

## TICKLERS and REMINDERS and the new AUTOMATED SEND FUNCTION in JBO 3.8 (12/4/2006)

As you know, your editorial office has 2 reminder letters to send to each assigned reviewer: the first reminder is called a “tickler” and the second is called a “reminder” (canned text may differ for each per AE letter customizations). **The number of reminders available to you has not changed. This new utility is simply a tool to help your office *automate* the time you choose to send out each of these 2 types of reminders.** You are offered essentially a *menu* of options for when to send these canned messages – **it is not intended for your office to send/resend the same letter at all the instances displayed.**

In JBO, as you know, the tickler and reminder go out only once. This rule continues, meaning that the automation utility allows you to choose: **one** automation choice for the tickler letter and **one** automation option for the reminder letter. Here are the options (1a~1f are for ticklers, 2a~2d are for reminders):

- 1A) Send **tickler** X days **after assignment**.
- 1B) Send **tickler** X days **after assignment** - only if the reviewer has agreed.

- 1C) Send **tickler** X days **before due date**
- 1D) Send **tickler** X days **before due date** - only if the reviewer has agreed.

- 1E) Send **tickler** X days **after due date**.
- 1F) Send **tickler** X days **after due date** - only if the reviewer has agreed.

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- 2A) Send **reminder** X days **after assignment**.
  - 2B) Send **reminder** X days **after assignment** - only if the reviewer has agreed.

- 2C) Send **reminder** X days **after due date**.
- 2D) Send **reminder** X days **after due date** - only if the reviewer has agreed.

### Why are there so many options?

This is done to give your office flexibility in when to auto-send your letters. Some offices may prefer to send letters based on due date, while others prefer to send based on number of days after the request was sent (i.e., assignment). Further, some offices wish to send their tickler or reminders *only* to accepting reviewers, while others do not. **It is not intended for your office to send/resend your letter at all the instances available, merely to give you multiple options for automating your letter sends.**

### What is the difference between A & B (and C&D, and E&F)?

Within the question of *when* to send the letter is the specification of *who* will receive the letter at the specified time: either (A) *all* requested reviewers who are not yet marked as declined, or (B) narrowed to *only* reviewers who have accepted your invitation to review – skipping the non-responders (and the same for C vs. D, or E vs. F).

### Does this automated function send different tickers/reminders to the accepting vs. non-responding reviewers?

Yes. You have a tickler for responding and non-responding reviewers, and a reminder letter for responding vs. non-responding reviewers –with text tailored to the specific AE. If you choose options with the “only if the reviewer has agreed” codicil, JBO will determine which letter to go to each reviewer – depending on whether they have accepted the review request or not responded yet.

### **How should I use this utility?**

Your office must decide which options work best for you. However, as an example, an office could be set to have:

- ticklers sent – to *all requested reviewers*, [20] days before the review is due (option 1c) *AND*
- reminders sent – to *accepting reviewers only*, once the review is [5] days overdue (option 2b)

### **What happens if I choose more than one tickler (or reminder) send option?**

It all depends on the existence of a saved “sent” date for that tickler/reminder for each reviewer. JBO’s new automated function checks for an existing “sent” date for each reviewer before sending any letters; this means that if you select multiple ticklers to go out via this automated function, JBO will check for a send date each time – as long as no date is found, it will send the specified letter. However if a “sent” date *is* found, JBO will *ignore* subsequent auto-sends.

### **How does the automation affect whether I can send letters manually?**

If you choose to send the letter manually *before* the automated letter goes out, you will be able to send the letter manually as you do now – via the Overdue/Pending Report. However, if the automated letter-send has already occurred, a date sent will appear in the Overdue/Pending report, and the manual option will not be possible unless you roll back the date the tickler or reminder was sent (see next question).

### **Is there any way for me to send out ticklers (and or reminders) more than once?**

Yes. This can be done via the “Modify Assigned Reviewer Info” menu option in the manuscript detail menu. An editable date field for the tickler and reminder letters is displayed here. If you remove this date (submit the screen with that field blank), JBO will act as if that letter had not yet been sent – meaning that the letter can be sent again.