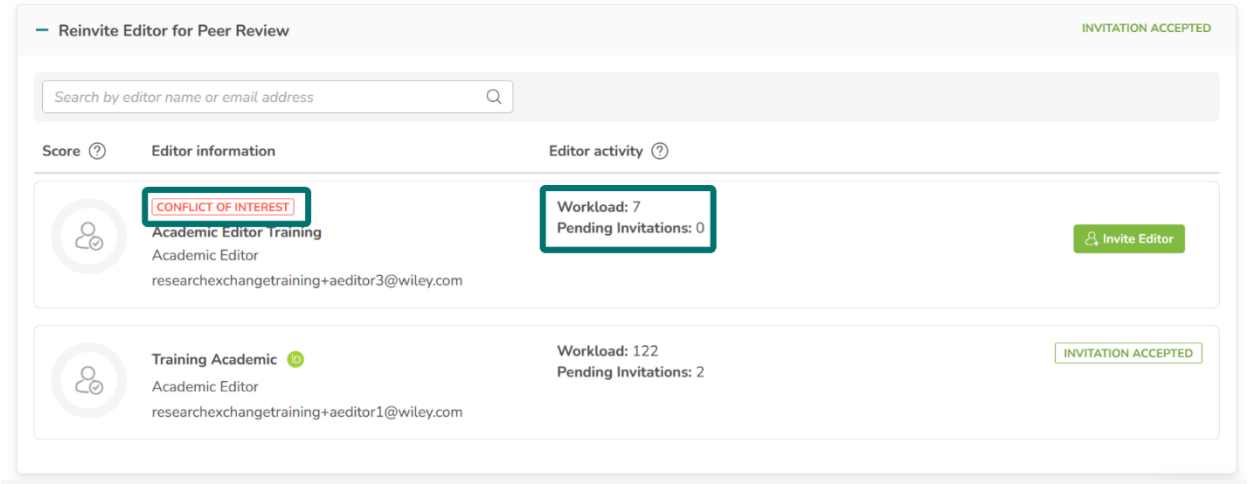
Applicable to:	Triage Editors, Lead Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

If more than one responsible editor is available on the journal, the role on the manuscript can be reassigned by following these steps:

1. From the **Article Details** page, click on the **Reinvite Editor for Peer Review**.

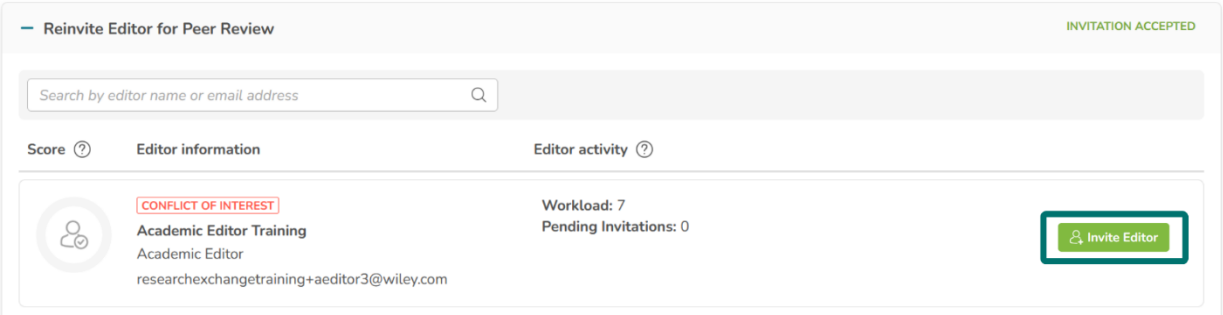


2. If a potential conflict of interest exists, a label will appear next to the editor's name. Hovering over this icon will reveal information about the conflict of interest identified.
3. Consider each editor's workload by checking the number of manuscripts currently allocated to them and the number of invitations pending. Some journals will also display the editor's keywords based on related publication history.

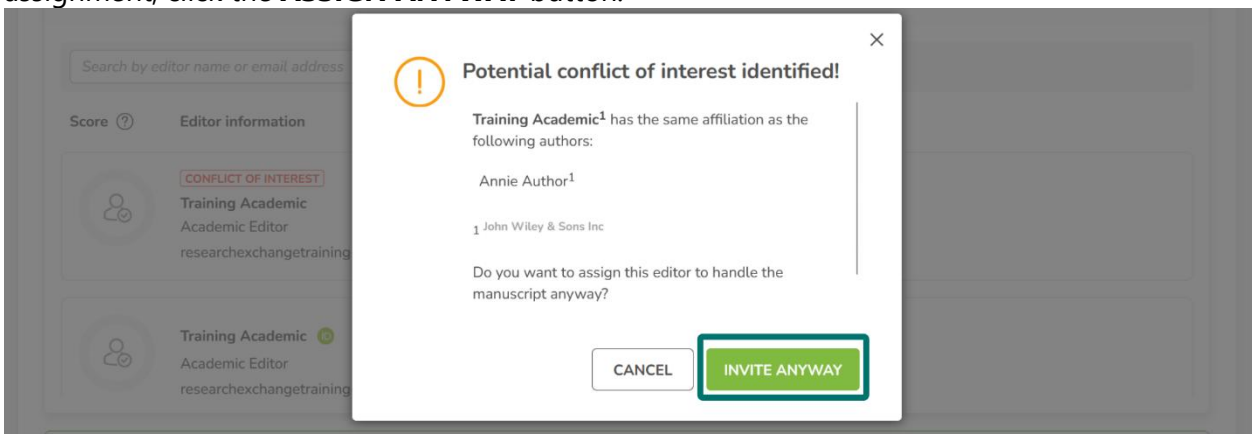


4. To invite an editor from the list, hover over their name and click the **Invite Editor** button. Editors with Full Access can complete this task by either inviting an editor from the list or selecting

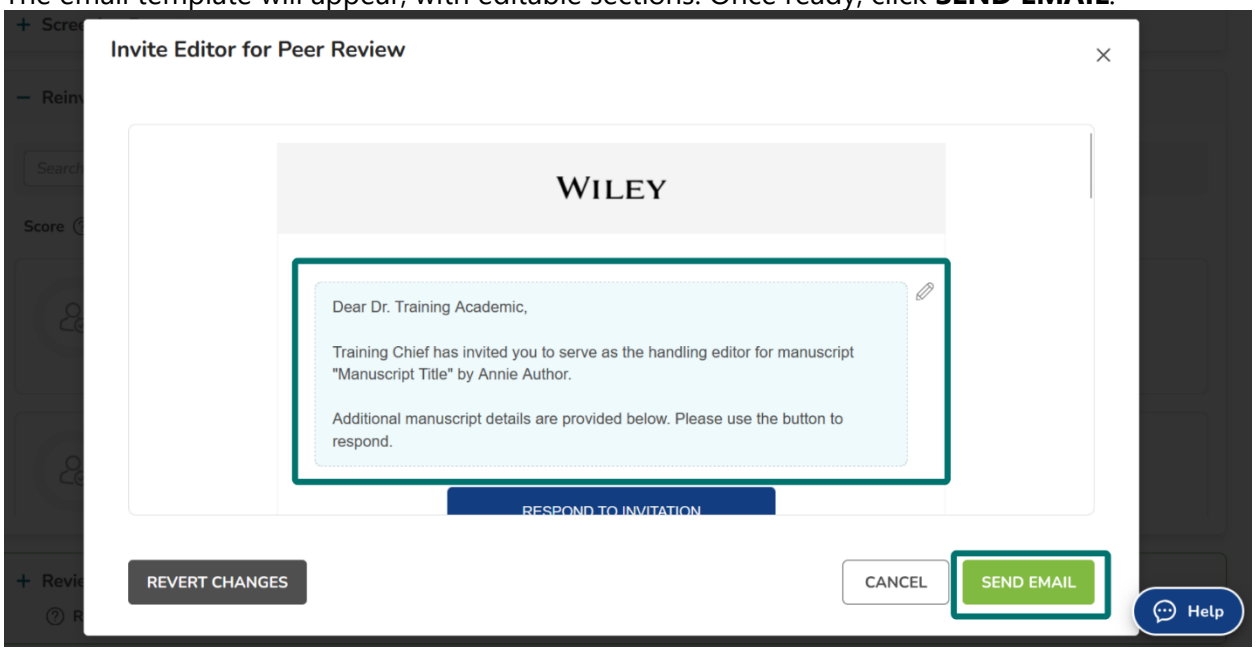
'Assign myself'.



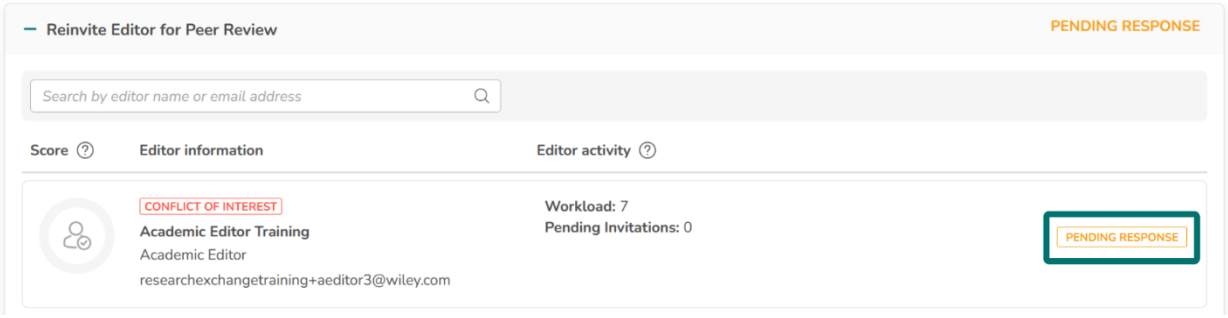
5. If a conflict of interest is detected, a pop-up will display relevant details. To continue with the assignment, click the **ASSIGN ANYWAY** button.



6. The email template will appear, with editable sections. Once ready, click **SEND EMAIL**.



7. The editor will now receive an email invitation to handle the manuscript. On the article details page, the new editor is marked with the label **Pending Response**.



Rules for reassigning or reinviting the Handling Editor to the Peer Review Step;

- Triage editors without Full Access Capability can only reassign or reinvite a Handling Editor before reviewer invitations are sent or after reviewer reports have been submitted
- Triage editors with Full Access Capability, Editorial Assistants, and Journal Managers can reassign or reinvite a Handling Editor at any time during the Peer Review Step

Conflicts of Interest with Editors

Research Exchange Review will automatically detect affiliation-matched conflicts of interest between editors and authors and between reviewers and authors. A warning message is displayed to the Editor before the invitation to prompt them to choose an alternative Editor.

However, before sending invitations, Editors should also carry out their due diligence to check for any potential conflicts of interest. To find out more, please refer to: Wiley Author Services Ethics Guidelines and the Conflicts of Interest Appendix within this document.

What will Invited Editors see?

Invited Editors can see the names of the author(s), the title of the paper, the abstract, and download the manuscript files.

Managing Editor Invitation Responses

Editor Invitation Response Times

Academic or Guest Editors have a limited time to respond to an invitation to handle a manuscript. The default time limit for responding to an invitation is 6 days.

Research Exchange Review will send a series of automatic emails to remind them of the deadlines for responding to invitations. If they do not meet the deadlines set by the destination journal, they will be informed by email that their invitation has expired.

If the Academic or Guest Editor agrees

The Triage or the Lead Guest Editor who sent the invitation will be informed by email.

If the Academic or Guest Editor declines

The Triage or the Lead Guest Editor who sent the invitation will be informed by email and asked to invite another member of the journal editorial board.

If an Academic or Guest Editor does not respond within the deadline

The invited editor will receive an email to inform them that they have been removed from the manuscript. The Triage or the Lead Guest Editor who sent the invitation will be informed by email and asked to invite another member of the journal editorial board.

If an Academic or Guest Editor can no longer handle the manuscript

If an invited editor decides they can no longer handle a manuscript — due to workload commitments or a potential conflict of interest, another member of the journal's editorial board can be invited in their place.

If an Academic Editor needs to be reinvited

Academic editors can be reinvited to handle a manuscript if they;

- Declined the invitation
- Accepted the invitation, and then the manuscript was reassigned to another editor
- Failed to respond within the 6-day time frame.

This can be done by following the instructions in the **Reinviting an Editor to Handle Peer Review** section.

Making Decisions or Recommendations

Important Note: *Acting on behalf of an Editor

In the Review module, Editors will manage the peer review process and make recommendations or decisions. Users with an **Editorial Assistant** or **Journal Manager** system role can carry out these tasks on behalf of editors from their dashboard.

Decisions vs Recommendations

In Research Exchange, **decisions** and **recommendations** are editorial actions taken at different stages of the manuscript workflow:

- **Decisions**: Final determinations about a manuscript's status (e.g., Accept, Reject, Revision) that do not require input from another editor.
- **Recommendations**: Suggestions made by editors that inform the final decision taken by the decision-making editor. These can be revised if the decision-making editor returns the manuscript to the recommending editor.

Decision options for Academic or Guest editors may vary depending on the workflow. In some multi-tier editor workflows, the academic editor or guest editors' editorial decision may pass to the triage editor as a recommendation instead of going directly to the author. In other workflows, academic editors may make an editorial decision, which will pass directly to the author. This is configured at the journal level, and adjustments can be requested by the editorial office through their Wiley contact.

Important note: Why can I see a Decision and Recommendation section?

In some workflows, usually 2-tier or 3-tier, editors making recommendations may be granted permission to make certain decisions without the need for approval from the decision-making editor. In these cases, editors will see both a Your Editorial Recommendation section and a Your Editorial Decision section on the Article Details page.

Peer Review System Logic

After peer review has been completed and the minimum number of required reviews has been received, it will be possible to make any of the editorial recommendations or decisions the system offers.

The platform counts the number of individual reviewers who have submitted reports across all versions of the manuscript. For example, if the minimum number of required reports is set to two, and there are only 2 reviewer reports from a single reviewer across the manuscript versions, then an additional independent review is required to make an accept decision. This will affect special issue submissions and in-flight manuscripts.

Editorial Decisions

The following instructions cover the task of making an editorial decision. If you are an editor who makes a recommendation, please see the Editorial Recommendations section for more information.

Available Decisions

When an editor first receives a manuscript, their initial decision options will vary depending on their role in handling the manuscript. The following decisions are available in Research Exchange. These may change depending on when the decision is being made and who is making it.

- Minor Revision
- Major Revision
- Reject
- Reject – Do Not Transfer
- Reject and Refer
- Reject and Send to Transfer Service
- Accept
- Return to Peer Review
- Move the manuscript to the next stage of the peer review process

Important Note: Decision Emails for Authors

At present, Authors will only be able to view the editor's comments directly in the Submission module. To view the entire decision email text they will need to refer to the email.

Decisions for Participating Journals Only

Reject and Send to Transfer Service

For journals that are configured to feed into the Wiley **Transfer Desk Assistant (TDA)**, the option to **Reject and Send to Transfer Service** will be available.

This option can be used if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted.

When chosen, the manuscript will be referred to Wiley's **Transfer Desk Assistant (TDA)**, which uses machine learning to analyze the manuscript and identify Wiley journals that are a good match for the research.

For more information, see: Reject and Send to Transfer Service before peer review

Reject and Refer

For journals that are configured to support **Editor-Driven Referral (EDR)**, the option to **Reject and Refer** will be available.

This option can be used if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted. When chosen, the manuscript will be referred to up to five journals, which can be selected

To find out more about Reject and Refer decisions, please refer to: Reject and Refer before peer review

Important Note: Decisions Not Available for Recommendation

Editors and reviewers making recommendations will only have the **Reject** option available. If the Journal participates in the Wiley reject and referral services listed above, the decision-making editor will have these options available.

Decisions Before Peer Review

Journal Manager system role can carry out these tasks on behalf of editors from their dashboard.

Based on an editor's initial evaluation of the manuscript, they can choose to:

- Move the manuscript to the next stage of the review process
  - For 1-tier workflows, this will be inviting peer reviewers
  - For 2-tier workflows, this will be inviting another editor or assigning themselves to handle the Peer Review step
- Request a **minor revision** if the manuscript requires minor changes
- Request a **major revision** if the manuscript requires a major rework
- **Reject** the manuscript if it is unsuitable for publication in the journal
- **Transfer the manuscript to another journal.** See **Decisions for participating journals only** to learn more about the options to **Reject and Send to Transfer Service** and **Reject and Refer.**

Accept Decision (Before Reviewer Invitation)

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

An Accept decision can only be made once the manuscript has received the minimum number of required reports set at the article or issue type level. This decision option will not be available in the drop-down list until the requirements have been met.

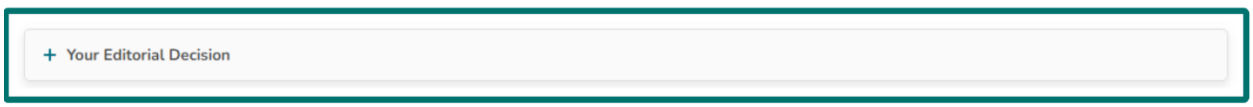
Some article types do not require peer review and will be configured in the platform so that they can be accepted without peer review.

Reject Decision (Before Reviewer Invitation)

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

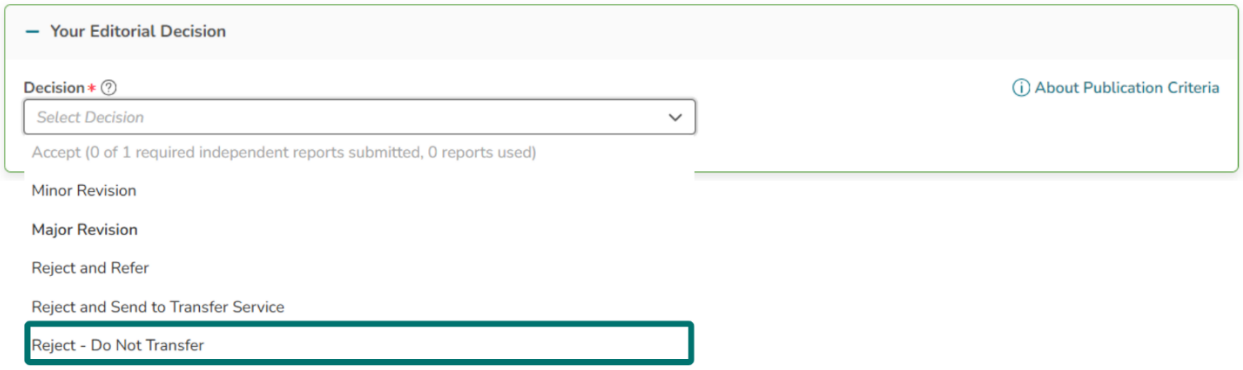
If the manuscript is unsuitable for publication, editors can follow these steps:

1. From the **Article Details** page, open the **Your Editorial Decision section.**

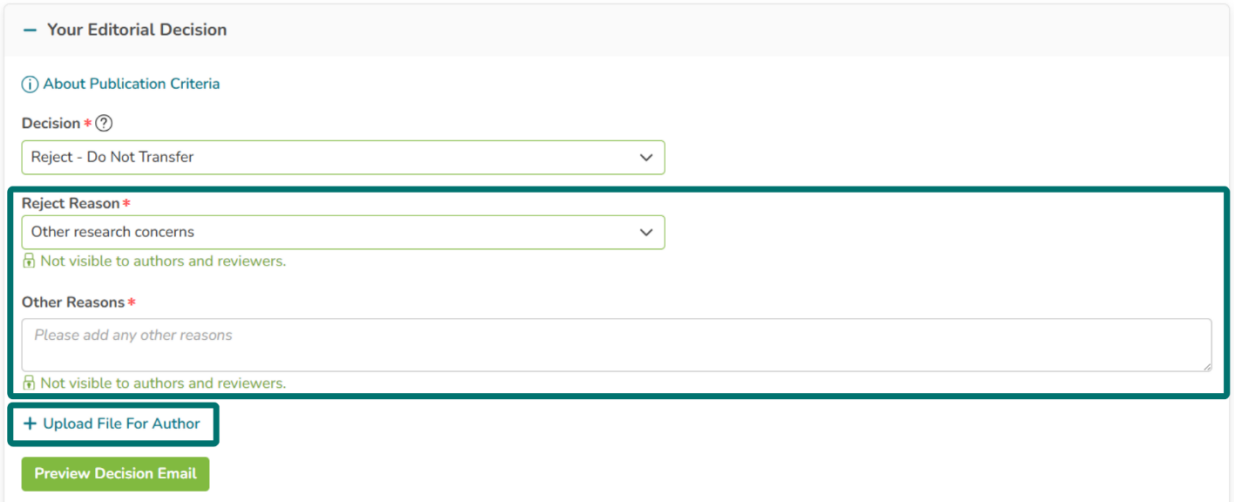


2. Click the downward arrow below the **Decision** heading and select the **Reject** option from the dropdown list. If the journal feeds into the Wiley Transfer Desk Assistant (TDA) or supports

Editor Driven Referral, this option will be labelled **Reject – Do Not Transfer**.

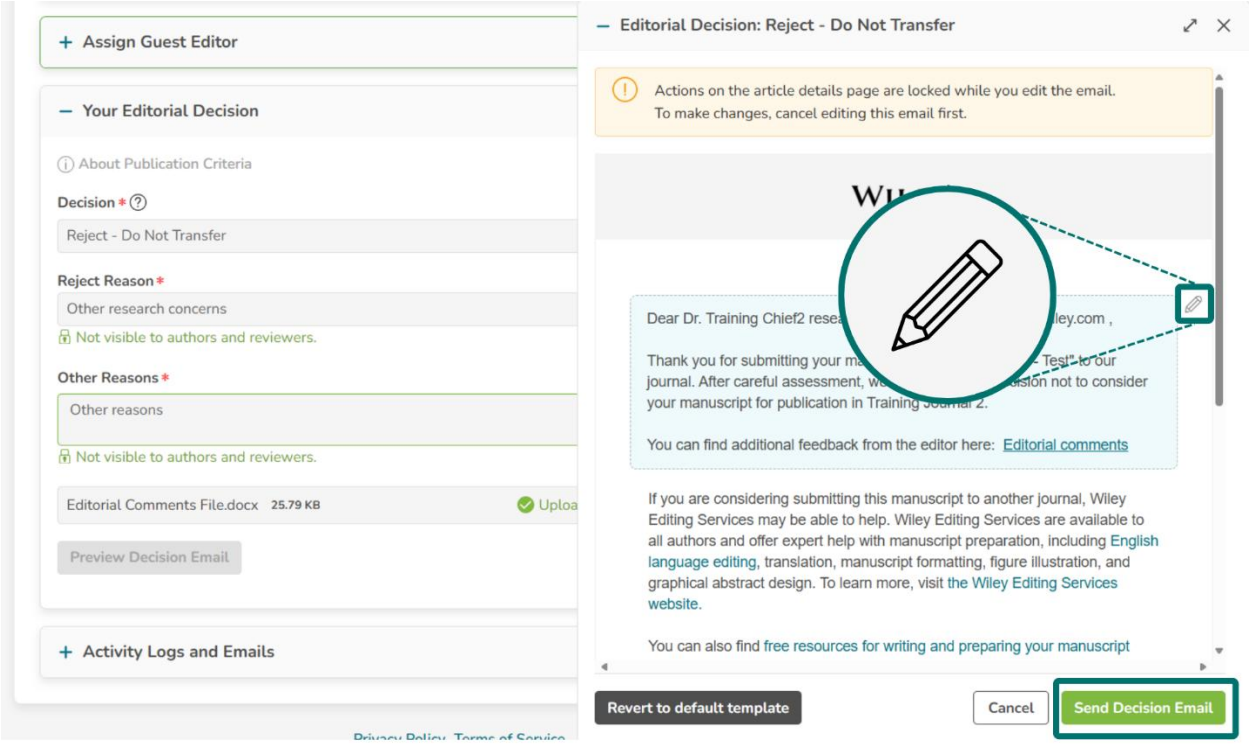


3. When making a **Decision**, select a **Reject Reason** from the drop-down list under the Reject Reason heading. If any of the following reasons are selected, additional details must be entered in the **Other Reasons** text box:
    a. Other reasons submission is a mismatch for this journal
    b. Other issues with manuscript quality
    c. Other research concerns
    d. Other ethical concerns
4. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.



5. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments. Click **Send Decision Email** when ready. A pop-up message will appear asking you to

confirm the action.



What happens next?

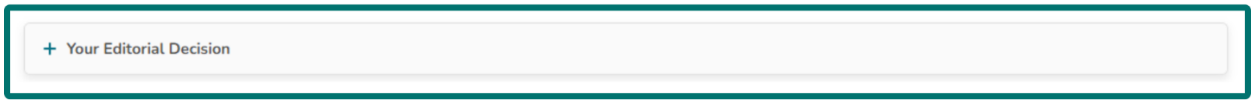
Recommendations will be passed to the decision-making editor for a final decision. Once a decision is made, the authors will receive an email notification to communicate the decision to reject the manuscript without transfer.

Reject and Refer Decision (Before Reviewer Invitation)

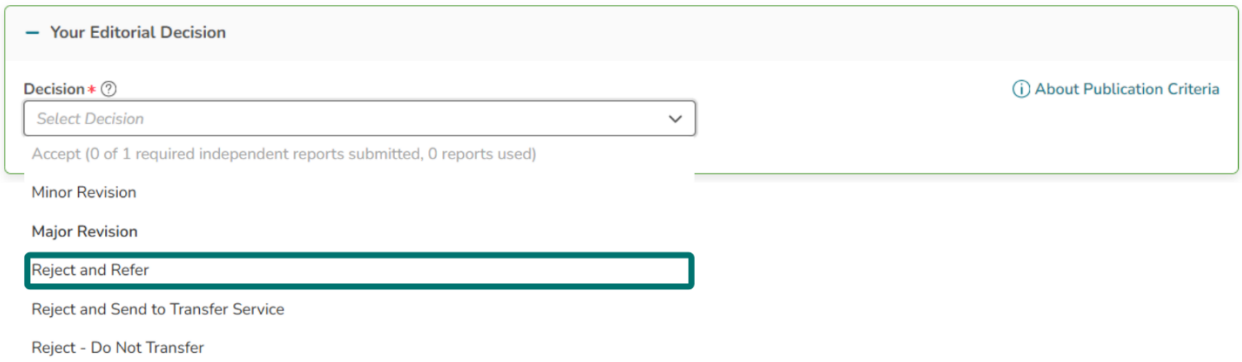
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

If the manuscript is unsuitable for publication, editors can follow these steps:

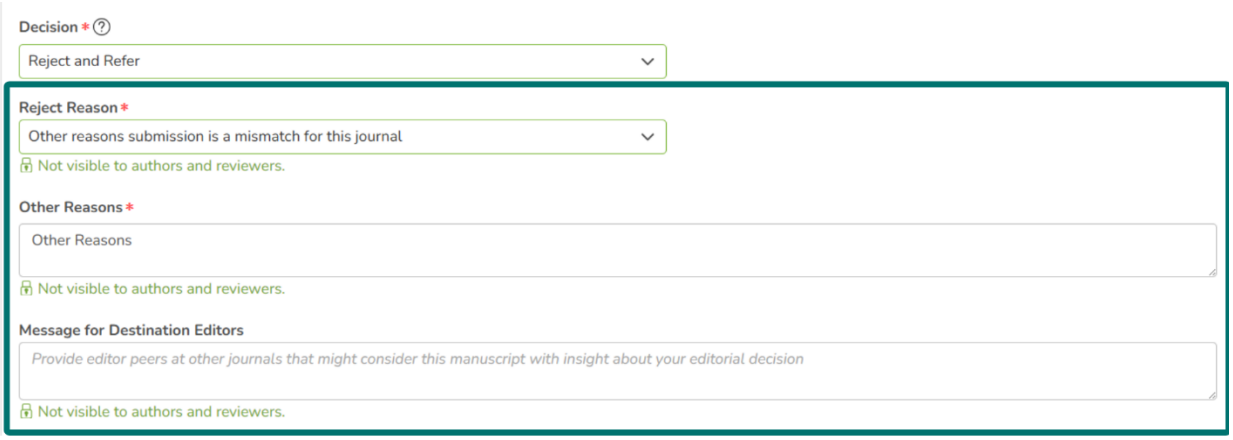
1. From the **Article Details** page, open the **Your Editorial Decision** section.



2. Click the downward arrow below the **Decision** heading and select the **Reject and Refer** option from the drop-down list.

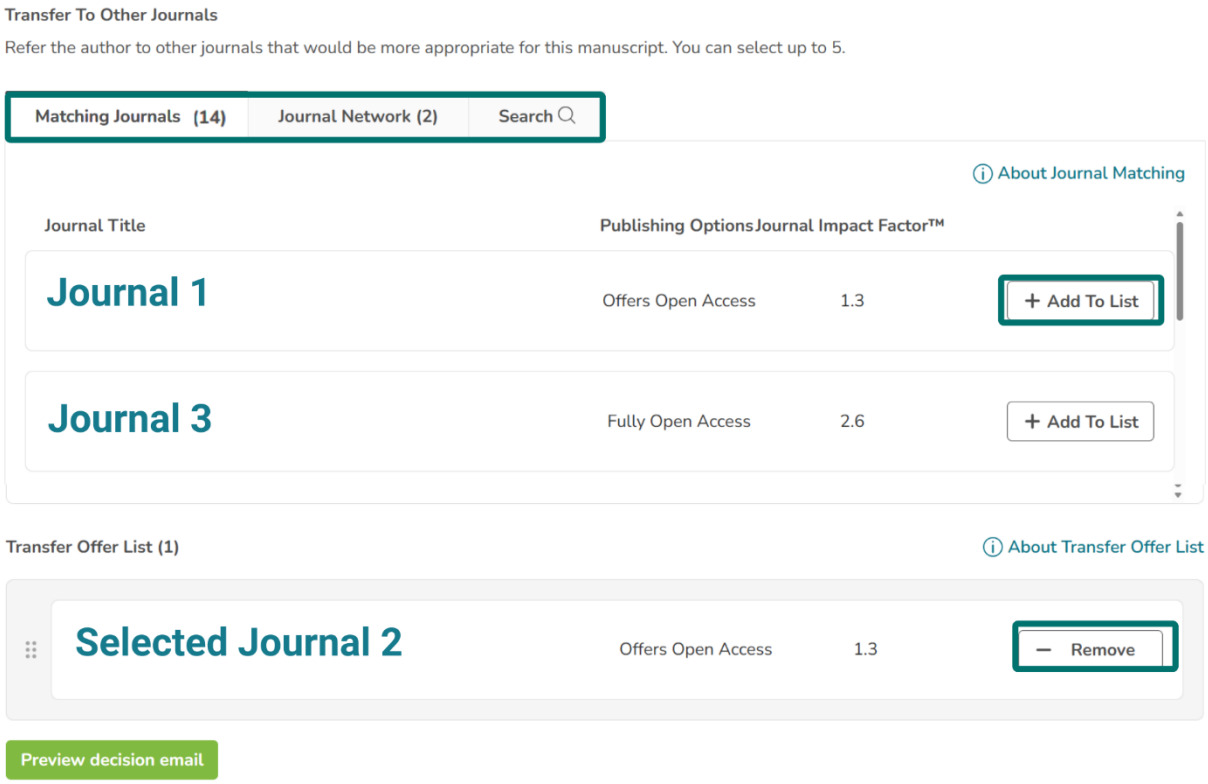


3. The reason for the rejection will need to be indicated. To give a reason, click the downward arrow below the **Reject Reason** heading and select an option from the drop-down list. To communicate the reason for the decision to the destination editors, add comments to the box labelled **Message to Destination Editors**. The editorial team of the receiving journal will be able to view this message, the name of the editor who suggested the transfer, the date of transfer, and the journal from which the manuscript was transferred. If one of the following reasons is selected, additional information will need to be provided in the box labelled **Other Reasons**.
    a. Other reasons submission is a mismatch for this journal
    b. Other issues with manuscript quality
    c. Other research concerns
    d. Other ethical concerns

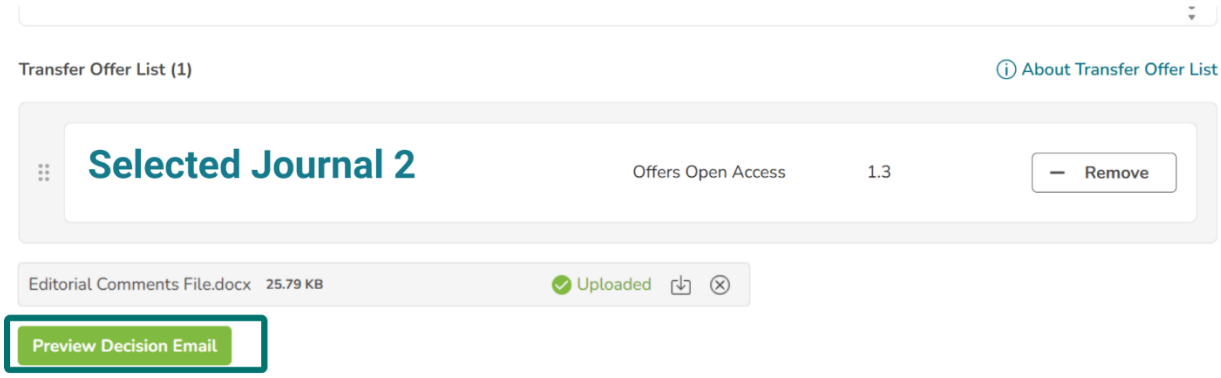


4. Under the heading **Transfer to Other Journals**, select **up to five journals** from the following. Each list will include key information about each journal, including the publishing options, and the Journal Impact Factor. Transfer suggestions in Research Exchange are aligned with each journal's transfer network setup, ensuring editors only see appropriate destination journals when referring a manuscript. Depending on the journal, transfer suggestions may be shown across multiple tabs or limited to the *Journal Network* tab only.
    a. **Matching Journals** tab for a list of suggested journals. This list is populated automatically by matching the manuscript keywords to journals with an appropriate scope.
    b. **Journal Network** tab is a list of journals from the Journal's Network. This list is populated by the Journal Administrator.
    c. **Search** to find a journal in the Research Exchange journal database by title.

5. From here, click the Journal Name to visit the journal homepage, click **Add to List** to add a journal to the **Transfer Offer List**, or click **Remove** to remove it.

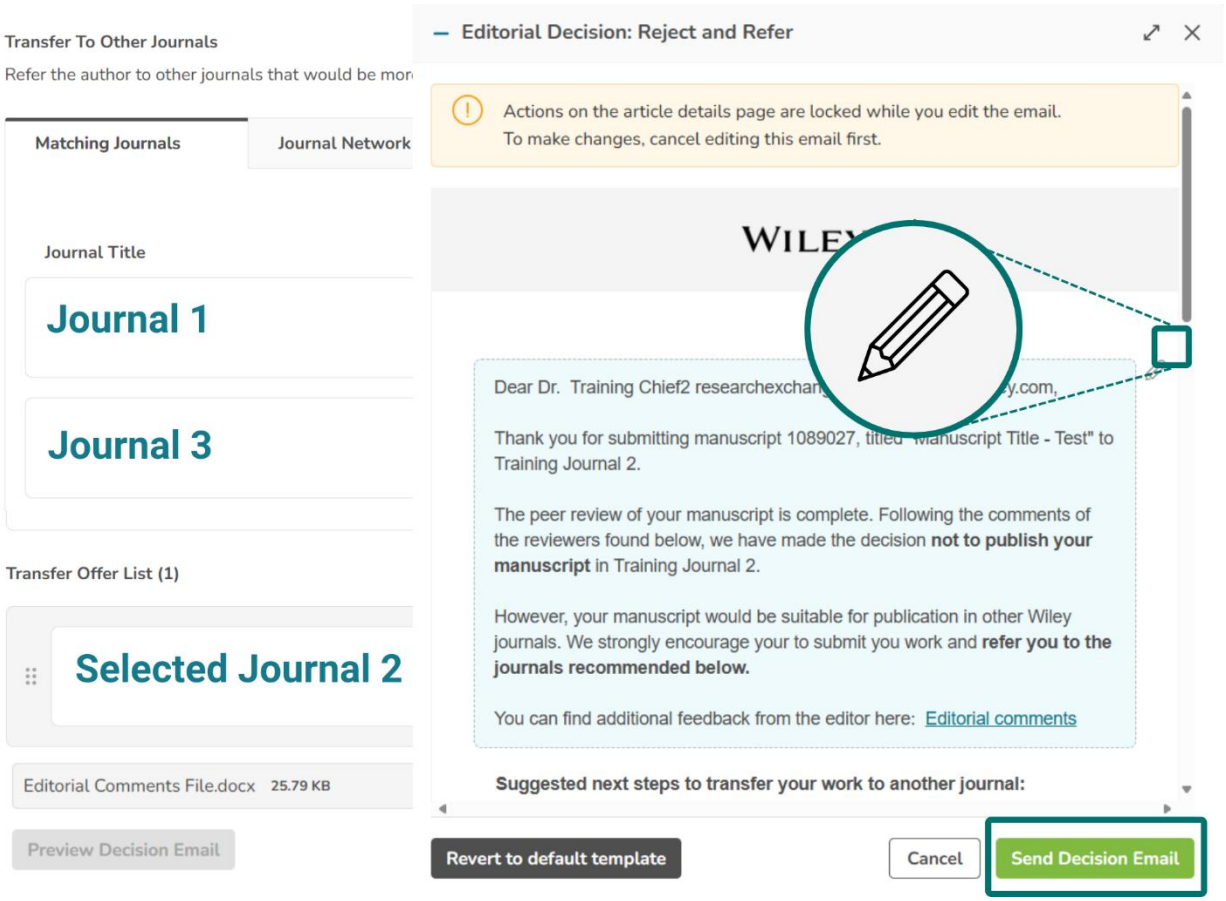


6. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments. If a file has been uploaded for the author, a link to view the file will automatically be included in the email.



7. Click the **pencil icon** to edit sections of the email template, adding a message to the author.Click **Send Decision Email** when ready. A pop-up message will appear asking you to

confirm the action.



What happens next?

Authors will be informed of the Reject and Refer decision in an email, which includes a list of up to five journals selected by the user, and a link to start the manuscript transfer.

Authors can choose to update their manuscript before confirming their submission to a suggested journal. If the authors choose to transfer their manuscript, it arrives at the new journal identified as a transfer for further action.

For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons

Important Note: *Reject and Refer Decision Not Available for all Journals

The decision to Reject and Refer is only available for journals that are configured to support Editor-Driven Referral (EDR).

Choose **Reject and Refer** if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted.

Editors and reviewers making recommendations will only have the **Reject** option available. The decision-making editor will have these options available.

Reject and Send to Transfer Service Decision (Before Reviewer Invitation)

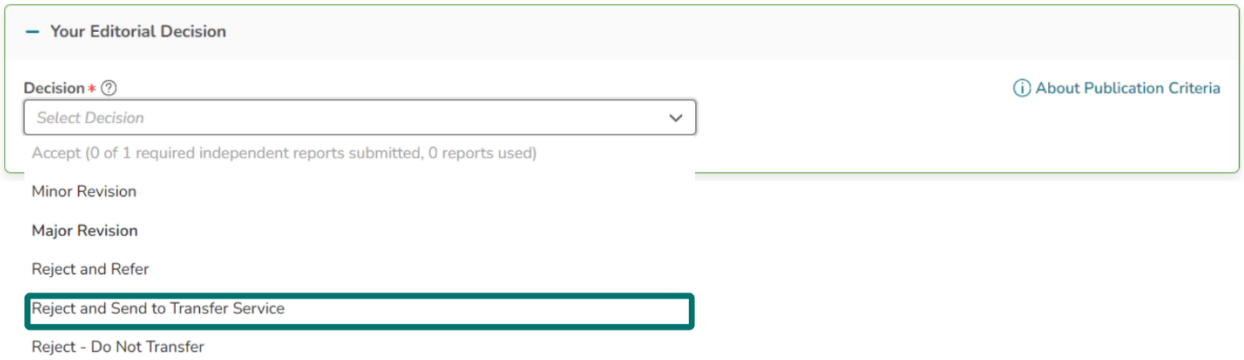
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

If Reject and Transfer to Transfer Service is chosen, the manuscript will be referred to **Wiley's Transfer Desk Assistant (TDA),** which uses machine learning to analyze the manuscript and identify Wiley journals that are a good match for the research.

1. From the **Article Details** page, open the **Your Editorial Decision** section.

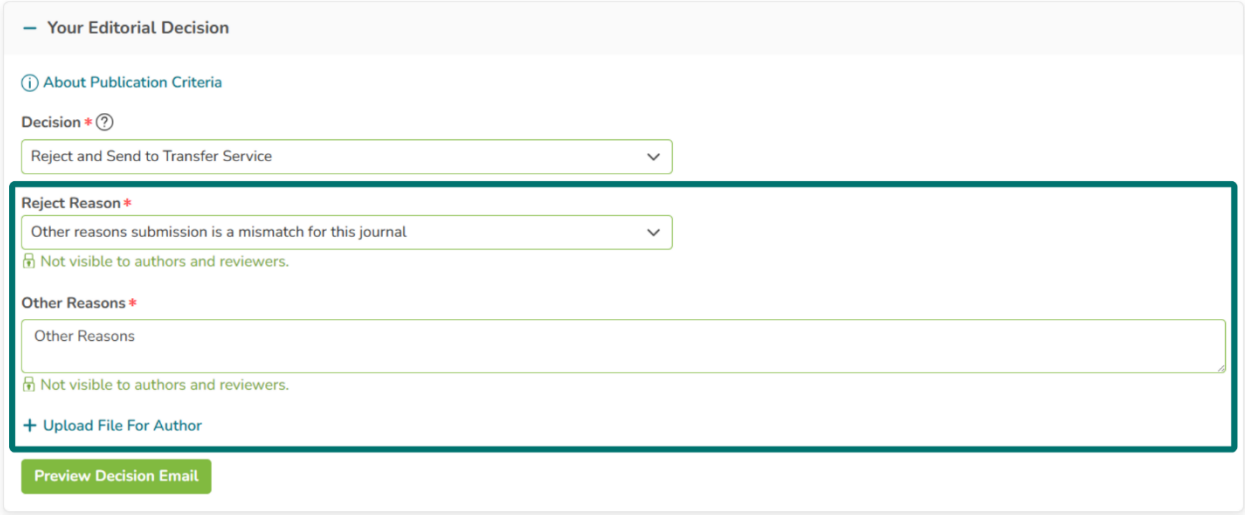


2. Click the downward arrow below the **Decision** heading and select the **Reject and Send to Transfer Service** option from the dropdown list.

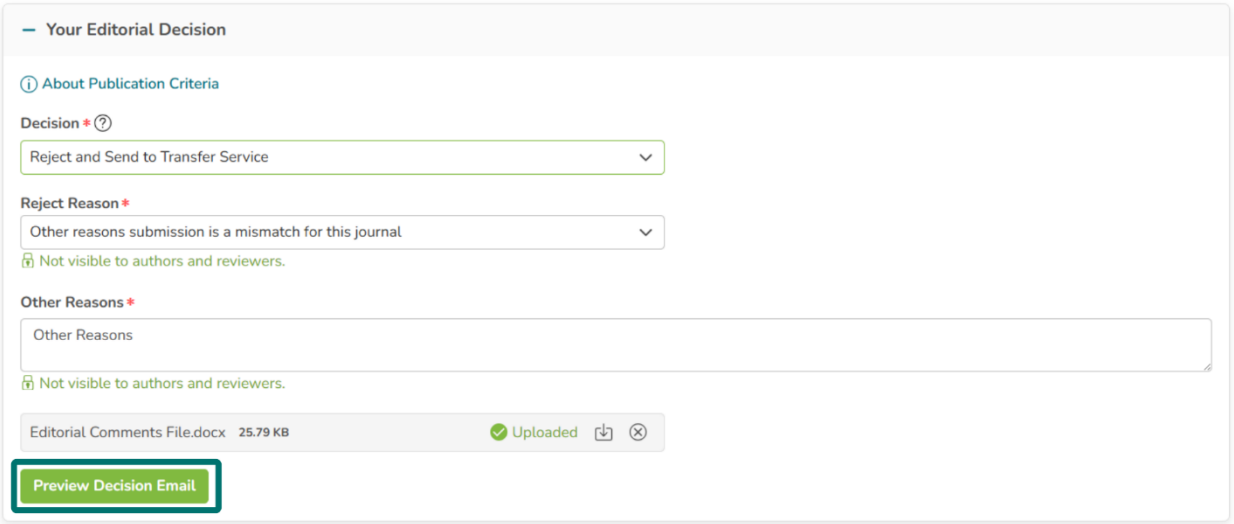


3. A Reject Reason is required. To give a reason, click the downward arrow below the **Reject Reason** heading and select an option from the drop-down list. If any of the following reasons are selected, additional details must be entered in the **Other Reasons** text box:
    a. Other reasons why submission is a mismatch for this journal
    b. Other issues with manuscript quality
    c. Other research concerns
    d. Other ethical concerns

4. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.

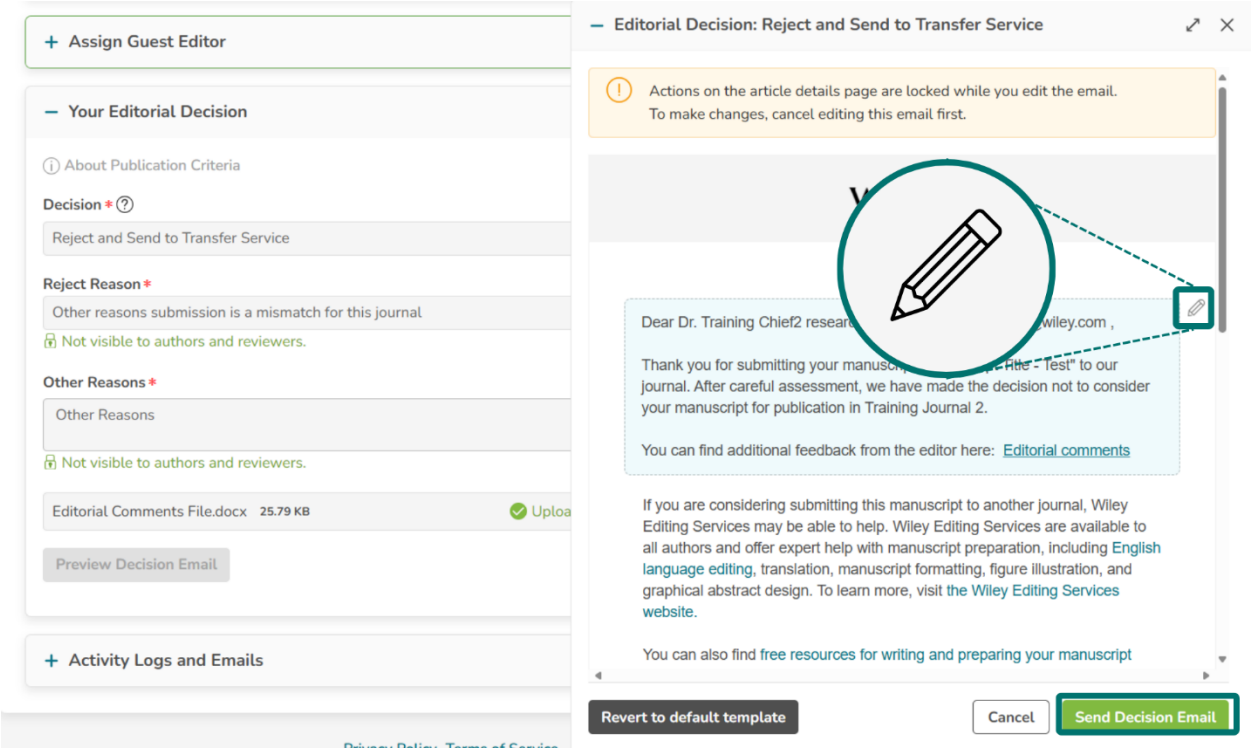


5. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments.



6. Click the **pencil icon** to edit sections of the email template, adding a message to the author. Click **Send Decision Email** when ready. A pop-up message will appear asking you to confirm

the action.



What happens next?

The authors will be informed of the Reject and Send to Transfer Service decision by email. This email includes a list of suggested recipient journals from the TDA database and a link to start the manuscript transfer.

Authors can choose to update their manuscript before confirming their submission to a suggested journal. If the authors choose to transfer their manuscript, it arrives at the new journal identified as a transfer for further action.

For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons

Important Note: *Reject and Transfer Decision Not Available for all Journals

The decision to Reject and Send to Transfer Service is only available for journals that are configured to feed into the Wiley Transfer Desk Assistant (TDA). It can be used if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted.

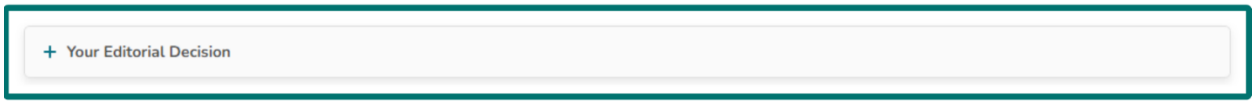
Editors and reviewers making recommendations will only have the **Reject** option available. The decision-making editor will have these options available.

Minor or Major Revision Decision (Before Reviewer Invitation)

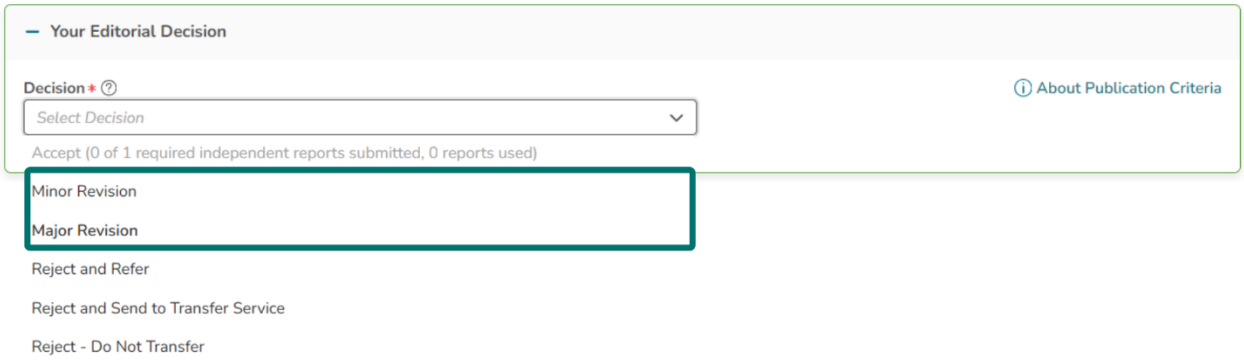
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

If the manuscript requires minor or major changes, editors can follow these steps:

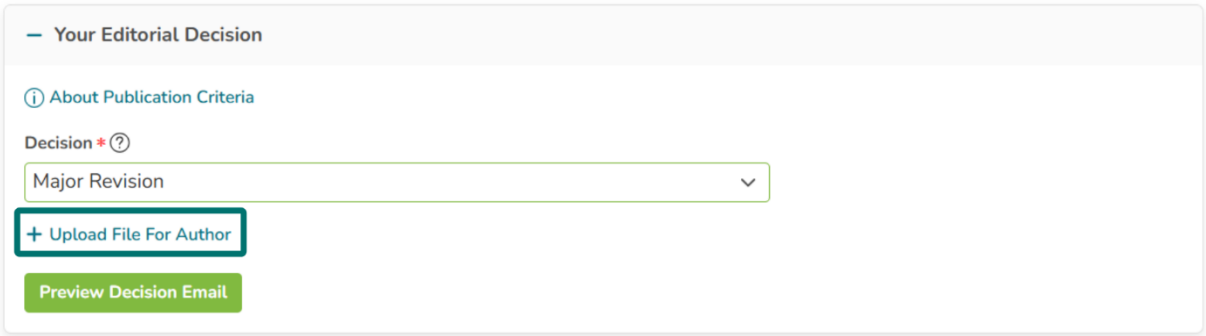
1. From the **Article Details** page, open the **Your Editorial Decision** section.



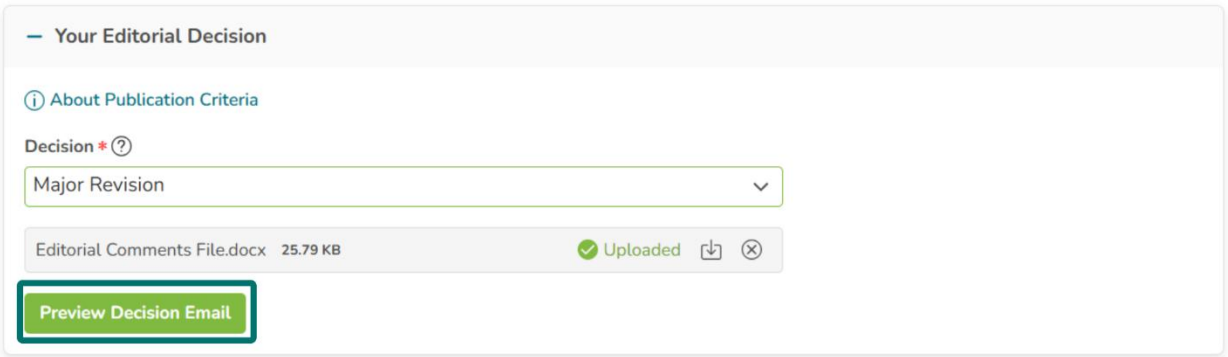
2. Click the downward arrow below the **Decision** heading and select the **Minor Revision** or **Major Revision** option from the drop-down list. Accept will not be available for articles that require peer review.



3. For editors making a **Recommendation**, there will be optional boxes to type a message to the author and a message to the decision-making editor. The message to the author from the Academic or Guest Editor is automatically included in the decision letter. The decision-making editor can choose to edit or remove the message when editing the decision letter template.
4. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.

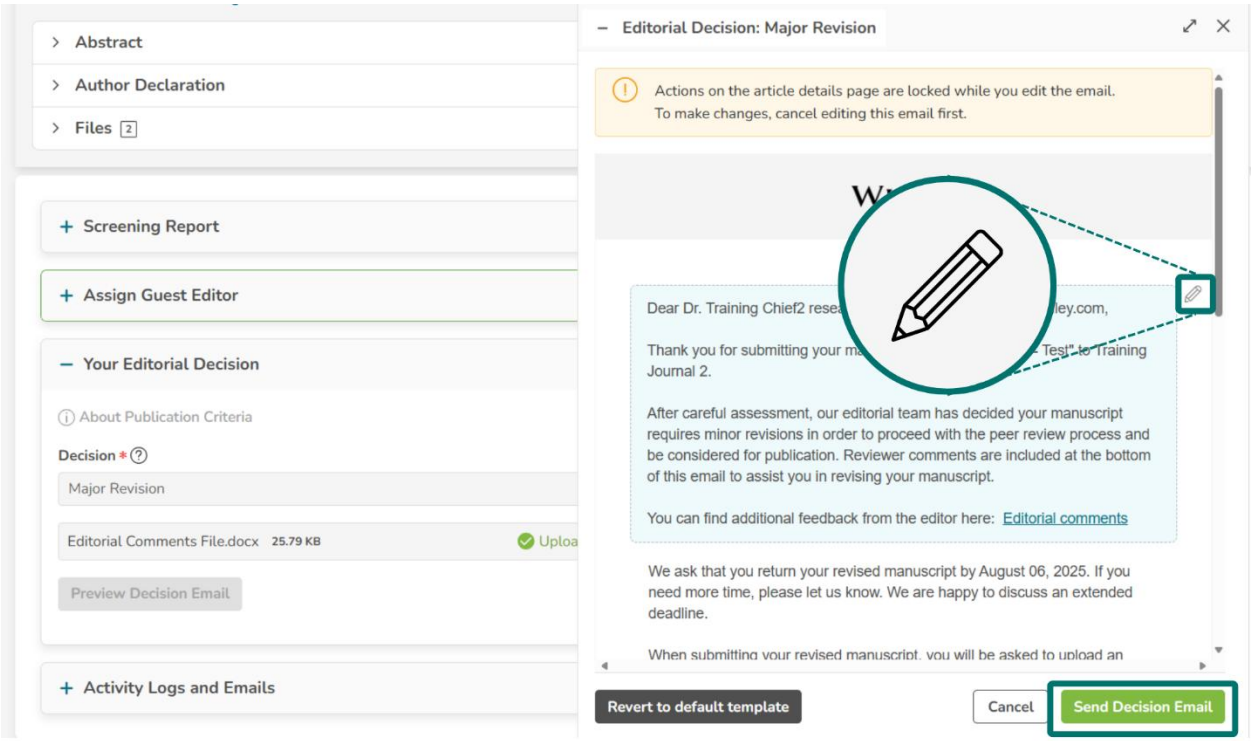


5. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments.



6. Click the **pencil icon** to edit sections of the email template, adding a message to the author. Click **Send Decision Email** when ready. A pop-up message will appear asking you to confirm

the action.



What happens next?

Authors will receive an email notifying them of the revision decision. The message will outline any required updates to address prior to resubmission.

Decisions after Peer Review

Based on the outcome of peer review, Editors can choose to:

- **Accept** if they feel that the manuscript is ready for publication without changes
- Request a **minor revision** if they feel the manuscript requires minor changes
- Request a **major revision** if they feel the manuscript requires major rework
- **Reject** the manuscript if they feel it is unsuitable for publication in the journal
- **Return to Peer Review** if the user is the decision-making editor, and they feel that the manuscript needs further peer review, or to discuss the recommendation

Transfer the manuscript to another journal. See Decisions for participating journals only to learn more about the options to **Reject and Send to Transfer Service** and **Reject and Refer**.

Editorial Comments

In multi-tier workflows where the academic editor or guest editor makes a recommendation to the triage editor or lead guest editor, there will be an additional section on the article details page for the triage editor or lead guest editor to consider, called **Editorial Comments.** This section includes the notes from the academic or guest editor as well as their recommendation for your editorial decision.

To access the Academic Editor's recommendation, log in to Research Exchange Review and select the Editorial Comments heading from the Article Details page. The message to the author from the Academic or Guest Editor is automatically included in the decision letter. The decision-making editor can choose to edit or remove the message when editing the decision letter template.

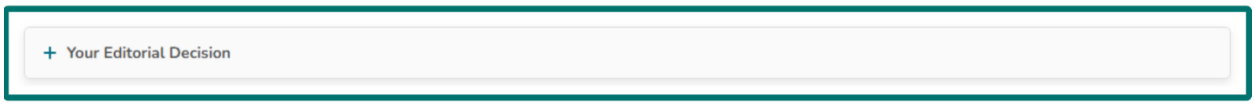
The triage editor or lead guest editor receiving the editorial comments also has the ability to see the reviewer reports from the peer review process. The triage or lead guest editor can access them by selecting the **Reviewer Reports** heading. More information on Reviewer Reports in the **Reviewer Reports** section of this guide.

Accept Decision (After Peer Review)

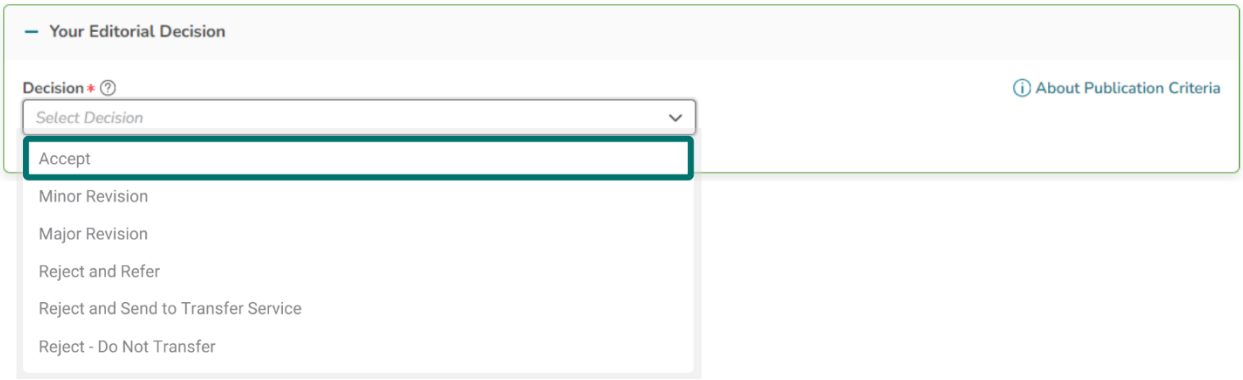
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability, Full Access Capability

If the manuscript is ready for publication without changes, follow these steps:

1. From the **Article Details** page, open the **Your Editorial Decision section.**

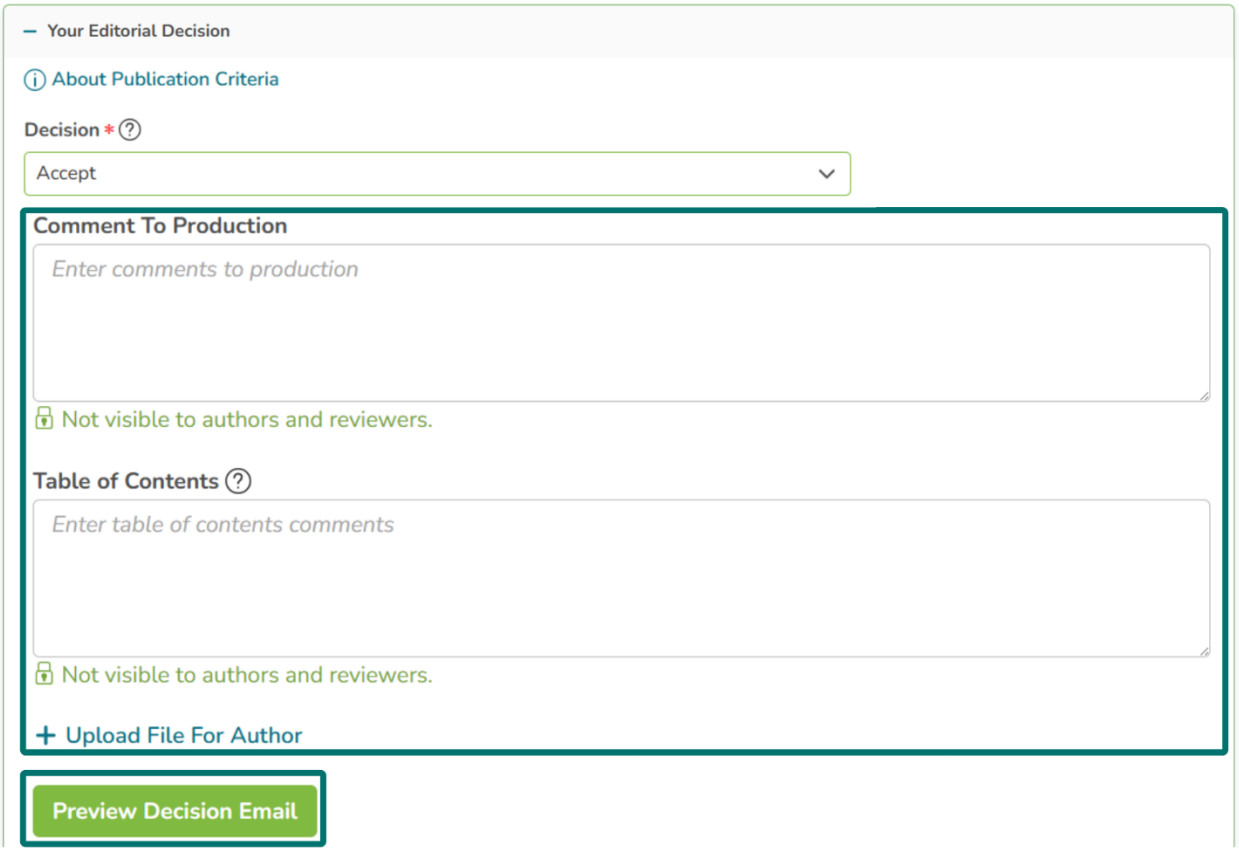


2. Click the downward arrow below the **Decision** heading and select the **Accept** option from the drop-down list.



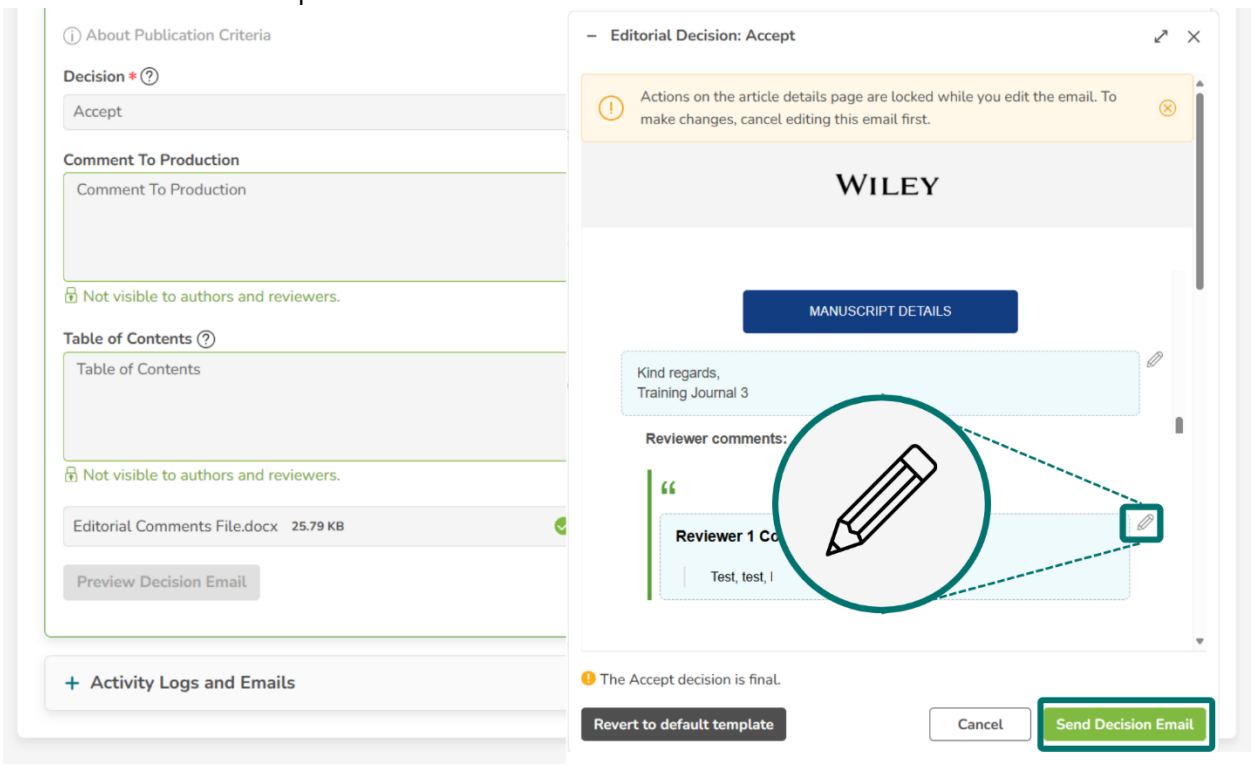
3. Type notes into the **Comments to Production** and the **Table of Contents** text for the production team. Clicking the question mark icon will provide guidance on the correct formatting for the table of contents information. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the

document for any viruses. Click the **Preview Decision Email** button.



4. Click the **pencil icon** to edit sections of the email template, adding a message to the recipient. Typed reviewer comments and any message from the Academic or Guest editor can also be edited. Click **Send Decision Email** when ready. A pop-up message will appear asking you to confirm the action. Please note, the email is only sent to the author once the Peer Review Cycle

Checks have been completed.



What happens next?

When a recommendation to accept is made, the manuscript will pass back to the decision-making editor.

When a decision to accept is made, the manuscript is assigned to the journal's Editorial Assistant for Quality Checks. These checks include:

- A Peer Review Cycle Check to assess the integrity and validity of the peer review process.
- Material Checks to confirm that the manuscript is ready for production.

Reject Decision (After Peer Review)

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability, Full Access Capability

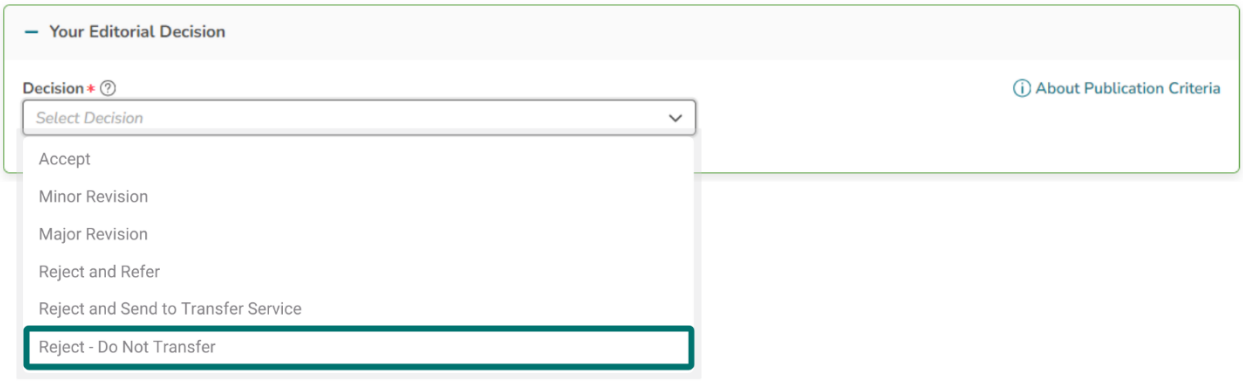
If the manuscript is unsuitable for publication in the journal, follow these steps:

1. From the **Article Details** page, open the **Your Editorial Decision section.**

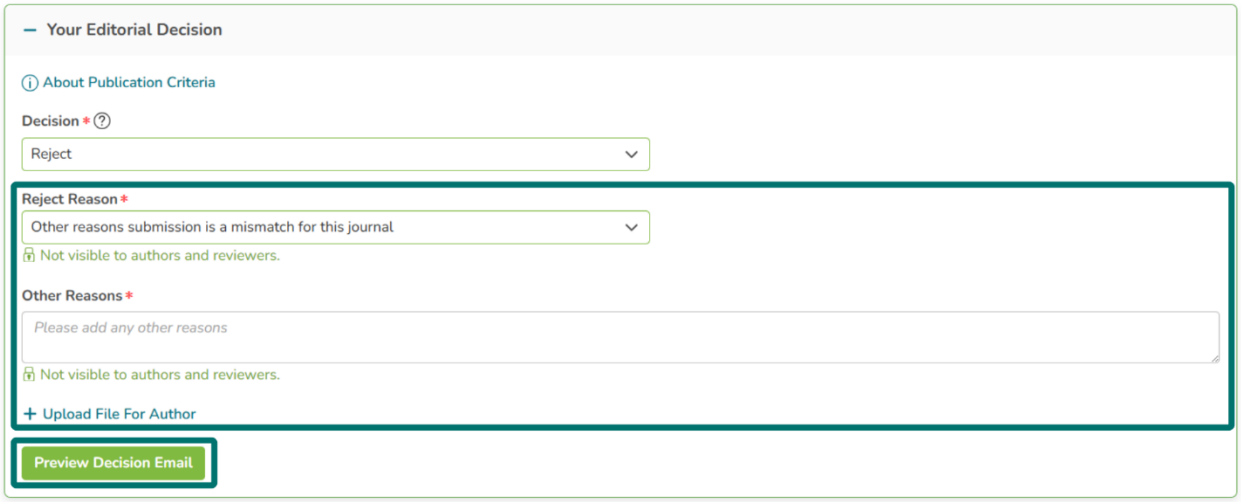


2. Click the downward arrow below the **Decision** heading and select the **Reject** option from the drop-down list. For Journals using the Wiley Transfer Desk Assistant (TDA) or Editor Driven

Referral, this option will be labelled **Reject – Do Not Transfer**.

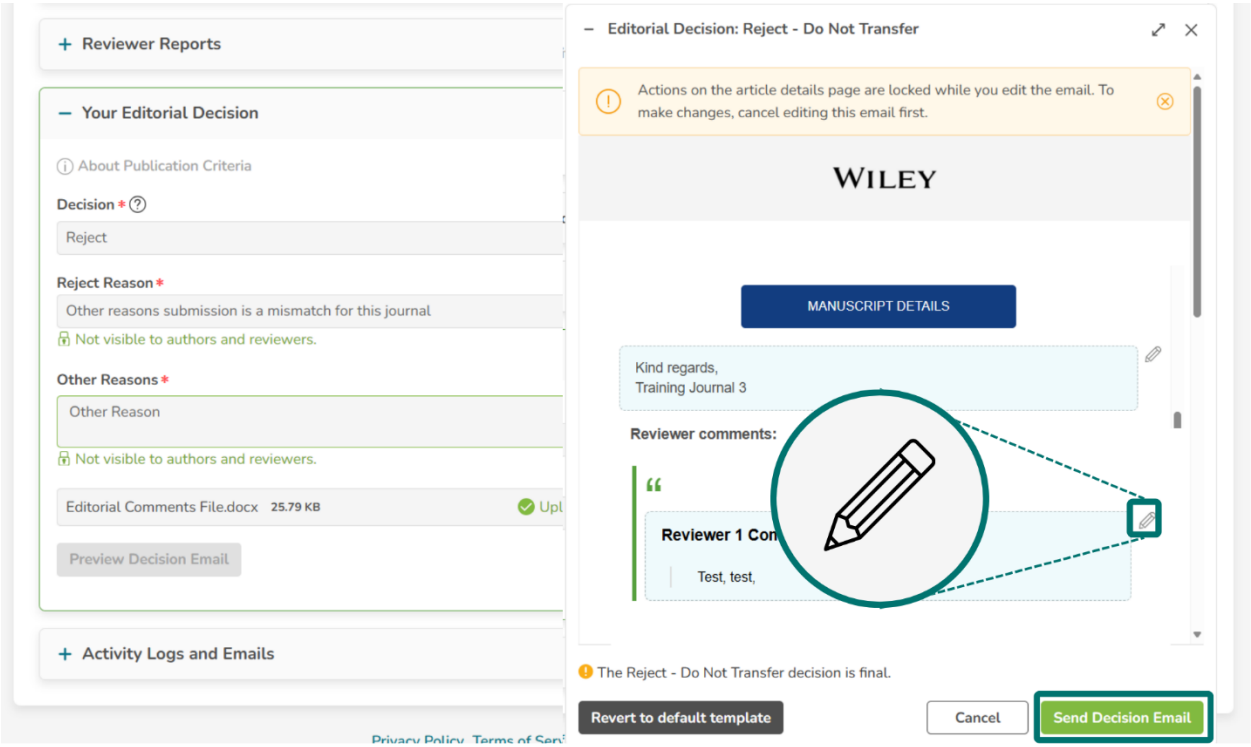


3. From the **Reject Reason** heading, select an option from the drop-down list.
   If one of the following reasons is selected, additional information needs to be provided in the box labelled **Other Reasons**.
   a. Other reasons submission is a mismatch for this journal
   b. Other issues with manuscript quality
   c. Other research concerns
   d. Other ethical concerns
4. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses. If making a Recommendation, there is the option to type comments to the author and the decision-making editor. Click the **Preview Decision Email** button.



5. Click the **pencil icon** to edit sections of the email template, adding a message to the recipient. Typed reviewer comments and any message from the Academic or Guest editor can also be edited. Click **Send Decision Email** when ready. A pop-up message will appear asking you to

confirm the action.



6. A pop-up confirmation panel will appear. To confirm the decision, click the **REJECT MANUSCRIPT** button.

What happens next?

When a reject decision is made, the authors receive an email notification to communicate the decision to reject the manuscript without transfer.

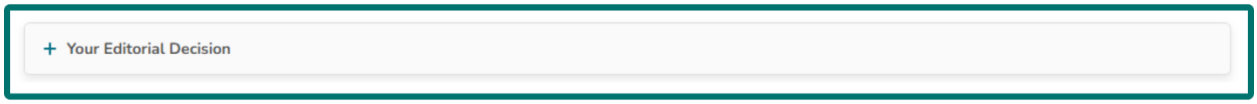
For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons.

Reject and Refer Decision (After Peer Review)

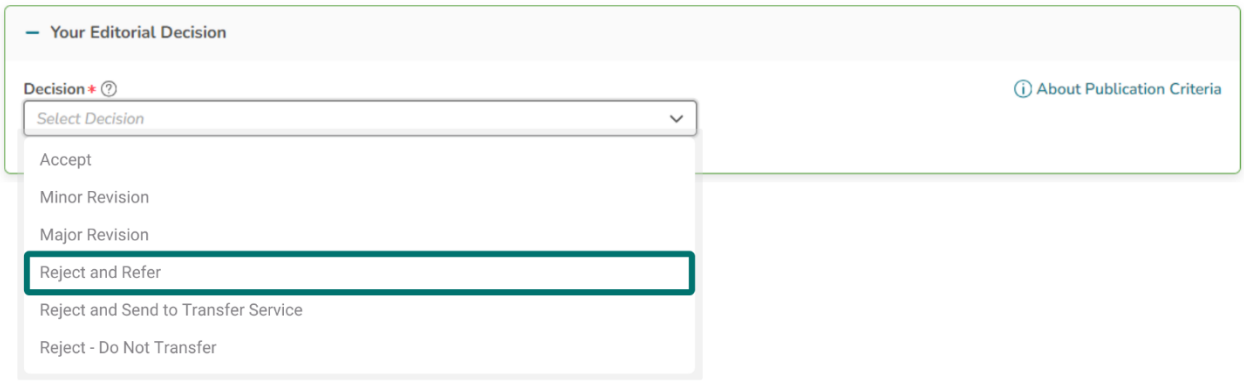
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability, Full Access Capability

To reject and refer a manuscript, follow these steps:

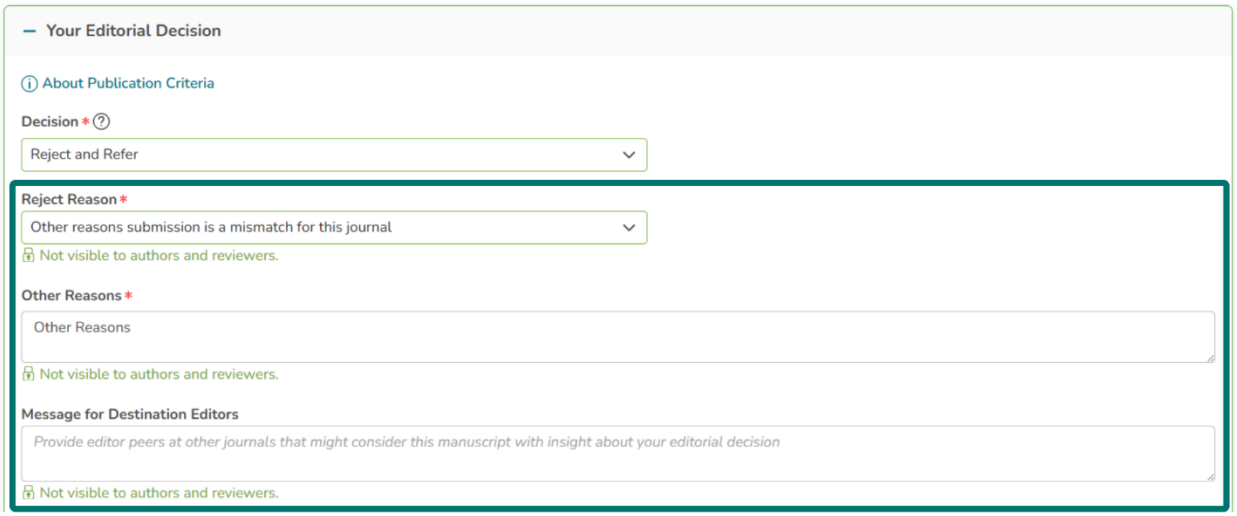
1. From the **Article Details** page, open the **Your Editorial Decision section.**



2. Click the downward arrow below the **Decision** heading and select the **Reject and Refer** option from the dropdown list.



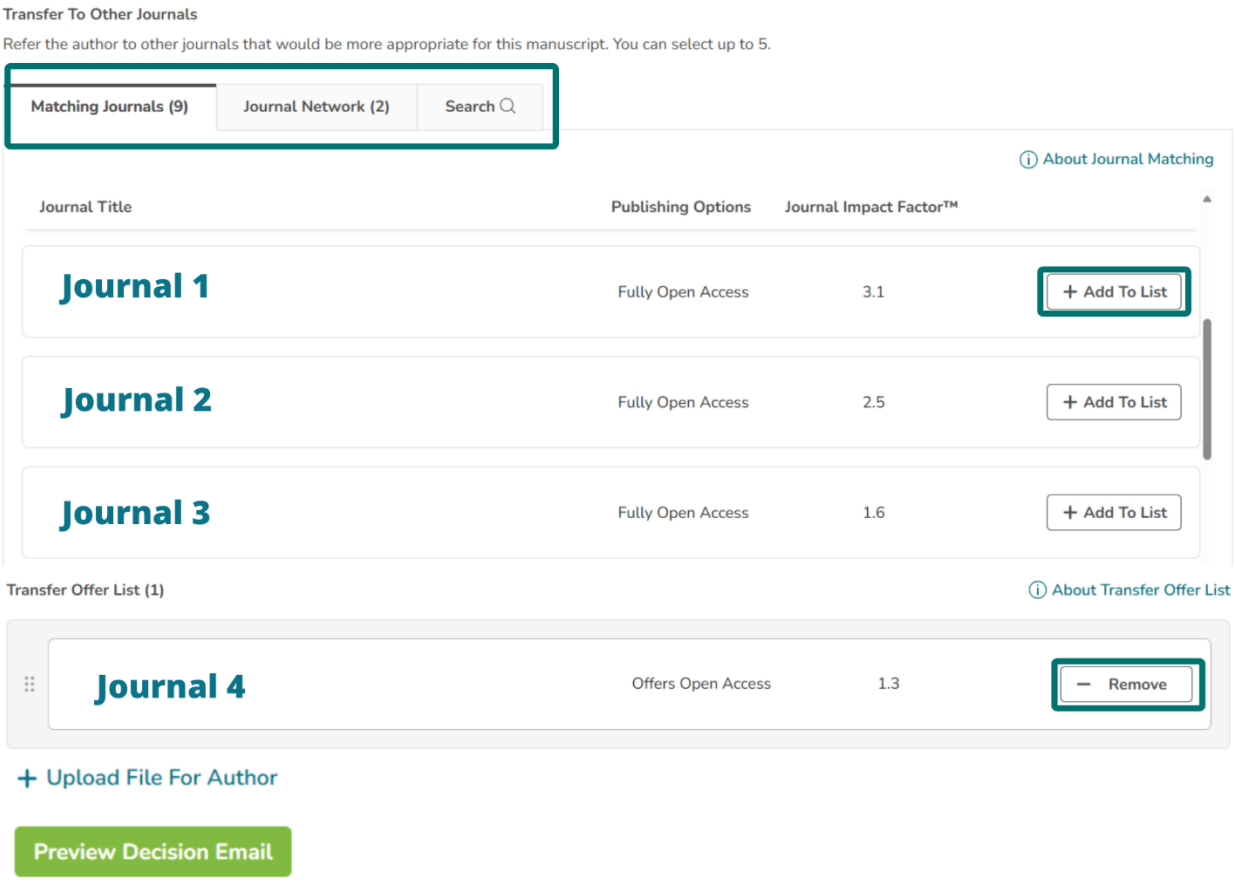
3. A reject Reason is required. To give a reason, click the downward arrow below the **Reject Reason** heading and select an option from the drop-down list. To communicate the reason for the decision to the destination editors, add comments to the box labelled **Message to Destination Editors**. The editorial team of the receiving journal will be able to view this message, the name of the editor who suggested the transfer, the date of transfer, and the journal from which the manuscript was transferred. If one of the following reasons is selected, additional information needs to be provided in the box labelled **Other Reasons**.
    a. Other issues with manuscript quality
    b. Other research concerns
    c. Other ethical concerns



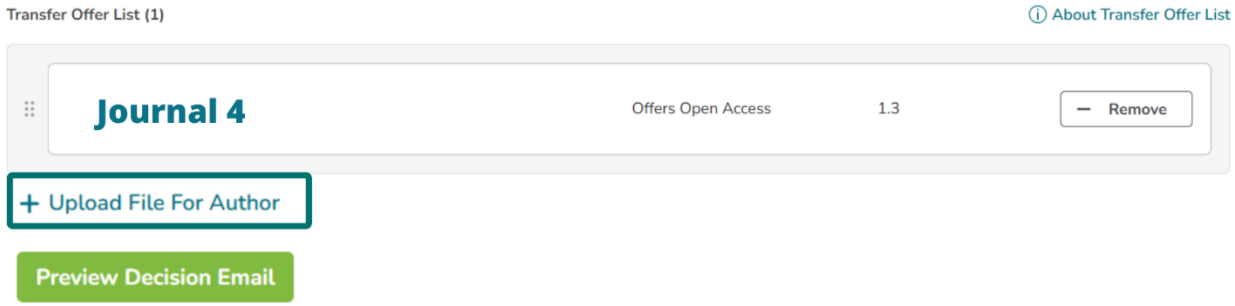
4. Under the heading **Transfer to Other Journals**, select **up to five journals** from the following. Each list will include key information about each journal, including the publishing options, and the Journal Impact Factor. . Transfer suggestions in Research Exchange are aligned with each journal's transfer network setup, ensuring editors only see appropriate destination journals when referring a manuscript. Depending on the journal, transfer suggestions may be shown across multiple tabs or limited to the *Journal Network* tab only.
    a. **Matching Journals** tab for a list of suggested journals. This list is populated automatically by matching the manuscript keywords to journals with an appropriate scope.

b. **Journal Network** tab is a list of journals from the Journal's Network. This list is populated by the Journal Administrator.
c. **Search** to find a journal in the Research Exchange journal database by title.

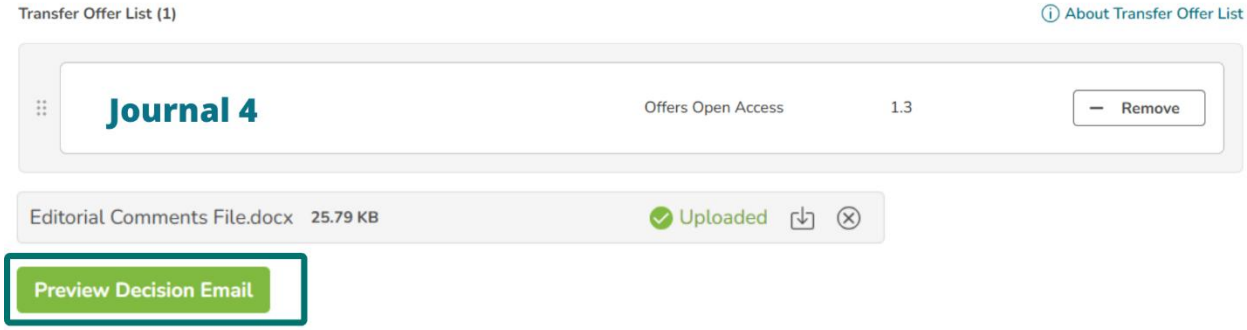
5. From here, click the Journal Name to visit the journal homepage, click **Add to List** to add a journal to the **Transfer Offer List**, or click **Remove** to remove it. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.



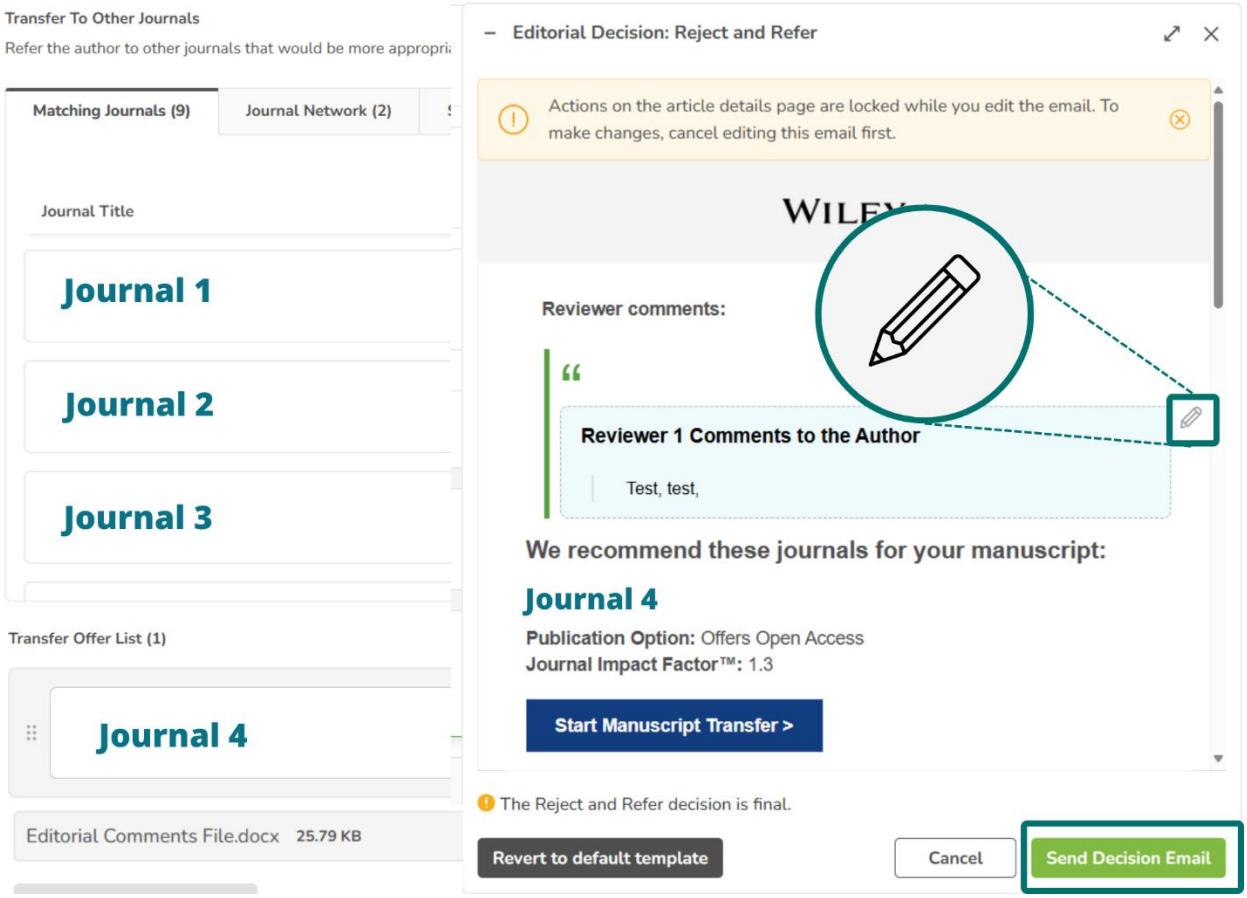
6. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.



7. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments.



8. Click the **pencil icon** to edit sections of the email template, adding a message to the author. Typed reviewer comments and any message from the Academic or Guest editor can also be edited. Click **Send Decision Email** when ready. A pop-up message will appear asking you to confirm the action.



What happens next?

When a Reject and Transfer decision has been made, authors will be informed in an email, which includes a list of up to five journals selected by the decision-making editor, and a link to start the manuscript transfer.

Authors can choose to update their manuscript before confirming their submission to a suggested journal. If the authors choose to transfer their manuscript, it arrives at the new journal, identified as a transfer for further action.

For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons.

Important Note: *Reject and Refer Decision Not Available for all Journals

The decision to Reject and Refer is only available for journals that are configured to support Editor-Driven Referral (EDR).

Choose **Reject and Refer** if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted.

Editors and reviewers making recommendations will only have the **Reject** option available. The decision-making editor will have these options available.

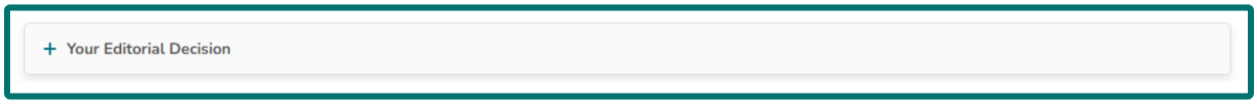
Reject and Send to Transfer Service Decision (After Peer Review)

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

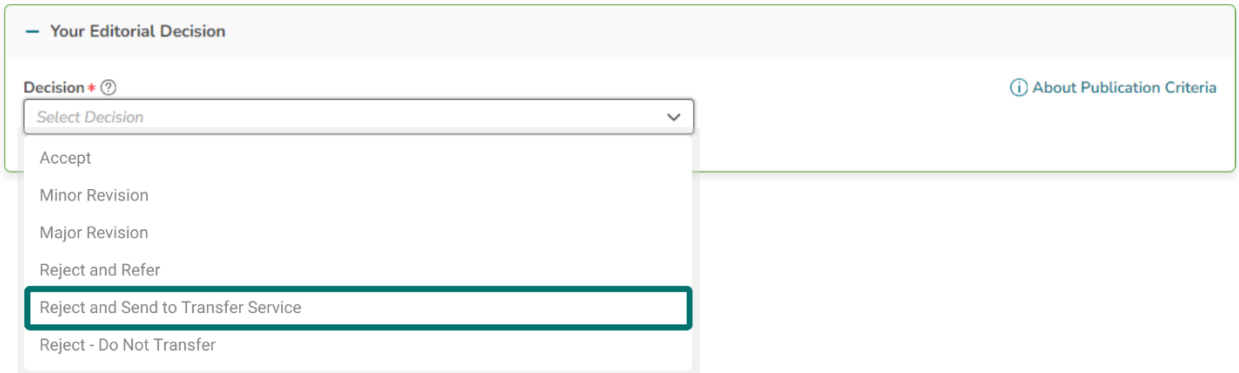
If Reject and Transfer to Transfer Service is chosen, the manuscript will be referred to **Wiley's Transfer Desk Assistant (TDA),** which uses machine learning to analyze the manuscript and identify Wiley journals that are a good match for the research.

To reject and transfer a manuscript, follow these steps:

1. From the **Article Details** page, open the **Your Editorial Decision** section.



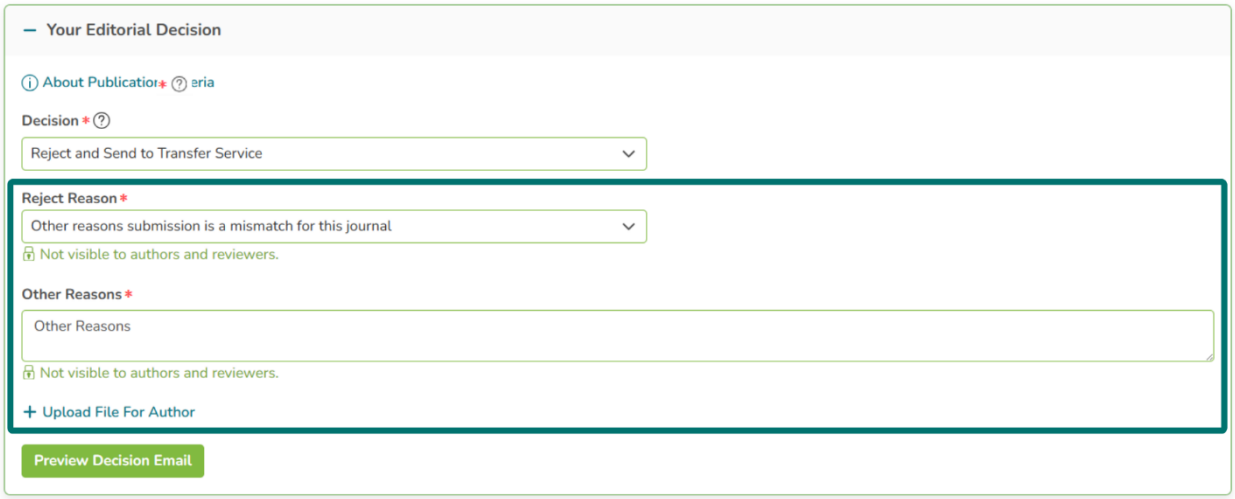
2. Click the downward arrow below the **Decision** heading and select the **Reject and Send to Transfer Service** option from the dropdown list.



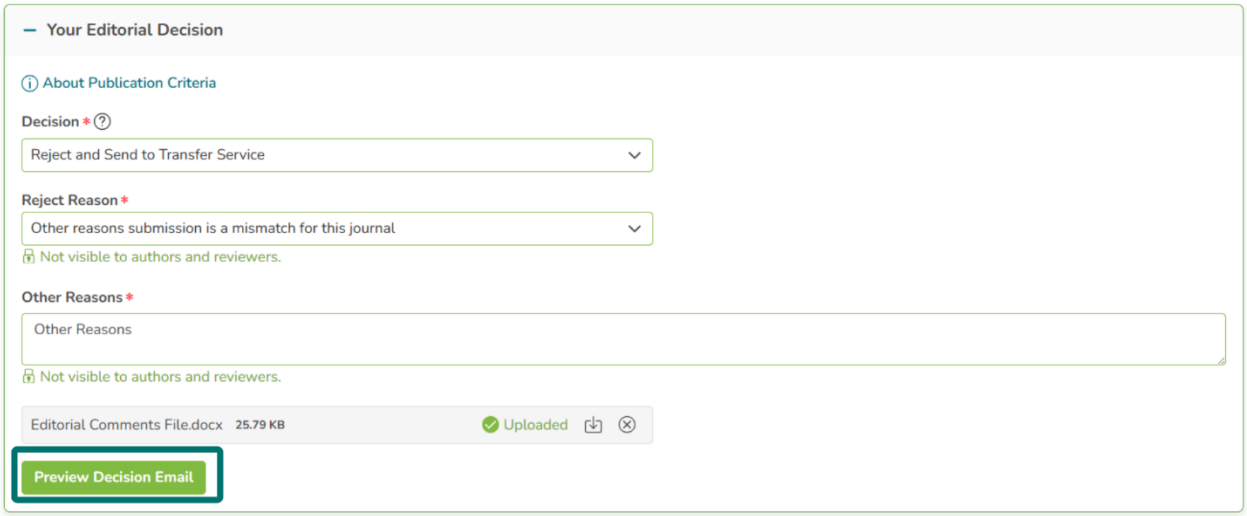
3. A Reject Reason is required. To give a reason, click the downward arrow below the **Reject Reason** heading and select an option from the drop-down list. If any of the following reasons are selected, additional details must be entered in the **Other Reasons** text box:
    a. Other reasons why submission is a mismatch for this journal
    b. Other issues with manuscript quality

c. Other research concerns
d. Other ethical concerns

Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses

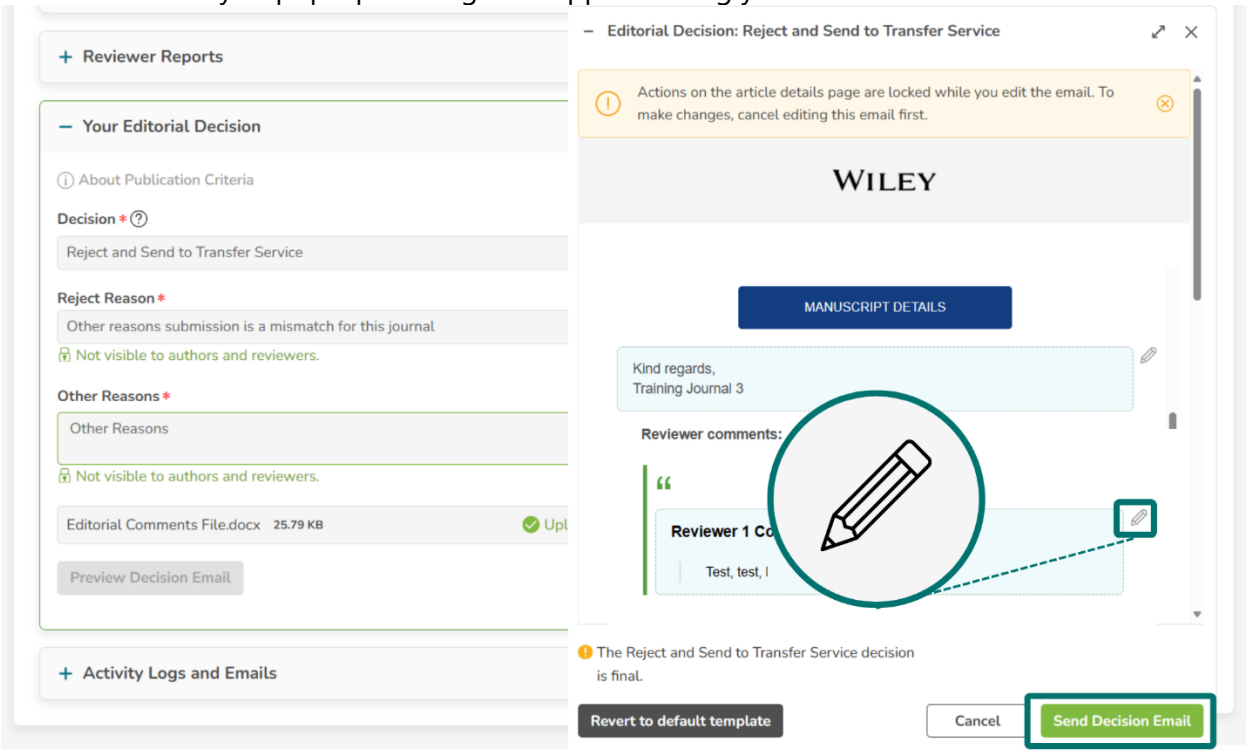


4. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments.



5. Click the **pencil icon** to edit sections of the email template, adding a message to the author. Typed reviewer comments and any message from the Academic or Guest editor can also be edited, before clicking the **Send Decision Email** button to send the email. Click **Send Decision**

Email when ready. A pop-up message will appear asking you to confirm the action.



What happens next?

Once a Reject and Transfer decision has been made, authors will be informed by email, which includes a list of suggested recipient journals from the TDA database and a link to start the manuscript transfer.

Authors can choose to update their manuscripts before confirming their submission to a suggested journal. If the authors choose to transfer their manuscript, it arrives at the new journal identified as a transfer for further action.

For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons

Important Note: *Reject and Transfer Decision Not Available for all Journals

The decision to Reject and Send to Transfer Service is only available for journals that are configured to feed into the Wiley Transfer Desk Assistant (TDA).

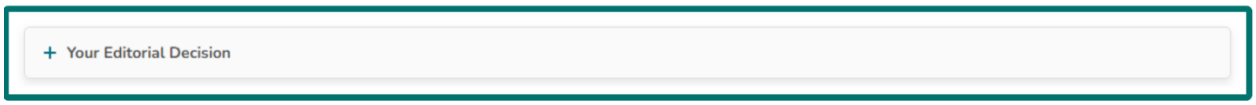
Choose **Reject and Transfer to Transfer Service** if a manuscript is high quality but is unsuitable for publication in the journal for which it was submitted. Editors and reviewers making recommendations will only have the **Reject** option available. The decision-making editor will have these options available.

Minor or Major Revision Decision (After Peer Review)

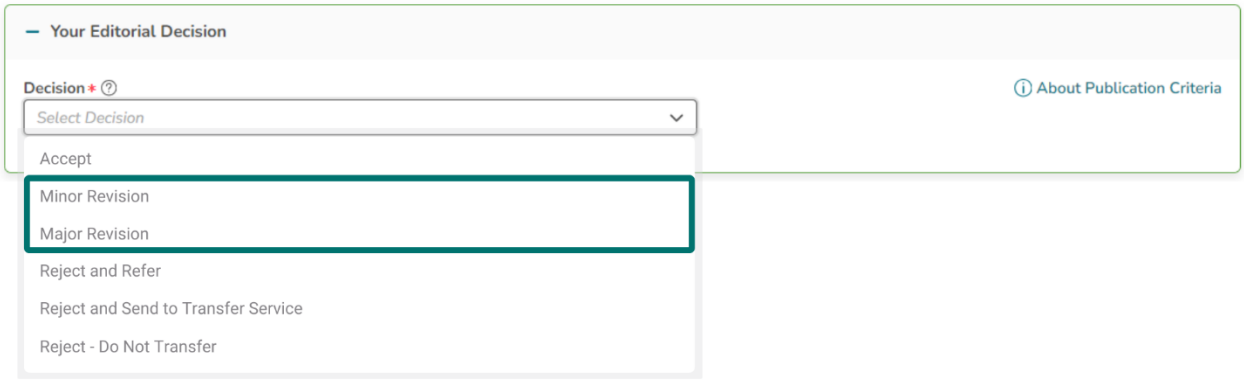
Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

To request minor or major revisions, follow these steps:

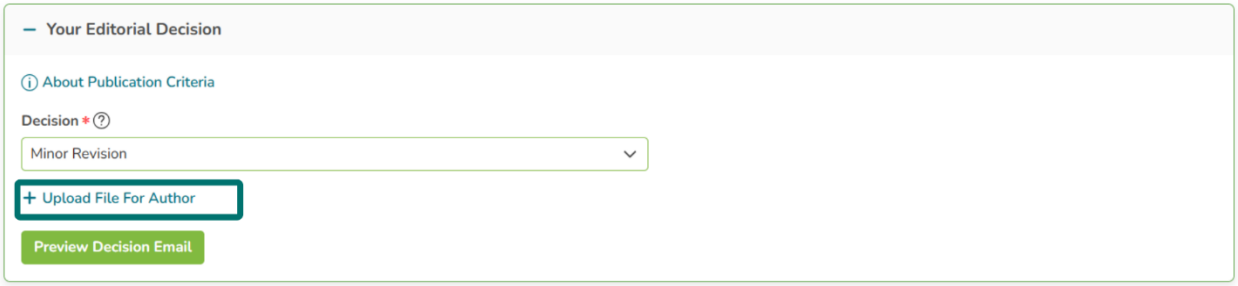
1. From the **Article Details** page, open the **Your Editorial Decision** section.



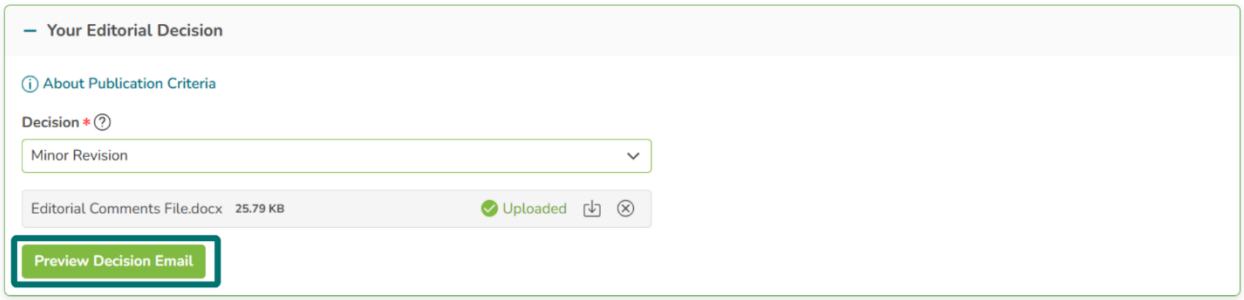
2. Click the downward arrow below the **Decision** heading and select the **Minor Revision** or **Major Revision** option from the drop-down list. Accept will not be available for articles that require peer review. For editors making a **Recommendation**, there will be optional boxes to type a message to the author and a message to the decision-making editor. The message to the author from the Academic or Guest Editor is automatically included in the decision letter. The decision-making editor can choose to edit or remove the message when editing the decision letter template.



3. Editors making a **decision** will be able to select **Upload File For Author** to attach to the decision letter. The platform will automatically scan the document for any viruses.

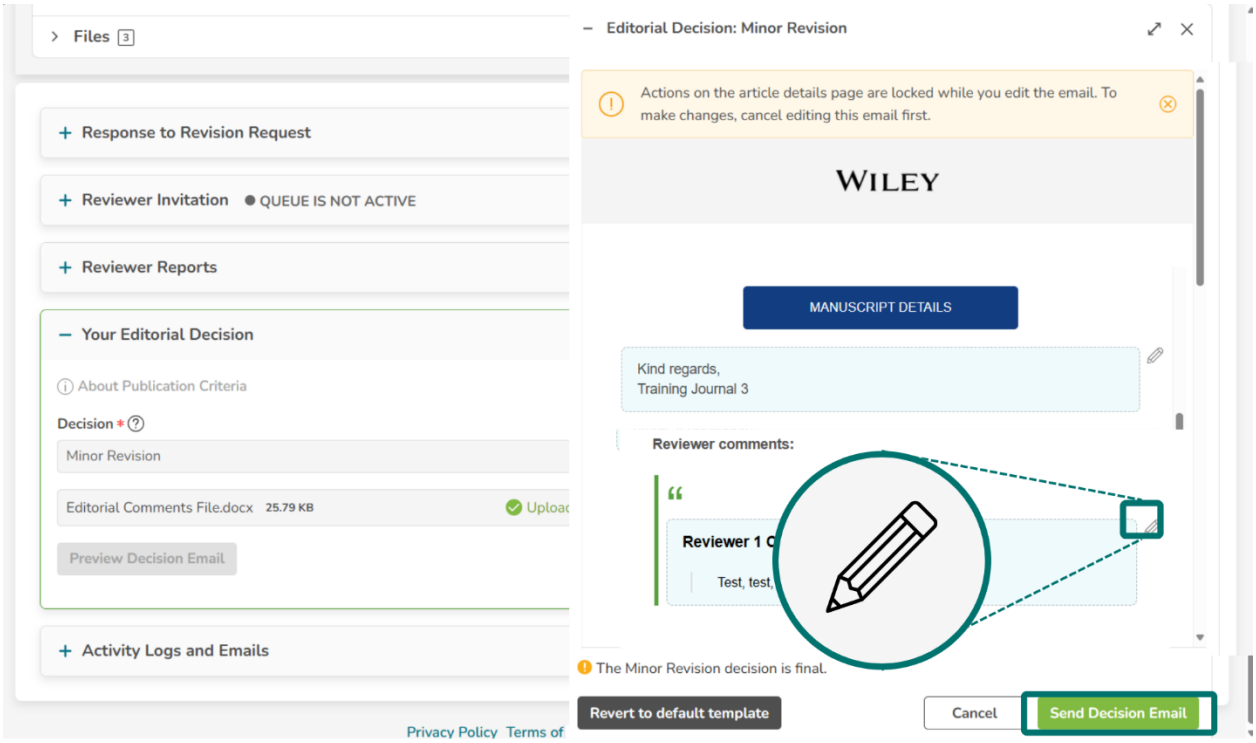


4. Click **Preview Decision Email** to see a preview of the email with editable sections to add comments.



7. Click the **pencil icon** to edit sections of the email template, adding a message to the author. Typed reviewer comments and any message from the Academic or Guest editor can also be edited. Click **Send Decision Email** when ready. A pop-up message will appear asking you to

confirm the action.



What happens next?

When a minor revision decision is made, the authors receive an email notification with details of the requested revision and are asked to submit a revised version in Research Exchange Submission.

When the authors submit the revised version, for most journals workflows, the revised manuscript will pass through Revision Checks before returning to Research Exchange Review. The version name in Research Exchange Review will change from Version 1 to Version 2.

To find out more about reviewing revised manuscripts, please refer to:

Responding to Revised Manuscripts

Returning the Manuscript to Peer Review

In multiple-tier workflows where the academic editor or guest editor makes a recommendation to the triage editor or lead guest editor, at times, the triage editor or lead guest editor may not agree with the academic editor's or lead guest editor's recommendation. There are several options for addressing this issue. (If triage editor or lead guest editor agrees with the decision, they can simply make a final decision. Instructions for this are available in the **Editorial Decisions** section.)

Overriding the Recommendation

The triage editor or lead guest editor can choose to ignore the academic editor's or guest editor's recommendation and make their own alternative recommendation. In doing so, however, ***the triage editor or lead guest cannot alter any of the reviewer reports that the editor has chosen to include***. As such, it is recommended that the triage editor or lead guest editor carefully review the reviewer

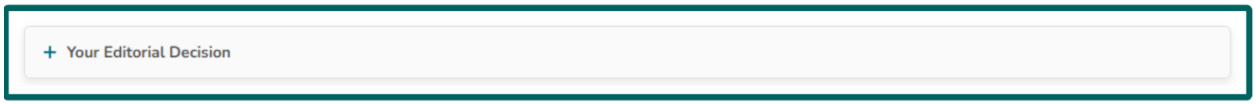
reports before deciding to override the academic editor's or guest editor's recommendation, particularly in cases of accept or reject decisions. As an alternative, the triage editor or lead guest editor can choose one of the following options instead.

Returning the Manuscript to the Handling Editor

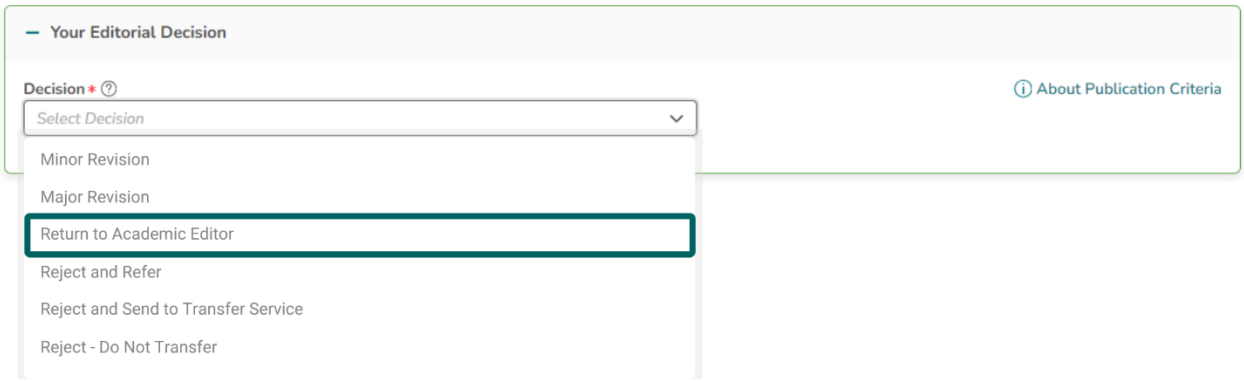
A triage or lead guest editor also has the option to send the manuscript back to the original handling editor alongside a message explaining why they are returning the manuscript (e.g., to request more peer review, to adjust the included reviewer reports, or alter an editorial recommendation).

To return a manuscript to the academic or guest Editor, follow these steps:

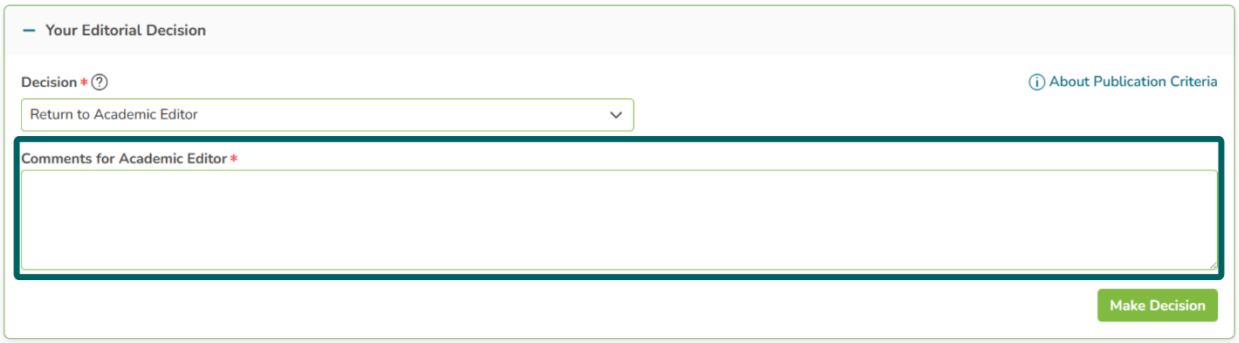
1. From the **Article Details** page, open the **Your Editorial Decision section.**



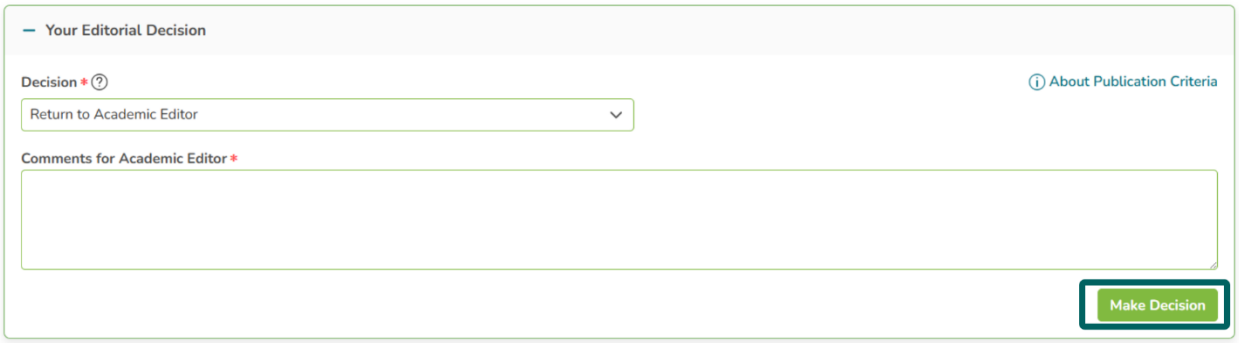
2. Click the downward arrow below the **Decision** heading and select the **Return to Peer Review** option from the drop-down list.



3. Type notes into the **Comments to Academic Editor** or **Comments to the Guest editor** box explaining why the manuscript is being returned.



4. Click the **Make Decision** button. A pop-up message will appear asking you to confirm the action.



When a manuscript is returned to the academic or guest editor, a final decision cannot be made until the academic or guest editor is ready to make another recommendation.

Assigning another Academic or Guest Editor

A triage or lead guest editor also has the option to assign the manuscript to another academic or guest editor on the editorial board for managing the peer review process and make another recommendation. The triage or lead guest editor can include a message explaining why they are sending the manuscript to this new academic or guest editor (e.g., to request more peer review, to adjust the included reviewer reports, or alter an editorial recommendation). This process is the same as it was for the original academic editor invitation. Please see the section on **Sending an invitation to an Academic or Guest Editor** for more information.

Changing Issue Type at Acceptance

Applicable to:	Decision-making editors, Editorial Assistants*, Journal Managers*, Full Access Capability

A decision-making editor may determine, only at the point of accepting an article, whether it should be published as part of a special issue of the journal or included in a regular issue. This may occur in the following situations:

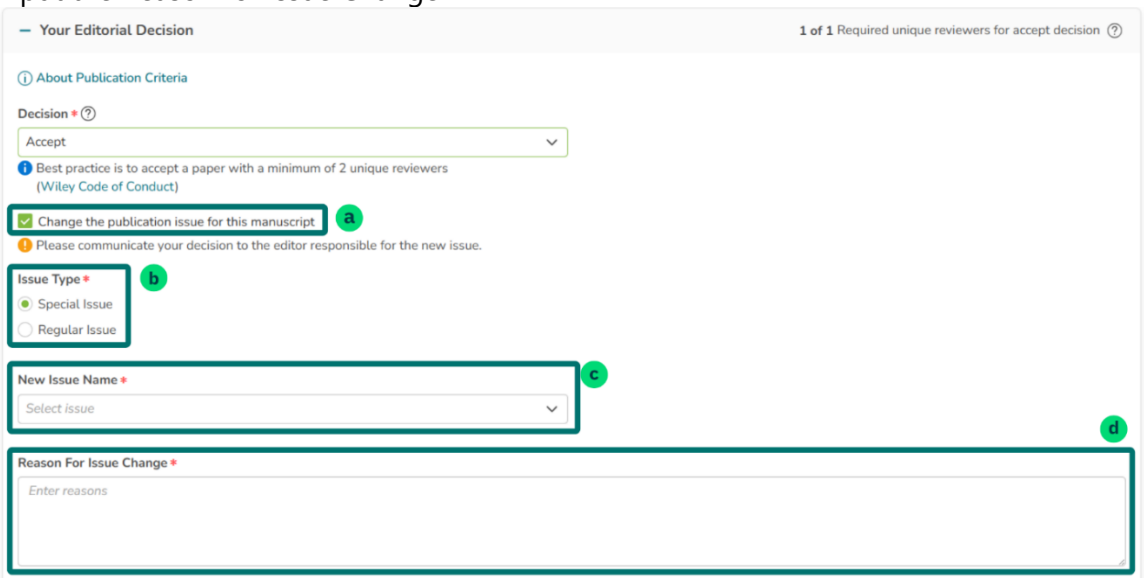
- Authors submit an article to a special issue, but the editors determine that it is out of scope and more suitable for a different special issue published by the journal, or for inclusion in a regular issue.
- Authors submit an article to a special issue that is later cancelled.
- Authors submit an article to a regular issue, but the editors determine that it is better suited to the scope of an open special issue published by the journal.

The following switches are supported;

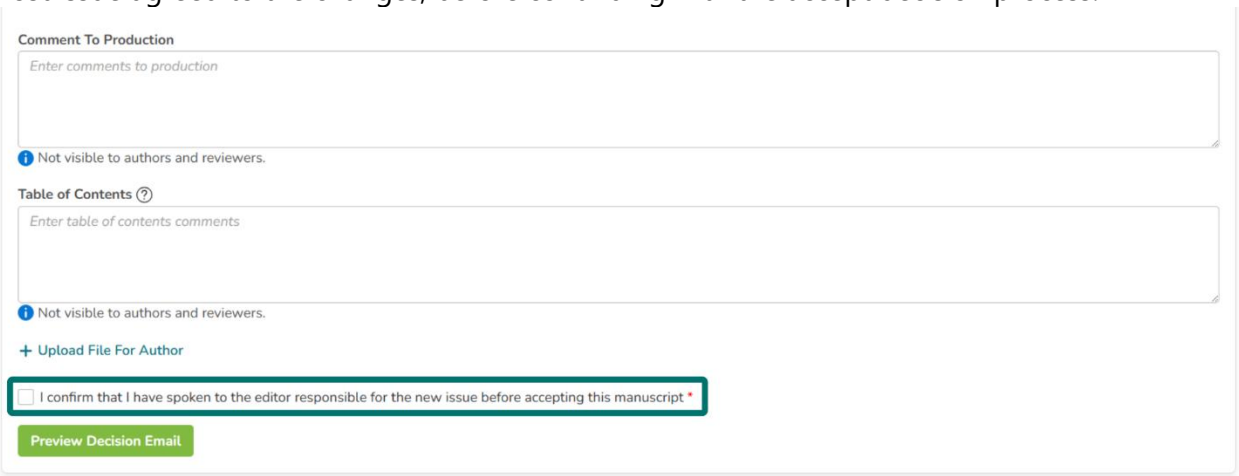
- Regular Issue to Special Issue
- Special Issue to Regular Issue
- Special Issue to Special Issue

To change the issue type, follow these steps;

1. From the Article Details page, open the Your Editorial Decision section and choose the Accept decision.
    a. Select Change the publication issue for this manuscript
    b. Choose the new issue type for this manuscript
    c. If changing to a Special Issue, choose the New Issue Name from the dropdown list. The list will include all open Special Issues, not closed or cancelled. If there are no open Special Issues for this journal, the Special Issue option will be greyed out and not available to select.
    d. Input the Reason for Issue Change



2. Select the mandatory confirmation checkbox to confirm that the editors responsible for the new host issue agreed to the changes, before continuing with the accept decision process.



What happens next?

Whenever the issue type is changed by the editor at acceptance, the Decision Letter will include that information to inform and confirm the change with the authors. This text is editable in the preview and may be amended to refine the message delivered to authors.

After the decision to accept the manuscript for publication has been submitted, changes are sent downstream to production only once the Material Checks stage has been completed and all required manuscript files have been provided by the authors in accordance with production requirements.

Editorial Recommendations

This section covers both the process for making an editorial recommendation and receiving an editorial recommendation.

When an editor first receives a manuscript, their recommendation decision options will vary depending on their role in handling the manuscript. The following Recommendations are available in Research Exchange. These may change depending on when the decision is being made and who is making it.

- Minor Revision
- Major Revision
- Reject
- Reject – Do Not Transfer
- Accept

Recommendations Before Peer Review

Accept Recommendation (Before Reviewer Invitation)

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

An Accept recommendation can only be made once the manuscript has received the minimum number of required reports set at the article or issue type level. This recommendation option will not be available in the drop-down list until the requirements have been met.

Some article types do not require peer review and will be configured in the platform so that they can be accepted without peer review.

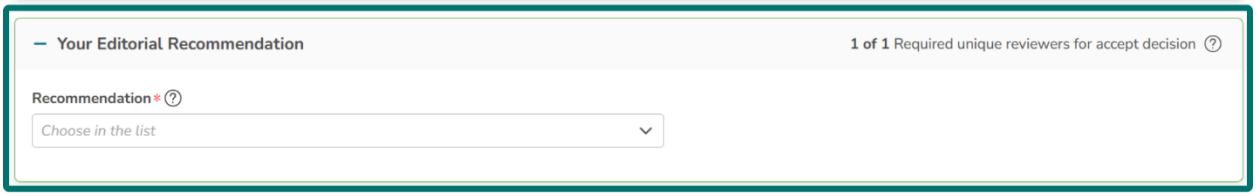
Reject Recommendation (Before Reviewer Invitation)

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

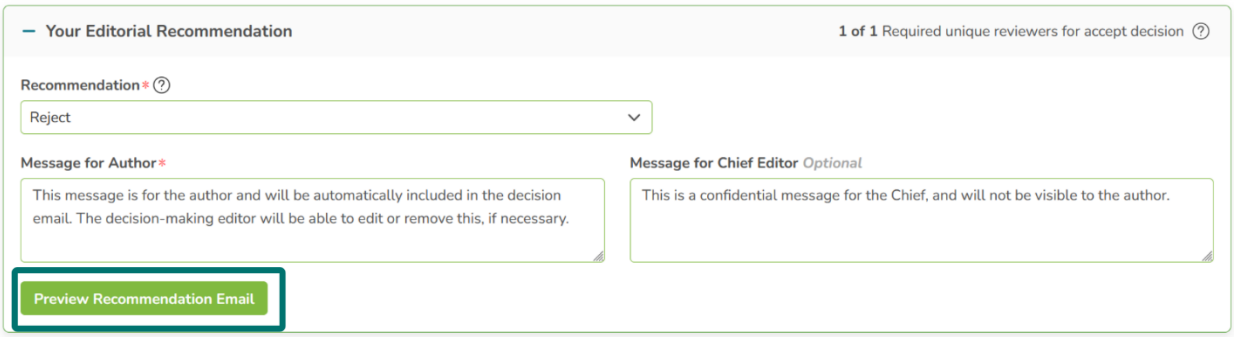
If the manuscript is unsuitable for publication, editors can follow these steps:

1. From the **Article Details** page, open the **Your Editorial Recommendation section.** Click the downward arrow below the **Recommendation** heading and select the **Reject** option from the

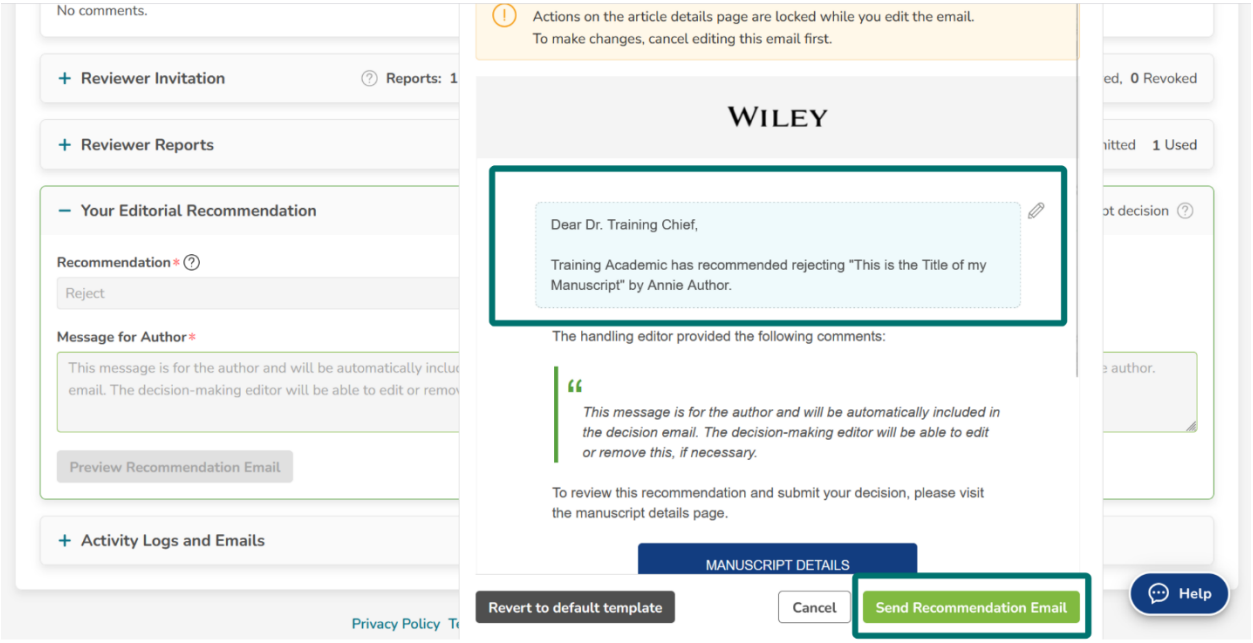
dropdown list.



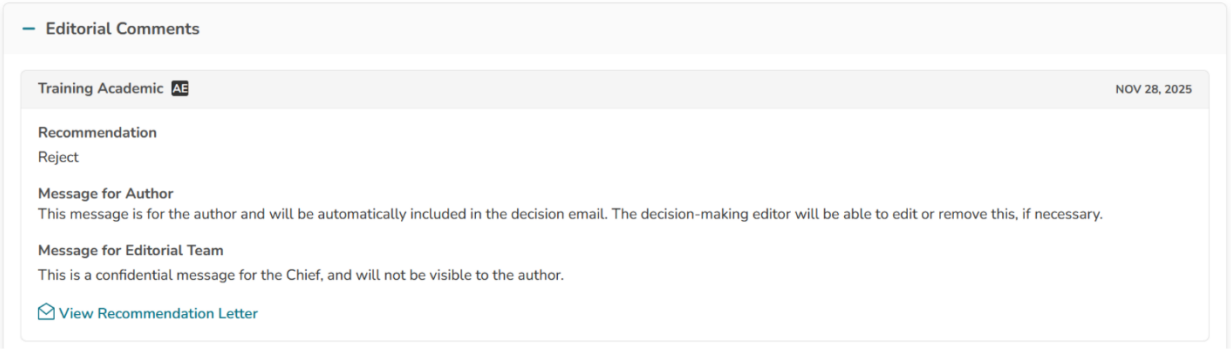
2. When making a **Recommendation to reject**, it is required to add a **Message for Author**. It is optional to add a **Message for Chief Editor.** Decision-making editors will be able to edit or remove the message for the author, if necessary. Click **Preview Recommendation Email** to see a preview of the email with editable sections to add comments.



3. A preview of the email to the decision-making editor will appear with editable sections to add comments. Click **Send Recommendation Email** when ready. A pop-up message will appear asking you to confirm the action.



The email will be sent to the decision-making editor, and the **Editorial Comments** section will be updated.



What happens next?

Recommendations will be passed to the decision-making editor for a final decision. Once a decision is made, the authors will receive an email notification to communicate the decision to reject the manuscript without transfer.

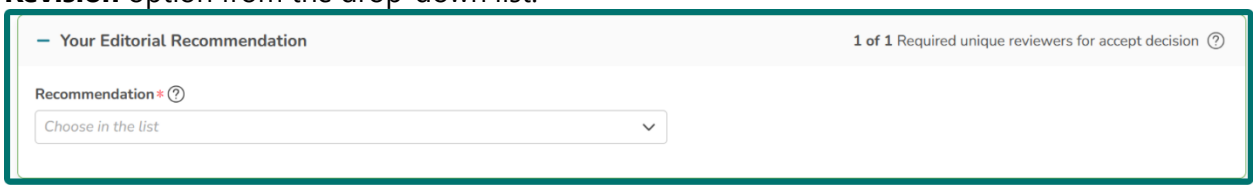
For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons.

Minor or Major Revision Recommendation (Before Reviewer Invitation)

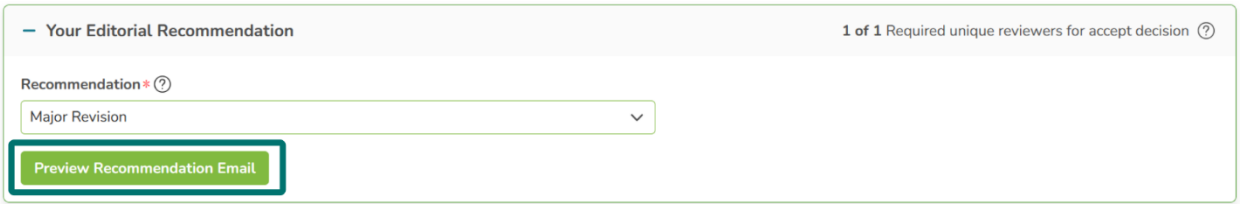
Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

To request minor or major revisions, follow these steps:

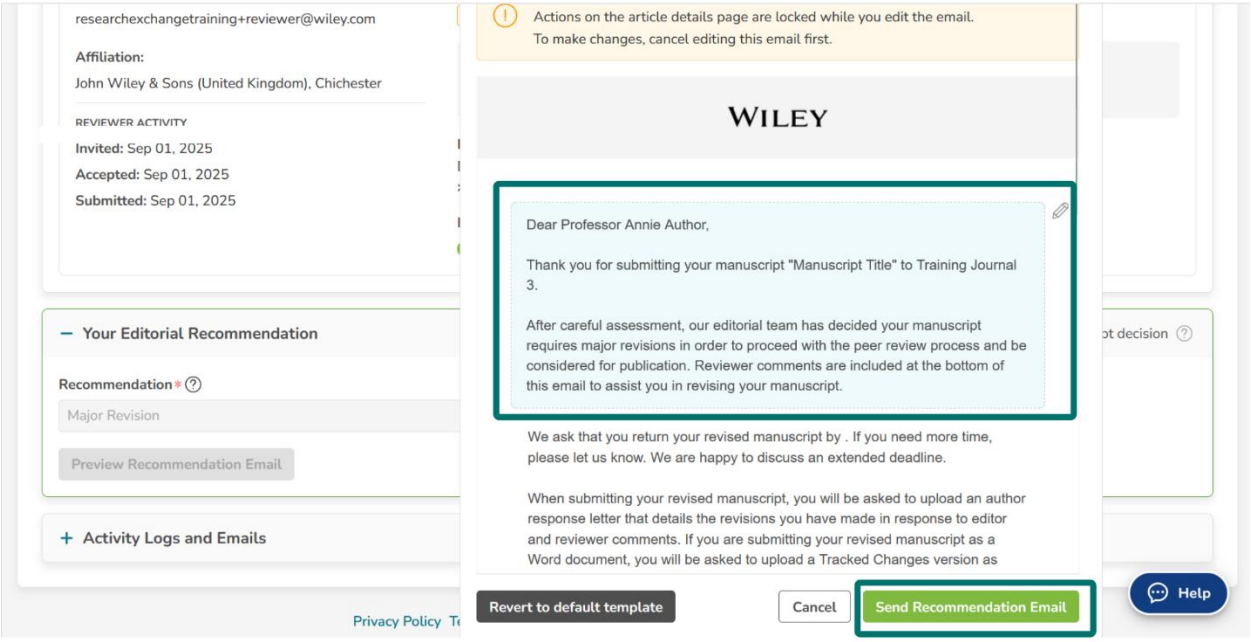
1. From the **Article Details** page, open the **Your Editorial Recommendation section.** Click the downward arrow below the **Recommendation** heading and select the **Minor Revision** or **Major Revision** option from the drop-down list.



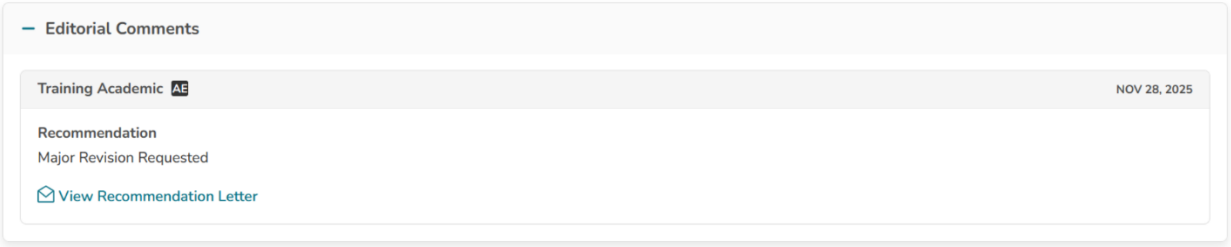
2. Click on **Preview Recommendation Email**.



3. A preview of the email to the decision-making editor will appear with editable sections to add comments. Click **Send Recommendation Email** when ready. A pop-up message will appear asking you to confirm the action.



The email will be sent to the decision-making editor, and the **Editorial Comments** section will be updated.



To find out more about reviewing revised manuscripts, please refer to: Responding to Revised Manuscripts.

Recommendations After Peer Review

Based on the outcome of peer review, Academic and Guest Editors in workflows where they make a recommendation can choose to:

- Accept if the manuscript is ready for publication without changes
- Request a minor revision if the manuscript requires minor changes
- Request a major revision if the manuscript requires a major rework
- Reject the manuscript if it is unsuitable for publication in the journal

Recommendations are not final and will be passed to the Triage Editor or Lead Guest Editor, who will review the reviewer reports and the recommendation before making their final decision.

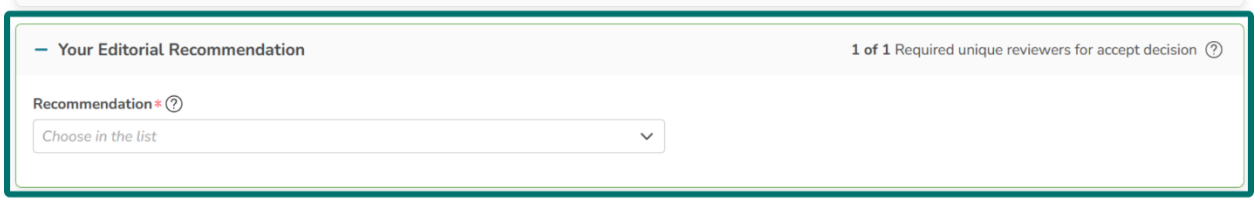
Accept Recommendation (After Peer Review)

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

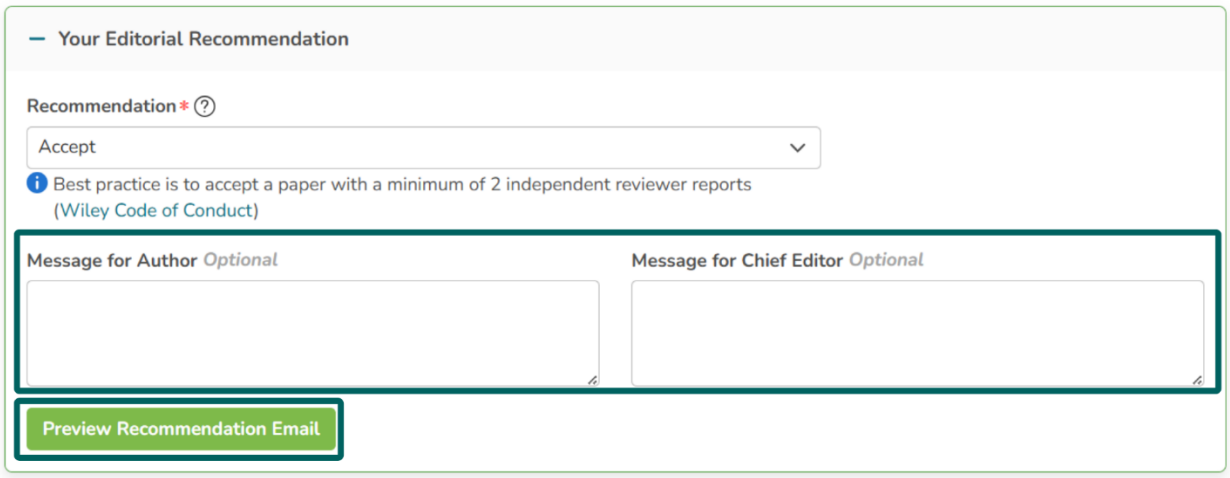
An accept decision can only be made once the manuscript has received the minimum number of required reports set at the article type level. To increase this, contact your Wiley representative.

If the manuscript is ready for publication without changes, follow these steps:

1. From the **Article Details** page, open the **Your Editorial Recommendation** section. Click the downward arrow below the **Recommendation** heading and select the **Accept** option from the drop-down list.

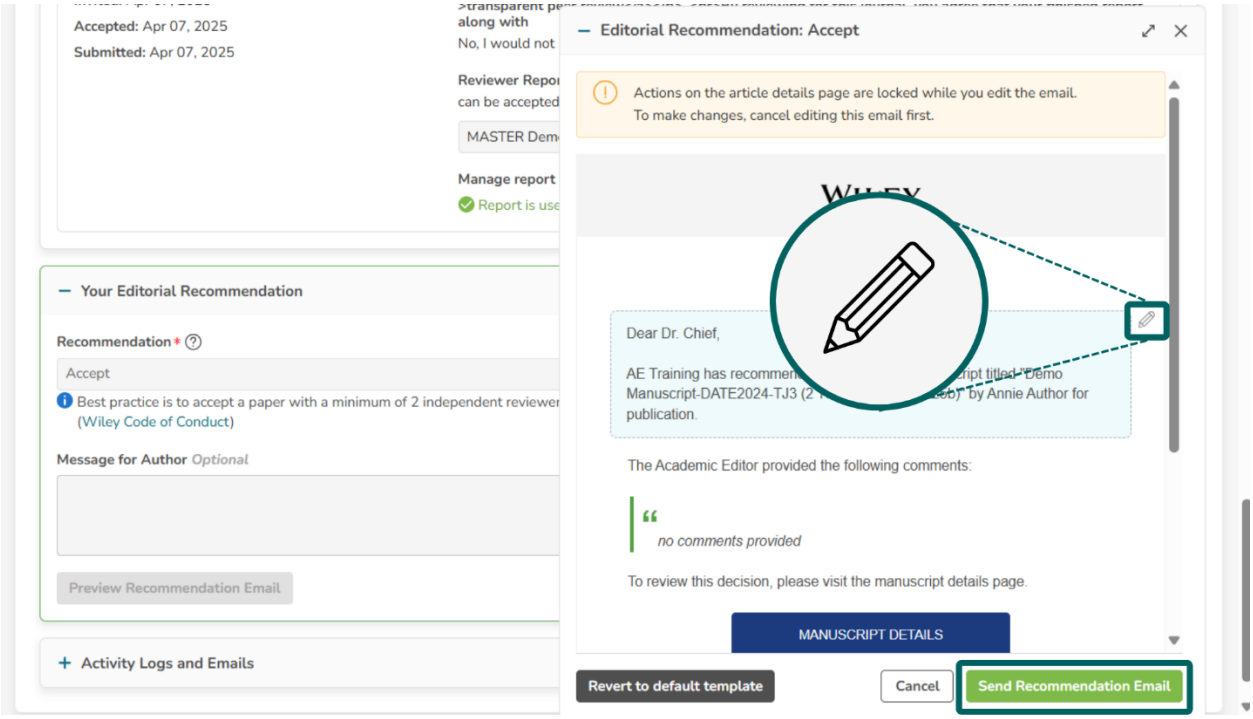


2. When making a **Recommendation to Accept**, it is optional to add a **Message for Author**. It is optional to add a **Message for Chief Editor.** Decision-making editors will be able to edit or remove the message for the author, if necessary. Click **Preview Recommendation Email** to see a preview of the email with editable sections to add comments.

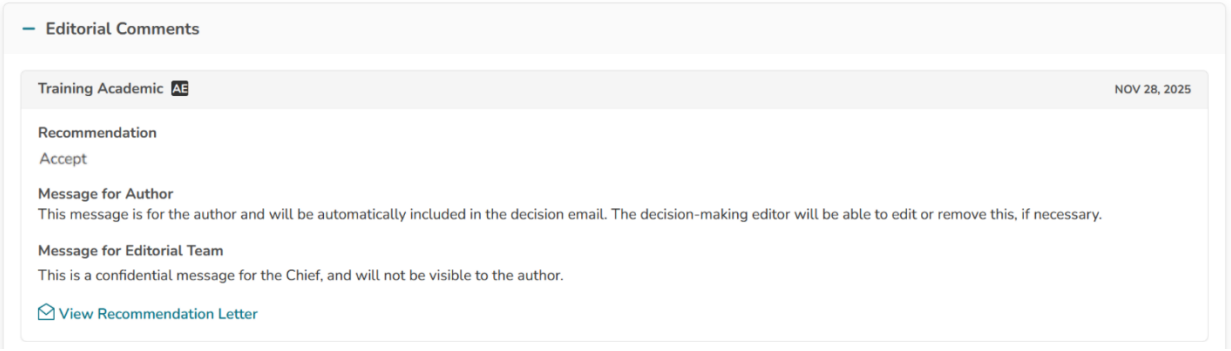


3. Click the **pencil icon** to edit sections of the email template, adding a message to the recipient. Click **Send Recommendation Email** when ready. A pop-up message will appear asking you to

confirm the action.



The email will be sent to the decision-making editor, and the **Editorial Comments** section will be updated.



What happens next?

When a recommendation to accept is made, the manuscript will pass back to the decision-making editor.

When a decision to accept is made, the manuscript is assigned to the journal's Editorial Assistant for Quality Checks. These checks include:

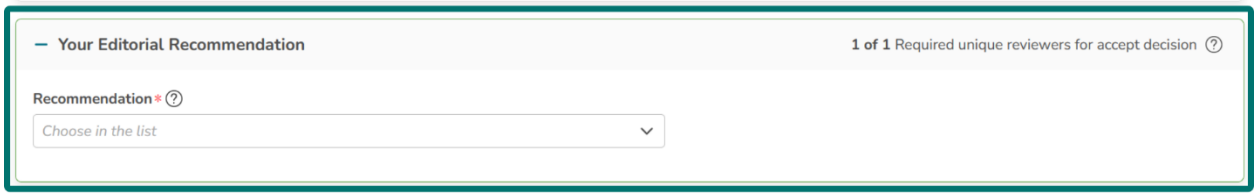
- A Peer Review Cycle Check to assess the integrity and validity of the peer review process.
- A Material Checks to ensure that the manuscript includes everything required by the journal's submission guidelines.

Reject Recommendation (After Peer Review)

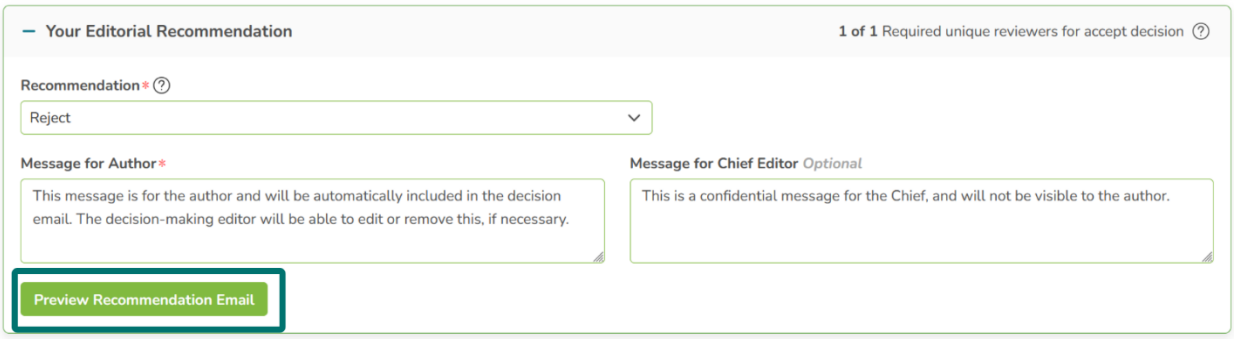
Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

If the manuscript is unsuitable for publication in the journal, follow these steps:

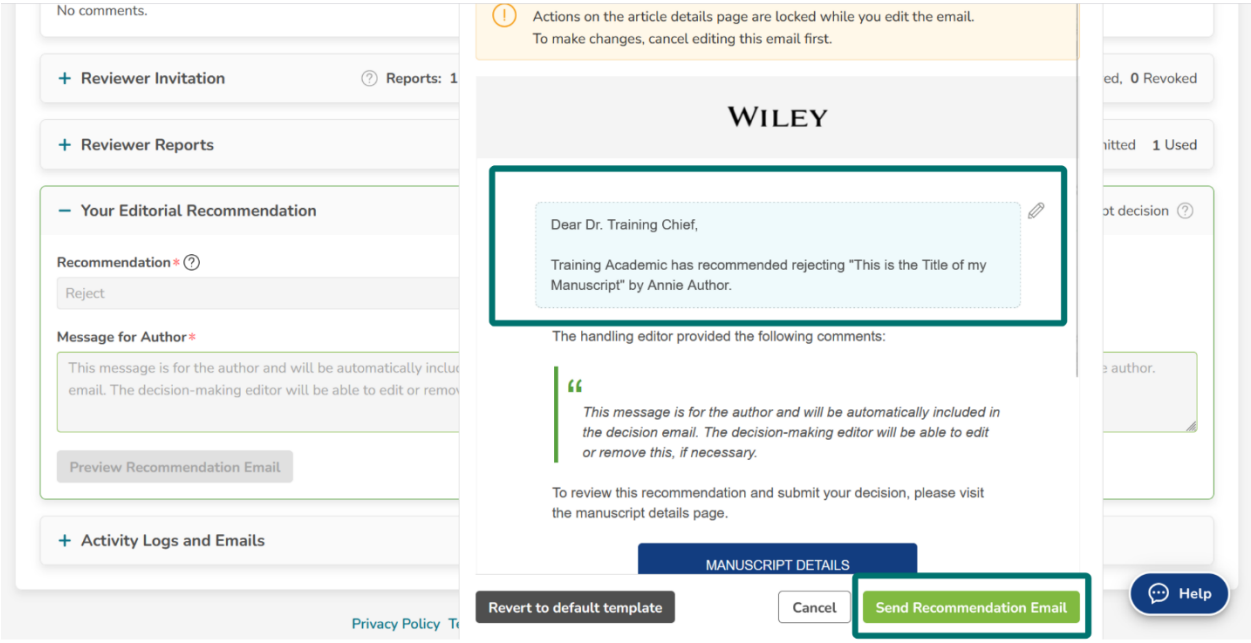
1. From the **Article Details** page, open the **Your Editorial Recommendation section.** Click the downward arrow below the **Recommendation** heading and select the **Reject** option from the dropdown list.



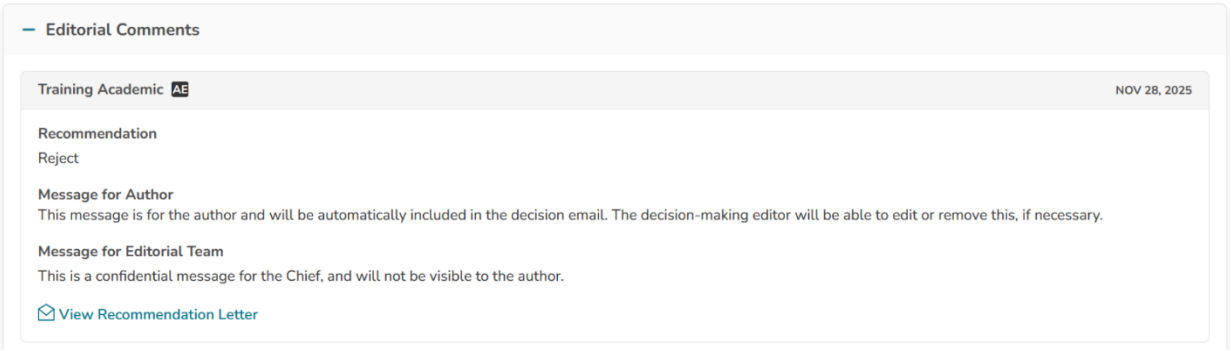
2. When making a **Recommendation to Reject**, it is required to add a **Message for Author.** It is optional to add a **Message for Chief Editor**. Decision-making editors will be able to edit or remove the message for the author, if necessary. Click **Preview Recommendation Email** to see a preview of the email with editable sections to add comments.



3. Click the **pencil icon** to edit sections of the email template, adding a message to the recipient. Click **Send Recommendation Email** when ready. A pop-up message will appear asking you to confirm the action.



The email will be sent to the decision-making editor, and the **Editorial Comments** section will be updated.



What happens next?

Recommendations will be passed to the decision-making editor for a final decision. Once a decision is made, the authors will receive an email notification to communicate the decision to reject the manuscript without transfer.

For a full list of Reject Reasons, please refer to: Appendix B: Reject Decision Reasons.

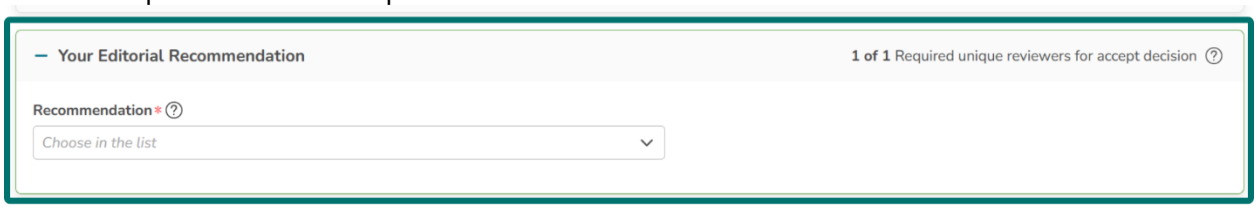
Minor or Major Revision Recommendations (After Peer Review)

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

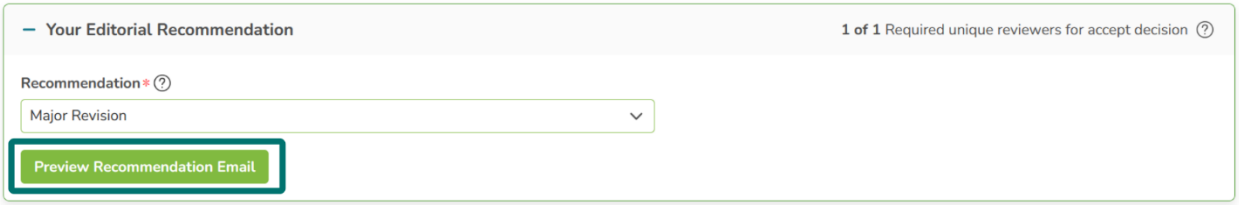
To request minor or major revisions, follow these steps:

1. From the **Article Details** page, open the **Your Editorial Recommendation section.** Click the downward arrow below the **Recommendation** heading and select the **Minor Revision** or **Major**

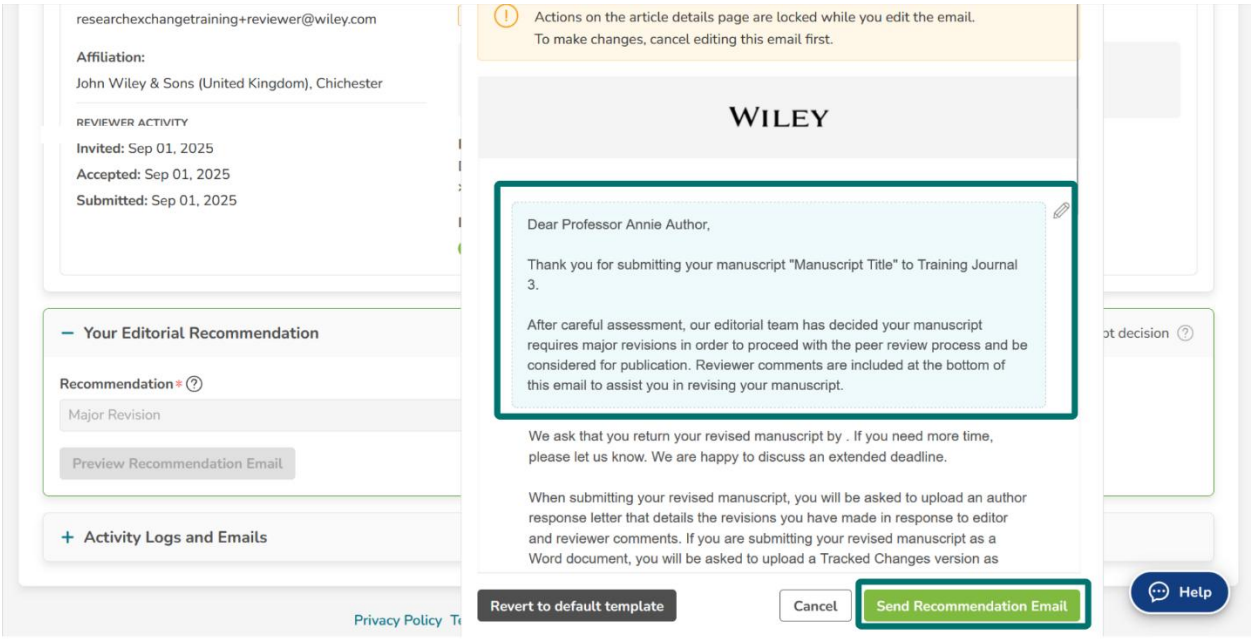
Revision option from the drop-down list.



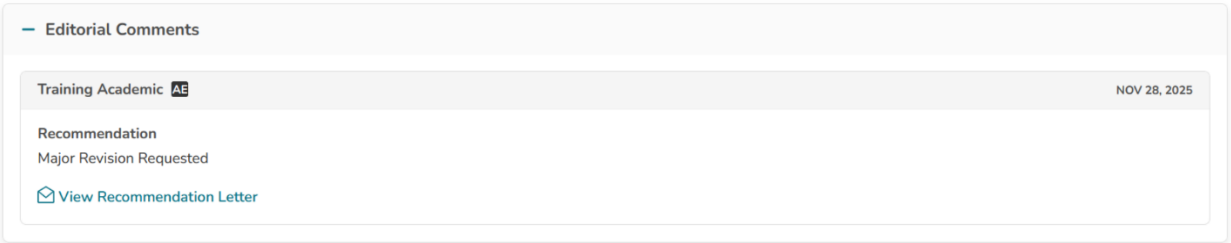
2. Click on **Preview Recommendation Email**. A preview of the email to the decision-making editor will appear with editable sections to add comments.



3. Click the **pencil icon** to edit sections of the email template, adding a message to the recipient. Click **Send Recommendation Email** when ready. A pop-up message will appear asking you to confirm the action.



The email will be sent to the decision-making editor, and the **Editorial Comments** section will be updated.



To find out more about reviewing revised manuscripts, please refer to: Responding to Revised Manuscripts.

Managing the Peer Review Step

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

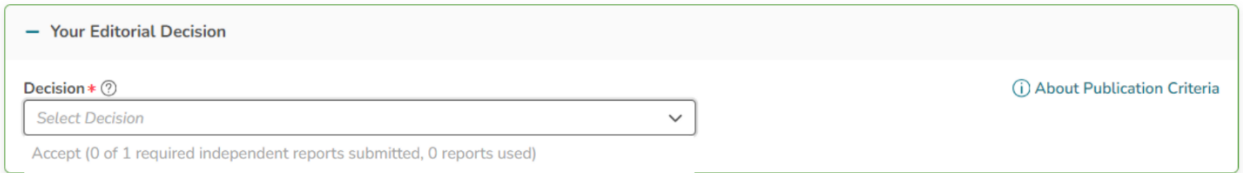
Minimum Required Reviewer Reports

The minimum number of required reviewer reports is set by Article Type for the journal. Some article types can be set to zero if they do not require peer review.

The minimum number of reviewer reports for an article type can be viewed in the platform. To see this, navigate to the Your Editorial Decision or Recommendation section on the Article Details page and view the number listed next to the Accept option. Editors managing the peer review process will also receive regular reminder emails to prompt them to invite the required number of reviewers.

Users who hold administrative roles on the journal (Editorial Assistants or Journal Managers) cannot be invited to review manuscripts.

1. From the **Article Details** page, open the **Your Editorial Decision or Recommendation** section. Click the downward arrow below the **Decision** or **Recommendation** heading and read the message next to **Accept**.

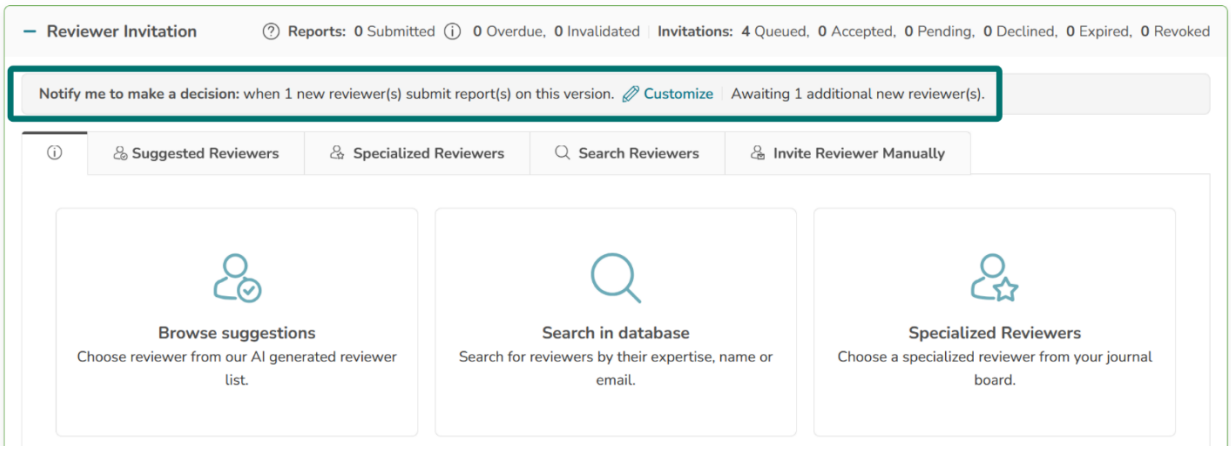


Increasing Required Reports for a Manuscript

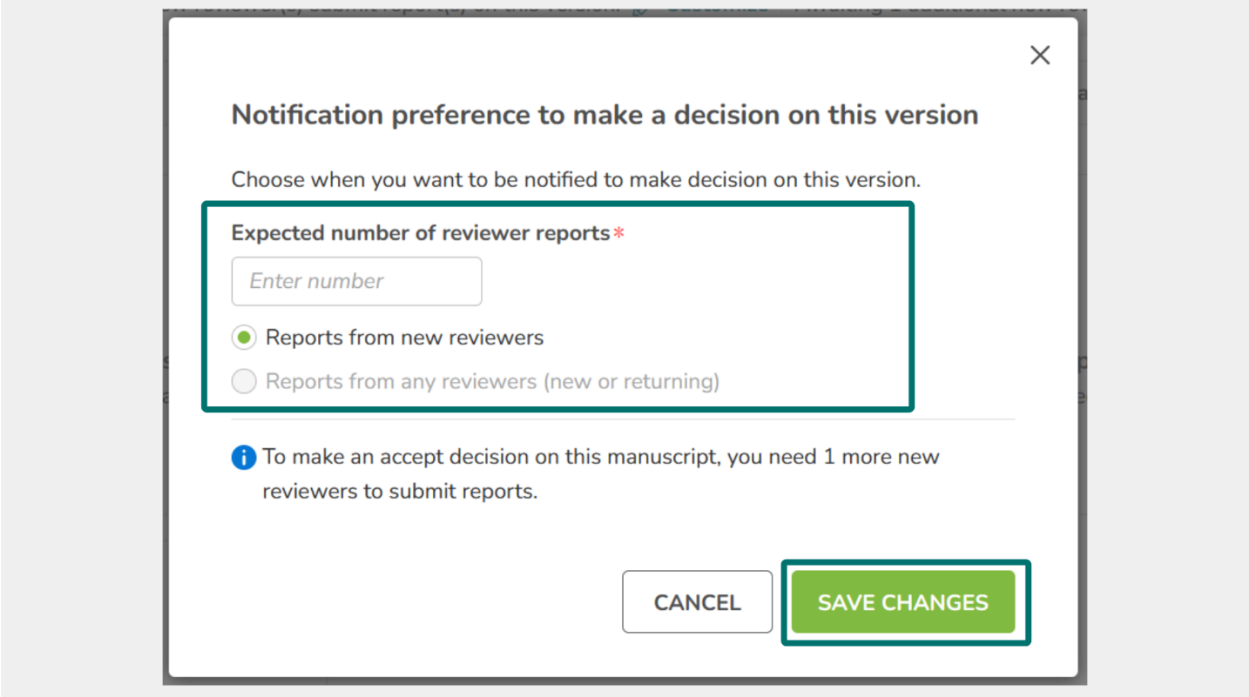
Handling Editors can set the number of reviewer reports they expect on the current manuscript version to be notified to make a decision or recommendation on the paper. Notification and reminders are linked with the manuscript status, which transitions to “Make Decision”/”Make Recommendation” only when the number specified by the Handling Editor is reached, thus reducing unwanted reminders when the Handling Editor is not ready to take action. This provides greater flexibility and control over the editorial workflow.

To increase this, follow these steps:

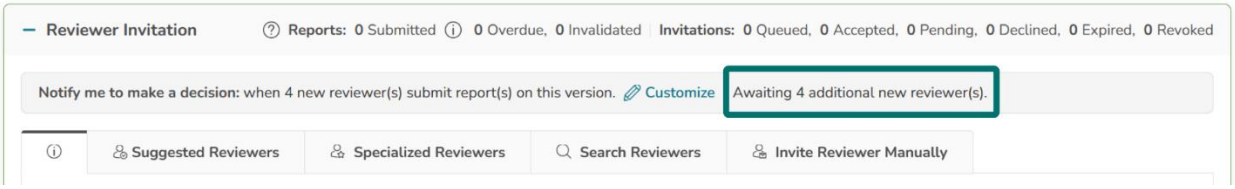
1. Go to the **Reviewer Invitation** section and select **customize**.



2. Enter the **expected number of reviewer reports.** This cannot be zero and if it is lowered below the minimum set at the article or issue type, then the ability to accept the manuscript will be locked. Click **save changes**. The manuscript status changes to the next workflow action (decision/recommendation) when the specified number of reports has been reached.



3. The updated number of required reviewer reports will be shown. The customize button remains available for users to adjust the number, either raising it above or reducing it to the minimum designated for the article or issue type. The minimum Research Integrity regulation set up at journal level.

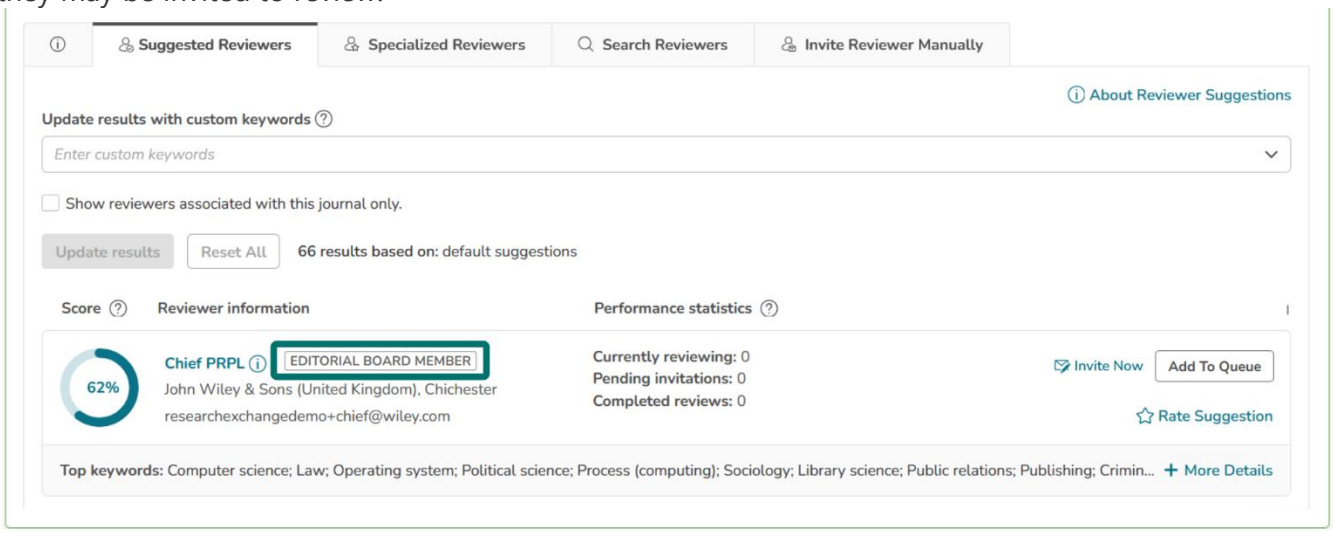


Reviewer Information

Each reviewer will be represented by a tile. Each reviewer tile contains basic information including name, affiliation, and email address. The additional information on the reviewer tile includes the following.

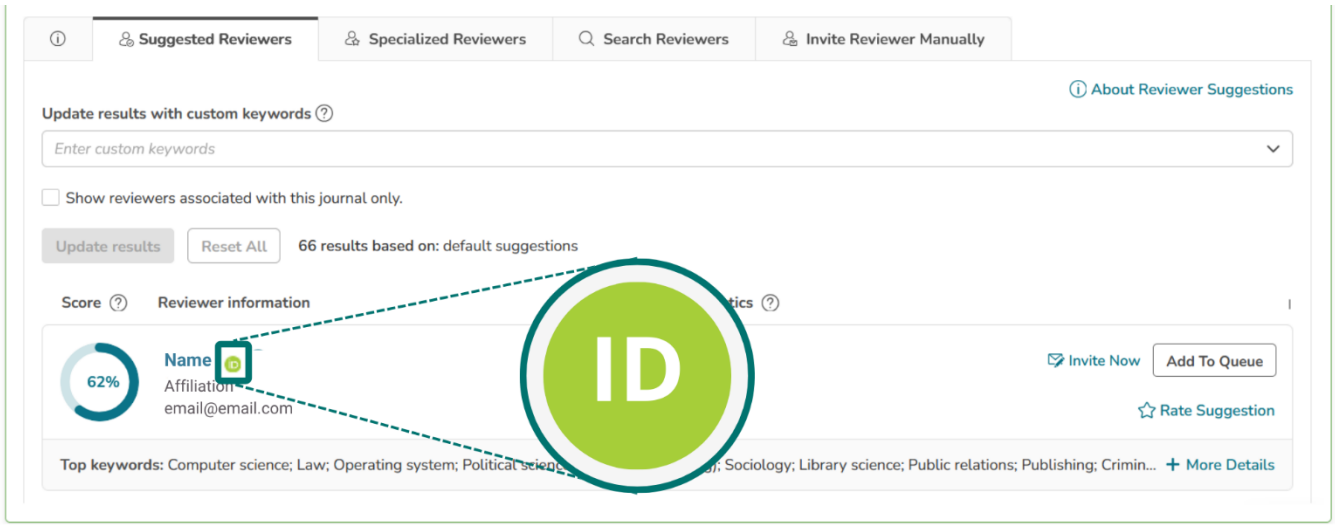
Editorial Board Members

When a reviewer is an active member of the journal's editorial board and holds the role of Triage Editor, Academic Editor, or Editorial Assistant in the system, a label will display when their name appears in the suggested reviewer or search reviewer lists. If someone does not currently have a role on the manuscript and has not previously interacted with it (such as an Academic Editor declining to handle it), they may be invited to review.



ORCID

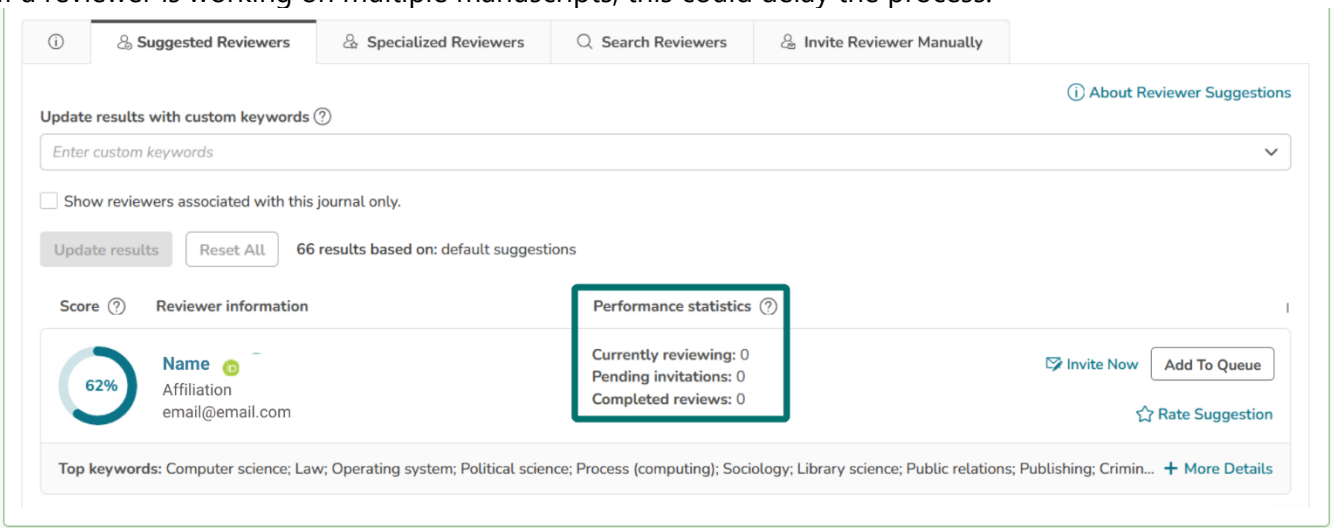
If the reviewer has linked an ORCiD with their profile, it will be denoted with a small green button with the word ID on it next to their name.



Performance Metrics

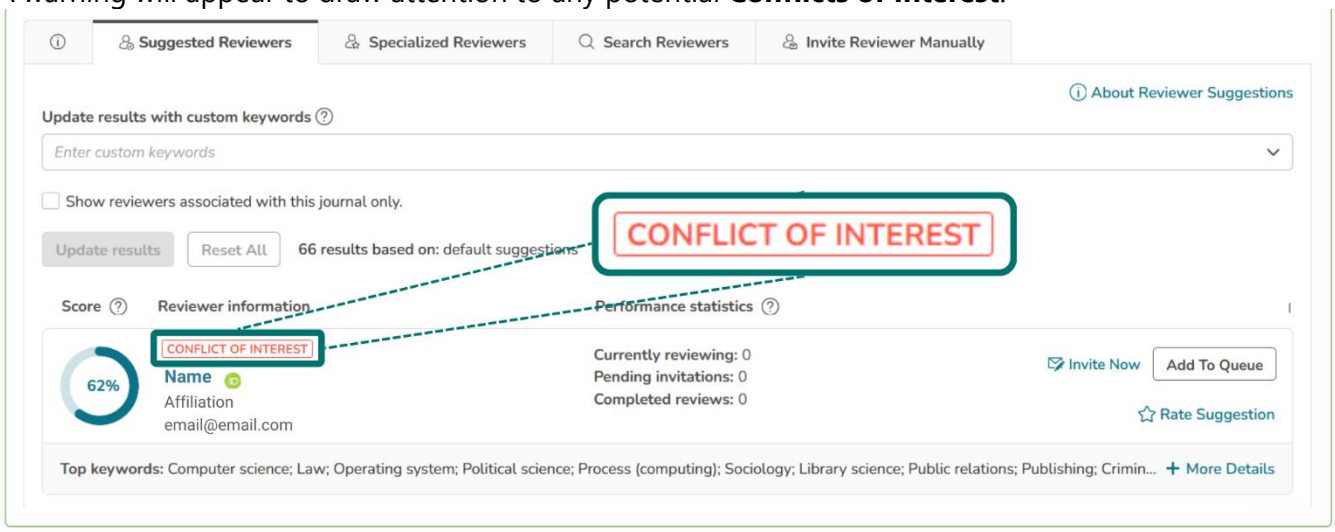
To provide an insight into the reviewer's availability, their current Research Exchange Review workload is displayed to the right of their name.

Consider each reviewer's workload by checking the number of manuscripts currently allocated to them. If a reviewer is working on multiple manuscripts, this could delay the process.



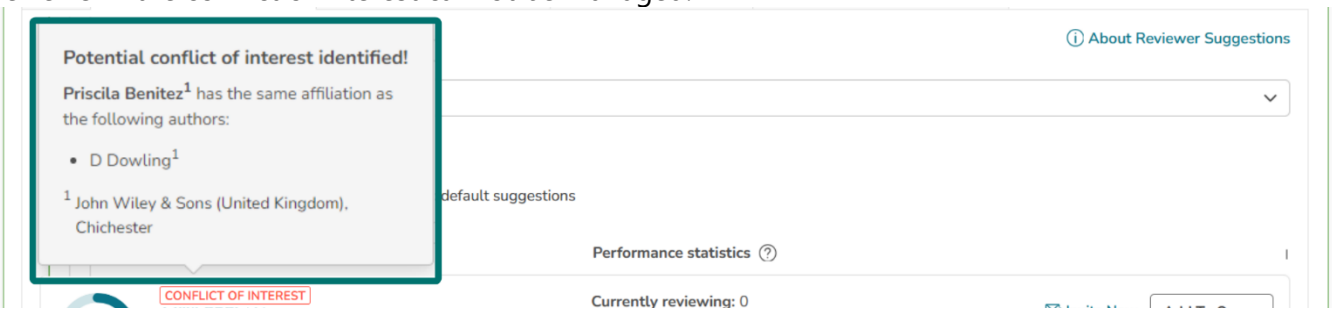
Reviewer Conflicts of Interest

A warning will appear to draw attention to any potential **Conflicts of Interest**.



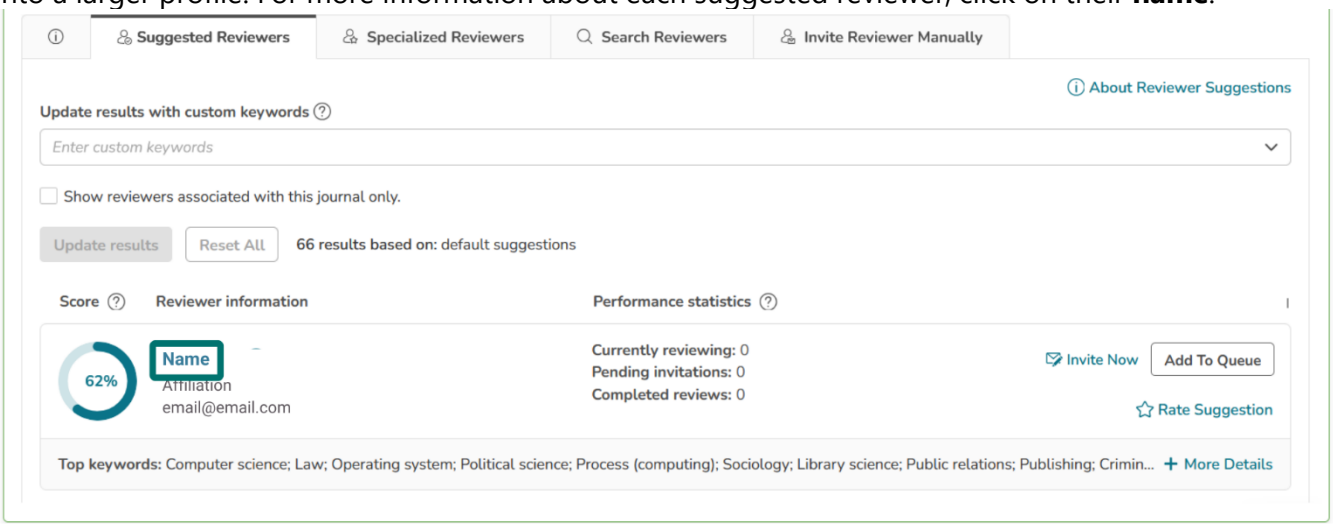
Hover over this label to display details of the conflict of interest. For more information on how conflict of interest warnings work in the system, please see Appendix F. Consider selecting an alternative

reviewer if the conflict of interest cannot be managed.



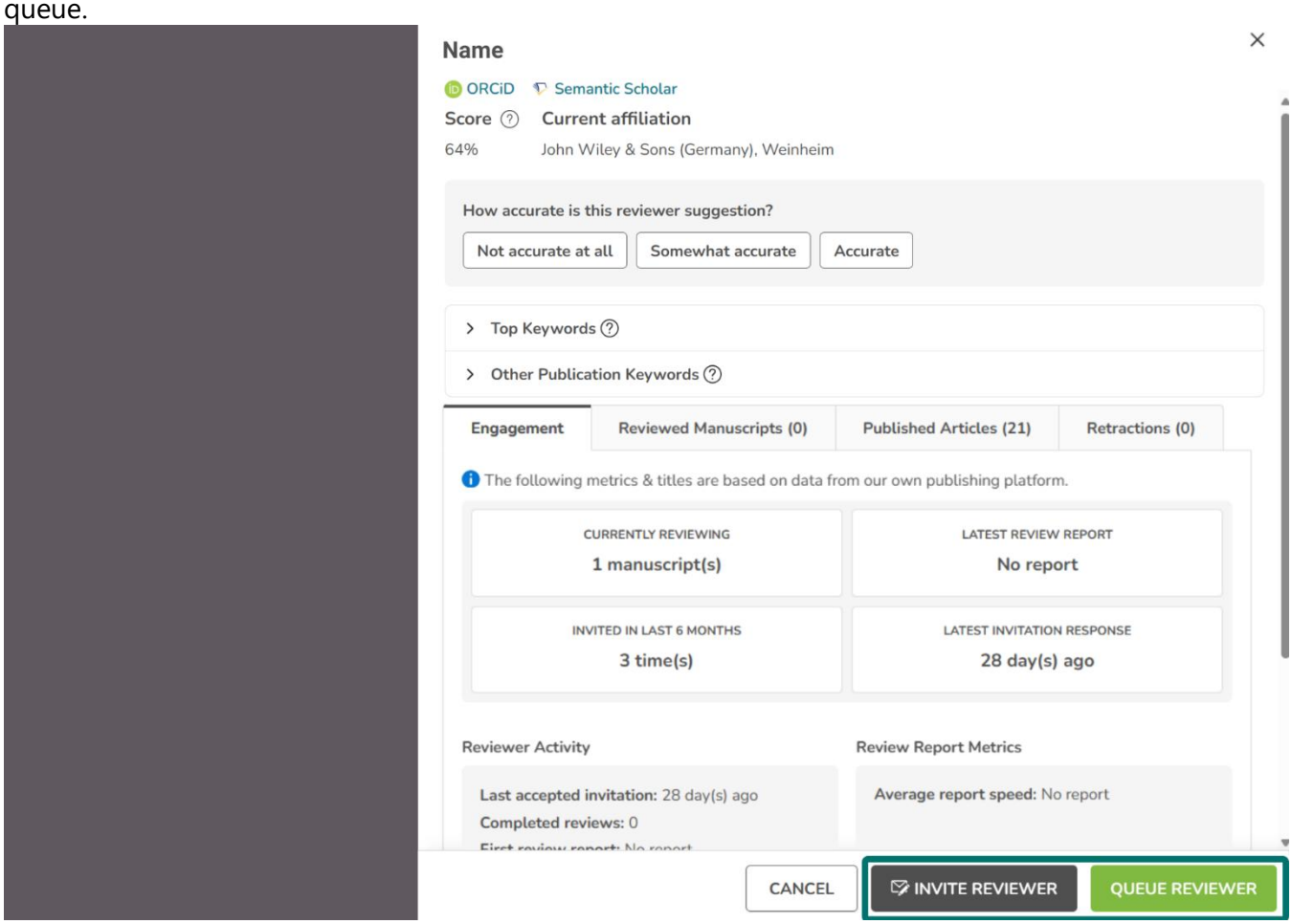
Reviewer Information Panel (Suggested & Search Tabs)

In the Suggested Reviewer tab, the user will also have the option to expand the review's information into a larger profile. For more information about each suggested reviewer, click on their **name**.



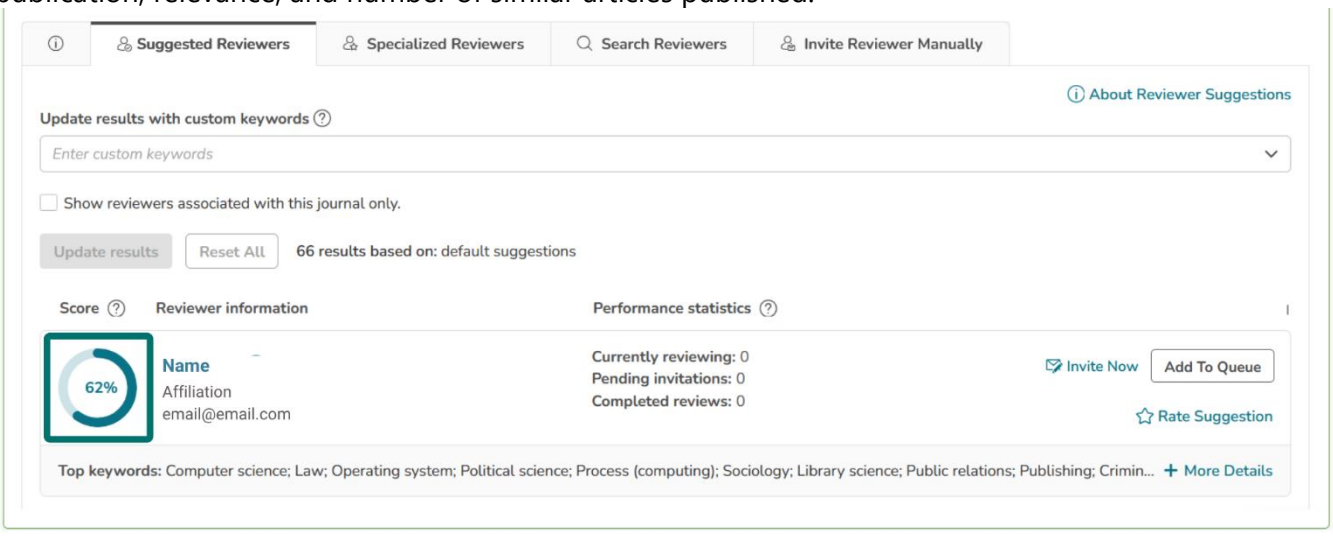
A panel will display further information and links to relevant articles published by the reviewer. Click the **INVITE REVIEWER** to invite the reviewer. Or you can select **QUEUE REVIEWER** to add them to your

queue.



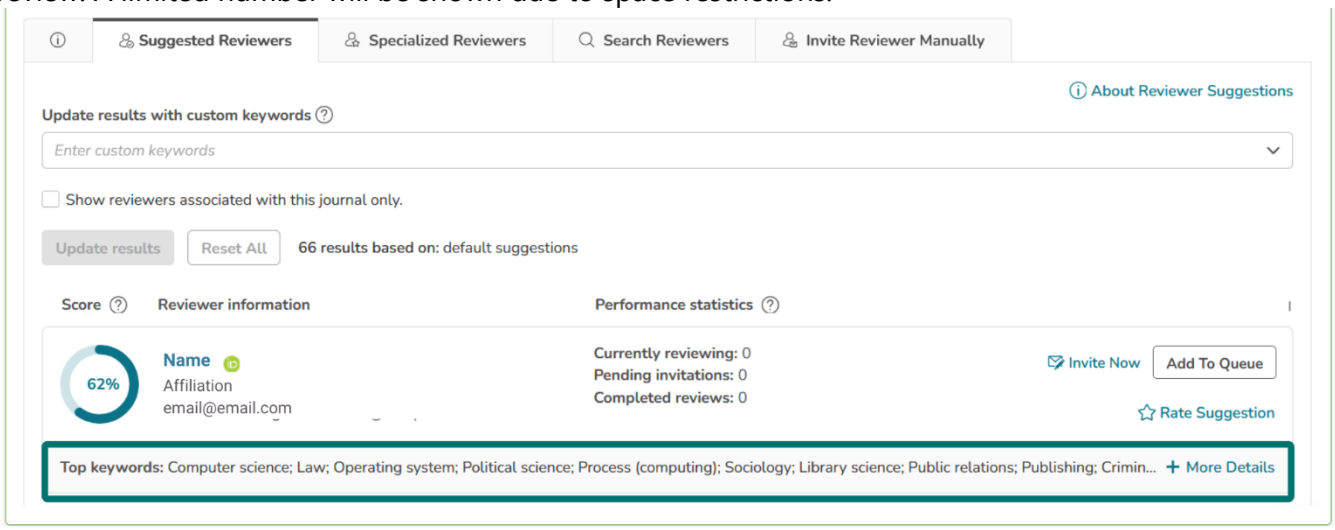
Reviewer Score (Suggested Reviewers only)

In the Suggested Reviewer tab, the user will find an additional metric. Each reviewer is assigned a **score**, which is a rank based on a combination of factors: a reviewer's matching expertise, recency of publication, relevance, and number of similar articles published.

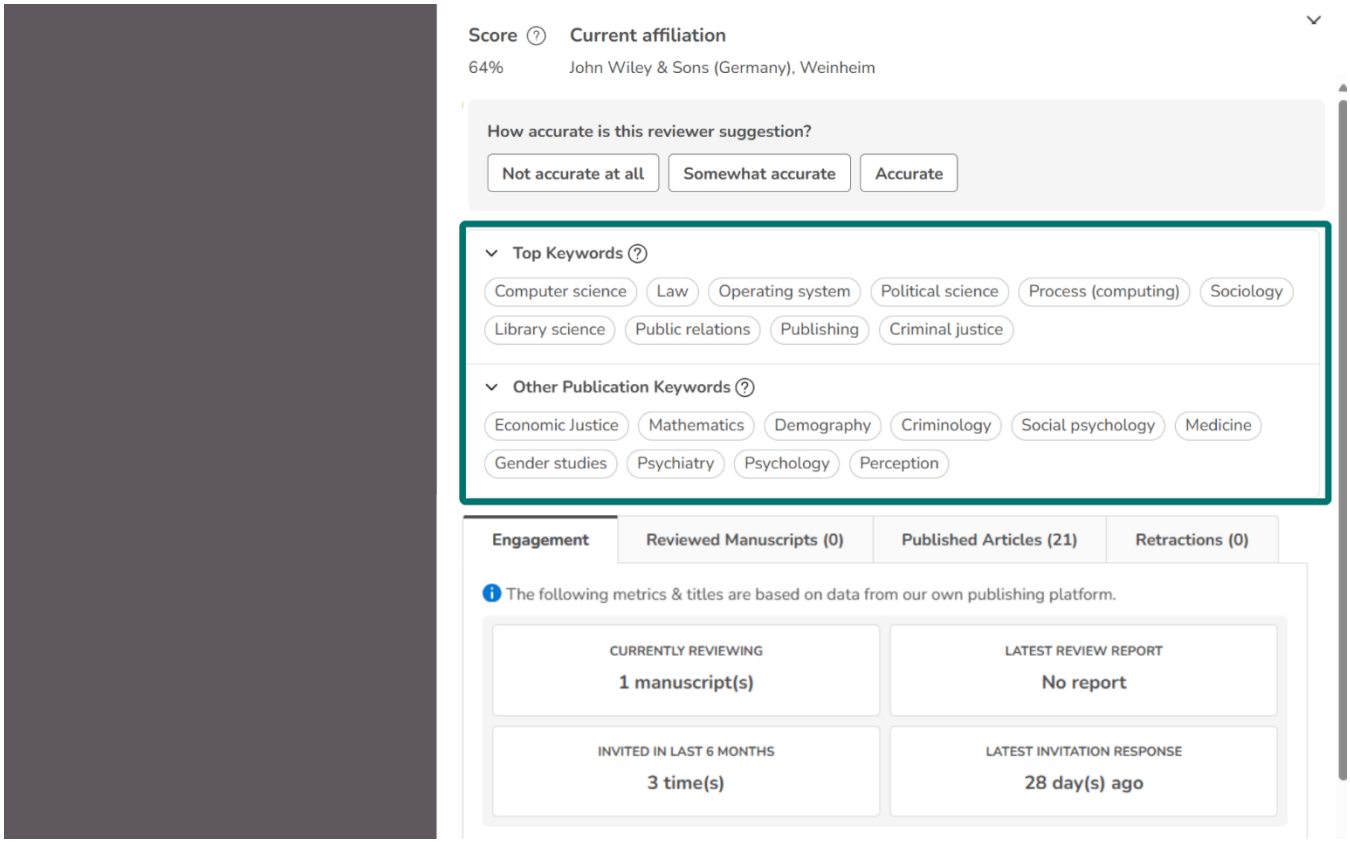


Reviewer Keywords

Some **Top Keywords** will be displayed on the reviewer tile. These keywords are automatically generated from the reviewer's full publication history and align with the subject matter of the manuscript under review. A limited number will be shown due to space restrictions.

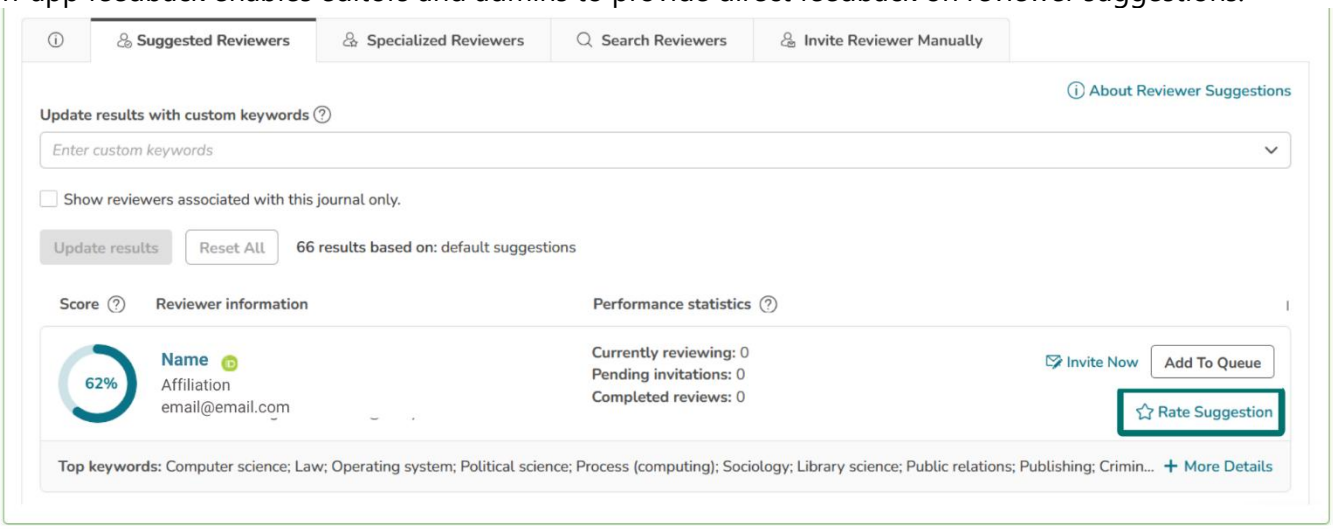


Clicking **More Details** will open the reviewer drawer. There are two sections, **Top Keywords** and **Other Publication Keywords**, that can be expanded. Other Publication Keywords are automatically generated from the reviewer's full publication history and reflect other topics and fields they have published in over time.

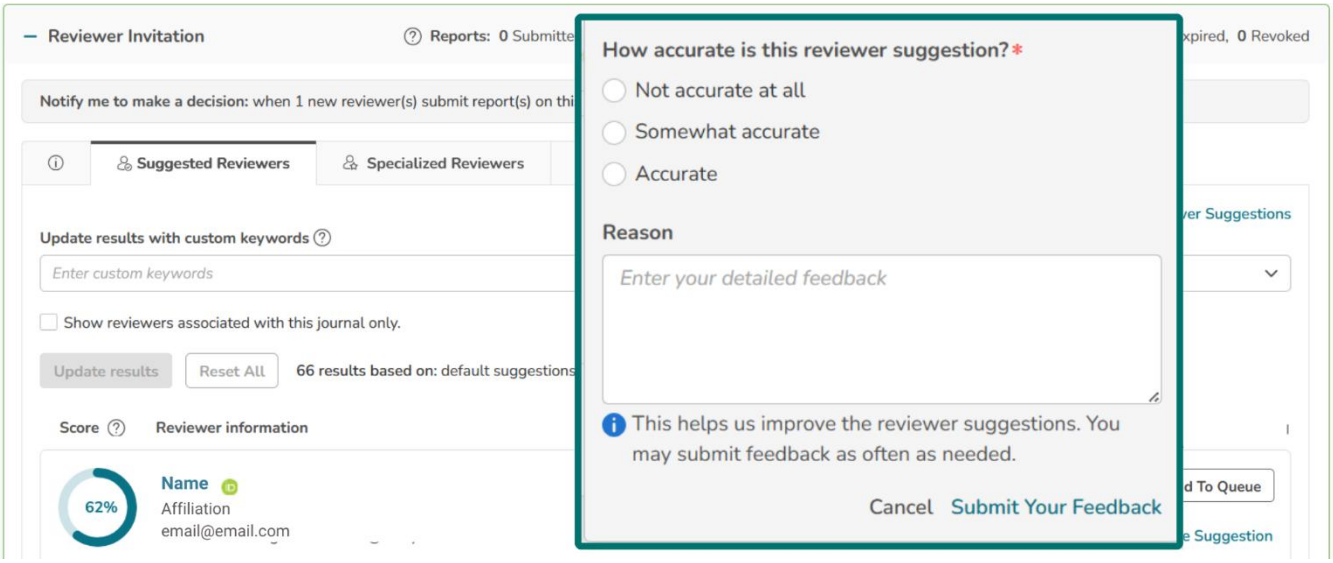


Reviewer Suggestion Rating

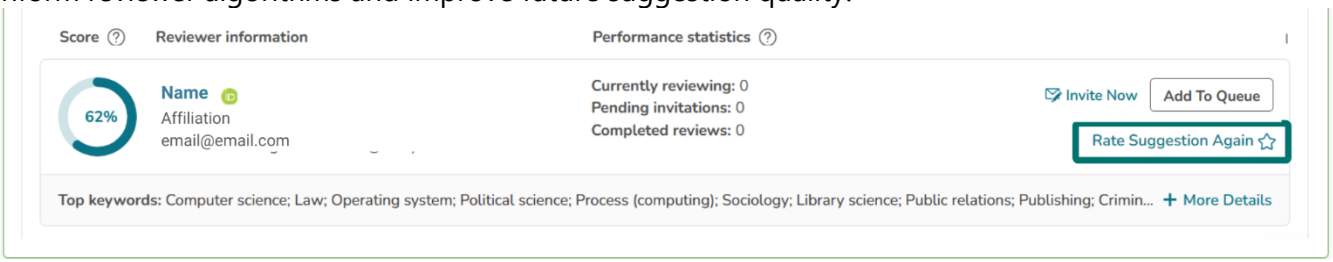
In-app feedback enables editors and admins to provide direct feedback on reviewer suggestions.



Clicking **Rate Suggestion** will allow editors and admins to rate the accuracy of the suggestion and provide detailed feedback.



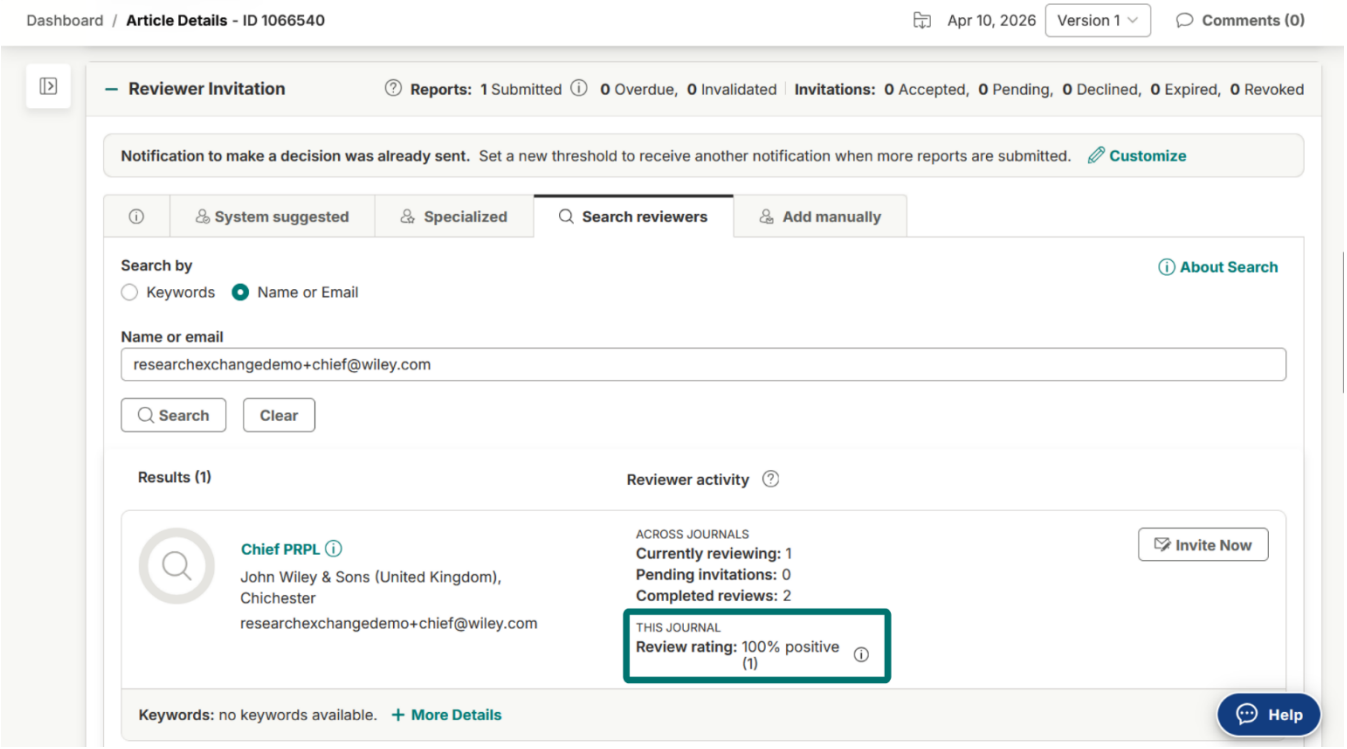
Clicking **Rate Suggestion again** will allow editors and admins to rate the reviewer a second time. There is no limit to the number of times a reviewer suggestion can be rated. Feedback data will be used to inform reviewer algorithms and improve future suggestion quality.



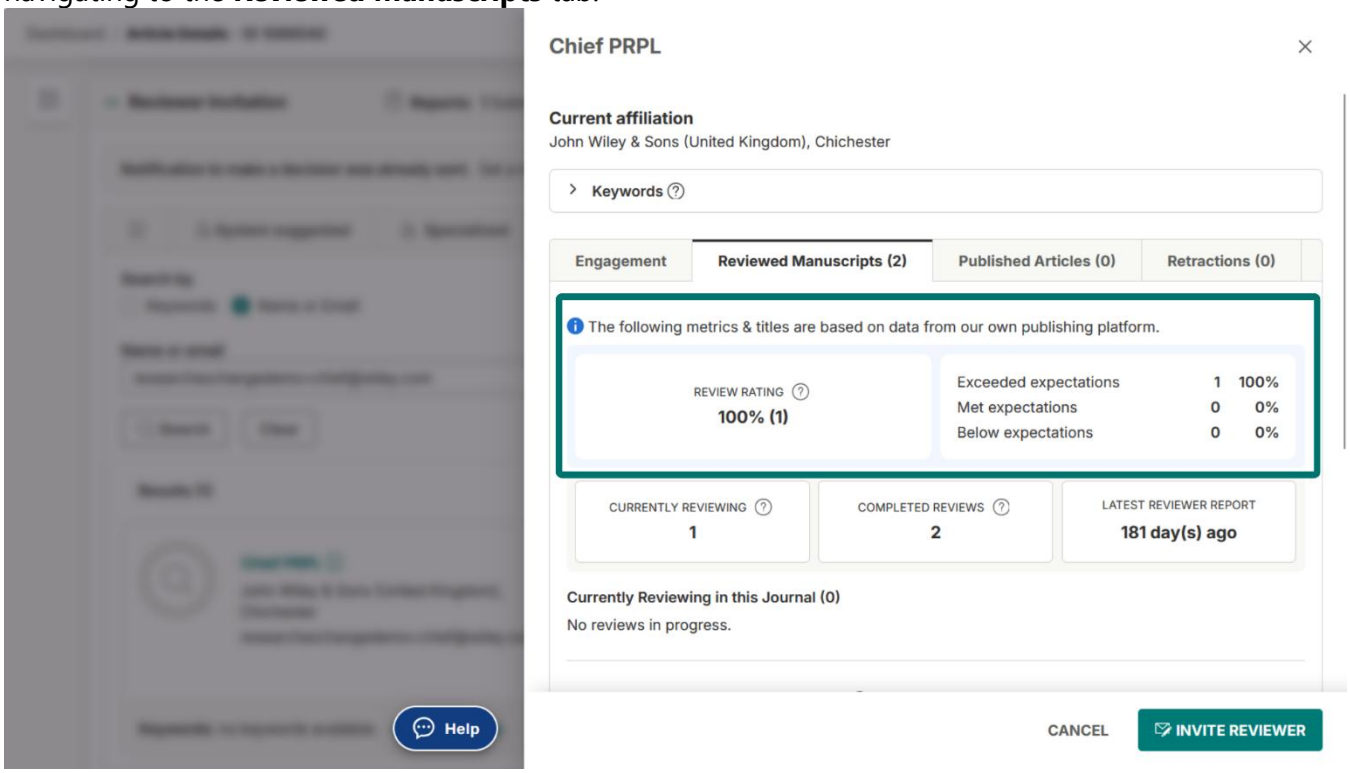
Reviewer Contribution Rating

Editors managing the Peer Review step on regular issue manuscripts can rate the quality of reviewer contributions. They, along with Editorial Assistants, Journal Managers, and editors with Full Access capability, can view statistics relating to their contributions to guide future invitations.

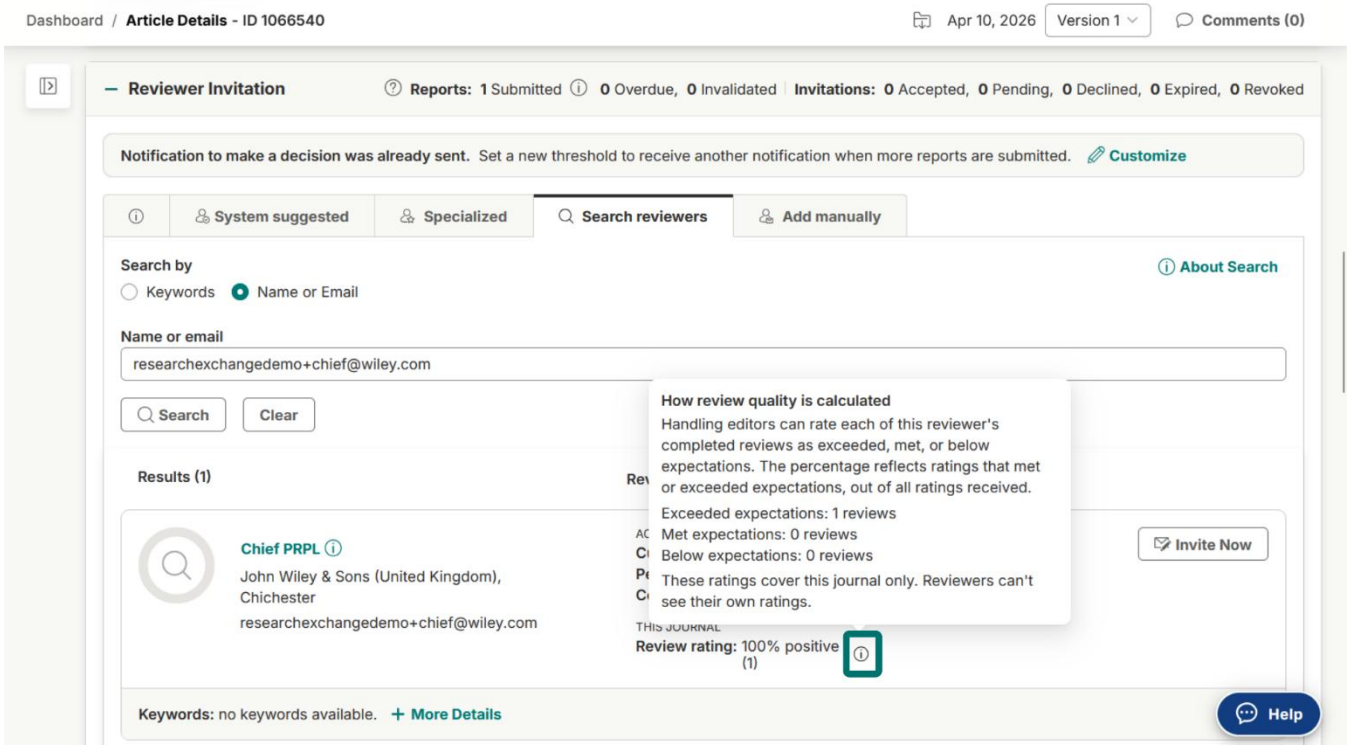
The reviewer rating for the journal will be displayed on each individual reviewer tile.



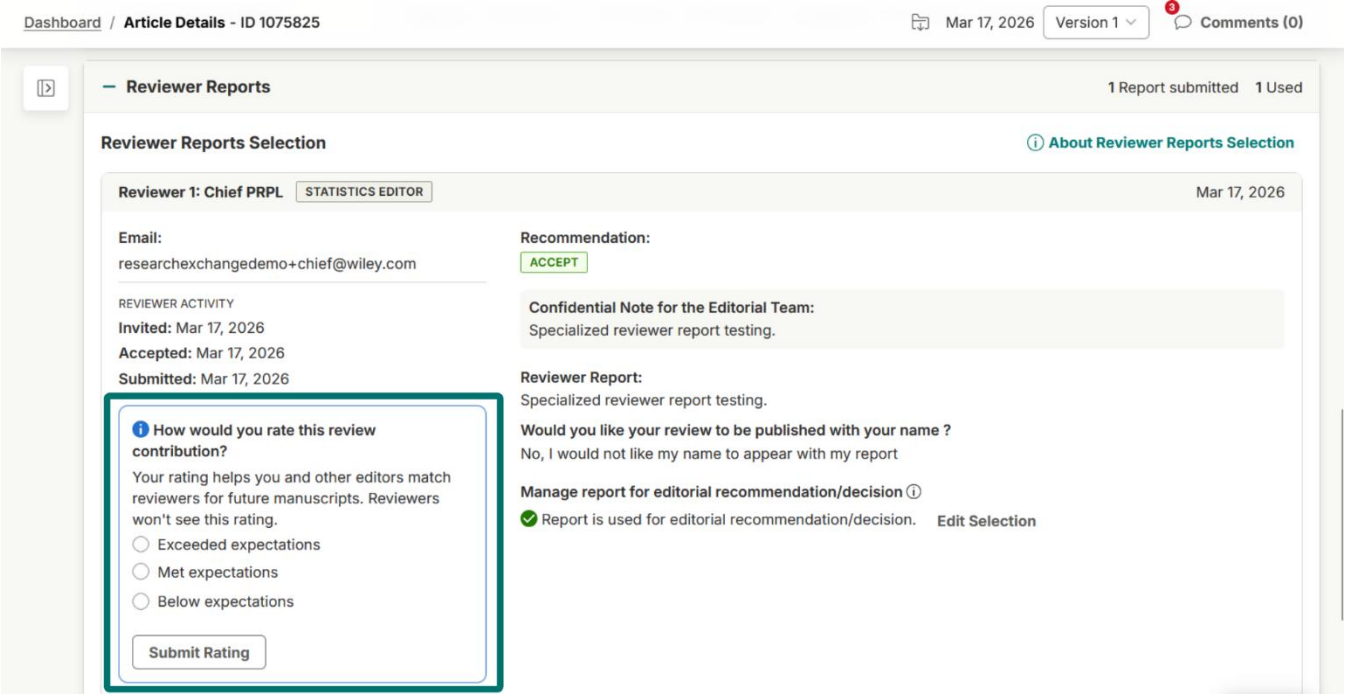
The reviewer rating is also available in the reviewer's full profile, accessed by clicking their name and navigating to the **Reviewed Manuscripts** tab.



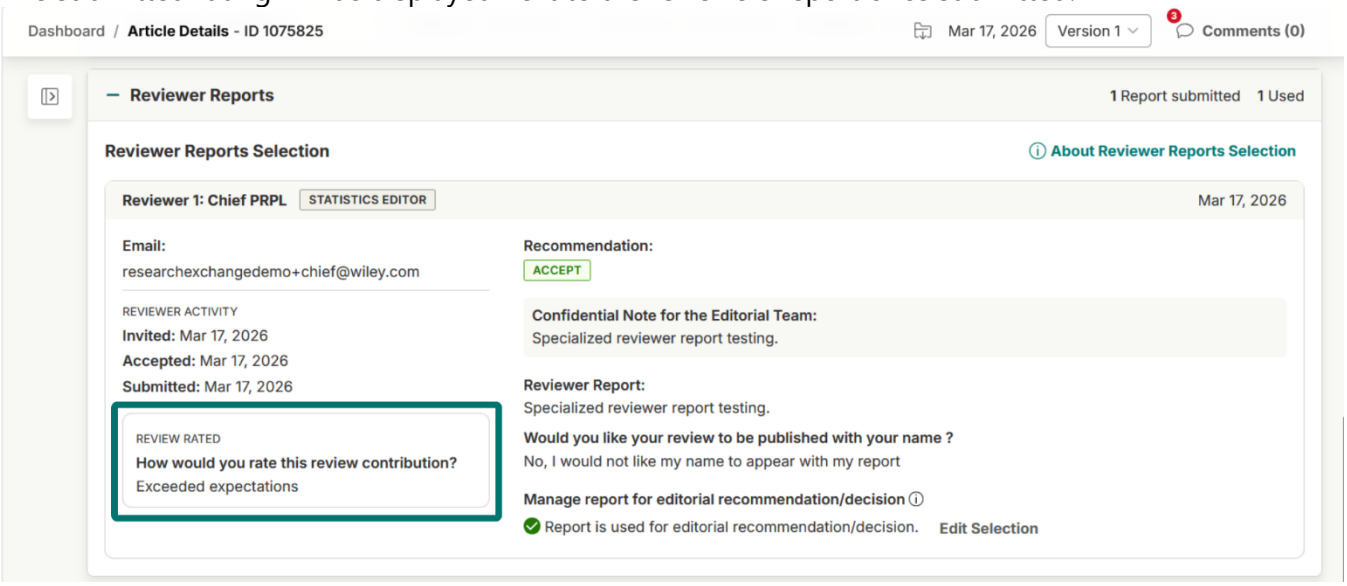
The rating is measured in a 3-point scale when the report is rated with one of the options: "Exceeded expectations", "Met expectations" or "Below expectations". The rating is displayed as a percentage of positive ratings for "Exceeded expectations" and "Met expectations", along with the number of ratings. To view how the rating is calculated and the rating breakdown, click the info icon.



Rating is available in the Reviewer Reports section after the reviewer has submitted their report. The rating can only be done once and cannot be edited after clicking Submit Rating.



The submitted rating will be displayed next to the reviewers report once submitted.

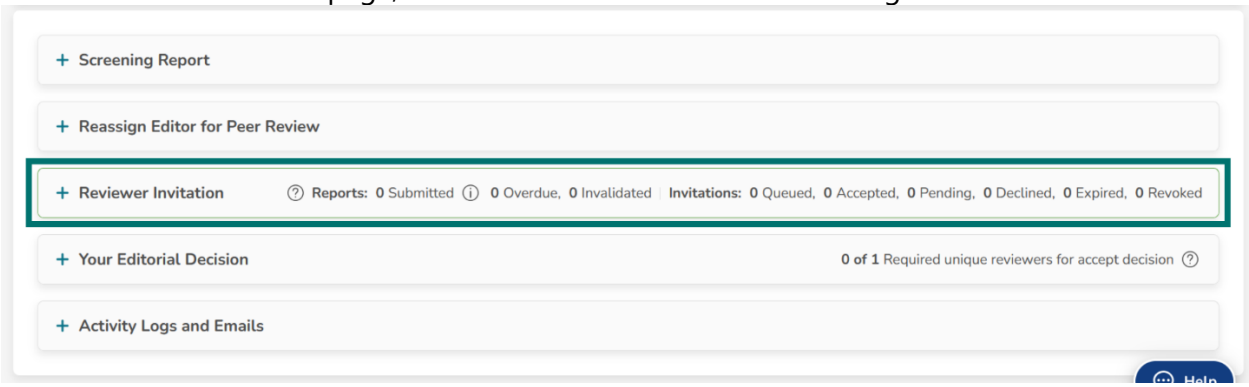


Finding and Inviting Reviewers to Peer Review

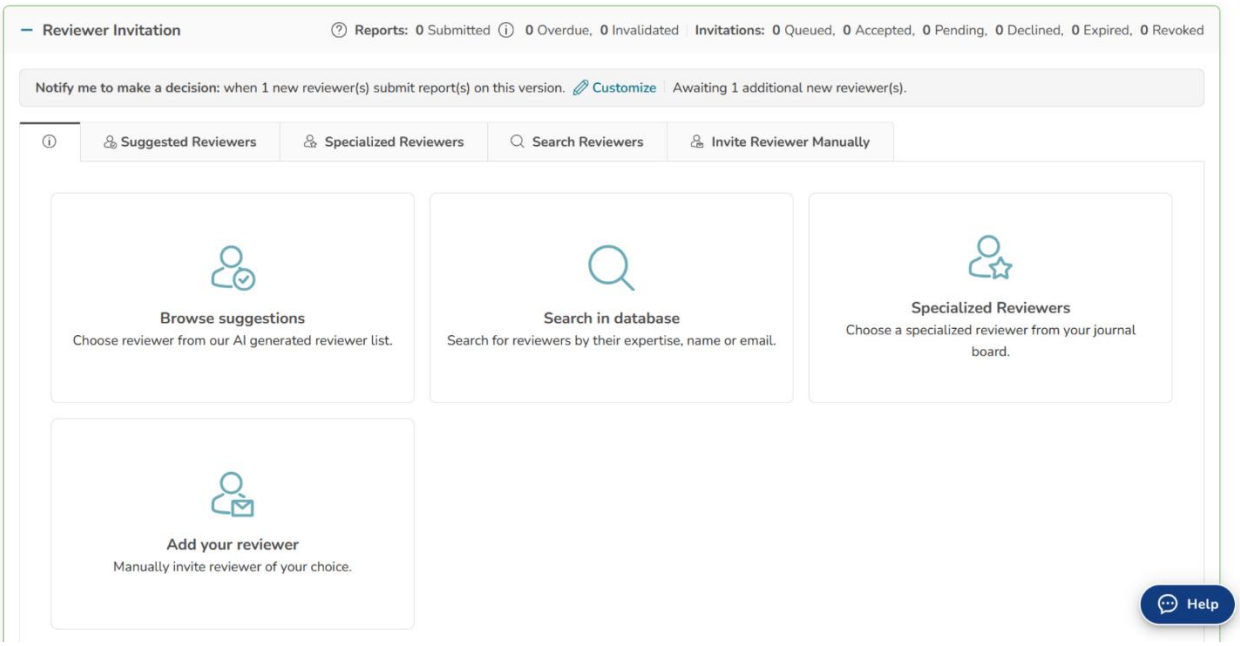
Academic Editors or Guest Editors are required to invite reviewers to review the manuscript. Users who hold administrative roles on the journal (Editorial Assistants or Journal Managers) cannot be invited to review the manuscript. Triage and Lead Guest Editors can carry out this task if they have assigned themselves as the Handling, Guest Editor, or have Full Access capability enabled.

To do this, follow these steps:

1. From the **Article Details** page, click the **Reviewer Invitation** heading.



2. In the **Reviewer Invitation** section, there are four choices:
    a. Browse suggestions (Suggested reviewer tool)
    b. Search in database (Search reveiwer tool)
    c. Specialized reviewers (Search specialized reviewer tool)
    d. Add a reviewer (Invite reviewer tool)



Want to know more?

For more information on peer review at Wiley, explore: How to Perform a Peer Review.

Suggested Reviewers

Based on the key topics addressed by the manuscript, Research Exchange Review will generate a list of suggested reviewers.

How are suggested reviewers determined?

The **Suggested reviewers** tool uses sophisticated technology to scan the manuscript, extracting author-supplied keywords and generating keywords based on the themes of the research. It then draws information from Research Exchange and from external academic databases to compile a list of potential reviewers. The tool matches manuscripts with the most suitable reviewers based on the degree of similarity between their areas of expertise and keywords extracted from the manuscript.

Suggested reviewers are ranked based on a combination of factors such as subject relevance, number of similar articles, and recency of the reviewer's publications.

Will co-authors appear in the suggested reviewers list?

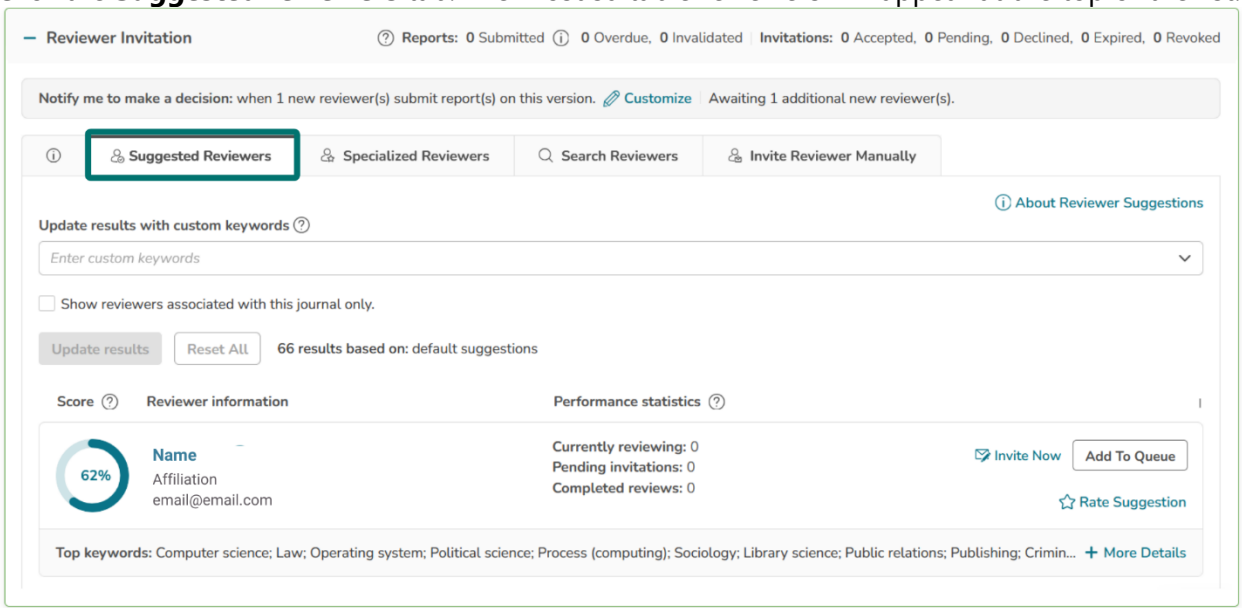
Co-authors of a manuscript should not appear on the suggested reviewers list. This is a deliberate design choice to uphold the integrity of the peer review process by avoiding conflicts of interest. Research Exchange's conflict of interest check is based on an exact **email address match** and an exact case-insensitive **name match**. Flagged reviewers remain visible in all reviewer lists. Exact name matches are common across many regions and may not represent a genuine conflict; editorial judgment is required before acting on a flag. When an editor attempts to invite or queue a reviewer flagged for a potential COI, a warning is displayed. If a co-author creates a separate account using a **different email address**, the system may not detect the conflict if they use a slightly different name, and they could appear in the suggested reviewer list.

It is advisable to remain vigilant when reviewing suggested reviewers, especially for manuscripts with multiple authors or complex collaboration histories. If a suggested reviewer appears to be a co-author or has a known relationship with the author, **do not proceed with the invitation**. Instead, manually search for alternative reviewers. Using the reviewer's Connect profile will help to verify affiliations and publication history if needed. If a conflict is suspected but not flagged by the system, escalate the case to the reviewhelp@wiley.com mailbox.

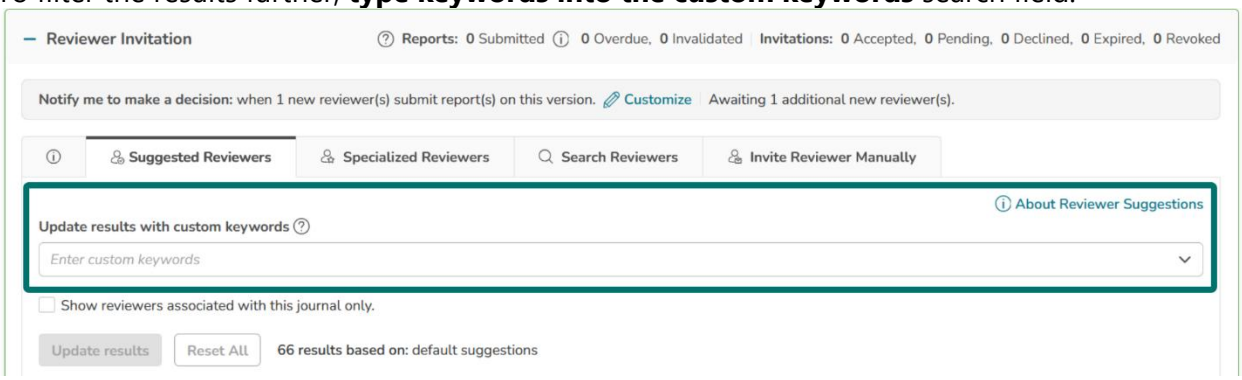
Inviting a Suggested Reviewer

To choose a reviewer from the **Suggested reviewers** list, follow these steps:

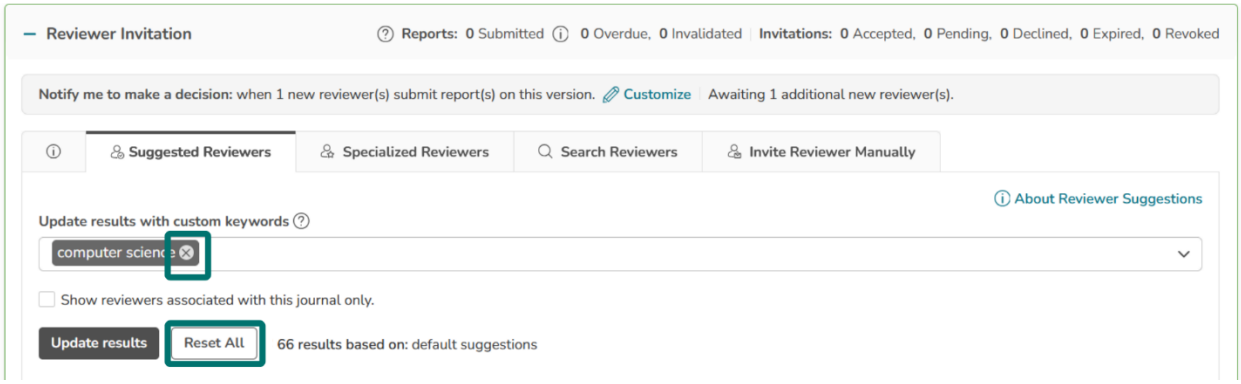
1. Click the **Suggested reviewers** tab. The most suitable reviewers will appear at the top of the list.



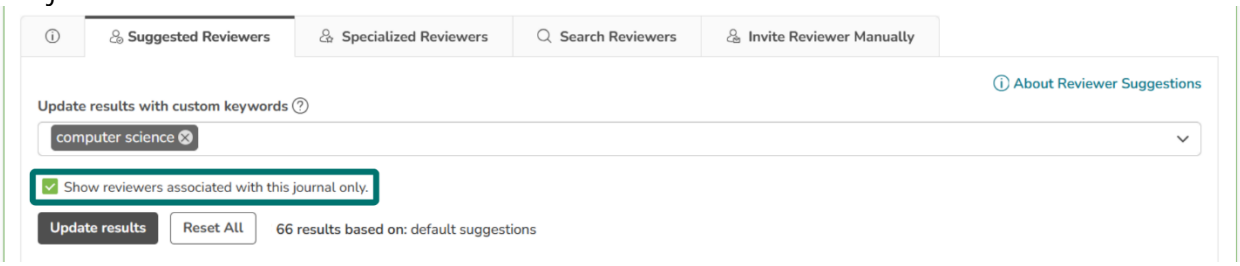
2. To filter the results further, **type keywords into the custom keywords** search field.



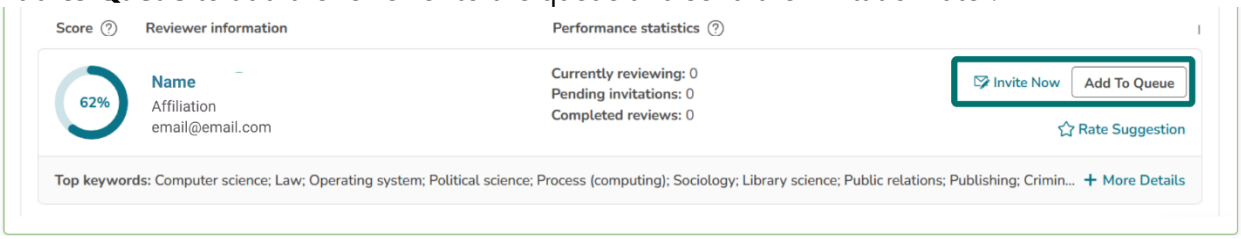
Remove keywords individually by clicking the cross next to each keyword, or clear all at once with **Reset All**.



3. Tick the checkbox to filter the list of suggested reviewers to only show reviewers associated with this journal.



4. To immediately invite a reviewer from the list, click the **Invite Now** button. An email preview will appear. Certain sections, highlighted blue with a pencil icon, can be edited before sending. Click **Add to Queue** to add the reviewer to the queue and send the invitation later.



See the **Reviewer Information** section for guidance on how to interpret the details on the Reviewer tile or to view a full reviewer profile.

Search Reviewers

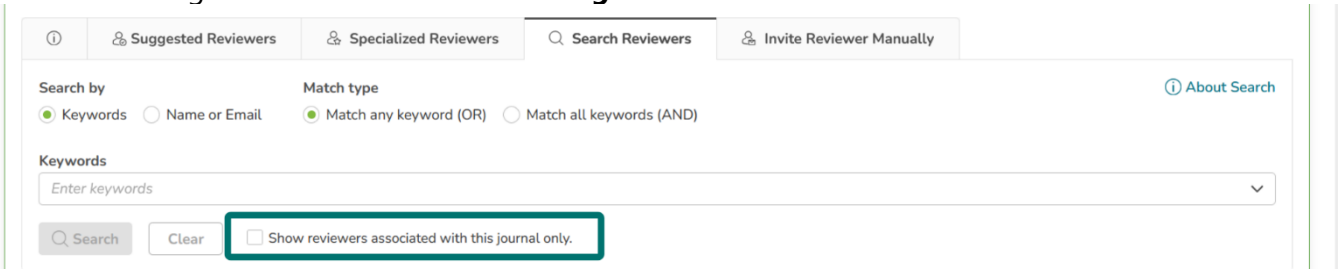
Search reviewers allows editors to find reviewers within a global Research Exchange Review database.

How does search reviewers work?

Search Reviewers can locate reviewers in the Research Exchange reviewer database by name or keywords. It can locate reviewers in the Research Exchange reviewer database by name or keywords. Keywords for reviewers are generated by the reviewer's publication history.

Searching only my reviewer database

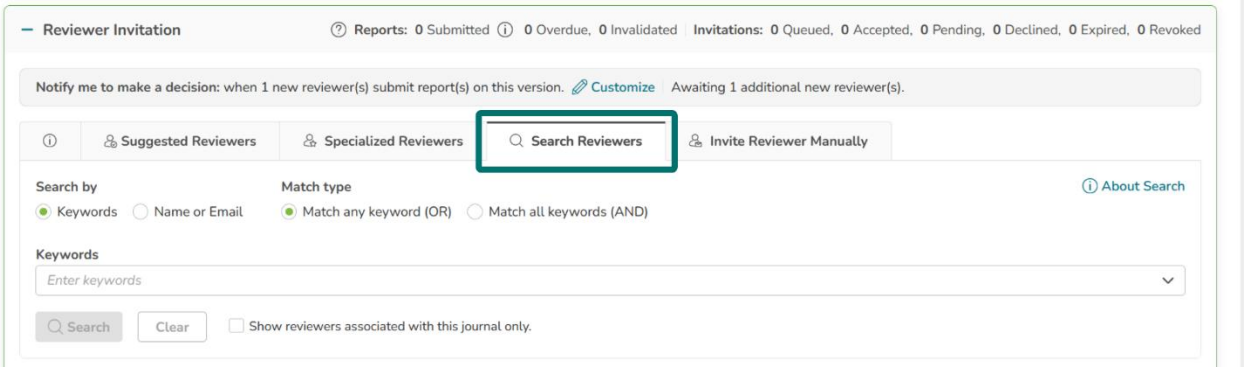
Some journals may have selected to bring a historical reviewer database to the Research Exchange system. To search for reviewers only from a journal's historical database, click the check box below the search bar that reads **Show reviewers associated with this journal only**. Then, proceed with the search following the instructions in the **Inviting a Search Reviewer** section.



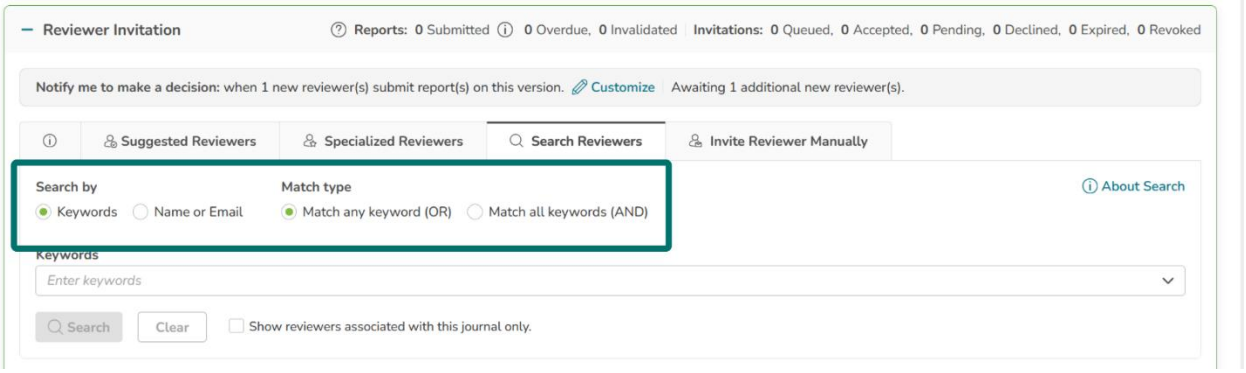
Inviting a Searched Reviewer

To search for a reviewer, follow these steps:

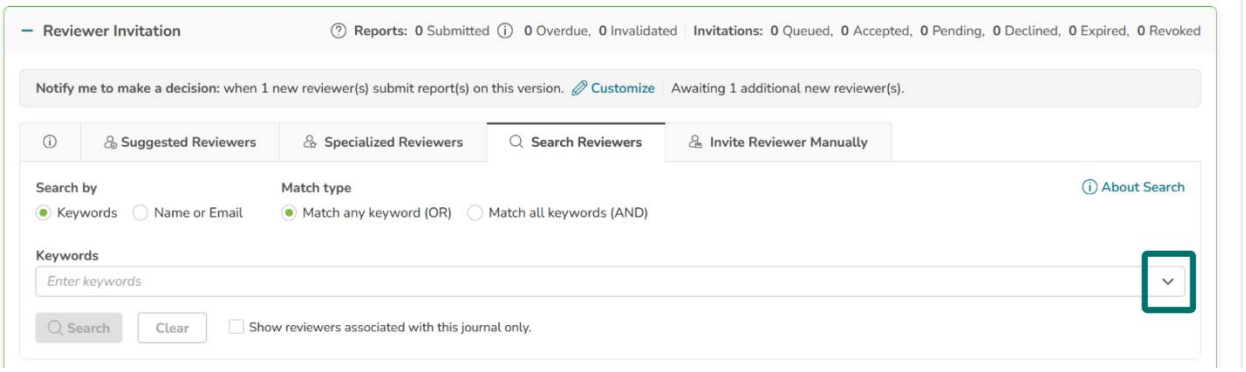
1. Select the **Search reviewers** tab.



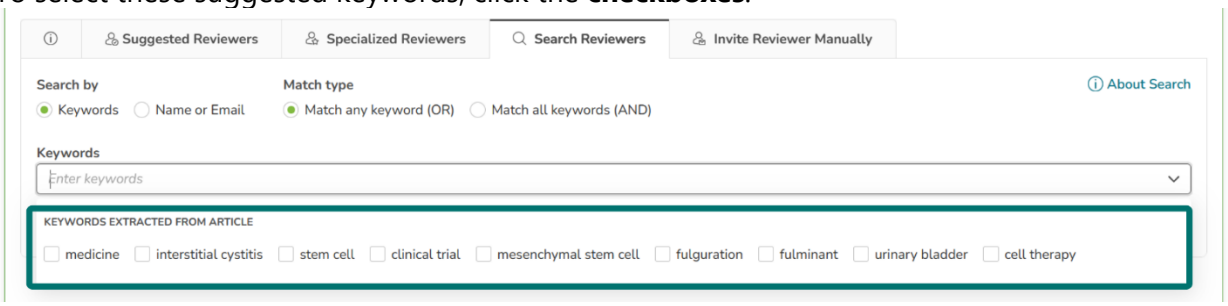
2. To search by keyword, select the **Keywords** radio button. Then, choose an option under the **Match type** heading:
    a. Select the **Match any keyword** radio button to return results that match any of the user's keywords
    b. Select the **Match all keywords** radio button to return results that match all the user's keywords



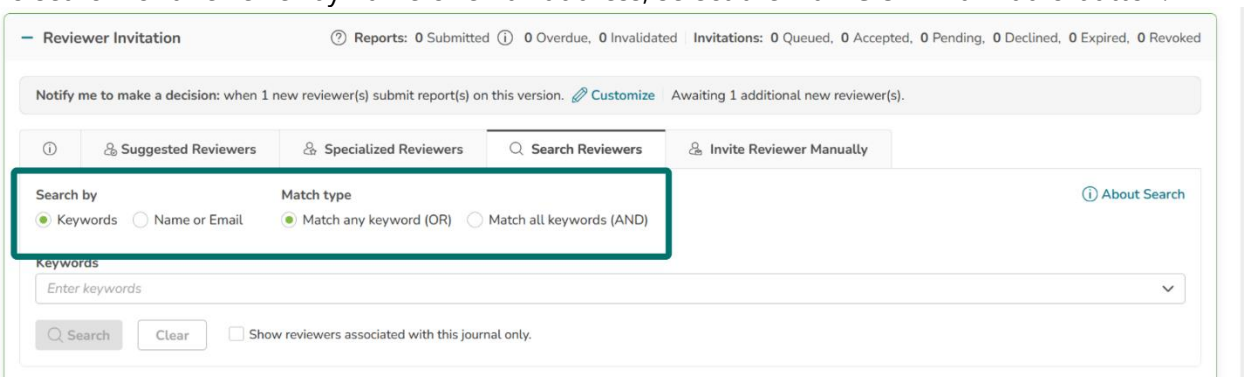
3. Click the **arrow** in the keywords search bar to access a list of suggested keywords extracted from the manuscript.



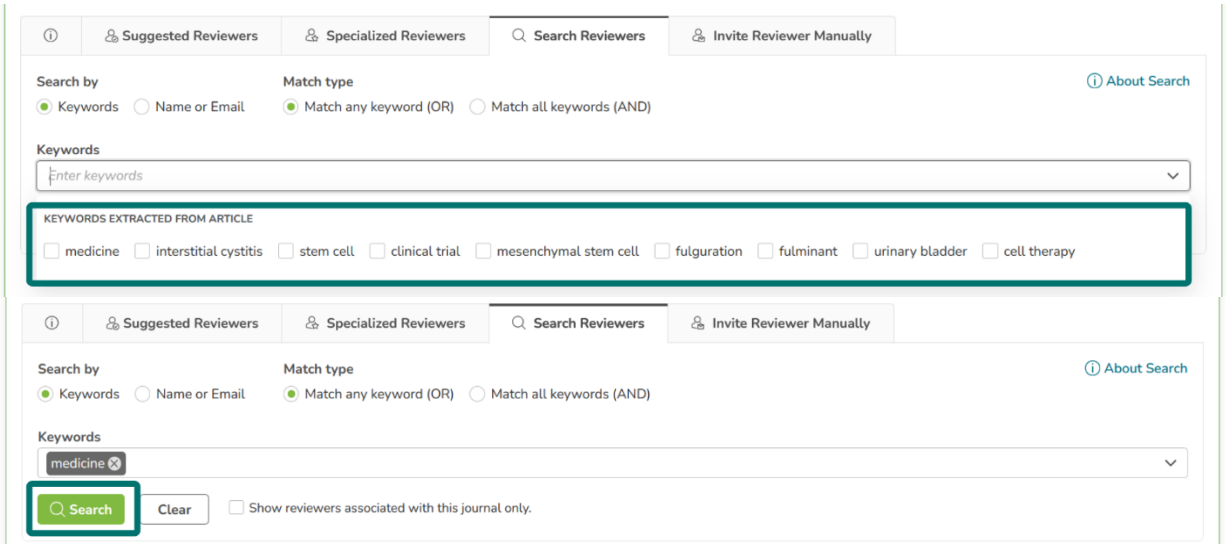
4. To select these suggested keywords, click the **checkboxes**.



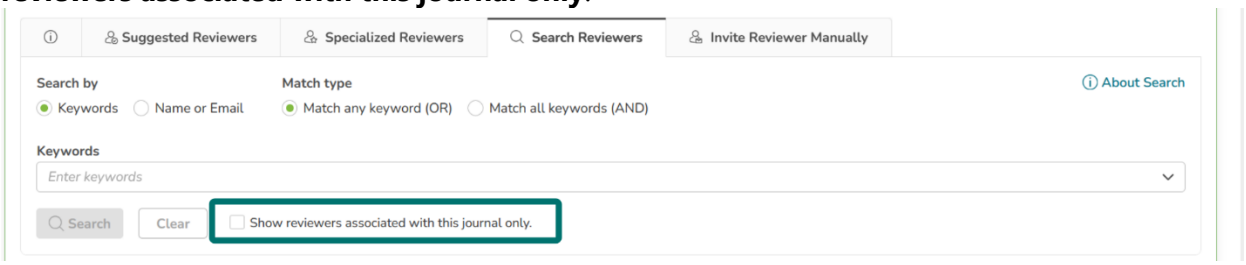
5. To search for a reviewer by name or email address, select the **Name or Email** radio button.



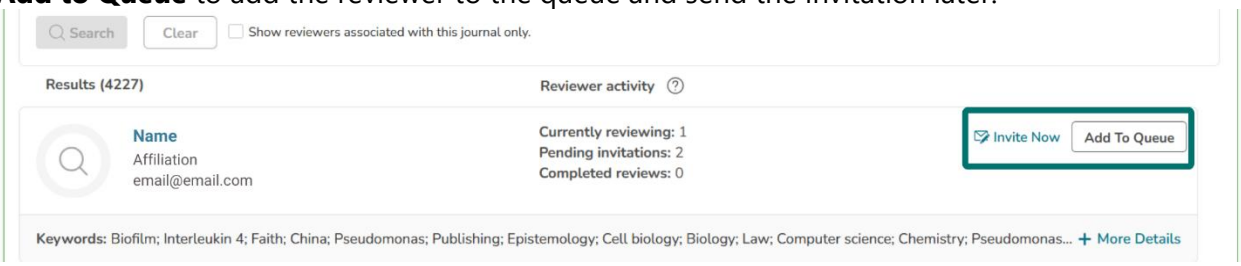
6. When a search criterion has been chosen, type the search term into the search field. When typing, a list of suggestions will populate below the field. Click the **Search** button to display the results.



7. To restrict the search to reviewers associated with the journal, check the box labeled **Show reviewers associated with this journal only**.



8. To immediately invite a reviewer from the list, click the **Invite Now** button. An email preview will appear. Certain sections, highlighted blue with a pencil icon, can be edited before sending. Click **Add to Queue** to add the reviewer to the queue and send the invitation later.



See the **Reviewer Information** section for guidance on how to interpret the details on the Reviewer tile or to view a full reviewer profile.

Specialized Reviewers

Within Research Exchange, a Specialized Reviewer refers to a designated expert who is invited to evaluate manuscripts that require specialist assessment. When enabled for the journal, the person acting as the handling editor is authorised to invite specialized reviewers.

How are Specialized Reviewers managed?

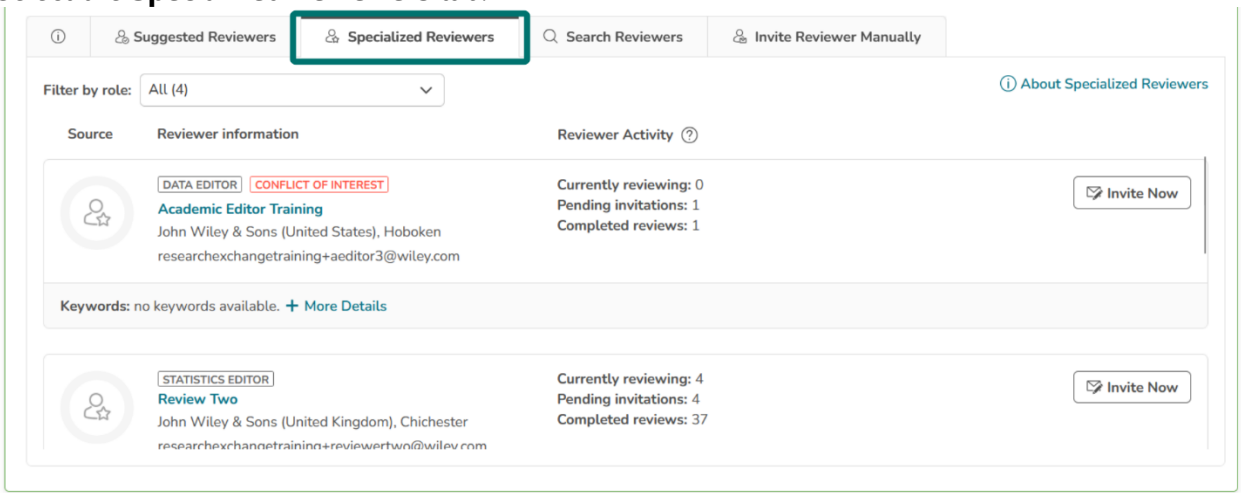
Specialized reviewers can be accessed through a separate tab. These reviewers are pre-assigned to the journal's specialized reviewer board with their designated specialist roles.

Journals may customise specialist reviewer roles as required. To request the addition or modification of roles on a journal's reviewer board, or to assign reviewers accordingly, please contact your Wiley representative. They will submit a Journal Operational Change Tracker (JOCT) ticket on your behalf.

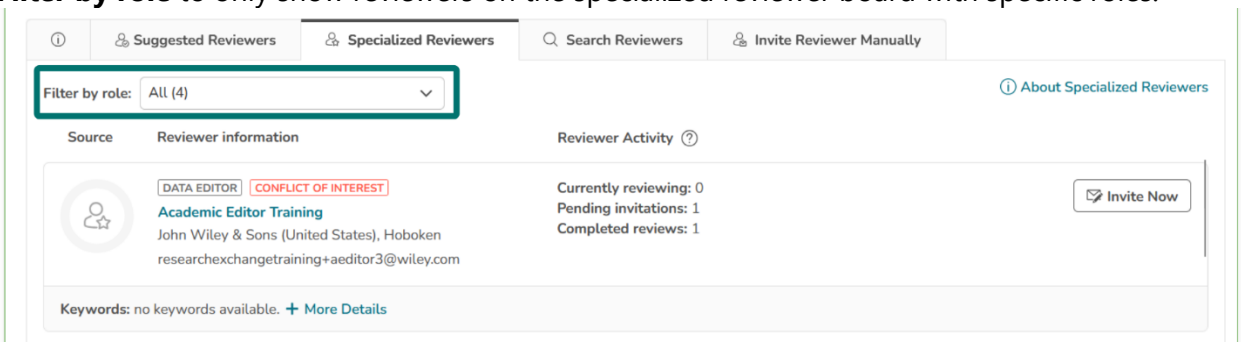
Inviting a Specialized Reviewer

To find and invite a specialized reviewer, follow these steps:

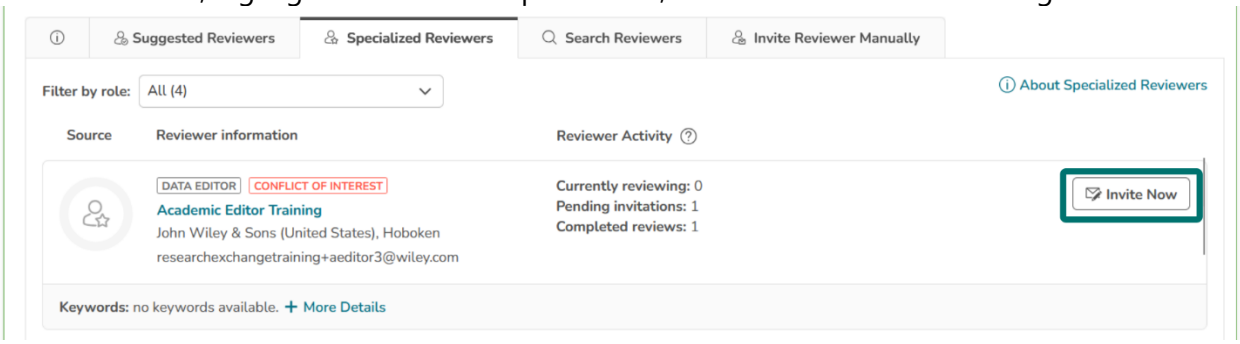
1. Select the **Specialized Reviewers** tab.



2. **Filter by role** to only show reviewers on the specialized reviewer board with specific roles.



3. To invite a reviewer from the list, click the **Invite Now** button. An email preview will appear. Certain sections, highlighted blue with a pencil icon, can be edited before sending.

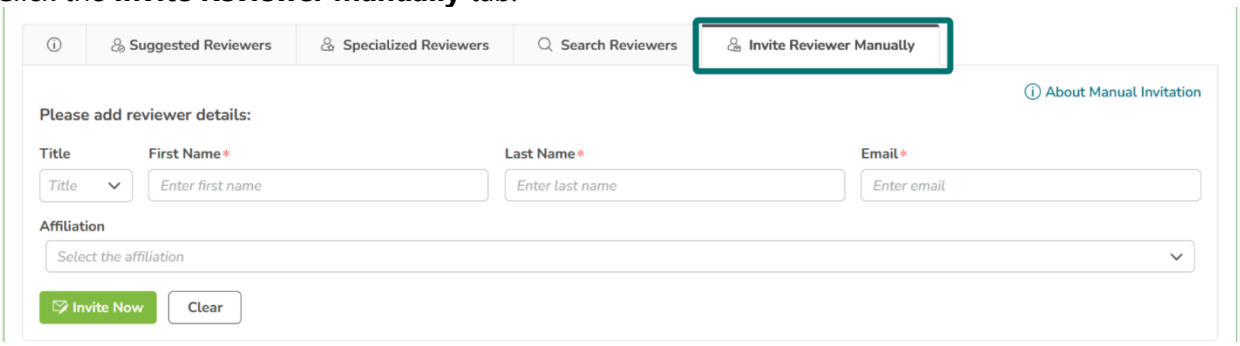


Manual Reviewer Invite

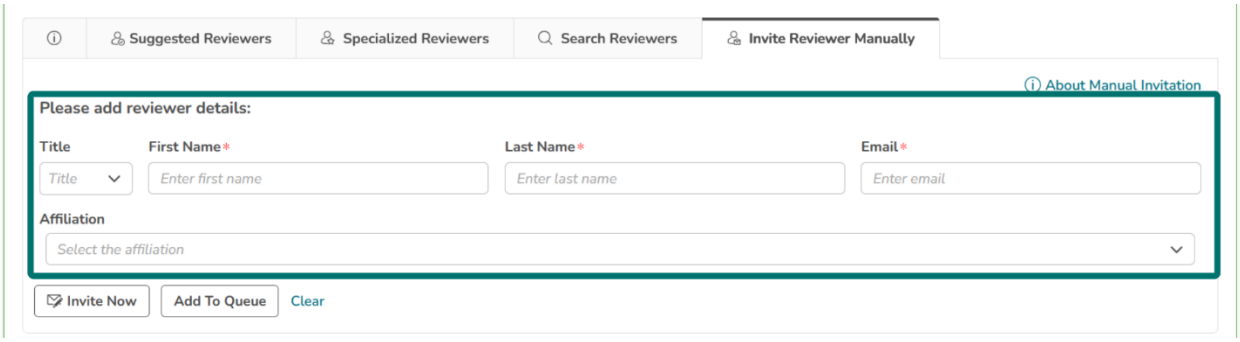
Inviting a new reviewer manually

To invite a reviewer who is not currently registered on the Research Exchange Review module, follow these steps:

1. Click the **Invite Reviewer Manually** tab.

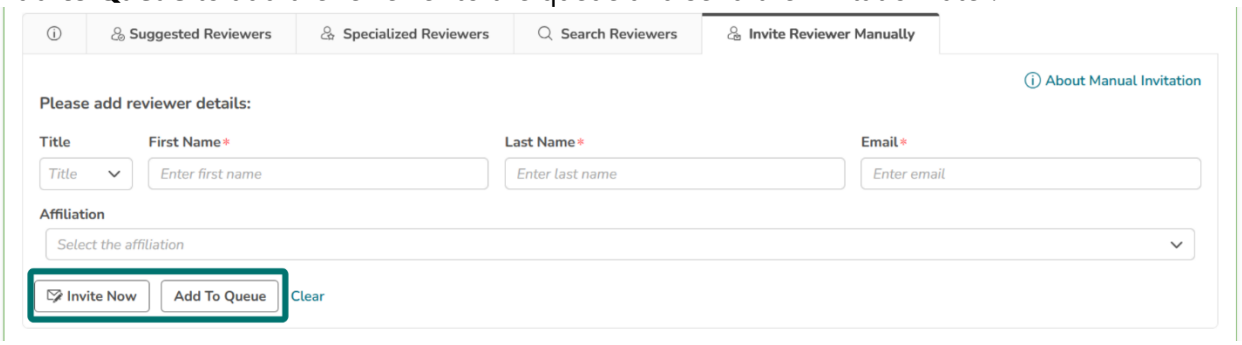


2. Choose the reviewer's title and add their name and email address into the required text fields (marked with an asterisk*). To avoid delays, double-check that the reviewer's email address is correct. Enter the reviewer's affiliation. When typing, a list of suggestions will populate below the field. **Choose an affiliation** from the list.



3. To immediately invite a reviewer from the list, click the **Invite Now** button. An email preview will appear. Certain sections, highlighted blue with a pencil icon, can be edited before sending. Click

Add to Queue to add the reviewer to the queue and send the invitation later.

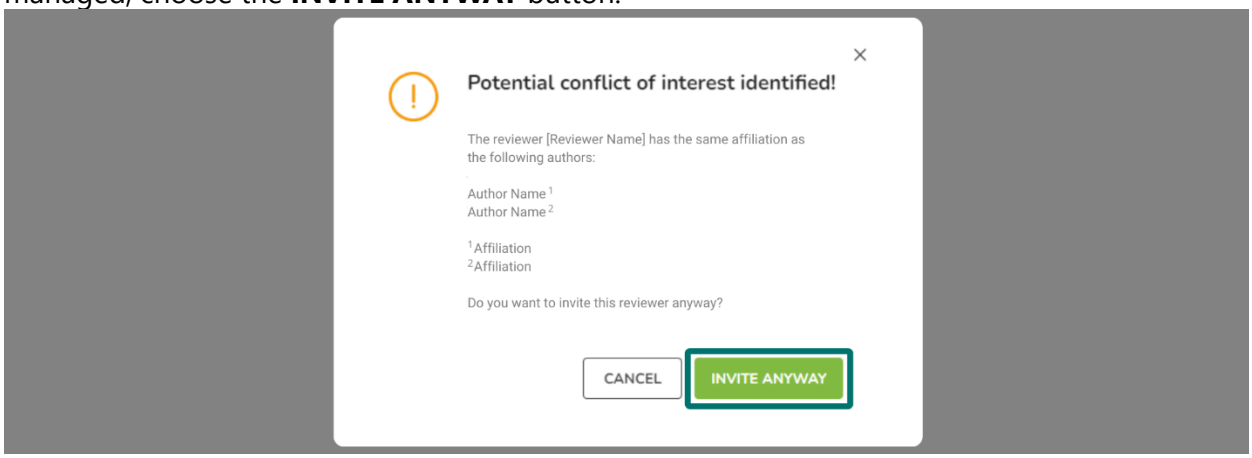


Inviting Reviewers

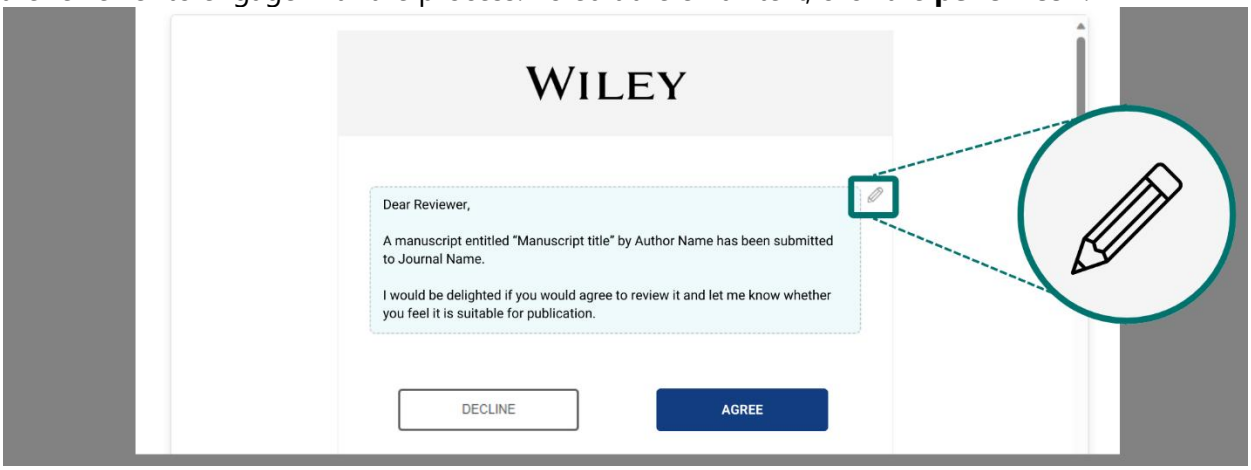
Inviting Reviewers Immediately

To instantly invite a reviewer to evaluate a manuscript, click the **Invite Now** button, and follow these steps:

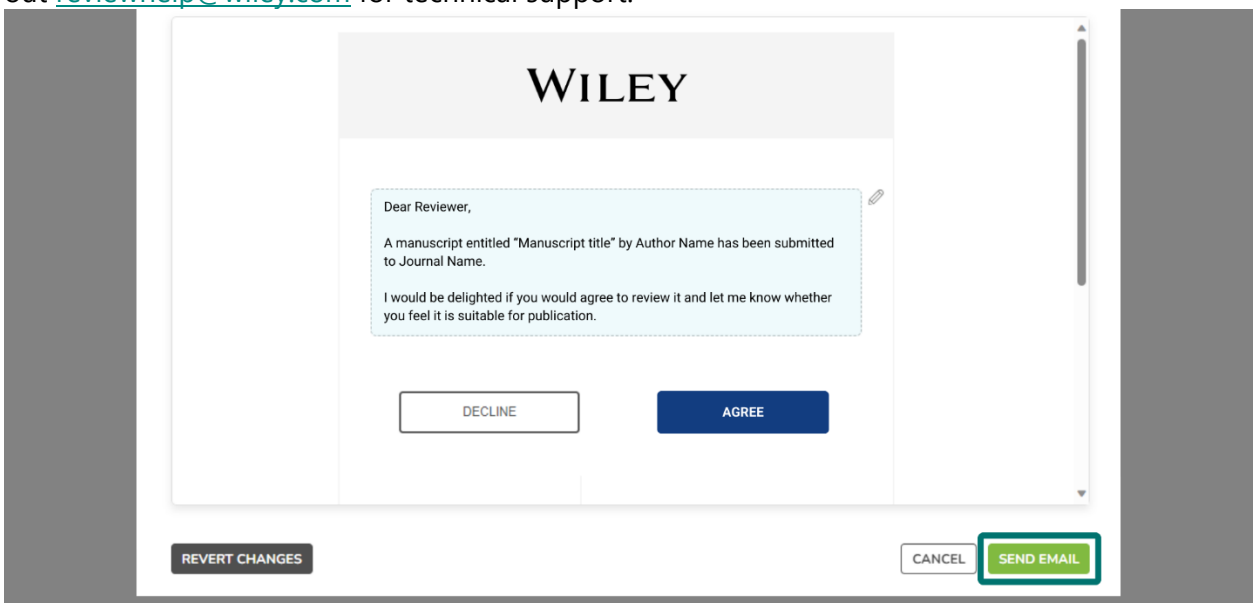
1. If there is a potential **conflict of interest**, a warning will appear. If confident that this risk can be managed, choose the **INVITE ANYWAY** button.



2. A draft email invitation is automatically generated. The blue sections can be edited to give more context or to add a personal message. This personal touch may start a dialogue and encourage the reviewer to engage with the process. To edit the email text, click the **pencil icon**.



3. When the message is ready to be sent, select the **SEND EMAIL** button. The reviewer will now receive an email invitation to review the manuscript. If you are unable to invite reviewers, reach out reviewhelp@wiley.com for technical support.



What Invited Reviewers will See

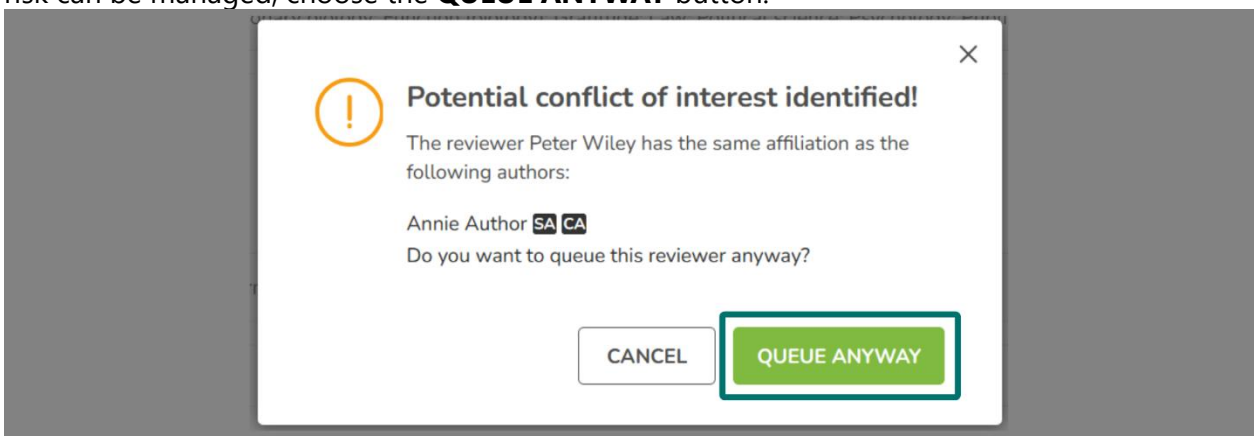
By default, invited reviewers will see the title of the manuscript and the research abstract. For some journals, reviewers will also see the names of the authors. Reviewers will only gain access to the full manuscript if they decide to accept the invitation to review.

If a journal requires reviewers to have access to the manuscript before accepting the invitation, they should reach out.

Inviting Reviewers using the Queue

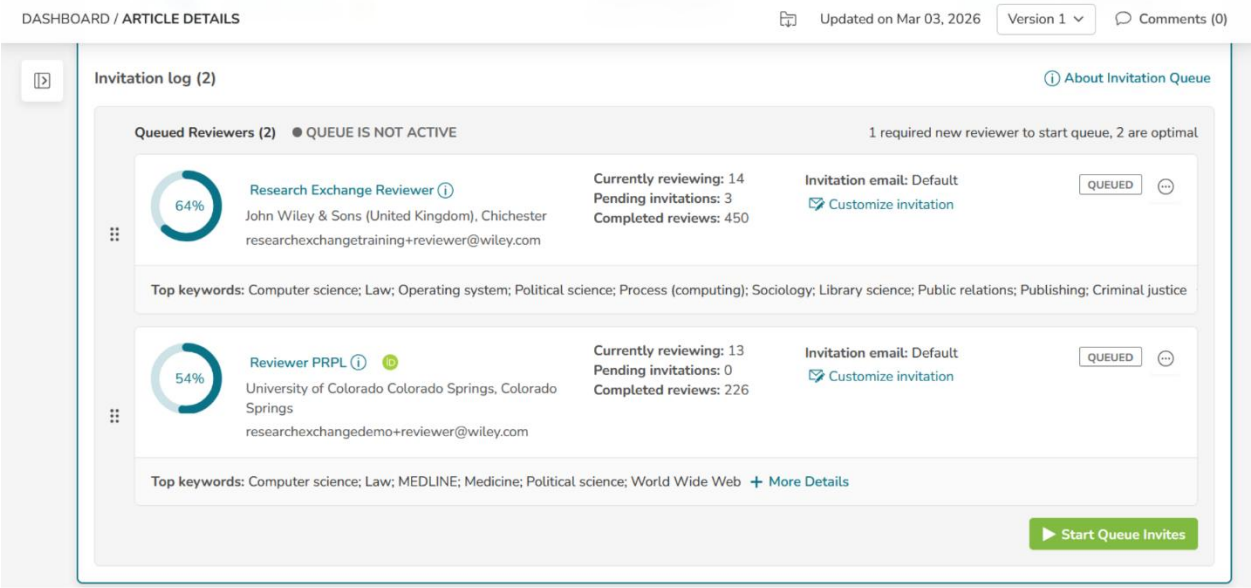
To invite reviewers at a later stage, click the **Add to Queue** button and proceed with the following steps:

1. If there is a potential **conflict of interest**, a warning will appear. If you are confident that this risk can be managed, choose the **QUEUE ANYWAY** button.

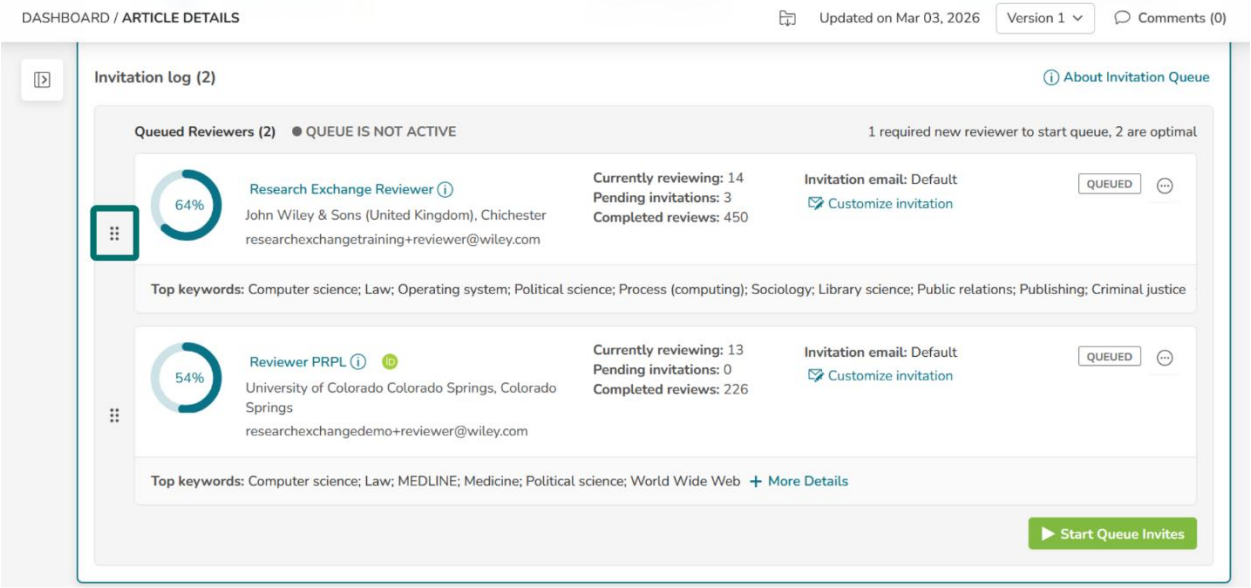


2. They will be added to the Invitation Log under the **Queued Reviewers** section with the status **Queued**. By default, the queue will be switched off. Reviewers who were invited immediately will

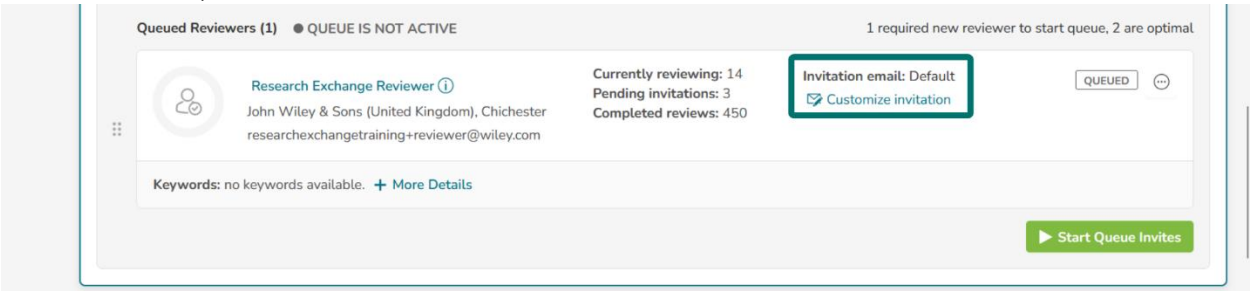
be listed under the **Invited Reviewers** section with the status **Pending Response**.



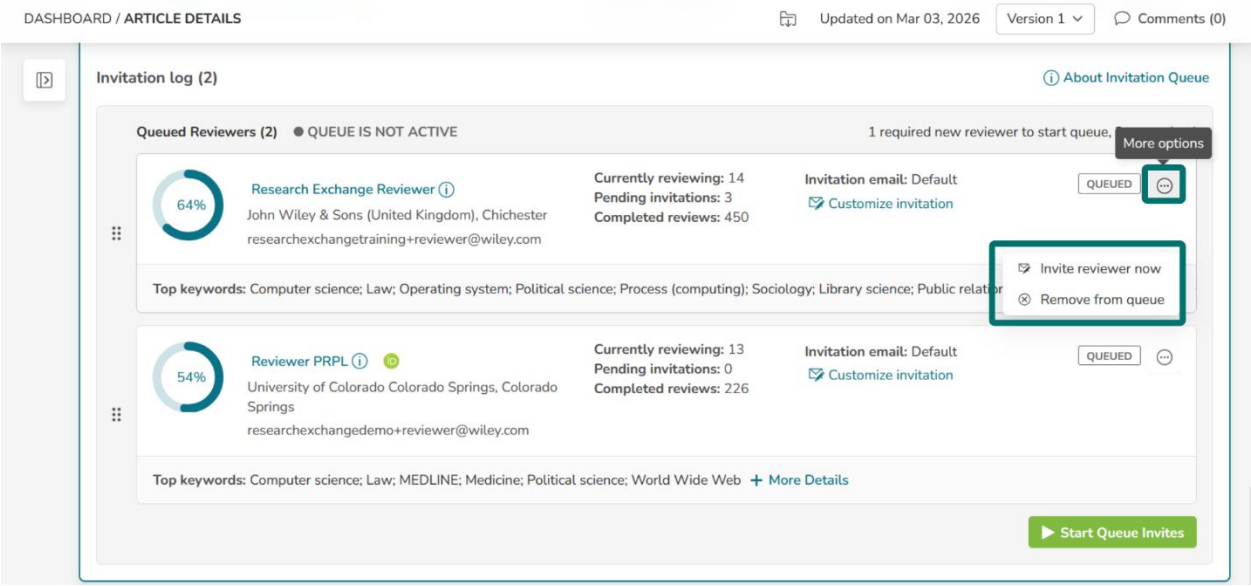
3. You can rearrange the list by dragging each reviewer tile.



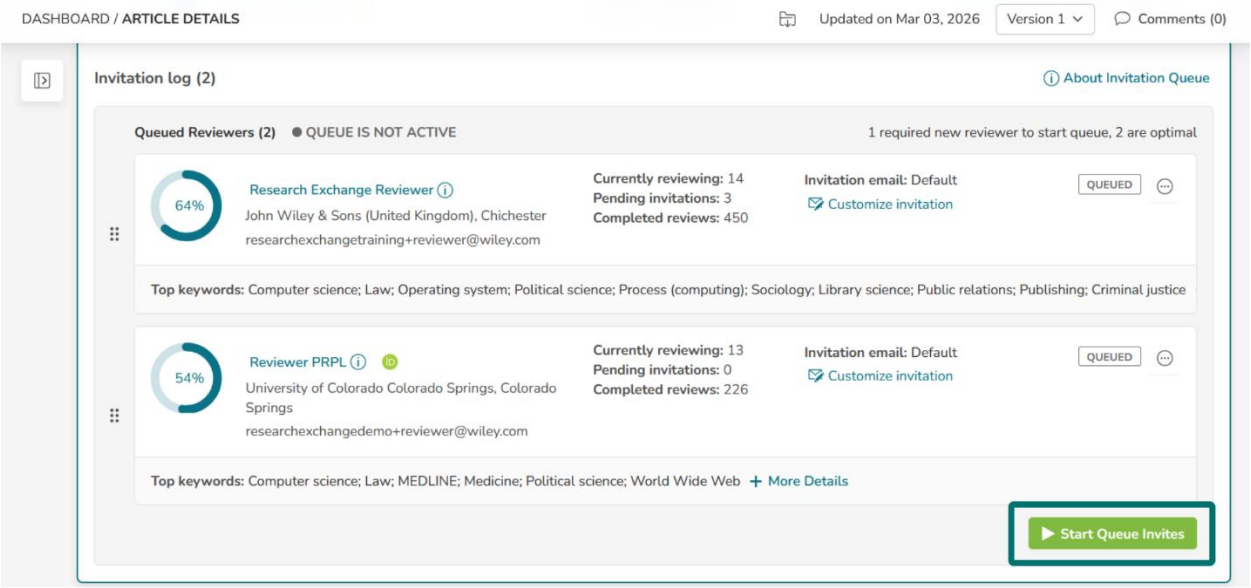
4. To customize the invitation for a specific reviewer, click **Customize Invitation**. If the invitation is not customized, the default invitation will be sent.



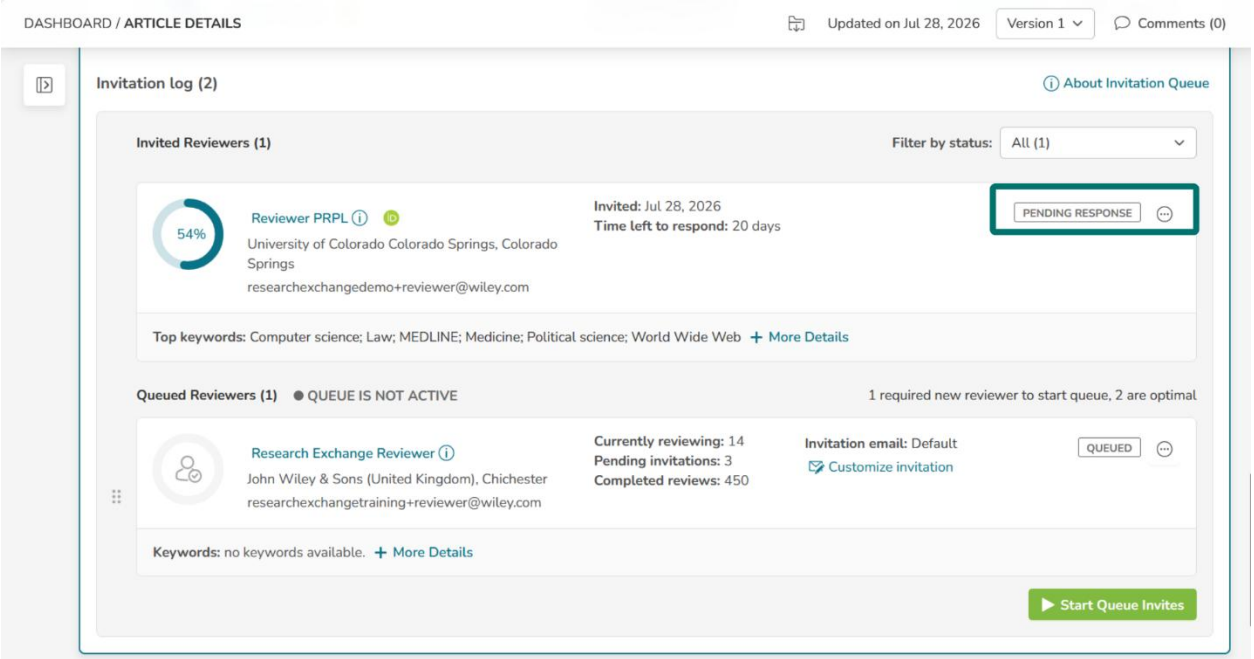
5. A reviewer can be invited immediately or removed from the queue. To do this, select the **circle icon with the ellipsis inside**, and choose the desired action.



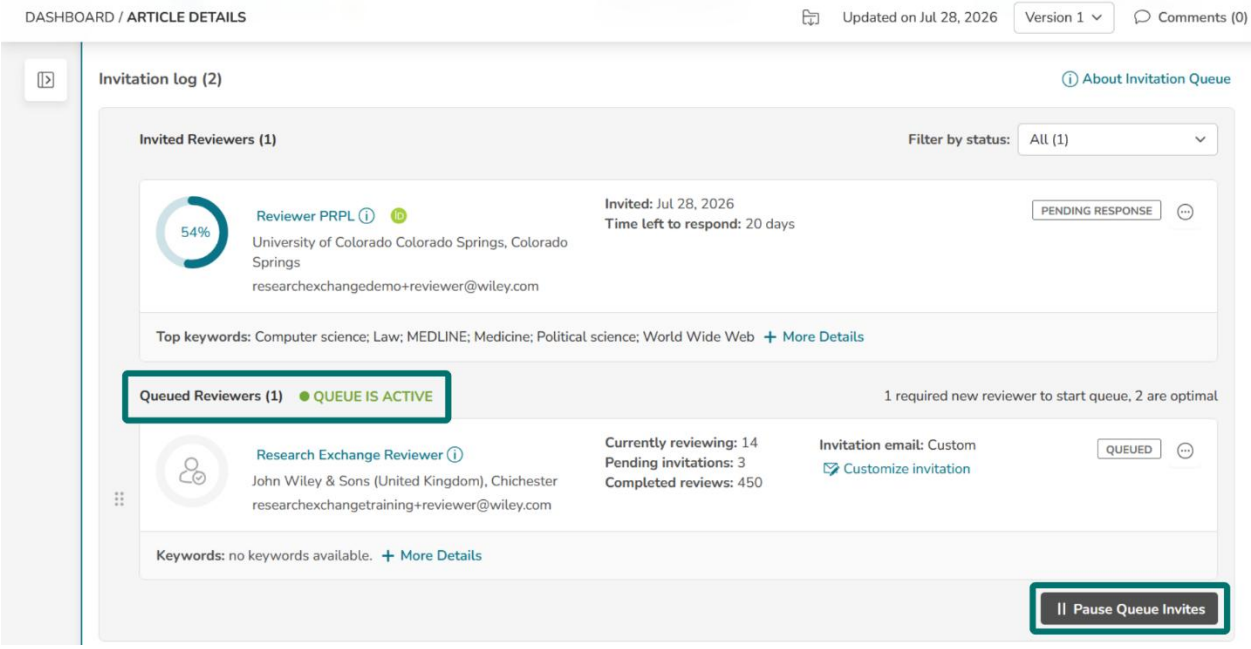
6. To start the queue, click **Start Queue Invites**. The queue will only invite the minimum number of reviewers to meet the minimum required reports for this article or issue type. To increase the number of reviewers the queue will invite, follow the instructions here.



7. The invited reviewers will move to the **Invited Reviewers** section with the status **pending response**.



8. The queue can be paused at any time by clicking the **Pause Queue Invites** button.



Reviewer Queue Logic

The queue invites selected reviewers in a prioritised order and invites only the required number of reviewers. If a reviewer declines or fails to respond within the designated timeframe, the system automatically sends an invitation to the next reviewer in the queue. This approach reduces unnecessary invitations, minimizes wasted reviewer effort, and helps shorten turnaround times.

After any change in invitation status, such as a decline or non-response, the queue evaluates whether the current number of active invitations is sufficient. If it isn't, the next reviewer in the queue is invited.

Reviewers who accept an invitation but do not submit their report by the deadline are assigned the status 'Overdue'. This status does not prompt the queue to automatically invite the next reviewer, avoiding unnecessary invitations if an overdue reviewer submits after the deadline. Instead, editors are notified by email when an accepted invitation becomes overdue and retain full control over whether and when to invite the next reviewer in the queue.

An invitation is considered active if it is **accepted** or **pending and less than 7 days old**. The queue checks whether an action is needed based on the total number of active invitations at that moment.

Declined reviewers can be re-invited or re-added to the queue.

What Invited Reviewers will See

By default, invited reviewers will see the title of the manuscript and the research abstract. For some journals, reviewers will also see the names of the authors. Reviewers will only gain access to the full manuscript if they decide to accept the invitation to review.

If a journal requires reviewers to have access to the manuscript before accepting the invitation, they should reach out.

Reviewer Invitation Response Deadlines

Reviewers have **21 days to respond to an invitation** to review a manuscript. Research Exchange will send a series of automatic emails to reviewers to remind them of the response deadlines for invitations.

- If a reviewer does not respond within the deadline, they will be informed by email that their invitation has expired."
- If the invitation has expired, the reviewer will need to be re-invited or re-queued, which can be done quickly and easily from the invitation log.
- If a reviewer was invited via the queue, they will have the same amount of time to respond. However, the queue will invite an additional reviewer if the invitation is not accepted within 7 days

To re-invite a reviewer after their invitation has expired, please refer to: Re-inviting reviewers.

Reviewer Report Submission Deadlines

Once an invitation is accepted, reviewers will have a default of **14 days to submit their report**. Research Exchange Review will send a series of automatic reminders to remind reviewers of the deadlines for submitting their report.

- This default setting of 14 days can be **increased in increments of 7 days to a maximum of 28 days** at request to your Wiley contact, who will raise a Journal Operational Configuration Tracker (JOCT) ticket. Please note that some limited subject areas have extended default timelines. These include life sciences, math, stats, and economics. Please speak to your Wiley contact if you are in one of these subject areas and would like more specific details.
- Reviewer **deadlines can be extended as many times as needed for as many days as needed** from the invitation log, before or after the report submission deadline.
- Reviewers can still **submit their reports after their deadline has passed**, as long as the editorial decision has not been made on the manuscript.

To extend the deadline for submission of a Reviewer Report, please refer to: Extending reviewer deadlines.

Manuscript Information Available to Reviewers

Once an invitation is accepted, depending on the journal configuration, reviewers will have access to the following;

Information	Single Anonymized	Double Anonymized
Manuscript title and submission metrics (article type, issue type, journal name, keywords)	Visible	Visible
Conversation Tool	Not Visible	Not Visible
Author names and affiliations	Visible	Not Visible
Editors with assigned roles on the manuscript	Visible	Visible
Abstract	Visible	Visible
Author declarations	Visible	Visible, except responses to; • "Is this research supported by funding?" • "Do you or any of your co-authors have a conflict of interest to disclose?"
Manuscript files	Visible after acceptance unless the journal has configured this otherwise	Visible after acceptance unless the journal has configured this otherwise. Title pages with author-identifying information will not be shared.
Submission questions	Not Visible	Not Visible

Information on what is included in the reviewer PDF can be found in Appendix H.

Important Note: Reviewer Recognition

By default, once a report has been submitted, the reviewer will receive a confirmation email. They will also receive an email notification if a manuscript is rejected or if it is accepted, to keep them informed of the outcomes of the manuscript, and to thank them for their time.

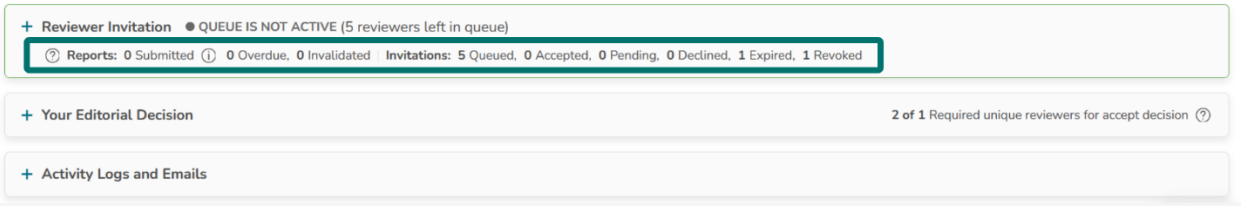
Continuing Medical Education (CME) credit and the ability to choose whether a verified record of the review is published online are also features available on some journals to support reviewer recognition. Recognition is only submitted when all of the following conditions are met; the reviewer opted in, a final editorial decision has been made, the report was selected as "Use Report" by the editor, and the review was not invalidated. Reports marked as "Do not use report" will not qualify for recognition, even if the reviewer has opted in.

The Invitation Log

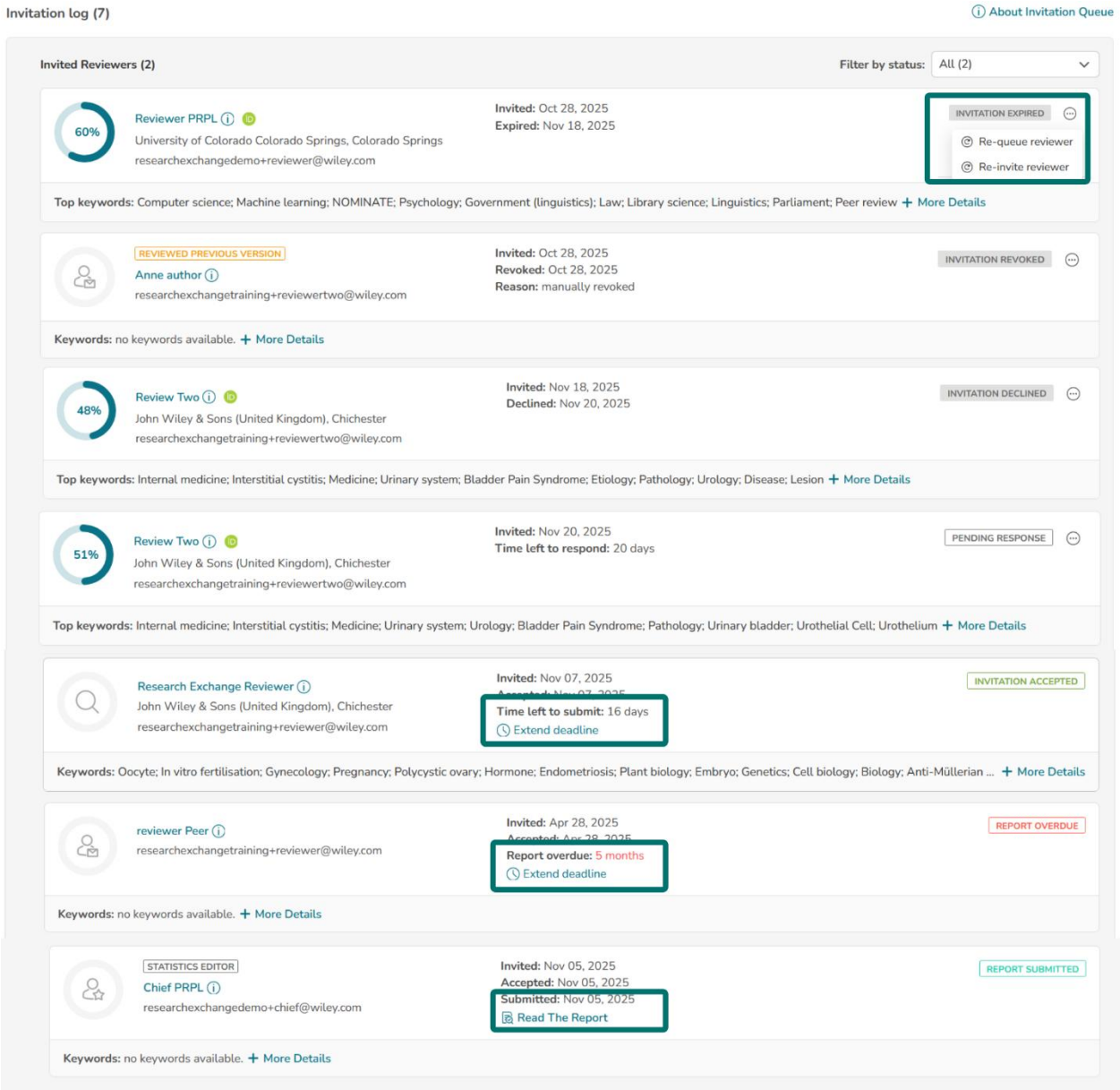
Editors will receive automated email updates to keep them informed about reviewers' progress against response times and deadlines. The status of each review invitation and report can be tracked using the **Invitation Log**.

Follow these steps to access the log:

1. From the **Article Details** page, scroll down to the **Reviewer Invitation** section. Alongside the section heading name, there is a summary invitation and submission metrics for the manuscript.



2. Select the **Reviewer Invitation** heading to open the **Invitation Log**.
    a. The invited reviewers are listed here, along with the required response times for any outstanding items.There are labels next to each reviewer's name indicate the status of each review invitation.
    b. To revoke and reviewer invitations that are pending a response, hover over the entry in the list and click **Revoke invitation**.
    c. When a reviewer has submitted their Reviewer Report, click the **Read the Report** link to view the report.



Important Note: Not Enough Reviewers

If we can't find enough reviewers, editors may be asked to assess the manuscript again, to determine whether the search for willing reviewers should be continued or the manuscript should be rejected.

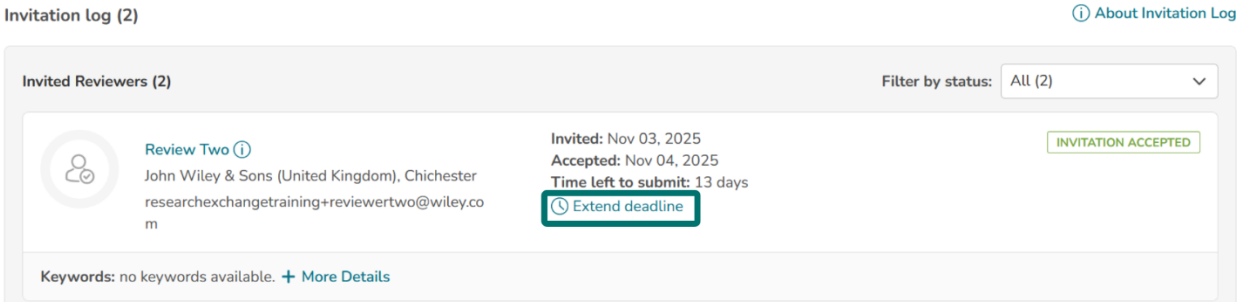
This process will begin at the point of twenty unresponsive or unwilling reviewers. At the point of thirty unresponsive or unwilling reviewers, we will consider withdrawing the manuscript.

Extending Reviewer Deadlines

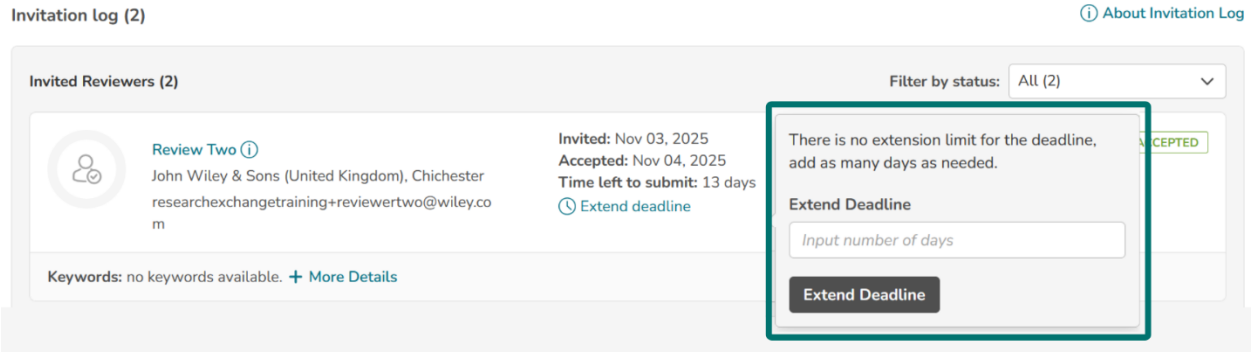
Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

After the reviewer accepts the invitation, the report deadline can be extended as often and as long as needed, at any time. Follow these steps to extend the deadline:

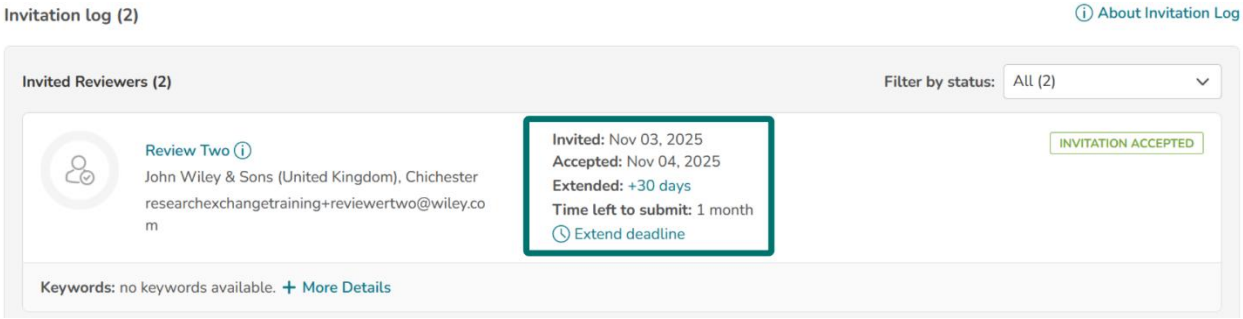
1. From the **Invitation Log**, click the **Extend deadline** button.



2. A pop-up panel will appear. In the box marked **Extend Deadline**, type the number of days to extend the deadline by. A pop-up panel will appear. To extend the deadline, click the **EXTEND** button.



The reviewer will receive an email notification to inform them that their deadline has been extended.



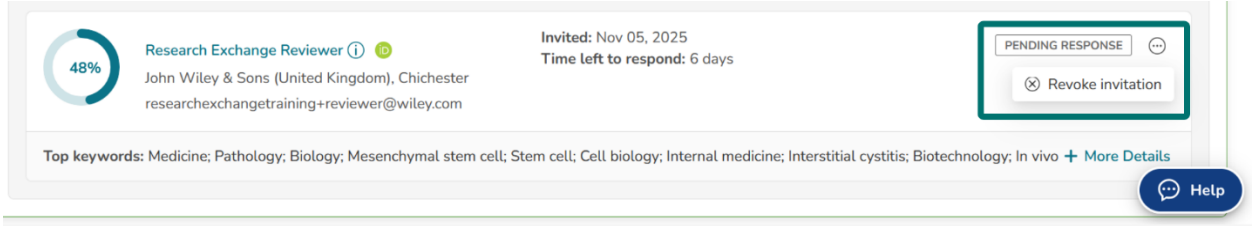
Revoking Pending Invitations

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

When a reviewer's invitation is **pending a response**, the invitation can be revoked by following these steps:

1. Click the ellipsis icon next to the status label in the reviewer tile. Choose the **Revoke invitation** option. An email will be sent to the reviewer informing them that their invitation has been

revoked.

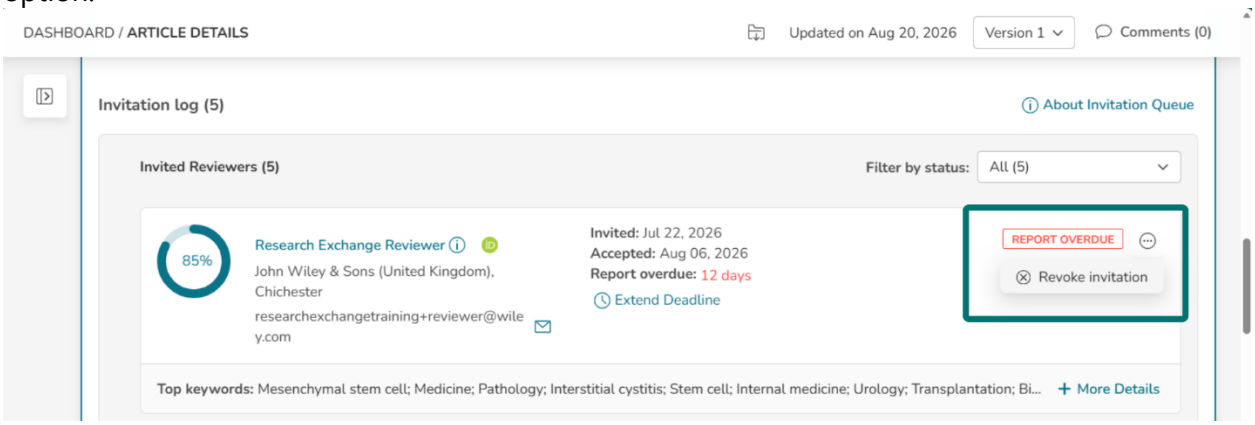


Revoke Accepted Invitations

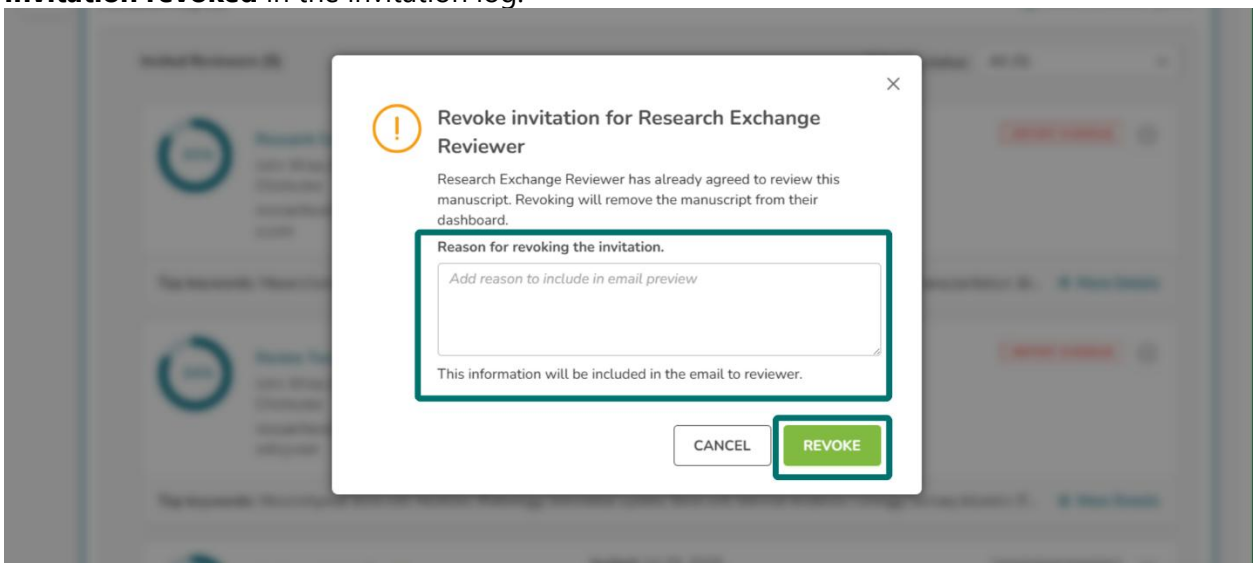
Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

When a reviewer's invitation has been **accepted,** the invitation can be revoked by following these steps:

1. Click the ellipsis icon next to the status label in the reviewer tile. Choose the **Revoke invitation** option.



2. A pop-up window will appear asking for the **reason for revoking the invitation**. This will be automatically included in the email preview that appears after selecting **Revoke.** Sections of the email template can be edited before sending. The status of the reviewer will update to **Invitation revoked** in the invitation log.

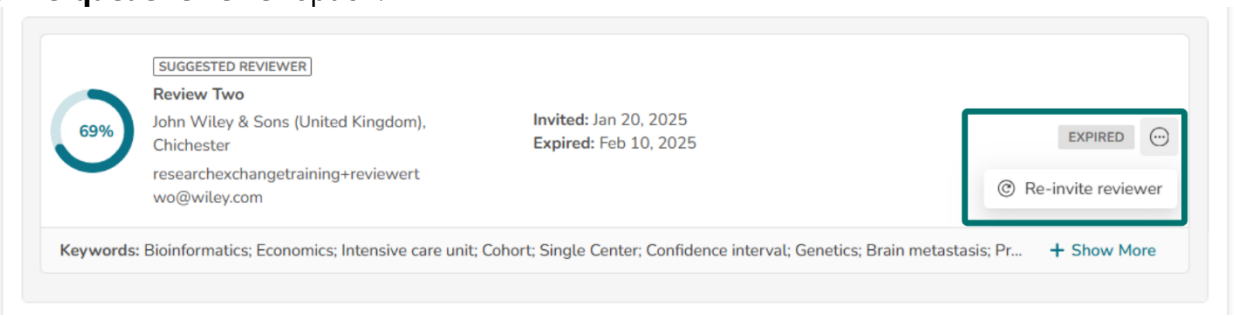


Re-inviting Reviewers with Declined, Expired, or Revoked Invitations

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

When a reviewer's invitation has **declined, expired, or been revoked**, the reviewer can be re-invited or re-queued by following these steps:

1. Click the ellipsis icon next to the status label in the reviewer tile. Choose the **Re-invite reviewer or Re-queue reviewer** option.

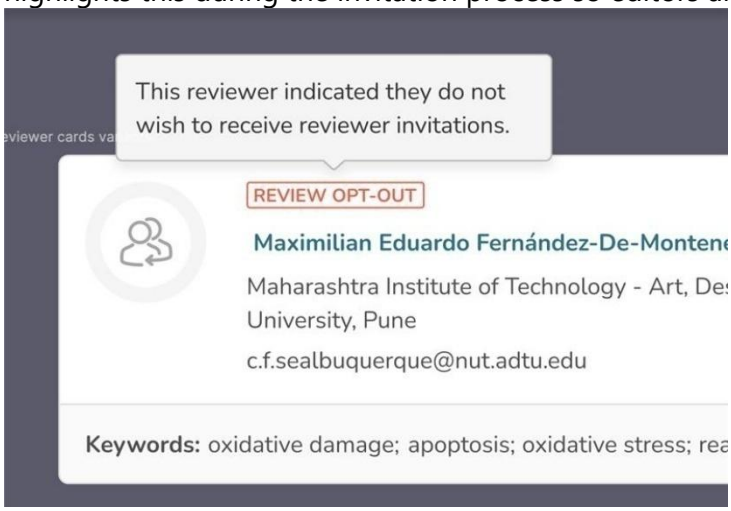


Inviting Reviewers who have opted out of invitation emails

Applicable to:	Academic Editors, Guest Editors, Editorial Assistants*, Journal Managers*, (Triage Editor and Lead Guest Editors if assigned themselves as the Handling Editor), Full Access Capability

Some reviewers choose to **opt out of receiving reviewer invitation emails**. When reviewers opt out of email invitations, they have the option to opt out for individual journals or for all journals in Research Exchange Review. Instead, the invitation is only accessible directly from within the reviewer's dashboard.

Editors and admins can **still invite these reviewers in Research Exchange**. The system clearly highlights this during the invitation process so editors and admins can decide whether to proceed.



When trying to invite the reviewer, a **pop-up message** appears stating that the reviewer has opted out of reviewer invitation emails, so the reviewer will not receive this email invitation from the platform. At this point, the options will be to proceed with the invitation or cancel and select a different reviewer. This allows editors to work with reviewers who prefer not to receive automated emails but still collaborate with selected journals or editors.

"Review opt-out" is a **reviewer preference**, not an invitation log status. The invitation status always reflects the real progress of that specific invitation e.g., invitation pending, accepted, declined or report submitted.

Handling Reviewer Reports

Reviewer File Upload

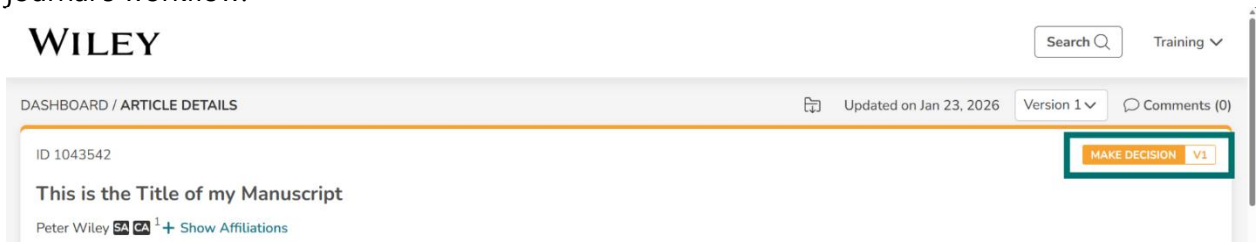
Reviewers can upload a Word, PDF, or LaTeX file as part of their review. The platform will automatically scan the document for viruses and anonymize the file's metadata. Comments that have been made including the person's identity will not be anonymized. Once submitted, everyone involved in the manuscript's management will be able to view the files. If the report is utilized, the author will have the capability to download the file via a secure link provided in the decision email, which is exclusively accessible to them.

Once a report has been submitted, the reviewer will receive an automated email thanking them for their report.

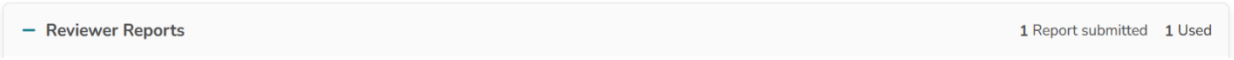
Accessing Reviewer Reports

To review these reports, follow these steps:

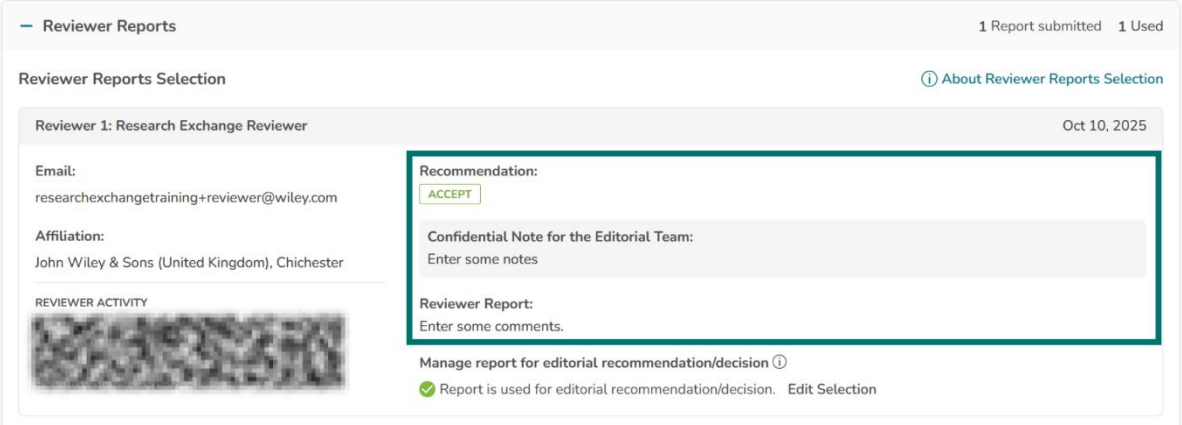
1. When the required minimum number of Reviewer Reports are submitted, the manuscript will move into the **Action Required** section of the dashboard. The label on the **Article Details** page will either show the status **Make Decision** or **Make Recommendation**, depending on the journal's workflow.



2. To view the Reviewer Reports, from the **Article Details** page, scroll down to the **Reviewer Reports** section to access the reports. The number is an indication of the number of reports that have been submitted.



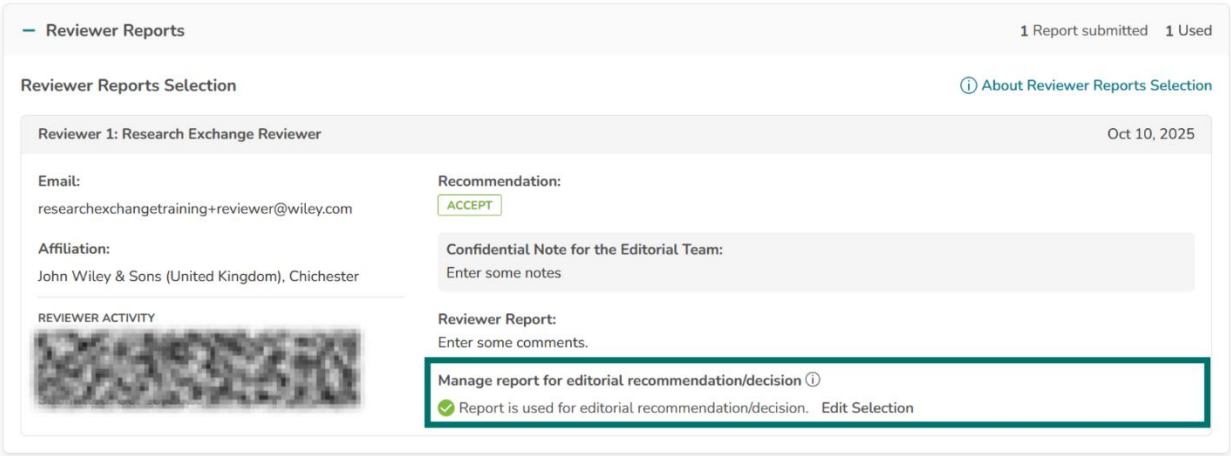
3. The reviewer's recommendation and confidential notes will be displayed. They will choose from the following options:
    a. **Accept** – if they feel the manuscript is ready for publication without changes
    b. **Minor revision** – if they have suggested minor changes to the manuscript
    c. **Major revision** – if they have identified areas that require major rework
    d. **Reject** – if they feel the manuscript is unsuitable for publication in the journal
4. The user will also have access to the **Reviewer Report**, which will either be provided as an uploaded file or written directly within the module. The report will include answers to any questions from the configured scoresheet.
    a. Detailed feedback on the strengths and weaknesses of the manuscript
    b. Suggested changes that the reviewer recommends the authors implement



Using Reviewer Reports

Reviewer reports are set to be automatically included in the email to the author by default They can be excluded on a case-by-case basis at an editor's discretion. Reviewers are not informed if their reports are excluded. To exclude a reviewer report, follow the instructions below.

1. Under the heading **Manage Report for editorial recommendation/decision**, the report is automatically selected to be used. Click **Edit Selection** to choose another option.



2. From the options displayed:
    a. Select **Use Report** if the report is suitable
    b. Select **Do not use report** if the report is not suitable
    c. Click the **Confirm Selection** button once a choice has been made.

The ability to include or exclude a reviewer report will remain in place until a final editorial decision is made. After a final editorial decision has been made, you cannot alter the choice to include or exclude a reviewer report.

In a multiple-tier workflow where the academic editor makes a recommendation to the triage editor, the triage editor will not automatically be able to amend the academic editor's decision to include or exclude a reviewer report. A triage editor can, however, choose from multiple pathways if they disagree with an academic editor's decision. Please see the section on Triage Editor Options for Disagreeing with Editorial Decision.

What reviewers See After Final Decision

A final decision in Research Exchange Review refers to either accepting or rejecting a manuscript. If a revision is requested, the manuscript remains in progress and is not considered final.

Once a final accept or reject decision is made, reviewers who reviewed **any version**of the manuscript are notified by email. They can then log in to Research Exchange Review to view the following:

8. Section: Response to Revision Request
    - For resubmitted manuscripts after a revision request, they can download the author's response file
9. Section: Editorial Comments (only available on the version of the manuscript they reviewed)
    - Who the decision-making editor was and their decision
    - For single anonymous workflows, they can see the decision letter and the file the editor may have uploaded in the letter. (*Inside the letter, depending on what the decision-making editor has chosen to keep in there, they will see the Handling editor's comments and reviewer comments. Links to documents from within the letter cannot be opened.)*
    - For double anonymous workflows, they cannot see the decision letter or the file the editor attached to the letter.
    - Cannot see activity log, comments in the conversation tool, comments between the editorial team when making recommendations or returning manuscripts to Peer Review.
10. Section: Reviewer Reports (only available on the version of the manuscript they reviewed)
    - Can see whether a reviewer was a member of the editorial board (labelled)
    - Cannot see the names, emails, or afilliations of other reviewers whose reports were chosen by the editor to be included in the final decision
    - Can see each reviewer's recommendation, written report, and uploaded file
    - Cannot see other reviewer's confidential note to the editorial team or unused reviewer reports

Reviewers are notified of the manuscript's final decision, regardless of which version they reviewed. However, if they did not review the final version of the manuscript, they will not have access to the final decision, the decision letter, or any reviewer comments included in that letter within the platform. A common example is when a reviewer assesses version 2 of a manuscript, minor revisions are requested, and a decision is then made on the resubmitted version 3 without sending it for further peer review.

Handling Revisions

Applicable to:	Triage Editors, Academic Editors, Lead Guest Editors, Guest Editors, Editorial Assistants*, Journal Managers*, Full Access Capability

When authors submit a revised version, for most journal workflows, the revised manuscript will pass through Revision Checks before returning to Research Exchange Review. The version name in Research Exchange Review will change from Version 1 to Version 2 for each subsequent version.

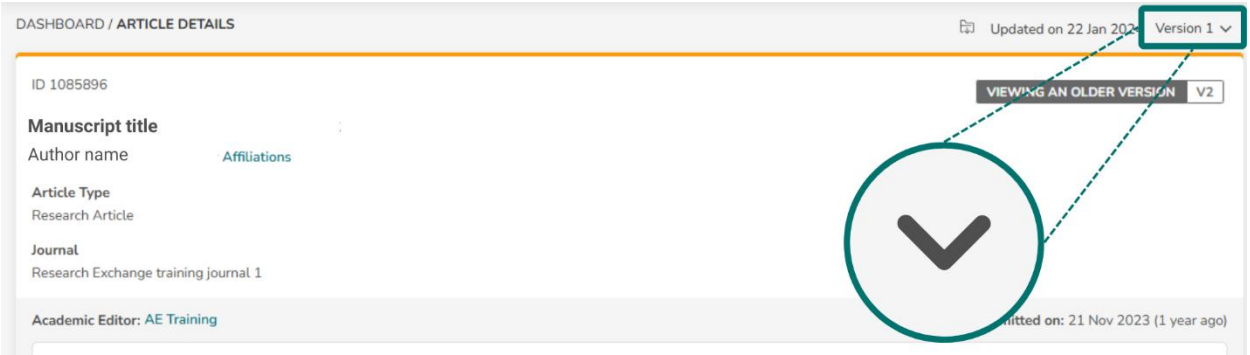
Invitations to review

If the authors are asked to revise their manuscript, once resubmitted, it will return to the editors who requested the revision decision. They will receive an email notifying them once the manuscript is available in the Review module.

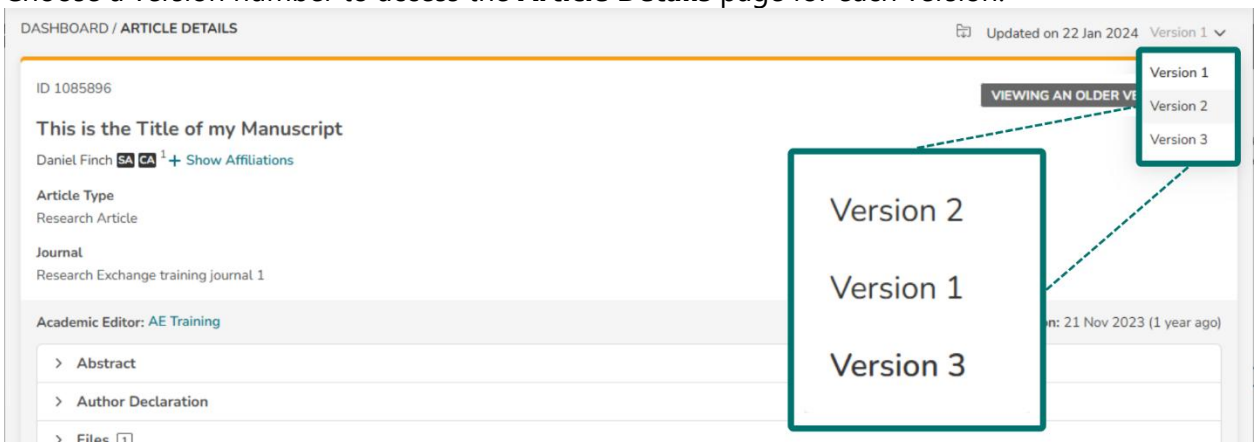
Viewing Manuscript versions

To view previous versions of a revised manuscript, follow these steps:

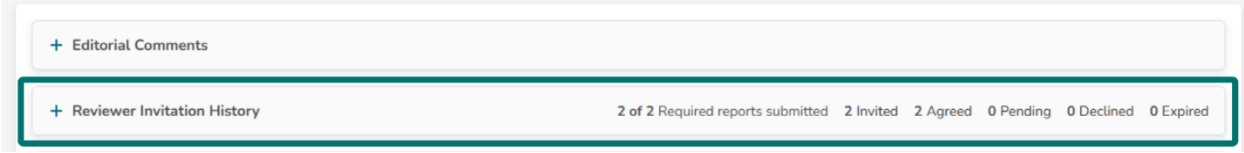
1. From the **Article Details** page, click the downward arrow next to the manuscript version number.



2. Choose a version number to access the **Article Details** page for each version.



3. The Article Details page for previous versions of the manuscript gives access to details of reviewers who were invited to review each version.



4. Reviewer Reports submitted for each version are also available to view.



Reviewing Revised Manuscripts

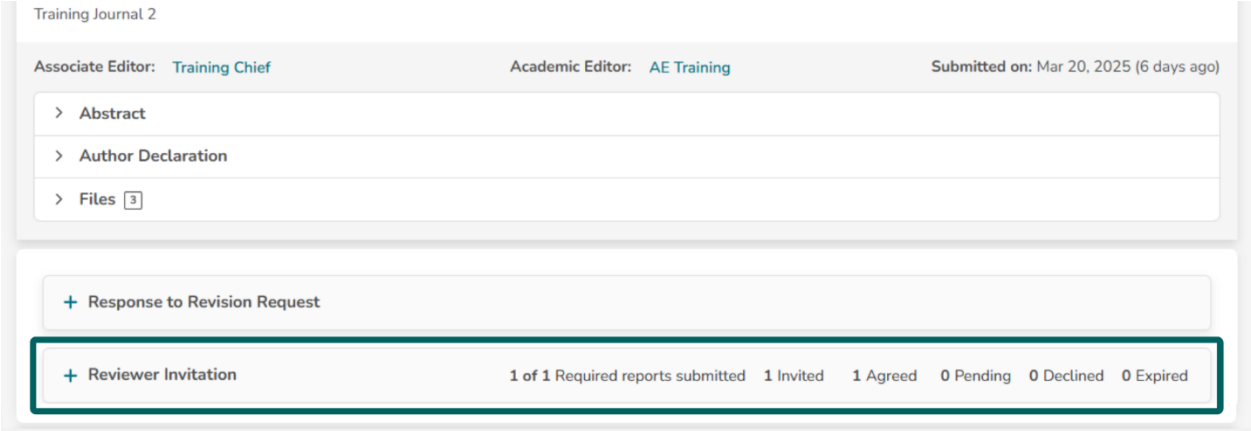
When evaluating a revised manuscript, consider whether the authors have addressed the previous review comments and made appropriate changes.

The original reviewers are **not** automatically invited to review the revised manuscript, but they can be easily re-invited. If re-invited, the email invitation should be edited to make it clear that they are being asked to evaluate the revised version.

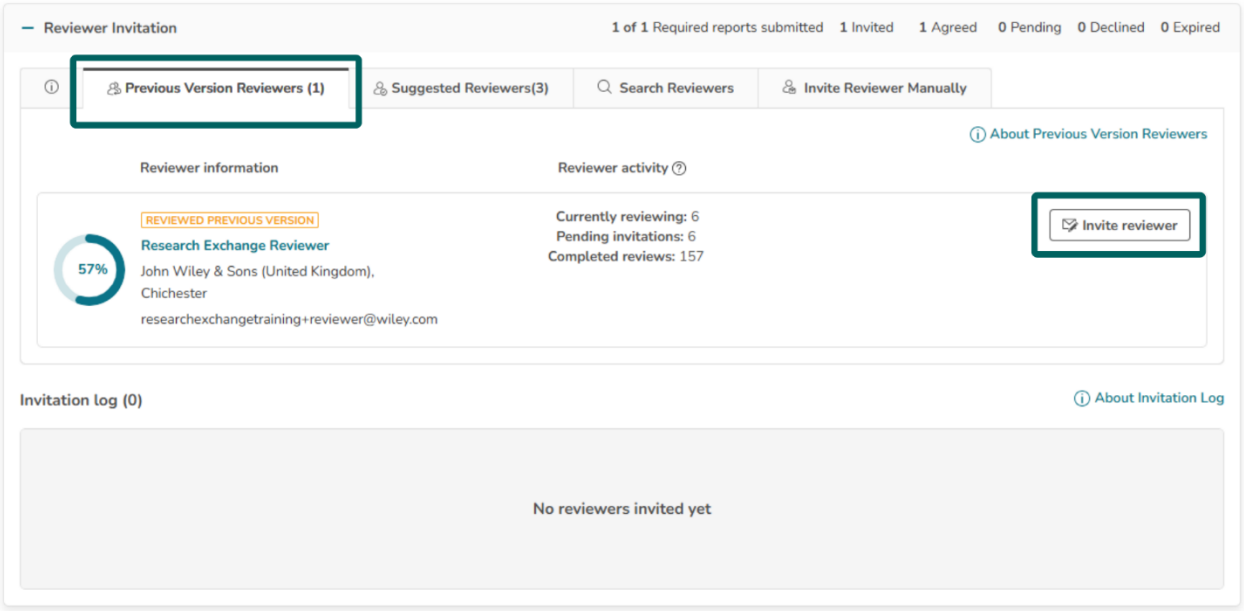
Inviting previous reviewers

Previous reviewers are **not** automatically invited to review a revised manuscript, but they can easily be re-invited by following these steps:

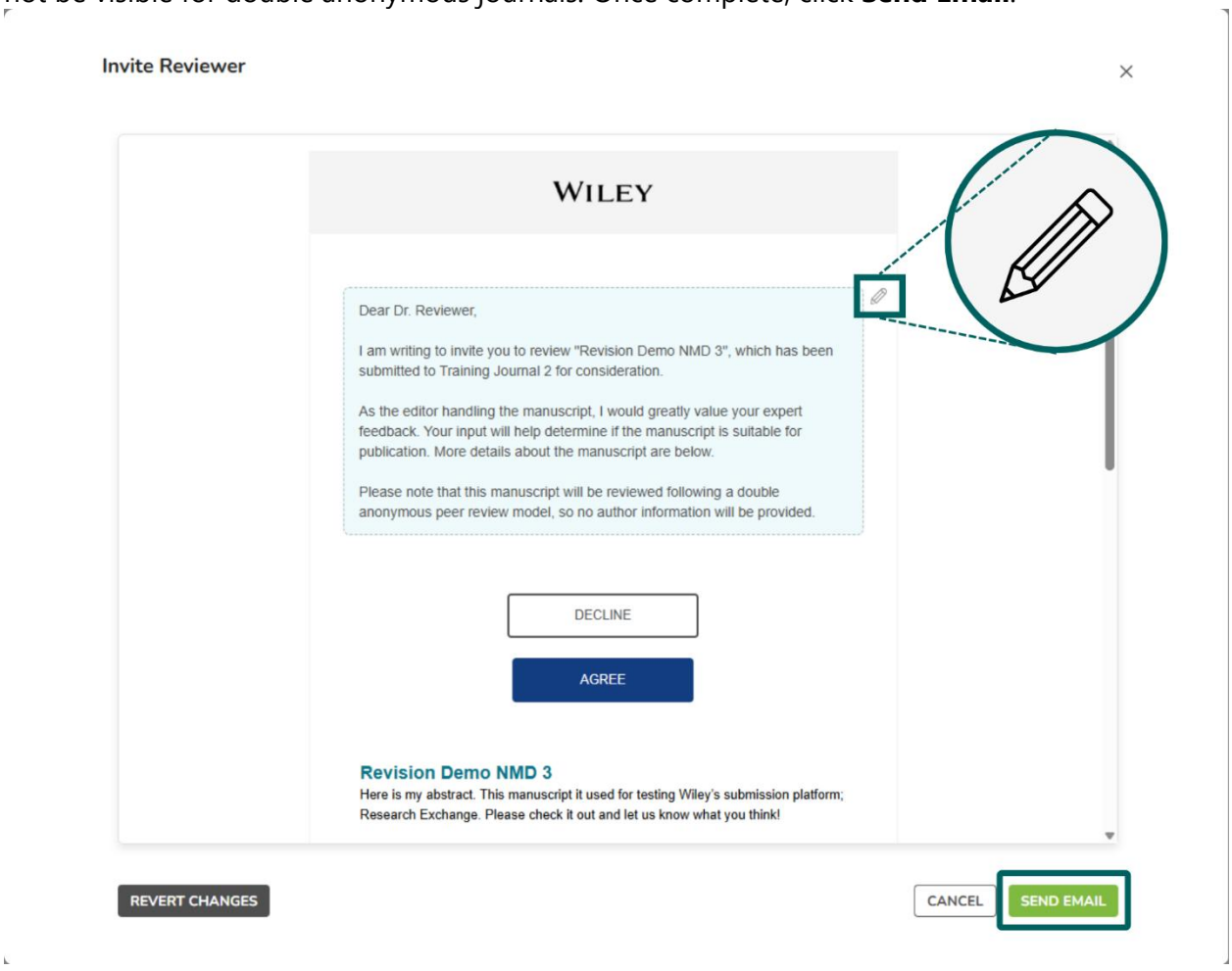
1. Click the **Reviewer Invitation** button.



2. Select the **Previous Version Reviewers** tab. Click the **Invite reviewer** button.



3. A draft email invitation is automatically generated. The text will make it clear that this is an invitation to review a manuscript again after it has been revised. To add a personal message or give more context, click the **pencil icon** to edit the blue sections of the text. Author names will not be visible for double anonymous journals. Once complete, click **Send Email**.



For instructions on how to invite new reviewers and edit the email invitation, please refer to: Sending an invitation.

Extending Author Deadlines for Revisions

Applicable to:	Editorial Assistants, Journal Managers

When a revision is requested, by default authors have 30 days to respond to a minor revision and 90 days to respond to a major revision. Although the default is not configurable, the deadline can be extended for the author.

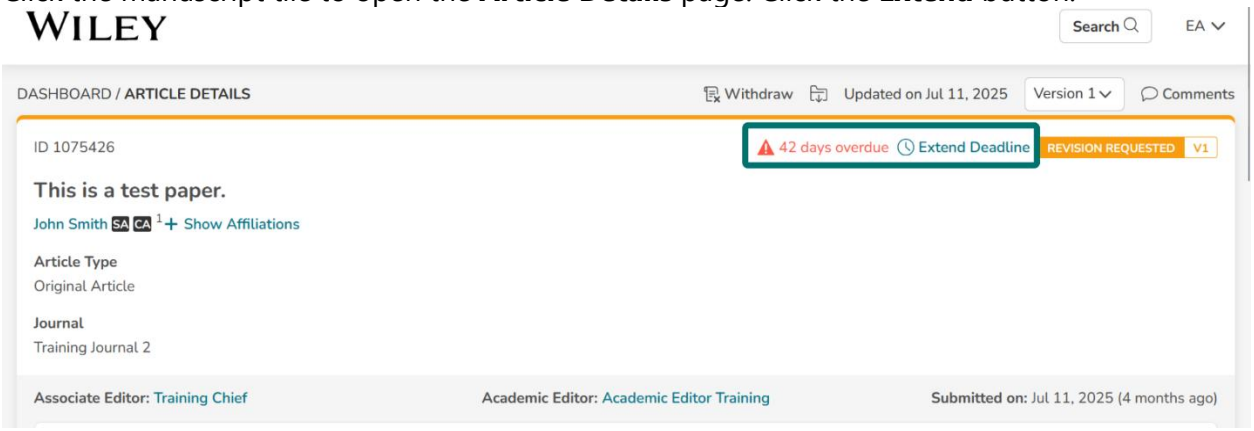
Research Exchange Review sends a series of automated reminders to authors, to confirm the submission deadline and provide updates as the final date approaches.

Deadlines can vary, depending on the journal and the manuscript type. To find out more about the standard email cadence and deadlines in Research Exchange Review, please go to: Appendix C: Email Cadence and Reminder Schedule

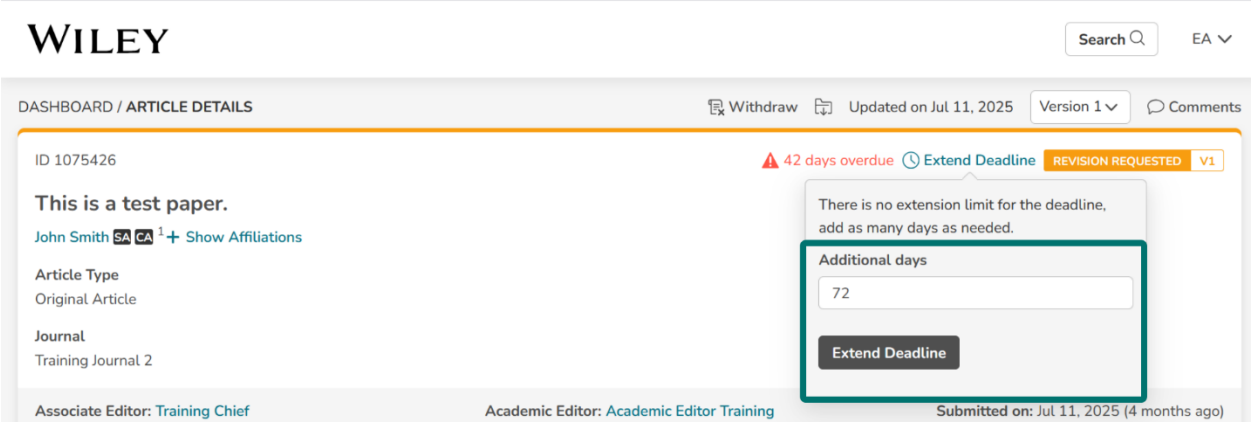
If an author misses the deadline for submitting their revised manuscript, a warning will be displayed on the manuscript tile in the dashboard. By hovering over this warning, you can see how many days have gone by since the deadline passed.

To extend the deadline for resubmission, follow these steps:

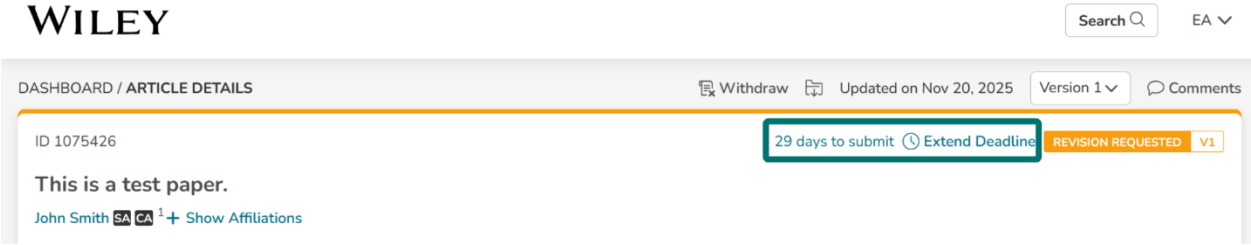
1. Click the manuscript tile to open the **Article Details** page. Click the **Extend** button.



2. In the box, type the number of days to add to the deadline. Click the **Extend Deadline** button. A popup window will appear. To extend the deadline, click the **EXTEND DEADLINE** button.



3. The deadline extension will be reflected. It can be extended again by following the same steps. Authors are not automatically notified by email when their revision deadline has been extended. Editorial Assistants are encouraged to notify the author via email.



Accessing Support

Research Exchange has been designed to be simple and easy to use. The platform will alert users to any errors or missing information, and support is available to help with any technical issues.

Technical Support

Please contact our support team at: reviewhelp@wiley.com

This mailbox is a Wiley support service for technical issues related to the Research Exchange Review platform. It assists with various problems, such as:

- Login issues
- Resetting a password
- Error messages when accessing the platform or performing actions
- Incorrect reports or recommendations uploaded by reviewers
- Editors unable to update their keywords
- Email notification issues, errors in system emails, incorrect email templates
- Missing files or review reports from previous versions
- Incorrect manuscript statuses, user dashboard issues
- Manuscript availability across different systems
- Editors experiencing errors when accessing manuscripts via email links
- Manuscripts transferred to special issues with incorrect editor permissions
- Editors needing to be reinstated to manuscripts they were previously working on

To help the support team address the issue quickly and effectively, please include as much information as possible, including the manuscript ID and title.

Editorial Help

For journals with **Wiley-managed editorial offices**, contact your Journal's editorial office.

For **independently managed editorial offices**, contact the Wiley Peer Review Team.

Peer Review Resources

For more information on peer review at Wiley, follow this link: Wiley Peer Review Resources.

For more information on how to perform a peer review, follow this link: How to Perform a Peer Review.

For more information on Wiley's Peer Review Policy, follow this link: Wiley Peer Review Policy.

Appendix A: Screening Module Manuscript Status

In the Screening module, the status of each manuscript is marked with a label on the right of the manuscript tile.

Status	Meaning
NEW MANUSCRIPT STAGE SC	The manuscript is assigned to the journal's screener for Submission Checks.
RETURNED TO DRAFT SC	The journal's screener has escalated a potential issue during Submission Checks. The manuscript has been returned to the author.
REFUSED TO CONSIDER SC	The manuscript has failed to pass Submission Checks and will not be considered for publication.
PAUSED SC	The journal's screener has escalated a potential issue during Submission Checks.
NEW MANUSCRIPT STAGE RC	The revised manuscript is assigned to the journal's screener for Revision Checks.
PAUSED RC	The journal's screener has escalated a potential issue during Revision Checks.
NEW MANUSCRIPT STAGE QC	The manuscript is assigned to the journal's screener for Quality Checks.
SENT TO PEER REVIEW QC	The manuscript has been returned to peer review because issues were identified during Peer Review Cycle Checks.
PAUSED QC	The journal's screener has escalated a potential issue during Peer Review Cycle Checks.
NEW MANUSCRIPT STAGE MC	The manuscript is assigned to the journal's screener for Material Checks.
FILES REQUESTED MC	The journal's screener has asked the author to provide missing files during Material Checks.
PAUSED MC	The journal's screener has escalated a potential issue during Material Checks.

Appendix B: Review Module Manuscript Status

In the Review module, the status of each manuscript is marked on the right of the manuscript tile.

Status	Meaning
ASSIGN EDITOR V1	An editor needs to be assigned to the manuscript to carry out the next step in the peer review process.
EDITOR ASSIGNED V1	An editor has been assigned to the manuscript to handle the current step in the peer review process.
EDITOR INVITED V1	An editor has been invited to the manuscript to handle the next step in the peer review process
PENDING EDITOR RESPONSE V1	An invited editor needs to accept the invitation to handle the next step in the peer review process.
RESPOND TO INVITE V1	An editor needs to respond to an invitation to handle the manuscript.
RESPOND TO INVITE V1	A reviewer needs to respond to an invitation to review the manuscript.
INVITE REVIEWERS V1	The minimum number of peer reviewers need to be invited to review the manuscript.
INVITATION PENDING V1	The minimum number of peer reviewers have not yet responded to an invitation to review the manuscript.
PENDING REVIEWER RESPONSE V1	The minimum number of peer reviewers have not yet responded to an invitation to review the manuscript.
REVIEWERS INVITED V1	The minimum number of peer reviewers have not yet accepted an invitation to review the manuscript, but reviewers have been invited by the editor managing the Peer Review step.
UNDER REVIEW V1	The minimum number of peer reviewers have accepted an invitation to review the manuscript, but some Reviewer Reports have not yet been submitted.

Status	Meaning
COMPLETE REVIEW V1	The manuscript needs to be reviewed.
IN SCREENING V1	Manuscript has been submitted and is undergoing pre-peer review screening checks and is not yet ready for action.
IN REVISION CHECKS V1	Manuscript has been resubmitted and is undergoing revision checks and is not yet ready for action.
REVISION REQUESTED V1	Revisions have been requested, and the author has not yet submitted the revised manuscript.
REVISION QA V1	The author has submitted a revised manuscript, but it is not yet ready for action.
VIEWING AN OLDER VERSION V2	An older version of the manuscript.
APPROVE QA V2	Historical status label when a manuscript has been resubmitted and is undergoing revision checks and is not yet ready for action.
AWAITING RECOMMENDATION V1	A reviewed manuscript is awaiting a recommendation.
AWAITING DECISION V1	A reviewed manuscript is awaiting a decision.
MAKE DECISION V1	A reviewed manuscript is awaiting a decision.
MAKE RECOMMENDATION V1	A reviewed manuscript is awaiting a recommendation.
PENDING APPROVAL V1	A reviewer report has been submitted but there are still outstanding reviewer reports.
ACCEPTED: AWAITING CHECKS V1	The manuscript has reached a final accept decision and is awaiting completion of the post-acceptance Peer Review Cycle Checks (QC) and Materials Checks (MC) in the Screening module.

Status	Meaning
VOID V1	Historical Refuse to Consider outcome in the Screening module.
NULL V1	An older version of the manuscript.
ACCEPTED: EXPORTED V1	The manuscript has passed both post-acceptance Peer Review Cycle Checks (QC) and Materials Checks (MC) in the Screening module and has been exported to the production workflow. Once passed to Production and published on Wiley Online Library, a manuscript's status will not update beyond "Accepted: Exported".
REJECTED V1	An editor has made a decision to reject the manuscript.
REFUSED TO CONSIDER V1	An editor has made a decision to refuse to consider the manuscript for publication.
WITHDRAWN V1	The manuscript has been declared void by the journal's Editorial Assistant or Administrator, usually because it was submitted in error.

Appendix C: Screening Module Reject Decision Reasons

Reject and Send to Transfer Service / Refer

Out of Scope

Lack of novelty/originality

Lack of impact/too specialized

Article type not accepted

Other reasons submission is a mismatch for this journal

Insufficient results/too preliminary

Inadequate scholarly presentation

Extensive language editing required

Other issues with manuscript quality

Reject and do not transfer

Flawed study design

Flawed methodology

Unsupported results/conclusion(s)

Unscientific/unscholarly content (e.g., spam, junk)

Other research concerns

High textual similarity/(self-)plagiarism

Suspected image manipulation

Suspected data falsification/fabrication

Suspected misconduct or violation

Authorship or contributorship misrepresentation(s)

Conflict(s) of interest/competing interest(s) or undisclosed conflict of interest

Simultaneous submission to multiple journals

Failure to disclose previous submission(s) or related articles under consideration/in press

Sanctioned author(s) and/or their affiliated institution(s)

Other ethical concerns

Appendix D: Email Cadence and Reminder Schedule

About this Schedule

This schedule shows the standard cadence of automated email reminders generated by Research Exchange Review.

Timeframes are expressed in **calendar days** rather than working days.

For Editorial Assistants on Wiley-Managed Journals

Manual and automated reminders are listed in this appendix. All reminder emails listed as need to be sent by the Editorial Assistant.

If the author responds at any point but needs further assistance, the Editorial Assistant should communicate manually by email and stop the reminder emails. Reminders should also be stopped if there is a pending Research Integrity issue.

Please note, all manual timeframes relate to working days (Monday to Friday). For example, if a first reminder is sent on Friday, and the next one is due in 3 days, this reminder should be sent on Wednesday, not on Monday.

Academic or Guest Editor Accepts or Declines an Email Invitation

When an Academic or Guest Editor is invited to handle a manuscript, the schedule for reminders follows the standard timeframe below:

Days	Emails and actions
0	Academic Editor invited
2	**1st Automated email:** Reminder to accept or decline the invitation.
4	**2nd Automated email:** Reminder to accept or decline the invitation.
6	**3rd Automated email:** The Academic Editor is informed that the invitation has expired.

Academic or Guest Editor Invites Reviewers

Academic or Guest Editors receive automated reminders if they have invited fewer than the required number of reviewers. The schedule for these reminders follows the standard timeframe below:

Days	Emails and actions
0	Academic or Guest Editor is assigned to handle the manuscript
5	**1st Automated email:** Reminder to invite the required number of reviewers
8	**2nd Automated email:** Reminder to invite the required number of reviewers
11	If the required number of reviewer invitations have not been sent after 11 days, the Managing Editor or Journal Administrator (with an Editorial Assistant user role) receives an automated email alert for further action.

Reminders are sent until **one** of the following conditions are met;

- Until X number of reviewers are invited
- X number of reviewers have accepted
- Minimum X number of reports submitted

Please note that the criteria listed above (X) will be configured for your journal. Reach out to your Wiley contact to confirm your settings and request amendments, as needed. Please be mindful when making a decision that there may be outstanding reviews pending submission.

Reviewers Agree or Decline Invitations to Review

Invited Reviewers receive automated reminders to agree or decline the invitation to review. The schedule for these reminders should follow the standard timeframe below:

Days	Emails and actions
0	The Reviewer is invited to review a manuscript
4	**1st Automated email:** Reviewer is reminded to accept or decline the invitation
7	**2nd Automated email:** Reviewer is reminded to accept or decline the invitation
14	**3rd Automated email:** Reviewer is informed that the invitation has expired.
21	**Invitation Expires:** Reviewer cannot accept the invitation to review unless re-invited.

Reviewers Submit Reviewer Reports

Reviewers who accept an invitation to review receive automated reminders to submit their Reviewer Report. The schedule for these reminders follows the standard timeframe below:

Days	Emails and actions
0	Reviewer accepts the invitation to review
4	**1st Automated email:** Reviewer is reminded to submit a Reviewer Report
7	**2nd Automated email:** Reviewer is reminded to submit a Reviewer Report
14	**3rd Automated email:** Reviewer is reminded to submit a Reviewer Report
24	**4th Automated email:** Reviewer is informed that the deadline has passed

If the deadline is extended, the reminder schedule will default to:

Days	Emails and actions
0	Reviewer accepts the invitation to review
9 days until the deadline	**1st Automated email:** Reviewer is reminded to submit a Reviewer Report
5 days until the deadline	**2nd Automated email:** Reviewer is reminded to submit a Reviewer Report
On the deadline	**3rd Automated email:** Reviewer is informed that the deadline has passed.

Academic or Guest Editor Makes a Decision or Recommendation

Academic or Guest Editors receive automated reminders to make an editorial decision or recommendation when **one** of these conditions are met:

- The minimum number of reviewer reports has been met
- There are no pending reviewer invitations
- There are no pending reviewer reports

The schedule for these reminders follows the standard timeframe below:

Days	Emails and actions
0	The manuscript is ready for a decision or recommendation and has met all conditions
0	**1st Automated email:** Receive a reminder to make a decision or recommendation

14	**2rd Automated email:** Receive a reminder to make a decision or recommendation; Editorial assistant is informed that a decision has not been

Triage or Lead Guest Editor Makes a Decision

Triage or Lead Guest Editors receive automated reminders to make an editorial decision when the recommendation from the Academic or Guest Editor has been submitted. The schedule for these reminders follows the standard timeframe below:

Days	Emails and actions
0	The manuscript is ready for a decision after the recommendation from the Academic or Guest Editor has been received
0	**1st Automated email: R**eceive a reminder to make a decision
14	**2nd Automated email:** Receive a reminder to make a decision; Editorial Assistant is informed that a recommendation has not been made

Author is Asked to Make Major or Minor Revisions

When an author is asked to make major or minor revisions to a manuscript, the author is reminded to revise and resubmit. The schedule for minor and major revision reminders follows the standard timeframe below:

Days	Emails and actions
0	Author is asked to make revisions to a manuscript
7	**1st Automated email:** Author is reminded to make revisions
14	**2nd Automated email:** Author is reminded to make revisions
21	**3rd Automated email:** Author is reminded to make revisions
28	**4th Automated email:** Author is reminded to make revisions For Major revisions, emails will continue every 7 days until the 90-day deadline.
30/90	**5th/13th Automated email:** Author is informed that the revision deadline has passed and will be prompted to submit their revision.

Appendix E: Handling In-Flight Manuscripts

What are In-Flight manuscripts?

The term 'in-flight' is given to manuscripts that are still under peer review when their journal transitions to Research Exchange Review.

There will be a transitional period where editorial teams will be using their current Electronic Editorial Office (EEO) and Research Exchange. After migration, those manuscripts will continue to be managed in the previous electronic editorial office until a decision is taken in the system.

- A **Reject** decision will proceed as normal, closing out that manuscript's lifecycle in the existing EEO
- An **Accept** decision will proceed as normal, sending the manuscript on to production
- A **Revision** decision will be returned to the author, and when it is resubmitted, the new version will be available for the editorial team to action in;
    - The existing EEO if the journal migrated to Research Exchange Submission and Review at the same time (Single migration)
    - Research Exchange if the journal was already using Research Exchange Submission and only migrated to Research Exchange Review. (Double migration)

Double migration to Research Exchange

A double migration refers to a journal's migration to Research Exchange Review when they are already using Research Exchange Submission.

During this migration period, editorial teams will need to continue to access dashboards in the current EEO and in Research Exchange to ensure submissions are peer-reviewed appropriately and with minimal delay.

For in-flights, once submitted, the new version will:

- Enter the Screening module for revision checks before moving back to peer review
- Retain the original manuscript ID number from their original EEO
- Bring across key metadata such as the title, article type, abstract, previous reviewer information, previously submitted reviewer reports, and previous editor decision letters
- Be assigned to the original editor handling the manuscript, where possible. However, if no exact match is found, it picks **the closest fit as possible**. Even if no close match is found, **it always assigns an editor*.**

Important Note: *Expected behavior for Users with Dual Roles on a Manuscript

In a 2-tier workflow, if the EiC assigns themselves as handling editor in ScholarOne, the system cannot automatically set them as the handling editor on the manuscript. Instead, they are assigned as Triage Editor without notification; the manuscript appears in their progress queue, but another handling editor

from the journal board will be assigned. The triage editor will need to find the manuscript and manually assign themselves as handling editor.

Single migration to Research Exchange

A single migration refers to a journal's migration to both Research Exchange Submission and Review on the same day.

On these migrations, in-flights will not move between platforms. Instead, a manuscript will live its entire life cycle—from original submission through to final editorial decision—on the original EEO. Even if there are revisions requested, those revisions will return to the original EEO.

Where a journal moves to both Review and Submission at the same time, reject and resubmits should be treated like revisions and resubmitted into the original system.

Appendix F: Conflicts of Interest

Research Exchange incorporates multiple layers of functionality to identify and manage potential conflicts of interest (COIs) throughout the editorial workflow. These mechanisms are designed to uphold the integrity of peer review and editorial decision-making while supporting transparency and accountability.

Automated COI Detection

The platform automatically detects and surfaces potential COIs based on:

- **Affiliation matches:** Editors and reviewers are identified if their institutional affiliations match those of the manuscript authors.
- **Direct email matches:** The system cross-references email addresses to identify overlap between authors, editors, and reviewers. Users are encouraged to maintain a single account to ensure accurate COI detection.
- **Shared Network or Device Use:** The Screening module includes an 'Unusual Activity Detection' tool post-acceptance that identifies editors and reviewers operating from the same IP address, device, or network, which may indicate impersonation or collusion.
- **Exact case-insensitive name matches:** A potential COI is flagged when there is an exact, case-insensitive match between a reviewer's name and any author listed on the manuscript. Matches against multiple authors are supported, though this scenario is expected to be rare.

It is also important to identify any other possible conflicts of interest that are not covered by the system.

Editor Assignment and COIs

The following assignment and conflict of interest (COI) handling applies to **all manuscripts**, including both regular and special issues.Editors who are part of an editorial board but are not currently assigned to a manuscript may still be invited to act as reviewers. These users are identified with an **Editorial Board Member** label. However, once an individual is invited as a reviewer on a manuscript, they cannot also be assigned to that same manuscript as an editor, and vice versa.

For **automatic assignment**, if a COI is detected, the system will attempt to assign an alternative handling editor (Lead Guest Editor or Guest Editor for special issues, Triage Editor or Handling Editor for regular issues). If no suitable editor is available, the assignment will fail and an **Editor Assignment Failed** notification will be sent to the Editorial Assistant (EA), prompting manual assignment:

- If the COI is **affiliation-based**, the EA can proceed with assigning the editor after reviewing and confirming the conflict.
- If the COI is **email-based**, the EA cannot assign that editor and must instead use the Show all editorial board members option to select an alternative editor outside the restricted group.

For **manual assignment**, COI handling depends on the type of conflict:

- **For affiliation-based COIs**, the system displays a Conflict of Interest tag against affected editors but still allows the EA or Admin to assign or invite them if appropriate.
- **For email-based COIs**, the affected editor will not appear in search results and cannot be selected. In this case, the EA must assign a different editor in the same role or, if none are available, use the Show all editorial board members option to broaden the selection.

Appendix G: Transferred Manuscripts

Transferred manuscripts refer to submissions moved from one journal to another within Wiley's ecosystem. These transfers can occur between journals on the Research Exchange platform or from external systems such as ScholarOne. There are two transfer options available;

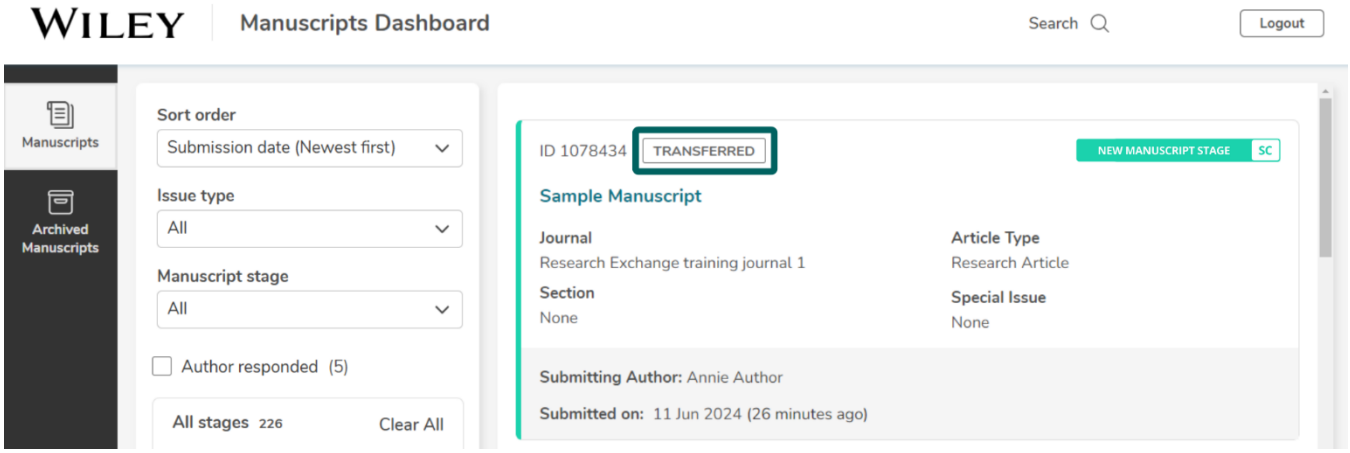
- **Reject and send to transfer service;** For journals that are configured to feed into the Wiley Transfer Desk Assistant (TDA) and can be used if a manuscript is high quality but is unsuitable for publication in the journal to which it was submitted. TDA uses machine learning to analyze the manuscript and identify Wiley journals that are a good match for the research.
- **Reject and refer service;** For journals that are configured to support editor-driven referral, where the manuscript will be referred to up to five journals, which can be selected by the decision-making editor.

Transferred Manuscripts in Screening

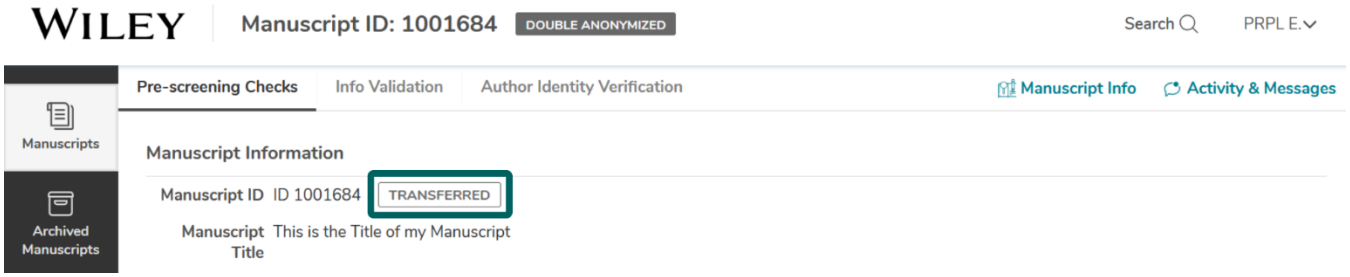
Identifying Transferred Manuscripts

From the Screening dashboard, you will be able to locate transferred manuscripts in the following ways;

On the Screening dashboard, the manuscript tile will have a 'Transferred' label.



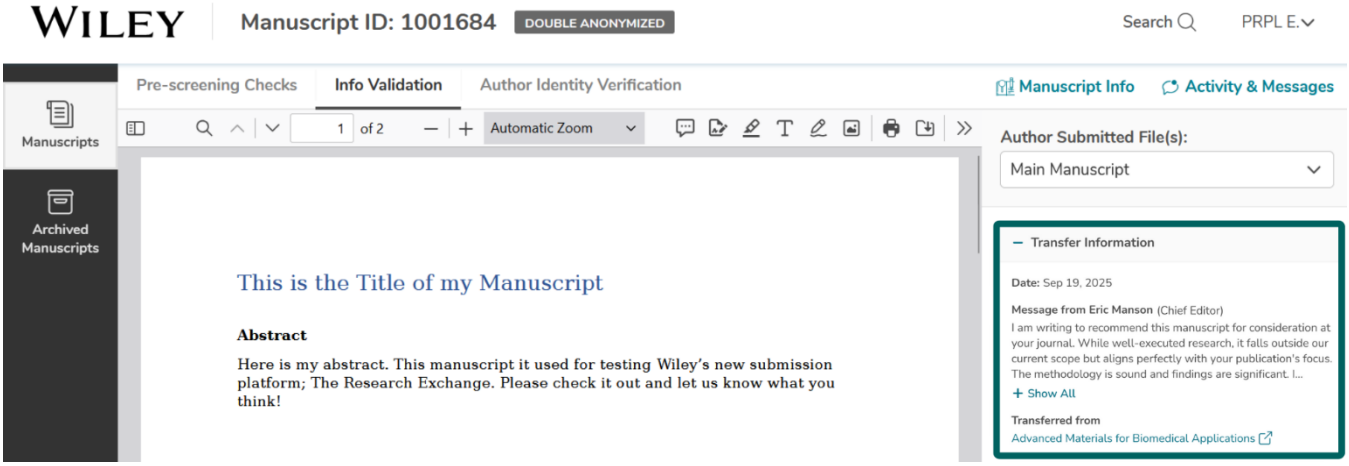
On the Manuscript Details page, the 'Transferred' label will be shown in the Manuscript Info section.



Available Information for Transferred Manuscripts

If a manuscript was transferred from a journal in Research Exchange using the reject and refer service, the transfer date, message to the destination editor, and the journal it was transferred from will appear

in the Info Validation Section during Submission and Revision Checks.



Available Actions on Transferred Manuscripts

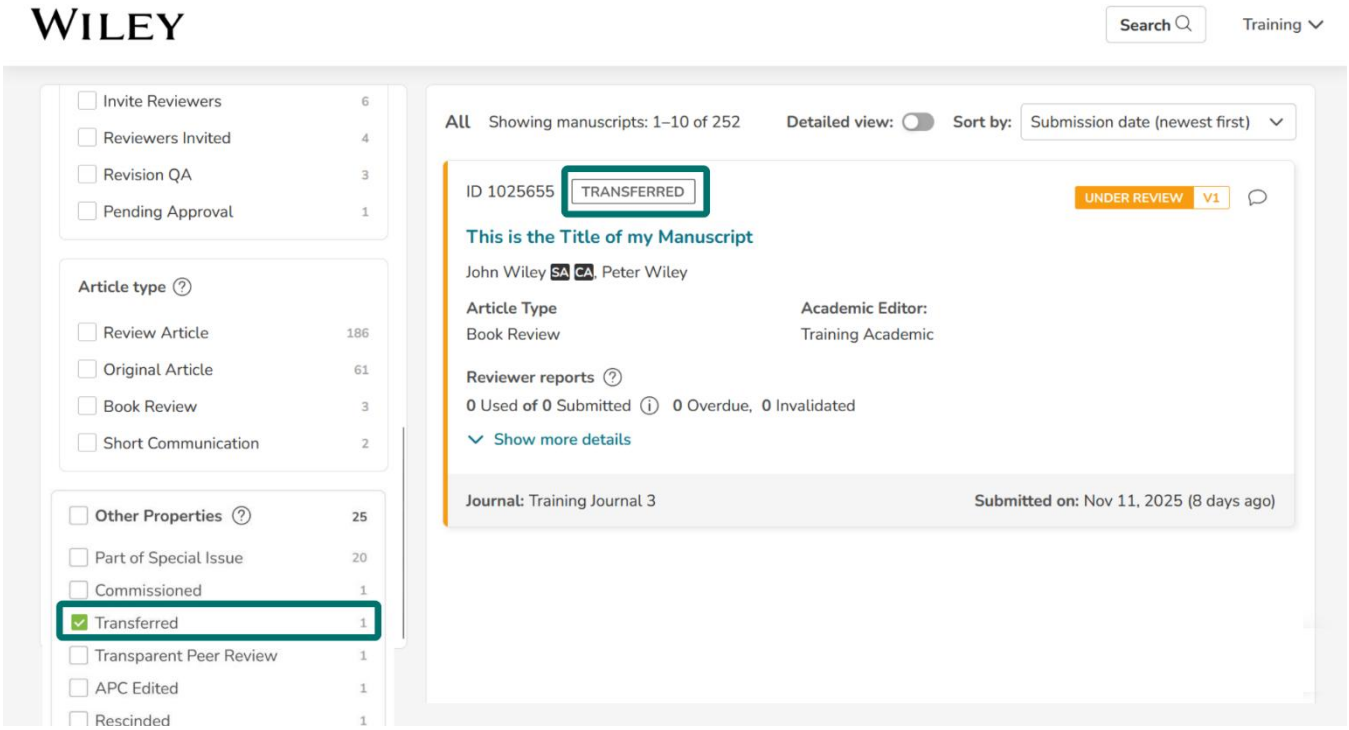
Transferred manuscripts are processed in the Screening module in the same manner as non-transferred manuscripts.

Transferred Manuscripts in Review

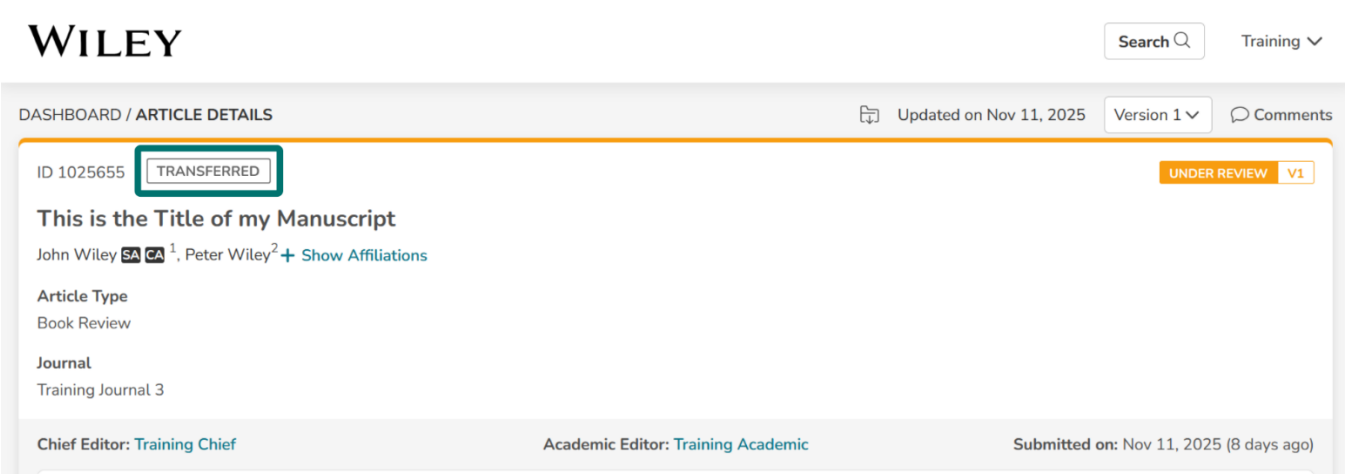
Identifying Transferred Manuscripts

From the editor dashboard in Review, you will be able to locate transferred manuscripts in the following ways;

Using the 'Other properties' filter, select 'Transferred'. This will filter your list to only show manuscripts that have been transferred, which are identified by a 'Transferred' label on the manuscript tile.



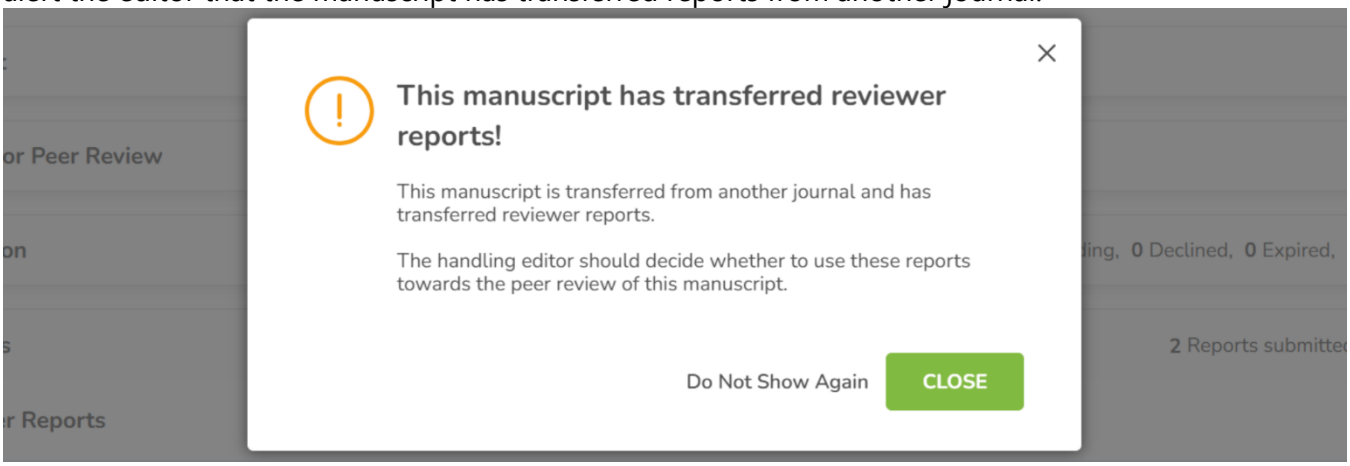
On the article details page, there will be a label that says ‘Transferred’.



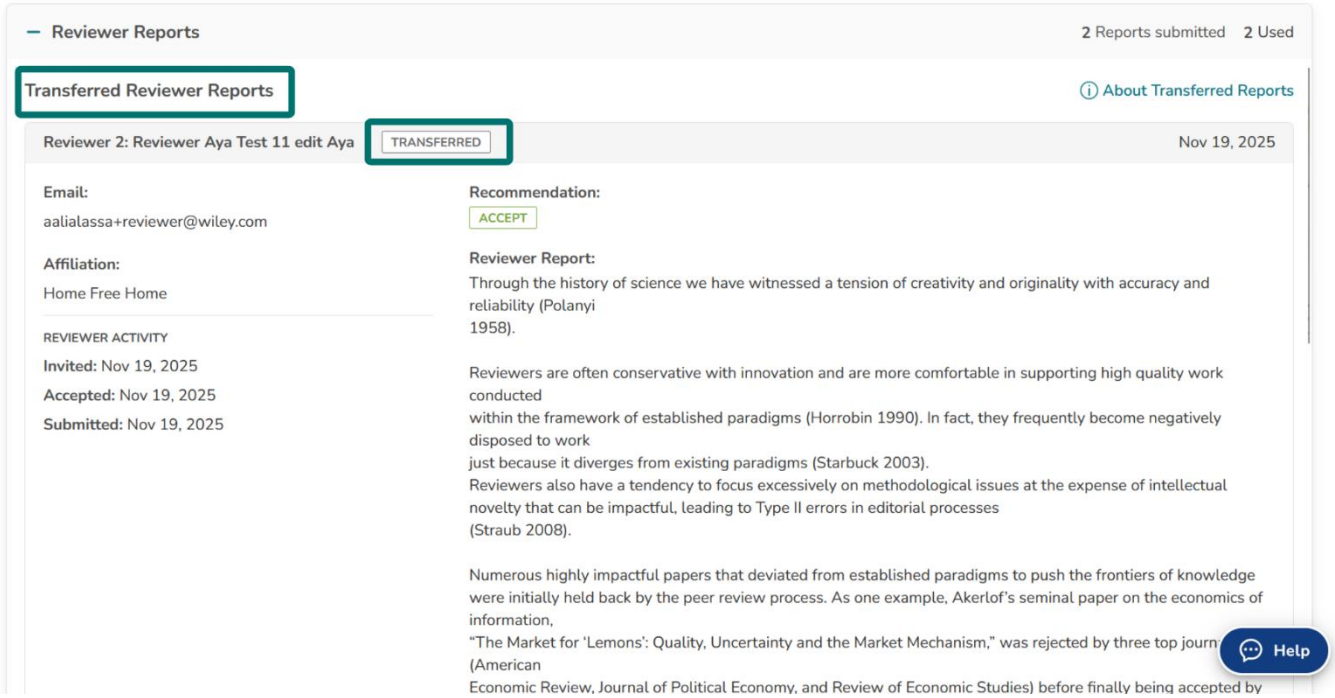
The transfer information section will be available for journals transferred from another journal on Research Exchange using the reject and refer service (EDR only).



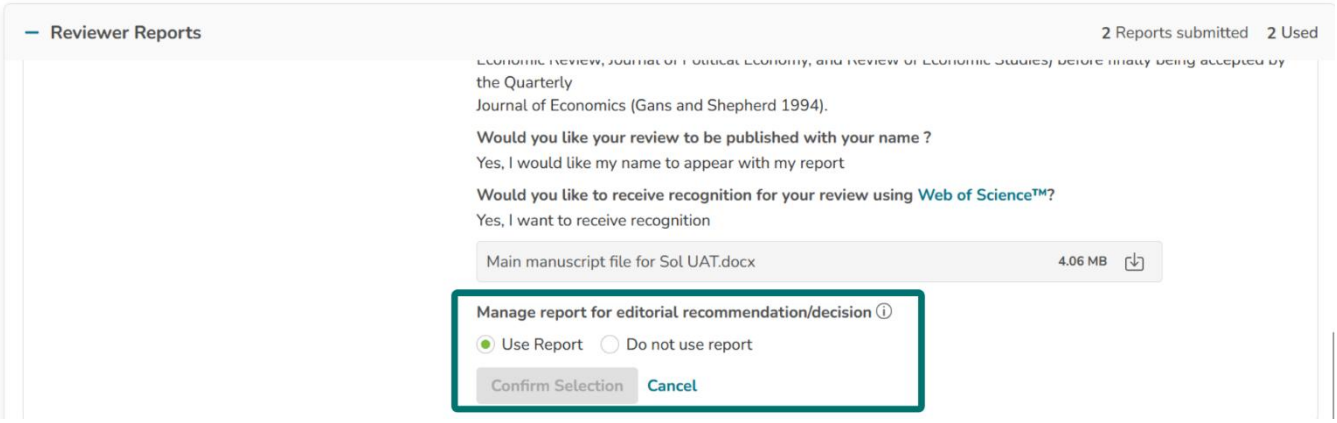
When selecting the ‘Reviewer Reports’ section on the article details page a notification will appear to alert the editor that the manuscript has transferred reports from another journal.



Within the ‘Reviewer Reports’ section, there will be a sub-section for Transferred Reviewer Reports. Each report will have a ‘Transferred’ label.



Editors can choose to use or disregard the report when making a decision or recommendation on the manuscript.



Available Information for Transferred Manuscripts

In the Review module, the manuscript will have the following information available to view;

- Manuscript files, including the reviewer PDF
- Submission metadata
- Transferred Information section, which will include; message from the destination editor, date of transfer, name of the editor who suggested the transfer, and the Research Exchange journal from which the manuscript was transferred (if transferred using the Reject and Refer service)
- Any reviewer reports that have already been collected before transfer

Re-inviting or Re-queuing Reviewers in the Transfer Log

Editors who receive a submission via an Editor-Driven Referral Network can re-invite or re-queue reviewers who submitted reports to the journal that previously rejected the submission.

These reviewers will appear in the **Reviewer Invitation** section under the heading **Transfer Log**, which will be displayed above the Invitation Log.

The Transfer Log section will only be available on v1 of the transferred manuscript, provided there is at least 1 transferred report.

Editors will be able to re-invite or re-queue reviewers who reviewed for v1 of the transferred manuscript if required. One re-invited or re-queued they will move t the Invitation Log.

Available Actions on Transferred Manuscripts

Transferred manuscripts are processed in the Review module in the same manner as non-transferred manuscripts.

Appendix H: Reviewer PDF

Reviewers are granted access solely to the files included in the Reviewer PDF generation. The following outlines which files are included and excluded from the Reviewer PDF:

Files **Included** in Reviewer PDF	Files **Not Included** in Reviewer PDF
Main Document (MS Word, LaTeX PDF)	Main Document (LaTeX file)
Anonymized Main Document (MS Word, LaTeX PDF). This is metadata only, any file comments that have been made and include the person's identity will not be anonymised.	Anonymized Main Document (LaTeX file)
Main Document – Tracked Changes	Title Page
Author Response	LaTeX Supplementary File
Figure	Supplementary Material not for Review
Table	Cover Image
Supplementary Material for Review and Publication	Conflict of Interest
Additional Files for Review/Not for Publication	Cover letter/Comments
Transcription	Embedded Video
	Embedded Audio
	Forms: CONSORT Statement
	Forms Systematic Review Statement
	Supplementary Zip Bundle
	README file
	Graphical Abstract files

To further reduce the risk of reviewers being able to identify authors and also streamline the reviewer interface, the following information has been hidden:

- **Double Anonymous Reviewers** will no longer see responses to:
    - "Is this research supported by funding?"

    - "Do you or any of your co-authors have a conflict of interest to disclose?"
- **Single Anonymous Reviewers** retain access to this information to identify potential conflicts.
- For all peer review model types, all Submission Questions will be hidden from reviewers.

Appendix I: AI-Suggested Research Keywords to Support Custom Taxonomies

This feature supports journals with previously established custom taxonomies where author-selected terms are used to categorise content on Wiley Online Library.

In Submission, a 'Research Keywords' Submission Question enables authors to manually select terms relevant to their submission from established taxonomy lists (managed by the Wiley Content Enrichment team). This is a required submission question for journals that have previously developed custom taxonomies with the Wiley Content Enrichment Team. A maximum of 10 keywords can be selected at any point in the submission process (including at revision or if a manuscript is returned to draft by the editorial office).

In Review, Author-selected keywords chosen during submission will be displayed on the Manuscript Details page in the Author Declaration area under the title Author selected sections.

Requests for setup should be directed to a Wiley representative who will raise a JOCT ticket.

Appendix J: Dryad Data Deposit

Eligibility

Journals that are members of the Wiley-Dryad Partnership can enable a submission question asking authors if they want to deposit data with Dryad.

Author Experience

Once configured, authors submitting to a Wiley-Dryad Partnership journal on Research Exchange will:

- Be asked, as part of the Additional Information step, "Would you like to deposit your data with Dryad?"
- Be guided through providing a Data DOI and, where relevant, a reviewer sharing link if they choose to deposit (or confirm an existing deposit).
- Continue to be asked to complete the journal's standard Data Sharing question, so the journal's data sharing policy (mandates, encourages, or expects), and a Data Availability Statement is generated, regardless of the author's Dryad choice.
- Be allowed, if they wish, to bypass the statement generator and write their own Data Availability Statement using the free-text editor, though structured metadata won't be captured for downstream systems in that case.

Editor and Admin Experience

Once the manuscript is submitted and moves to the Review module, the DOI and DAS is visible to editors and assistants under the author declaration section on the Article Details page. Once a manuscript reaches a final decision (acceptance, rejection, or withdrawal), Research Exchange automatically sends an update to Dryad, so the dataset's status stays in sync without manual intervention.

Document History

Version	Date	Author	Updates	Status
1.0	08-May-2025	Editorial Learning Essentials	Initial document	Published
2.0	02-Jun-2025	Editorial Learning Essentials	Journal filter list, new email text for re-inviting reviewers, author-led manuscript linking, table of contents text box for decision-making editors,	Published
3.0	07-Jul-2025	Editorial Learning Essentials	Decision-making editors can upload a file with their decision	Published
4.0	21-Jul-2025	Editorial Learning Essentials	Re-ordering of appendices, message to author from Academic or Guest editors is automatically included in the decision letter template for the decision-making editor to edit or remove, if desired.	Published
5.0	01-Aug-2025	Editorial Learning Essentials	Updated terminology 'flag' to 'identify' in relation to automated COI alerts, new filtering and sorting options for suggested reviewers list, Triage and Lead Guest Editors can be reassigned to manuscripts, Screening tools are not available on version 2 onwards.	Published
6.0	18-Aug-2025	Editorial Learning Essentials	Update to conflict of interest appendix, ability to re-invite a declined reviewer, how to invite specialist reviewers	Published

7.0	01-Sep-2025	Editorial Learning Essentials	Transparent Peer Review supported, update to editor dashboard images and statuses, linking papers during peer review	Published
8.0	15-Sep-2025	Editorial Learning Essentials	Conversation tool for editors, reviewer suggestion ratings, new top keywords on reviewer profiles	Published
9.0	30-Sep-2025	Editorial Learning Essentials	Upon request, the 'Full Access' capability lets editors review and manage any manuscript submitted to the journals on whose editorial boards they serve.	Published
10.0	20-Oct-2025	Editorial Learning Essentials	Apply APC Discount Codes for Export to Price Proposal, changes to peer review logic, editors and admins can increase the number of required reviewer reports on a manuscript-by-manuscript basis.	Published
11.0	04-Nov-2025	Editorial Learning Essentials	User manages email notifications for conversation tool, update to the editor assignment list, Editorial Assistants and Journal Managers can rescind rejected manuscripts, editor dashboard filter updates.	Published
12.0	28-Nov-2025	Editorial Learning Essentials	Bi-directional linking of manuscripts, New UI updates to activity label, status label, and section headings, full access capability, transfers appendix	Published

13.0	02-Dec-2025	Editorial Learning Essentials	Manual assignment, Reviewer PDF appendix, changes to self-assignment rules	Published
14.0	19-Dec-2025	Editorial Learning Essentials	Clarifying manuscript information available to Reviewers after invitations are accepted, steps to reassign a Triage Editor at the post-peer review step, steps for recording editor out-of-office periods, steps to assign out-of-office editors, editors can re-invite or re-queue reviews from v1 of transferred EDR manuscripts, participants of the conversation tool can be viewed for each manuscript.	Published
15.0	21-Jan-2026	Editorial Learning Essentials	Editor workload logic changed to include all assignments, regardless of their stage, and pending invitations. New appendix on AI-suggested research keywords to support custom taxonomies, how to access and answer voluntary demographic questions.	Published
16.0	18-Feb-2026	Editorial Learning Essentials	Update to editor workload calculation logic, update to email reminders to make a decision logic, clarify that author comments in submissions are not anonymized, editors can change issue type at acceptance, rename 'Return to Academic or Guest Editor' decision, special issue filter.	Published
17.0	25-Feb-2026	Editorial Learning Essentials	Update information on dashboard search and filters to	Published

			accommodate the new unified dashboard for all Review roles.	
18.0	11-Mar-2026	Editorial Learning Essentials	Clarify who can reinvite or reassign editors during the Peer Review Step, Screening results and screener comments now visible on all versions of the manuscript, instructions to create a customized email signature, some conversation tagging abilities are available for the conversation tool. Added link to getting started page to update expertise keywords & areas of interest in CONNECT.	Published
19.0	09-Apr-2026	Editorial Learning Essentials	Research Exchange Review now flags potential conflicts of interest (COI) when a reviewer's name exactly matches the name of an author on the manuscript under consideration. Expanded Editor Selection for Pre-peer, Peer, and Post-peer Review Activities.	Published
20.0	22-Apr-2026	Editorial Learning Essentials	Reviewer opt-out preferences are shown on the reviewer tile when inviting a reviewer. Clarified that opt-out preferences apply across all journals, not just individual journals. APC waivers should not be requested after a manuscript has been accepted. Doing so can delay the application of the waiver and may result in authors receiving payment reminders during this period.Any changes that need to be made after an editor has accepted the manuscript, an email must be sent to cs-openaccess@wiley.com. In this	Published

			email, include all relevant information and select a reason for applying a waiver: invited by editor, contractually agreed, part of a special issue, or other. If "other", specify details and provide a code if available.	
21.0	13-May-2025	Editorial Learning Essentials	New editorial review process sidepanel available on article details panel. Update to reviewer queue logic. Editors can now streamline their workflow by pre-assigning themselves to subsequent activities on three-tier workflows. Clarification on which journals will and will not appear in EDR networks.	Published
22.0	26-May-2026	Editorial Learning Essentials	Clarification on what reviewers can see after a final decision and update to COI assignment logic.	Published
23.0	16-Jun-2026	Editorial Learning Essentials	Removed the section on updating Research Exchange account keywords, added guidance on managing editor notification settings, and clarified that author search is available to all dashboard users, editors can view author AI disclosure statements from the article details page.	Published
24.0	30-Jun-2026	Editorial Learning Essentials	Reviewers can opt out of review invitations from individual journals, and reviewer recognition is only submitted after a decision has been made and the editor has selected their report for use.	Published

25.0	31-Jul-2026	Editorial Learning Essentials	Reviewer profile tiles now show their workload data. Accepted invitations transitioning to status 'Overdue' are no longer triggering automatic invitations by the reviewer queue. New Keywords filter allowing editors to filter manuscripts by selected keywords. Added new option for editors, editorial assistants, and journal managers to download the dashboard view as a CSV file.	Published
26.0	19-Aug-2026	Editorial Learning Essentials	Message to Author from the Handling Editor is only required for Reject recommendation. Information on Dryad data deposit integration into Research Exchange.	Published
27.0	02-Sep-2026	Editorial Learning Essentials	Accepted review invitations can now be revoked.	Published
28.0	16-Sep-2026	Editorial Learning Essentials	Published status removed and replaced with "Accepted: Awaiting Checks" and "Accepted: Exported". Editors assigned to a manuscript, Editors with Full Access capability, Editorial Assistants, and Journal Managers can now send ad hoc emails to authors, reviewers, and other editors directly from the Review module. Editors assigned to the Peer Review step on regular issue manuscripts can rate a reviewer's contribution in the Review Report section.	Published