



Taylor & Francis Group
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Taylor & Francis Author Workflow & Research Dashboard



Key Features of the Workflow

For the Library

- Individual Research Dashboard accounts to approve article eligibility under the agreement
- Libraries have full control over which articles to approve
- Real time self service reporting
- Reduces administration around OA - no individual invoices for APCs under the agreement
- Dedicated workflow contacts at T&F

For the Researcher

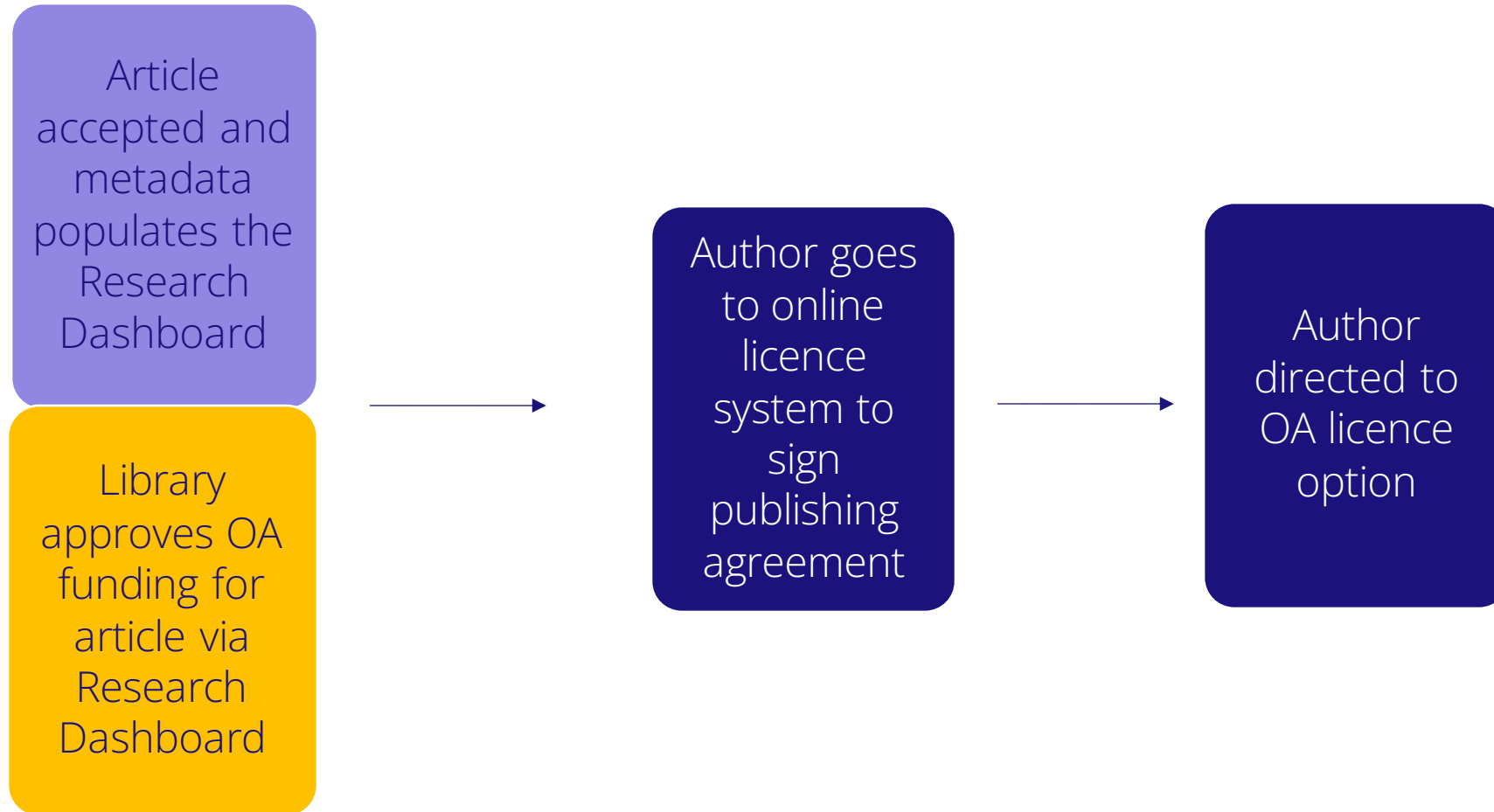
- Affiliation based workflow: matching engine identifies eligibility
- Clear messaging at each stage of the process to alert them to the agreement in place
- Communication to confirm funding approval
- Choice of Creative Commons licence
- Core content article types eligible (original research)

Workflow for an Open Select Article at Taylor & Francis



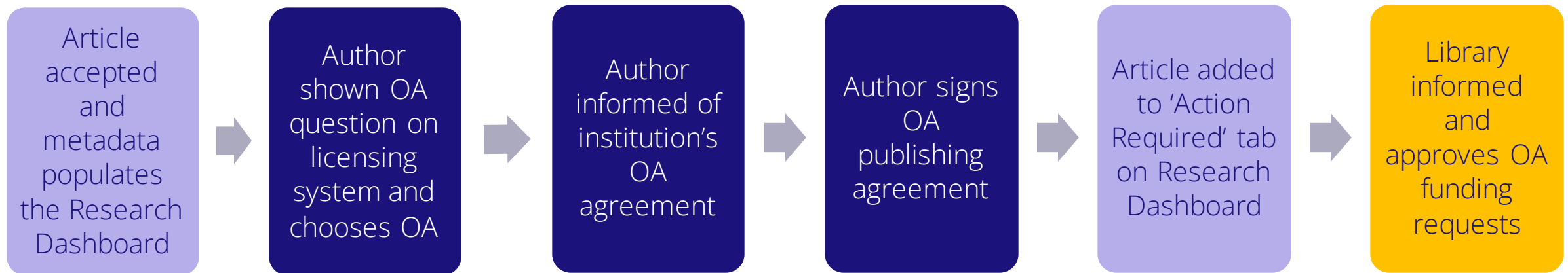
From Article Acceptance: 2
different workflows, depending on how
quickly the library and author take
action

1. Library approval for OA funding via Dashboard *before* author has signed publishing agreement



The default workflow

2. Author signs publishing agreement and chooses OA before library approves for OA funding via Dashboard





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Default Workflow

The Library approves an article for OA funding before the author signs the Author Publishing Agreement



Send To: Author Email

Subject: Your article with Taylor & Francis

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

Congratulations on the recent acceptance of your manuscript submission to *Journal Title*. The Taylor & Francis production team will work with you to publish your article online as quickly as possible.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article open access. We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

Look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

Email to author on acceptance, alerting them to OA agreement

The email text can be customized

Library approves
the author for
OA funding

Running Total

Accepted Articles

Submitted Articles

Action Required Articles

Approved Articles

Declined Articles

Durham university

Accepted Articles

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

COLLAPSE ALL

test

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
Chelsey Horstmann Dennis	Advances in Physics: X	Reviews	Open Access	\$855.00	✓ Approved

Author Email chelsey.horstmandennis@tandf.co.uk
Organization name Durham University_1
Submission Date Not Available
Orcid

DOI 10.1080/21622671.2017.1948390
Research Funder Not Available
Acceptance Date Not Available

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	Approve Decline

Author Email vinay.c.cp@informa.com
Organization name Durham University_1
Submission Date Not Available
Orcid

DOI 346434334664
Research Funder Not Available
Acceptance Date Not Available

Contact Us

Approved Article Email to Author

Send To: Author Email

Subject: Gold Open Access funding approval for your article

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

We recently emailed you to let you know that your institution has an open access agreement with Taylor & Francis. We're pleased to let you know that your library has approved Gold Open Access funding for your article through their Research Dashboard.

This means that your article will be published open access; it will be available online for anyone to read, anywhere.

What happens next?

If you have already signed an open access publishing agreement, you don't need to do anything.

If you have not yet signed a publishing agreement, or have already signed a non-open access publishing agreement, then you will receive an email asking you to sign a new publishing agreement. You will be asked to choose a Creative Commons licence, you can find more information about licence choice here. <http://authorservices.taylorandfrancis.com/publishing-agreements-your-options>. Please note that this can take 24 to 48 hours to reach you.

You will not be asked for any payment.

If you have any queries, please contact apc@tandf.co.uk

Best wishes,

Taylor & Francis Group

Author receives
confirmation of
OA funding

Author



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b89325f>

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Author receives
a link to the
Author
Publishing
Agreement (APA)

Author Publishing Agreement

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3

Online Author Publishing Agreement Home Page

Welcome to the Taylor & Francis journal article publishing agreement. This online tool allows you to generate and electronically sign your journal article publishing agreement. You will be presented with a series of screens that prompt you to answer questions relating to your article. You will be given the opportunity to review the full information on the agreement and its terms before signing.

Please note that this system supports on all modern browsers (like Google Chrome, Microsoft Edge, Mozilla Firefox, Safari etc). We no longer support IE.

We generate PDF files with digital signatures. To view these correctly you will require either Adobe Acrobat or Adobe Reader version X or higher. For details on the latest versions and how to upgrade please visit the [Adobe website](#).

There is help available on all screens, marked with this symbol: 

After answering each question, please press the "next" button to take the next step.

Please click the "next" button to continue.

NEXT

Author Publishing Agreement

1

2

3

Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." For Queries or Change in Information, [Click Here](#) to Contact Administrator

Article title	Test for Anna
Article doi	10.1080/02687038.2022.2100206
Journal title	Aphasiology

Corresponding Author

Author's name	Chelsey Horstmann dennis
Institution name	Iowa State University

Complete Author List

Author's name	Affiliation
Chelsey Horstmann dennis	Iowa State University

PREVIOUS

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1

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Specify Article Funders

This page is used to supply us information on funders. Some funders require specific author agreement forms.

Note that entering funding information is not mandatory, as we understand many articles will not have funders. If we have already received funding information about your article, it will appear here, but you may edit it if necessary.

Start typing the name of your funder(s) and we will suggest options for you to select. If your funder is not found, you can still add them manually.

bill

Add

- Bill and Melinda Gates Foundation
- Ann and Bill Swindells Charitable Trust
- Billings Clinic Foundation
- Buffalo Bills Youth Foundation
- Bill and Carol Fox Center for Humanistic Inquiry, Emory University
- Bill and Melinda Gates Institute for Population and Reproductive Health
- Billi and Bernie Marcus Foundation
- Buffalo Bill Center of the West

Grant Number

NEXT


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If the author has a CC BY mandate, they are shown this page

1


2

Please answer the question below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

The funder information you provided requires a Creative Commons Attribution (CC BY) author agreement, and that has been selected for you.

Does this article contain content from third parties for which you are responsible for obtaining permission to reuse?

- No
 Yes 

START AGAIN

NEXT

If there is no mandate, they can select their CC licence choice

Author Publishing Agreement

1 ————— 2 ————— 3

Please answer the question below.

Additional help information is available by clicking on the help ⓘ icons. To hide the help, click the close button or anywhere outside the popup.

Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. ⓘ

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- Yes 


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Do you need to declare and publish a conflict-of-interest statement? 

- No
 Yes

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Below is a preview of the agreement drafted for your article. You will electronically sign this on the next screen. Is the preview acceptable?

- Yes
- No



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ARTICLE TITLE ('Article'):	Test for Anna
ARTICLE DOI:	10.1080/02687038.2022.2100206
AUTHOR(S):	Chelsey Horstmann dennis
JOURNAL TITLE ('Journal'):	Aphasiology
JOURNAL ISSN:	1464-5041

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This is your final agreement. Ticking the box below and selecting "Next" will be your final step. An option to download a version to sign and scan is available at the bottom if you have been advised you cannot digitally sign.

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- I understand the Article will be made available under the following access and use licence, and that I have read and understood the terms of this licence: [Creative Commons Attribution-NonCommercial-NoDerivatives License](https://creativecommons.org/licenses/by-nc-nd/4.0/) (CC BY-NC-ND).
- I agree to assume responsibility for any applicable payment of the Article Publishing Charge.

I confirm I have read and accept the Terms & Conditions of this Publishing Agreement

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Status - Awaiting T&F approval of APA


Taylor & Francis have been notified of your acceptance and will review your Author Publishing Agreement.

Journal title	Aphasiology
Article doi	10.1080/02687038.2022.2100206
Article title	Test for Anna

Corresponding Author

Chelsey Horstmann dennis Chelsey.horstmann@dennis@tandf.co.uk Iowa State University	 APA Signed
--	---

Complete Author List

Chelsey Horstmann dennis Chelsey.horstmann@dennis@tandf.co.uk Iowa State University	 APA Signed
--	---

Exit

Author digitally signs the APA



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Workflow 2

*Only if the author signs the
Author Publishing Agreement
before the library has approved
the article in the Research
Dashboard*



Send To: Author Email

Subject: Your article with Taylor & Francis

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

Congratulations on the recent acceptance of your manuscript submission to *Journal Title*. The Taylor & Francis production team will work with you to publish your article online as quickly as possible.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article open access. We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

Look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

Email to author on acceptance, alerting them to OA agreement

The email text can be customized



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b89325f>

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Author receives
a link to the
Author
Publishing
Agreement (APA)

Author Publishing Agreement

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Online Author Publishing Agreement Home Page

Welcome to the Taylor & Francis journal article publishing agreement. This online tool allows you to generate and electronically sign your journal article publishing agreement. You will be presented with a series of screens that prompt you to answer questions relating to your article. You will be given the opportunity to review the full information on the agreement and its terms before signing.

Please note that this system supports on all modern browsers (like Google Chrome, Microsoft Edge, Mozilla Firefox, Safari etc). We no longer support IE.

We generate PDF files with digital signatures. To view these correctly you will require either Adobe Acrobat or Adobe Reader version X or higher. For details on the latest versions and how to upgrade please visit [the Adobe website](#).

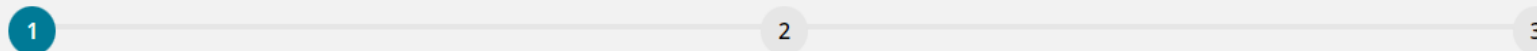
There is help available on all screens, marked with this symbol: 

After answering each question, please press the "next" button to take the next step.

Please click the "next" button to continue.

NEXT

Author Publishing Agreement



Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." For Queries or Change in Information, [Click Here](#) to Contact Administrator

Article title	Test for Anna
Article doi	10.1080/02687038.2022.2100206
Journal title	Aphasiology

Corresponding Author

Author's name	Chelsey Horstmann dennis
Institution name	Iowa State University

Complete Author List

Author's name	Affiliation
Chelsey Horstmann dennis	Iowa State University

PREVIOUS

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Author Publishing Agreement

1

2

3

Specify Article Funders

This page is used to supply us information on funders. Some funders require specific author agreement forms.

Note that entering funding information is not mandatory, as we understand many articles will not have funders. If we have already received funding information about your article, it will appear here, but you may edit it if necessary.

Start typing the name of your funder(s) and we will suggest options for you to select. If your funder is not found, you can still add them manually.

bill

Add

- Bill and Melinda Gates Foundation
- Ann and Bill Swindells Charitable Trust
- Billings Clinic Foundation
- Buffalo Bills Youth Foundation
- Bill and Carol Fox Center for Humanistic Inquiry, Emory University
- Bill and Melinda Gates Institute for Population and Reproductive Health
- Billi and Bernie Marcus Foundation
- Buffalo Bill Center of the West

Grant Number

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Author Publishing Agreement

1


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3

Please answer the question below.

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Most authors writing papers concerning original research are considered the copyright owners of that work. You may not be the copyright owner if your work was previously published elsewhere, and must inform us if any rights have been granted elsewhere.

Please tell us about the copyright ownership of your article. 

- I own copyright. If I have coauthors, we jointly own copyright and I am acting on our behalf.
- I am an employee of the UK, Canadian, Australian, or other Commonwealth Realm Government, and the Crown retains and asserts copyright. 
- I am a US Government (including NIH) employee and there is no copyright to transfer 
- I am a contractor of the US Government (includes NIH contractors) 
- I am an employee of the European Commission and copyright is asserted and retained by the European Union. 
- I am employed and the copyright belongs to my employer (or is a 'work made for hire'). 
- I am an employee of a Government, Agency, or International Organization and copyright is retained by that entity. 

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Author Publishing Agreement

1

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Author chooses
OA publishing

Please answer the question below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Open access offers greater accessibility, visibility and impact for your research. Articles published open access with Taylor & Francis typically receive 58% more citations* and over 6 times as many downloads**

* Citations received up to 10th June 2022 for articles published in 2017-2021. Data obtained from Digital Science's Dimensions platform.

** Usage in 2018-2021 for articles published in 2017-2021

Your funder or institution may recommend, or mandate, publishing open access and provide funding to cover the Article Publishing Charge (APC). To find out if you are eligible for direct funding from your institution, or to find the APC price for your article, select open access check and quote below. If you choose not to publish open access, you won't be asked to pay an APC and your article will be available to anyone with a subscription to the journal.

Open access check and quote

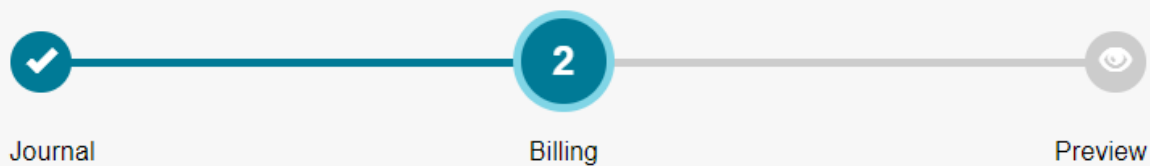
- I have my quote and wish to publish my article open access
- I wish to publish without open access

START AGAIN

NEXT

The system has recognised that the institution is part of the agreement and therefore lets them know that they may be eligible for APC funding

Request Quote



We have noticed you are affiliated with an organization that may be able to fund your **Article Publishing Charge (APC)**. We will contact them for approval to fund the APC. In the event they decline to fund the APC we will contact you for alternative billing details.

If your organization declines to fund the APC, it will be £2375 GBP plus VAT or other local taxes where applicable in your country.

I do not wish to request funding from my organization

PREVIOUS

NEXT

Preview your quote

Journal: **Aphasiology**

Article type: **Paper**

Article details	
Title	Test Article
Article ID (DOI)	10.1080/13632434.2021.1887643123123

Corresponding author details	
Chelsey Dennis	Email: chelsey.horstmannedennis@tandf.co.uk Organization: Durham University

Quote details	
Quote number	Q-191853
Gold Open Access (APC) Fee	£2,375.00 GBP
APC Discount (100.00%)	-£2,375.00 GBP
Total amount Gold Open Access (APC) Fee*	£0.00 GBP

This is the information that will be included in your invoice. Please make sure that all of the information is correct. If you need to make amendments navigate back to previous page.

PREVIOUS

SUBMIT

Author

Thank you!

Your request for gold open access has been processed.

A request will now be sent to your institution. Please return to your author publishing agreement to complete the licence signing.


Author Publishing Agreement

If the author has a CC BY mandate, they are shown this page

1


2

Please answer the question below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

The funder information you provided requires a Creative Commons Attribution (CC BY) author agreement, and that has been selected for you.

Does this article contain content from third parties for which you are responsible for obtaining permission to reuse?

- No
 Yes 

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If there is no mandate, they can select their CC licence choice

Author Publishing Agreement

1 ————— 2 ————— 3

Please answer the question below.

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Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. ⓘ


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Author Publishing Agreement



Please answer the question below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Do you need to declare and publish a conflict-of-interest statement? 

No

Yes


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Please answer the question below.

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Below is a preview of the agreement drafted for your article. You will electronically sign this on the next screen. Is the preview acceptable? 

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ARTICLE TITLE ('Article'):	Test for Anna
ARTICLE DOI:	10.1080/02687038.2022.2100206
AUTHOR(S):	Chelsey Horstmann dennis
JOURNAL TITLE ('Journal'):	Aphasiology
JOURNAL ISSN:	1464-5041

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JOURNAL ISSN:	1464-5041

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Article doi	10.1080/02687038.2022.2100206
Article title	Test for Anna

Corresponding Author

Chelsey Horstmann dennis
Chelsey.horstmann@dennis@tandf.co.uk
Iowa State University

 **APA Signed**

Complete Author List

Chelsey Horstmann dennis
Chelsey.horstmann@dennis@tandf.co.uk
Iowa State University

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Tue 26/11/2019 09:27



AP-No-Reply <apc@tandf.co.uk>

Sandbox: An approval request has been sent to your institution to cover the APC on your article

To ● Horstmann Dennis, Chelsey

Dear Sir/Madam,

Article Title: test

DOI/MS ID: 191412402

Journal: Advances in Physics: X

I can confirm that the details of your article will now be passed to the contact we have at your institution. They will then make a decision about covering the article publishing charge (APC) for your article using the information you have supplied.

Once they have reviewed your request you will be informed of their decision and of the next steps or further options available to you.

If you have any further questions, please do not hesitate to contact us.

Kind regards

APC Team

Taylor and Francis Customer Support

apc@tandf.co.uk

The author then receives
confirmation of the request for
OA funding

Author

From: abc@tandf.co.uk <abc@tandf.co.uk>

Sent:

To:

Subject: Action needed: author request to use your OA membership fund with T&F

Dear Sir/Madam,

We have been contacted by an author who has informed us that they are affiliated with your institution. They would like to make their article Open Access using your OA membership fund. Please log in to your dashboard to approve or decline this request (the article will show in the 'Author Requested OA' tab). You can find the article details below.

The link for your Dashboard is [domain=taylorfrancis.com](#), and you will need your username and password to access the site.

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Kind Regards,

APC Team
Taylor and Francis Customer Support

Article
DOI

Article Title

Main Author

Article Type

Journal

Publishing Model

Final Price

The Library
is notified
of an
author's
request for
funding

This article will then appear on your action required tab. You then have the ability to approve or decline.

 Login

- Running Total
- Accepted Articles
- Submitted Articles
- Action Required Articles
- Approved Articles
- Declined Articles

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Action Required OA

Search by Author Name, Article Title, Journal, Email, ORCID, DOI 

[DOWNLOAD AS CSV](#)

Article Type: All

OA Profile: All

Funder: All

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Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
<input type="checkbox"/> test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	<div style="display: flex; justify-content: space-between;"> Approve Decline </div>

Author Email vinay.c.cp@informa.com
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 346434334664
 Research Funder Not Available
 Acceptance Date Not Available

Approved Article Email to Author

Send To: Author Email

Subject: Gold Open Access funding approval for your article

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

We recently emailed you to let you know that your institution has an open access agreement with Taylor & Francis. We're pleased to let you know that your library has approved Gold Open Access funding for your article through their Research Dashboard.

This means that your article will be published open access; it will be available online for anyone to read, anywhere.

What happens next?

If you have already signed an open access publishing agreement, you don't need to do anything.

If you have not yet signed a publishing agreement, or have already signed a non-open access publishing agreement, then you will receive an email asking you to sign a new publishing agreement. You will be asked to choose a Creative Commons licence, you can find more information about licence choice here. <http://authorservices.taylorandfrancis.com/publishing-agreements-your-options>. Please note that this can take 24 to 48 hours to reach you.

You will not be asked for any payment.

If you have any queries, please contact apc@tandf.co.uk

Best wishes,
Taylor & Francis Group

Once
approved,
author receives
confirmation of
OA funding


Author

Mon 25/11/2019 14:25

AP-No-Reply <apc@tandf.co.uk>

Sandbox: Your request to use your organization's fund has been declined

To ● Horstmann Dennis, Chelsey

 If there are problems with how this message is displayed, click here to view it in a web browser.Quote.pdf
80 KB

Dear Sir/Madam

Article Title: test

DOI/MS ID: 45678763567634565 /

Journal: Journal of Agricultural Sciences

We sent the information about your article and funding onto your Organization's Open Access team to review.

Unfortunately, your request for this article has been declined. I am happy to say there are still options available to you to make your article Open Access if you are still interested.

You can make your final article Open Access through payment of a charge (Gold) or you can archive an earlier version of your article without any charge to you (Green). For the Gold option, you can pay the article publishing charge (APC) yourself or via another funder or source. Please find a revised APC quote attached, if you would like to choose this option please complete the quote here

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For the Green option, you don't need to complete a quote. Your work will be published without charge in the journal and you can choose to make your Accepted Manuscript (AM) freely available by posting it online. Visit our [Author Services site](#) to find out more.

If you have any further questions, please do not hesitate to contact us.

Kind Regards

APC Team

Taylor and Francis Customer Support

apc@tandf.co.uk

If the funding is declined by the institution the author will receive this email. They can still choose OA if they wish (they will need to create a new quote with a new payer) or go down the green OA route.



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Research Dashboard Overview



What does the Research Dashboard do?

- Displays article metadata of all accepted core content articles by your corresponding authors;
- Enables institutions to approve or decline articles for funding under the agreement and track the remaining article allocation across the consortia;
- Each tab can be exported as CSV for further analysis and tracking;
- Fully integrated with the author workflow so the author is kept informed of any decision taken by the library.

Accepted Articles shows the latest articles that have been accepted for publication (they have not yet been approved or declined)

Running Total shows a history of all articles approved for funding, and the current remaining balance across the Consortia

Approved Articles is a record of all articles that have been approved for funding

Submitted Articles show any articles in full OA journals that have been submitted but not yet accepted

Declined Articles are any articles that have been declined for funding

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Accepted Articles

Search by Author Name, Article Title, Journal, Email, ORCID, DOI

Article Type: All OA Profile: All

Funder: All

COLLAPSE ALL

Author	Journal Title	Article Type	OA Profile	Price	Action Required
Chelsey Horstmann Dennis	Advances in Physics: X	Reviews	Open Access	\$855.00	Approve Decline
test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	Approve Decline

Contact Us

Action Required articles are any articles where the author has proactively requested OA funding

Article Metadata includes: author name, journal, DOI, accepted date, article type, Orcid ID and funder (if provided)

- ● For further questions, please contact:
oalibrarianenquiries@tandf.co.uk