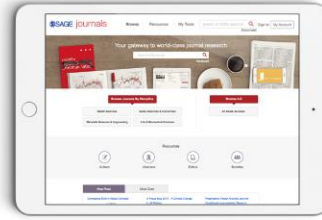
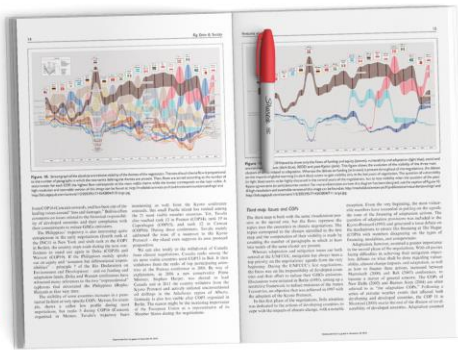


SAGE Read and Publish Switzerland agreement 2021-2022

Open Access Portal in Use



Contents of this Slide Deck:

1. What is included in the Switzerland/SAGE Read and Publish agreement?
2. What is SAGE's Open Access Portal?
3. How are Eligible Articles Identified
4. The Pre-Approve Workflow for institutions
5. The Author workflow
6. CBP (institutional) Dashboards and reports and APC payment

1: What is included in the Switzerland agreement?

- Unlimited OA publishing in more than 900 Hybrid titles*, with no APC payable
- A 20% discount on list rate APCs in Gold Open Access Journals
- Option of a CC-BY, CC-BY-NC (or CC-BY-NC-ND) license, chosen by the Author
- Read access rights to the journals your institutions subscribes to

*Publishing rights apply where:

- The corresponding author is a staff member or student of a member institution, at the time of submission
- The article enters production (post acceptance) between the 1st of January 2021 and 31st of December 2022 and while the institution subscribes to their respective package
- The journal is part of the Premier collection
- The article is "Article type" (some commercially sponsored articles, invited articles, book reviews and other content types are excluded)
- Authors accept the offer within 2 weeks of being contacted.

2: What is SAGE's Open Access Portal?

The **SAGE Open Access Portal** is an integrated online platform that provides a single portal for authors, consortia, libraries and funders to manage open access publishing across more than 1000 journals published by SAGE including titles published on behalf of, or in association with, over 400 societies. Launched in 2020, the SAGE Open Access Portal supports SAGE Choice, our hybrid OA publishing option, for 800+ journals and SAGE's 180+ pure Gold Open Access journals.

2: What is SAGE's Open Access Portal?

For Authors it will:

- Automatically identify and contact all authors who are eligible for the Switzerland Open Access Agreement with SAGE
- Provide the appropriate Creative Commons license which they, or any co-author, can digitally sign, quickly and easily.
- For Gold OA Journal Articles: Provide a fully integrated online payment system to manage the APC transaction process, including automatically applying any applicable discounts, waivers or taxes.
- Send automated reminders and updates on any activities relating to their article(s) in the portal.
- Create a personal login account within the portal from which to view and track the open access status of any article(s) on which they are an author or co-author.

2: What is SAGE's Open Access Portal?

For Institutions it will:

- Automate the terms of the Switzerland Read and Publish agreement in a single uniform workflow.
- Automatically identify all eligible articles/authors to which to offer the Switzerland agreement publishing rights to; maximizing the uptake of their Open Access Agreement
- Communicate the Swiss agreed preference for Open Access publishing with their authors.
- Enable Centralized Bill Payer accounts to be set up through which institutions can pre-approve OA offers and to accept or decline to pay Gold OA APCs associated with authors at their institution or organization centrally.
- Provide reporting through various administrative dashboard views and downloadable report functions.

3: How are Eligible articles identified?

These next 3 slides take you through how a Corresponding Author declares their affiliation during submission, which we later use to decide automatically if a paper is eligible:

3: How are eligible articles identified?

Submission and Peer Review (ScholarOne): Author inputs institution (Ringgold ID)

- The options authors are shown populate as they type, similar to a google search.
- This helps them correctly set their affiliation.
- The full list is provided to SAGE by Ringgold

The screenshot shows the 'Create New Author' form in ScholarOne. The form includes fields for 'Last (Family) Name', 'Institution 1', 'Institution Number', 'Institution', 'Department', 'Country / Region', 'State/Province', and 'City'. The 'Institution' field is currently set to 'University of Basel', and a dropdown menu is open, displaying a list of institutions. The dropdown menu includes the following options:

- University of Basel
- Basel, Basel-Stadt, CH, academic
- University of Basel Faculty of Arts History and Humanities
- Basel, BS, CH, academic/gen
- University of Basel Programme of Science Research
- Basel, BS, CH, academic/gen
- University of Basilicata
- Potenza, Basilicata, IT, academic
- University of Basel Faculty of Medicine
- Basel, BS, CH, academic/medsch
- University of Basel Department of Environmental Sciences

The form also features a 'Quick Fill' button and an 'Edit' link for each field. The background of the form is dark grey, and the text is white. The 'SCHOLARONE' logo is visible in the bottom left corner, and the 'Clarivate Analytics' logo is in the bottom right corner.

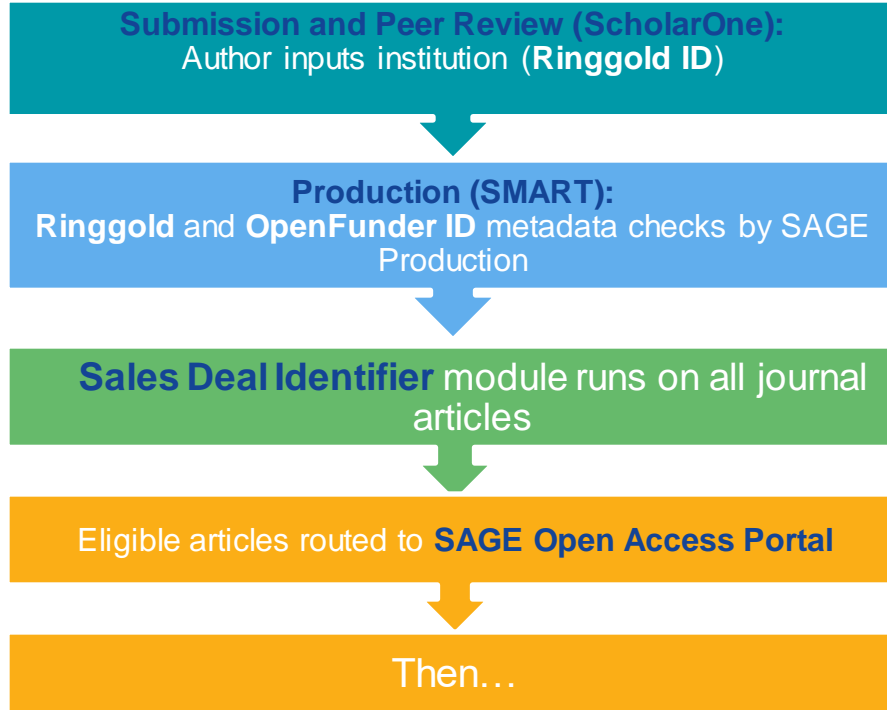
3: How are eligible articles identified?

Submission and Peer Review (ScholarOne): Author inputs institution (Ringgold ID)

- An Author can enter an affiliation not on the list, but they are warned why this might not be advisable and have to do so proactively
- If an author doesn't choose a match, we attempt to match them to an affiliation using their e-mail domain

The screenshot shows a web form titled "Create New Author" with several input fields: "Last (Family) Name:", "Institution 1" (with a "Quick Fill" dropdown and "Edit" link), "Institution Number:", "Institution:" (with an "Edit" link), "Department:", "Country / Region:", "State/Province:", and "City:". A warning message is displayed in a red-bordered box over the form, stating: "mc.manuscriptcentral.com says Your selected institution was manually entered and not connected to Ringgold. To connect your institution to Ringgold select the institution from the dropdown of institutions provided as you type. Why is this important? Ringgold IDs are used by Publishers to determine if your institutional affiliation entitles you to a discount for APCs. Allows organizations to easily identify your institution from others that use similar names." An "OK" button is located at the bottom right of the warning box. Below the form, a dropdown menu is visible with the following options: "University of Basilicata Potenza, Basilicata, IT, academic", "University of Basel Faculty of Medicine Basel, BS, CH, academic/medsch", and "University of Basel Department of Environmental Sciences". The footer of the page includes "SCHOLARONE™" and "Clarivate Analytics".

3: How are eligible articles identified?



The next step happens post acceptance, when the article moves from editorial systems into production.....

All articles **automatically, proactively** checked against the Switzerland Agreement parameters:

- Journal package list
- Contract dates
- Corresponding author Ringgold ID
- Article type

4a: Pre-Approve Workflow - Hybrid

These next 2 slides take you through how a hybrid identified article is presented to the University to approve or reject, in the Pre-Approve workflow. This happens before an offer of OA is made to the Authors.

4a: Pre-Approval - Hybrid

[Assess article now](#)

Dear University of Basel ,

The following article has been matched to your Centralised Billing Payer profile for pre-approval assessment:

- Switzerland Demo Article Hybrid
- 10.1177/2050313116971172
- Advances in Structural Engineering

Please thoroughly check the article, APC and author details in order to make your eligibility and funding decisions. The authors will only be contacted after you have logged your decision.

[Assess article](#)



Administrator clicks here

Please **log your decision by Tuesday 23 February 2021** so that the article can be processed using the correct publishing route. The article will be processed as a subscription article up until the time we receive the open access license confirmation from one of the authors later in this workflow. Delays may result in the article being published subscription first.

View all your actions via your [SOAP Centralised Bill Payer Dashboard](#)

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

- Administrators (there can be multiple admins) are contacted by email to alert them that an article is ready to be reviewed
- There is a 5 day deadline for completing this step

4a: Pre-Approval - Hybrid



Welcome to SAGE's Open Access Portal

This article's metadata has been matched to your Centralised Bill Payer profile.

The corresponding author [redacted] has declared that they are affiliated with Universitat Basel.

Pricing Details	Price (GBP)
Open access article processing charge	2,200.00
Institutional discount (100.00%)	-2,200.00
Total	0.00

SAGE has matched the author-declared metadata with the criteria of your institution arrangement and determined that the article is eligible to be made open access.

Do you agree that this article is eligible for your institution arrangement ?

- Yes, the article is eligible
- No, the article is not eligible
- I don't know

Decision Note

Enter decision note here

This comment will appear in your Dashboard report

CONFIRM

SAGE choice

Article Details

Article
Switzerland Demo Article Hybrid

Article Type
Article

DOI
10.1177/2050313116971172

Journal
Advances in Structural Engineering

Journal Type
Hybrid

Authors [Collapse All](#)

Universtat Basel
Switzerland

License Details

Peer Review Submission Date
15 January 2020

Peer Review Acceptance Date
09 March 2020

The administrator is given the article details and is asked whether to accept or reject the article.

Article details here

Administrator decision here

Administrator notes here (will be communicated to the Authors)

For Hybrid articles the APC will be shown as Zero. If the Administrator Accepts, then the offer will be made to the Authors. If they reject, then no OA offer will be made, and the workflow ends here.

4b: Pre-Approve Workflow - Gold

These next 2 slides take you through how a gold identified article is presented to the University to approve or reject, in the Pre-Approve workflow. This happens before an the author is contacted to complete the OA steps.

4b: Pre-Approval - Gold

[Assess article now](#)

Dear University of Basel ,

The following article has been matched to your Centralized Billing Payer profile for pre-approval assessment:

- Switzerland Demo Article Gold
- 10.1177/2050313116881173
- Trends in Hearing

Please thoroughly check the article, APC and author details in order to make your eligibility and funding decisions. The authors will only be contacted after you have logged your decision.

Assess article



Administrator clicks here

Please **log your decision by Tuesday 23 February 2021** so that the article can be published without delay.

View all your actions via your [Centralized Bill Payer Dashboard](#)

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

- Administrators (there can be multiple admins) are contacted by email to alert them that an article is ready to be reviewed
- There is a 5 day deadline for completing this step

4: Pre-Approval - Gold

SAGE openaccess | STG

1 Approve Article

2 Author Process

3 Confirm Billing

4 Preview Invoice

5 Make Payment

Welcome to SAGE's Open Access Portal

Following the criteria of your institution agreement, this article has been identified by SAGE as eligible to be made open access.

This article's metadata has been matched to your Centralised Bill Payer profile.

The corresponding author (xxxxx@xxxxx) has declared that they are affiliated with Universitat Basel.

Please make a thorough assessment of the article and author details and price to make your decision.

Pricing Details	Price (GBP)
Open access article processing charge	1,110.00
Institutional discount (20.00%)	-222.00
Subtotal	888.00
Tax (0%) (Tax is calculated based on your account's billing address)	0.00
Total	888.00

Will you take responsibility for paying the article processing charge for this article?

- Yes, I will be the bill payer
- No, I will not be the bill payer
- This article is not eligible for your institution arrangement

Administrator decision here

Decision Note

Enter decision note here

Administrator notes here (will be communicated to the Authors)

continue

in Hearing

Article details here

Article Details

Article

Switzerland Demo Article Gold

Article Type

Article

DOI

10.1177/2050313116681173

Journal

Trends in Hearing

Journal Type

Gold

Authors

Corresponding author

Universitat Basel

Switzerland

xxxxx@xxxxx

xxxxx@xxxxx

Robinson

xxxxx@xxxxx

Funders

License Details

Peer Review Submission Date

15 January 2020

Peer Review Acceptance Date

09 March 2020

Publication Status

Not published subscription

- The administrator is given the article details and is asked whether to accept or reject the article.

- For Gold OA article with a payable APC, the Administrator will be given 3 options and the Authors will be informed of the decision:

- "Yes, the article is eligible and I will be the bill-payer"
- "Yes, the article is eligible but I won't be the bill payer"
- No, the article is not eligible"

5a: Author Workflow - Hybrid

These next 7 slides take you through how an Author is offered the Open Access publishing for a hybrid article, and the steps they take in the system.

5a: Author Workflow Hybrid

Open Access Offer Email sent to corresponding author with all authors copied

[Choose open access](#) for your article

Dear ~~xxxxxx~~ ~~xxxxxx~~,

Congratulations on the acceptance of your paper *Switzerland Demo Article Hybrid* (DOI: 10.1177/2050313116871371/ ID: ASE-PR20.R1).

Open access publication for your paper in **Advances in Structural Engineering** has been requested by your institution. The Consortium of Swiss Academic Libraries has an agreement with SAGE Publishing that allows you to publish your article Open Access at no additional cost. Your institution recommends to publish the article Open Access.

Select your publishing route



Author clicks here

No payment by you is required to make your article open access. Just select the open access publishing option via the button above to sign the open access license. This offer expires on Thursday 04 March 2021. After this date, you may not be able to make your article open access for free.

Benefits of open access:

- free to read – no subscription required
- gain high visibility and global exposure to a multidisciplinary audience
- a route to be compliant with funder and institution open access mandates

[Visit SAGE's Open Access Portal](#) to learn more and choose your publishing route.

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

5a: Author Workflow Hybrid

The user is then taken to the Online portal:

SAGE openaccess STG



Welcome to SAGE's Open Access Portal

Here you can choose to make your article open access and select your open access license.

Choosing open access will mean that your article can be read in the journal by anyone anywhere in the world without restriction. This may increase the number of readers of your article. It may also encourage collaboration and faster development in your field of research.

Open access for your article has been requested by
your institution

The Consortium of Swiss Academic Libraries has an agreement with SAGE Publishing that allows you to publish your article Open Access at no additional cost. Your institution recommends to publish the article Open Access

Pricing Details	
Open access article processing charge	2,200.00
Institutional discount (100.00%)	-2,200.00
Total	0.00

Price (GBP)
2,200.00
-2,200.00
0.00

No payment is required to make your article open access. There will be no charge to you.

Would you like to make your article open access?

- Yes, make my article open access
- No, publish my article subscription

Author choses OA publishing (or rejects)

SAGE choice

Article Details

Article
Switzerland Demo Article Hybrid

DOI
10.1177/2050313116871371

Journal
Advances in Structural Engineering

Journal Type
Hybrid

Authors [Expand All](#)

Corresponding author

Pricing and discount shown here to make it clear that hybrid articles are free.

5a: Author Workflow Hybrid

Declining Open Access Offer

Would you like to make your article open access?

- Yes, make my article open access
- No, publish my article subscription



Reason

Author Name

Example@Example.com

Email

example@organization.co.uk

The reason I have declined open access for my article is:*

Enter Reason

175 remaining

**Your comments will be shared with the person or organization named above who requested open access for your article.*

CONFIRM

If they do reject
OA, they are
required to give a
reason

5a: Author Workflow Hybrid

SOAP: Register/Log in



Now, the
transacting
Author confirms
their identity

- Any author can take action
- Select name from the dropdown
- Register account with email address in article metadata
- SAGE must know who is signing the license



Let us know who you are

Only one of the named authors of the article may complete the next step: copyright and open access license selection.

Please select your name from the author dropdown to log in or register for an account.

Author Selection

Author

Select Author

Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac | Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows; compatibility view is not supported | Safari: 12 to 13 - Mac OS

5a: Author Workflow Hybrid

Open Access License Selection





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Author choses OA license type

Now, the transacting Author chooses the CC-BY license type.

- Swiss Authors will be offered a choice of CC-BY or CC-BY-NC here by default
- If they have declared a funder that requires a specific license (e.g. Wellcome funded articles) only the required license will be offered (e.g. CC-BY).
- Author may contact the customer service team (openaccess@sagepub.com) if they require a license option not presented

5a: Author Workflow Hybrid

Copyright confirmation



Who owns the copyright of your Contribution?

- The copyright to the Contribution is owned by you
You represent and warrant that the copyright to the Contribution is yours.
- U.S. Government work ⓘ
You are employees of the United States Government and prepared the Contribution as part of your official duties.
- Other Government department work (not U.S.) ⓘ
You are employees of the Government of the country indicated in the box provided and prepared the Contribution as part of your official duties.
- Work made for hire for employer/Work done in the course of employment (non-government)
The Contribution was prepared by you at the direction of your employer and within the scope of your employment and copyright in the Contribution is owned by your employer.
- More than one of the options above applies

Author choses Copyright status

The transacting Author declares the copyright status and signs the agreement digitally

Terms & Signature

- I have read and accept the [Terms of the Agreement](#)
- I warrant that I am one of the named authors of the Contribution and that I am authorized to sign this Agreement; in the case of a multi-authored Contribution, I am authorized to sign on behalf of all other authors of the Contribution.

Signing Author : [redacted]

SIGN AGREEMENT


Author Signs the agreement

5a: Author Workflow Hybrid

Order confirmation

Open access license information for your paper

Dear Authors,

 has selected the following open access Creative Commons license for your article, on behalf of any co-authors: [Creative Commons Attribution license \(CC BY 4.0\)](#)

- Switzerland Demo Article Hybrid
- 10.1177/2050313116871371
- Advances in Structural Engineering

Attached is the full license and the terms of the agreement for your reference. It also specifies how your article may be reused.

Your paper will be published open access by SAGE in **Advances in Structural Engineering** under the terms of this signed agreement soon.

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

SAGE Offices:

Los Angeles: 2455 Teller Rd Thousand Oaks, CA 91320, USA

London: 1 Oliver's Yard, 55 City Road, London, EC1Y 1SP, UK. Registration No. 1017514

New Delhi: B-1/I-1, Mohan Cooperative Industrial Estate, Mathura Road, Post Bag 7, New Delhi 110 044, India

Singapore: 18 Cross Street #10-10/11/12, China Square Central, Singapore 048423

Washington, DC: 2600 Virginia Avenue NW, Suite 600, Washington, DC, 20037, USA

Melbourne: Level 20, 114 William Street Melbourne, VIC 3000, Australia

[About SAGE](#)
[Privacy policy](#)

WF4 EA14

All Authors on the paper are notified of the choice by email.

For Hybrid OA, articles are free, so this is the end of the process.

5b: Author Workflow - Gold

These next 7 slides take you through how an Author is offered the Open Access publishing for a Gold OA article, and the steps they take in the system when the Institution (CBP) has agreed to be the bill payer. If the institution has not agreed to be the bill payer, the author will be presented with the APC information and will need to arrange for payment instead of the institution.

5b: Author Workflow Gold

License selection email

[Complete the Open Access process](#) for your article now

Dear **[Name]**,

Congratulations on the acceptance of your paper *Switzerland Demo Article Gold* (DOI: 10.1177/2050313117871172/ ID: TIA-PR20.R1).

Trends in Hearing is a Gold Open Access journal, in which all papers are made freely available and published with an Open Access license. In order to proceed with the publication of your article, you need to select the appropriate OA license type.

Select your license



Author clicks here

No payment by you is required to make your article open access. Just select the button above to sign the open access license.

[Visit SAGE's Open Access Portal](#) to learn more and choose your license.

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

5b: Author Workflow Gold

The user is then taken to the online portal:

SAGE openaccess STG

1 Payment Arranged 2 **Open Access Summary** 3 Register/Log In 4 License Selection

Welcome to SAGE's Open Access Portal
Your article has been accepted for publication in Trends in Hearing. In order to proceed with publication, select your open access license.

University of Basel has already agreed to pay the article processing charge to make your article open access.
There is no charge to you to make your article open access.

[CONTINUE](#)

Author clicks here

TRENDS in Hearing

Article Details

Article
Switzerland Demo Article Gold

DOI
10.1177/2050313117871172

Journal
Trends in Hearing

Journal Type
Gold

Authors [Expand All](#)

Marionette Chikwara +
Corresponding author
[Name] +

- In the preapprove workflow, the institution will have already accepted or rejected the article.
- If they have accepted the article and agreed to pay the APC, this confirmation screen will appear to the author to confirm they will not be charged the APC amount.

5b: Author Workflow Gold

SOAP: Register/Log in

SAGE openaccess STG



Now, the author confirms their identity

- Any author can take action
- Select name from the dropdown
- Register account with email address in article metadata
- SAGE must know who is signing the license

Let us know who you are

Only one of the named authors of the article may complete the next step: copyright and open access license selection.

Please select your name from the author dropdown to log in or register for an account.

Author Selection

Author

Select Author

Select Author

Select Author

Select Author

Select Author

Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac |
Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows;
compatibility view is not supported | Safari: 12 to 13 - Mac OS

5b: Author Workflow Gold

Open Access License Selection





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- U.S. Government work
You are employees of the United States Government and prepared the Contribution as part of your official duties.
- Other Government department work (not U.S.)
You are employees of the Government of the country indicated in the box provided and prepared the Contribution as part of your official duties.
- Work made for hire for employer/Work done in the course of employment (non-government)
The Contribution was prepared by you at the direction of your employer and within the scope of your employment and copyright in the Contribution is owned by your employer.
- More than one of the options above applies

Terms & Signature

- I have read and accept the [Terms of the Agreement](#)
- I warrant that I am one of the named authors of the Contribution and that I am authorized to sign this Agreement; in the case of a multi-authored Contribution, I am authorized to sign on behalf of all other authors of the Contribution.

Signing Author:

SIGN AGREEMENT

Article Details



Article
Switzerland Demo Article Gold

DOI
10.1177/2050313117821173

Trends in Hearing

Journal Type
Gold

Authors
Exo...

through 
Corresponding author


Author choses OA license type

Author choses Copyright status

Author Signs the agreement

Now, the author chooses the CC-BY license type.

- Swiss Authors will be offered a choice of CC-BY or CC-BY-NC here by default
- If they have declared a funder that requires a specific license only the required license will be offered (e.g. CC-BY).
- Author may contact the customer service team (openaccess@sagepub.com) if they require a license option not presented

The author declares the copyright status and signs the agreement digitally

5b: Author Workflow Gold

Awaiting bill payer payment notification

Awaiting bill payer payment

University of Basel has been asked to make payment of the article processing charge (APC) now.

Once they have processed the payment, you will be sent the order confirmation and your article will be published open access.

[GO TO DASHBOARD](#)

[LOG OUT](#)

Once the author has signed the license, the institution/bill payer will be notified and asked to proceed with the payment.



Article Details

Article

Switzerland Demo Article Gold

DOI

10.1177/2050313117871172

Journal

Trends in Hearing

Journal Type

Gold

Authors

[Expand All](#)

[View Profile](#)

Corresponding author



[View Profile](#)



5b: Author Workflow Gold

bill payer notification

Next step: [Complete payment process](#)

Dear University of Basel ,

Recently, you agreed to be the bill payer for the article processing charge (APC) for the paper below. The author has now signed the Creative Commons license form. Next, please complete the payment process as soon as possible.

- Switzerland Demo Article Gold
- 10.1177/2050313116881173
- **Trends in Hearing** published by SAGE Publishing

[Complete payment process](#)



Bill payer clicks here

Production work on the paper will not start until you have completed the transaction. If you are having difficulty completing the transaction, please contact us so that we can assist you.

View all your actions via your [Centralised Bill Payer Dashboard](#)

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

The bill payer/institution is notified by email and asked to complete the payment process.

5b: Author Workflow Gold

The user is then taken to the Online portal:



Let us know who you are

Bill Payer Log in

Email

Password

[Forgotten Password](#)

Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac |
Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows;
compatibility view is not supported | Safari: 12 to 13 - Mac OS

LOG IN

Select name from
the dropdown and
log in.

5b: Author Workflow Gold

enter billing details

SAGE openaccess STG Welcome [User]

1 Approve Article 2 Author Process 3 **Confirm Billing** 4 Preview Invoice 5 Make Payment 6 Order Confirmation

Approved article ready for payment
Article approved on 18 Feb 2021 by [User]

Pricing Details	Price (GBP)
Open access article processing charge	1,110.00
Institutional discount (20.00%)	-222.00
Subtotal	888.00
Tax (0%) (Tax is calculated based on your account's billing address)	0.00
Total	888.00

[Depth Pricing Guide](#)

Please select one of the following payment options

- Aggregated Payment Schedule
New invoice cycle: 28 February 2021
- Invoice/Credit Card

Billing Address
(If changes are made, tax will be re-calculated on the Preview Invoice page)

Open Access Administrator
CBP7@sagepub.com
University of Basel / Kollegienhaus
Petersplatz
1
Basel
4051
Switzerland
41 0911770202

Billing Details

Purchase Order Number

VAT ID

Note to appear on invoice

75 remaining

Article Details

Article
Switzerland Demo Article Gold

Article Type
Article

DOI
10.1177/2050313116881173

Journal
Trends in Hearing

Journal Type
Gold

Authors

Corresponding author
Universitat Basel
Switzerland
[Email: \[User\]](#)

Declared Funders
None

Article received submission date
15 January 2020

Peer Review Acceptance Date
09 March 2020

Publication Status
Not published subscription

PREVIEW INVOICE

Bill payer selects payment option

Bill payer fills in billing details

Bill payer clicks here to preview invoice

The bill payer will select their payment option from those available to them.

Bill payer can enter their purchase order number, VAT ID and invoice note if applicable.

5b: Author Workflow Gold

preview invoice

SAGE openaccess STG

1 Approve Article

2 Author Process

3 Confirm Billing

4 Preview Invoice

5 Make Payment

Please check the details on the invoice preview below and select your payment method



SAGE Publications Ltd
1 Oliver's Yard, 55 City Road
London EC1Y 1SP, UK
UK VAT No: 232 855 176

Invoice No. _____
Invoice Date _____
Payment Due By _____
Customer Account No. 02P503049

Article Details

Title: Saltwater Demo Article Gold
DOI: 10.1177/0265231318881173
Publication: Emerald in Planning (25/7)
License: CC BY 4.0
Year Review Submission Date: 15 January 2020
Year Review Acceptance Date: 09 March 2020

Bill to:
Open Access Administrator
University of Basel / Kollegienhaus
Postfach 3
Basel
4001, Switzerland
02975@unibas.ch
(+41 60211) 9202
VAT No: 1234
Payee Invoice Note

Order Details

Open Access Article Processing Charge
Institutional discount (20.00%)
Subtotal
UK VAT (0%)
Total Amount (excludes VAT)

Price (GBP)

1,110.00
-222.00
888.00
0.00
888.00

Authors' corresponding author

University of Basel
Ludwig-Maximilians-Universität München

Author Affiliation

University of Basel
Ludwig-Maximilians-Universität München

ORCID

456789
None declared

Open Funder Name

None declared

The user will read the “payment terms and conditions” and will have the option to edit their billing details if necessary.

Before proceeding to the payment, the user will see a preview invoice.

They will choose to either “pay by credit card” or to send a final invoice.

I have read and agree to the [Payment Terms and Conditions](#)

EDIT BILLING DETAILS

Bill payer agrees to terms and conditions

Select payment method

PAY BY CREDIT CARD

SEND FINAL INVOICE

5b: Author Workflow Gold

author payment confirmation email

Open access transaction complete

Dear ██████████,

I am pleased to inform you that University of Basel has completed the transaction of the article processing charge for your paper.

- Switzerland Demo Article Gold
- 10.1177/2050313116881173
- Trends in Hearing
- CC BY 4.0

SAGE can now work to produce your paper and publish it open access. If you or your co-authors are contacted by the SAGE production team, please ensure that you respond to any queries promptly.

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

Once the bill payer has paid the APC, the author will receive a payment confirmation email.

6: CBP dashboards, billing and reporting

These next 3 slides take you through the CBP (institutional) dashboard, showing actions needed, reporting available, billing options (for Gold OA articles) and article status.

6: CBP (institutional) Dashboard

Invoice payment overdue: 2640.00 GBP

Actions overdue: 5

Dashboard
Articles awaiting approval
Articles awaiting payment assignment
Invoices awaiting payment
Recent actions
Aggregated billing (Next invoice)
Reports

<p>Articles awaiting approval</p> <p>8</p>	<p>Articles awaiting payment assignment</p> <p>1</p>
<p>Invoice awaiting payment</p> <p>0</p> <p>Outstanding: 0.00 GBP</p>	<p>Recent actions</p> <p>Review recent activities</p>
<p>Aggregated billing</p> <p>Outstanding balance: 2640.00 GBP</p> <p>Next invoice: 28 Feb 2021</p>	

For invoice or payment queries, please contact SAGE OA Accounts Receivable: DAAR@sagepub.co.uk
If you have any other queries, please contact SAGE OA Customer Service: openaccess@sagepub.com

This is the home screen for Institutional administrators.

From here, institutions can monitor articles awaiting approval, assign payment methods to APCs and manage their prepaid or aggregate billing. They can also download reports.

- For the Pre-Approve workflow, this will show all articles including hybrid OA approval requests

How to Get Help

SAGE have a dedicated open access customer service team, you can contact them via openaccess@sagepub.com

For Centralised Bill Payer profile set up requests or changes, please contact OA.operations@sagepub.co.uk