Instructions for Organizers: Working with Confex

2017 Annual Meeting, Population Association of America
Chicago, IL ● April 27 – 29, 2017

Please read these instructions carefully. The success of the PAA meeting depends in part upon your full completion of your responsibilities and doing so in a timely manner. We thank you in advance for being a conscientious and thorough session organizer and helping deliver a superb annual program!

This document provides an overview of all organizer duties. All submissions to the program, the reviews by the organizers, and much of the communications are conducted via Confex, PAA’s online submission website. Confex functions for organizers will open October 7th, but you will be able to go in and view your submissions starting today to start thinking about your session(s). This document provides a description of how to use Confex as you conduct your work to organize your sessions.

Organizer Duties

Each session organizer, and any co-organizer, is responsible for: (1) selecting four very high-quality papers for the primary session; (2) selecting equally high-quality papers for one (or two) overflow sessions; (3) providing grades for papers not selected but to be reviewed for poster sessions; (4) providing final outcome decisions for all other papers submitted to the session; (5) signing up to chair the session or recruiting another person to chair and recruiting a chair for any approved overflow session; and (6) recruiting one or two discussants for each session and for any approved overflow session. All of these duties are described in more detail below.

Key Deadlines for the Review Phase

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>September 29, 2016</td>
<td>Deadline for authors to submit papers to Confex</td>
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<tr>
<td>October 7, 2016</td>
<td>Session organizers need to identify any papers on which they have conflicts of interest. This is also the date to begin entering decisions in Confex</td>
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<tr>
<td>October 28, 2016</td>
<td>Deadline for session organizers to select submissions for their primary session and potential overflow session(s)</td>
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<tr>
<td>November 29, 2016</td>
<td>Authors are notified of papers accepted into standard sessions or forwarded for possible inclusion in overflow or poster sessions</td>
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<tr>
<td>December 15, 2016</td>
<td>Organizers and authors are notified of overflow decisions</td>
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<tr>
<td>December 20, 2016</td>
<td>Authors are notified of poster decisions</td>
</tr>
<tr>
<td>January 12, 2017</td>
<td>Deadline for organizers to obtain chairs and discussants for all sessions</td>
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Accessing the Confex User Portal as a Session Organizer

You can access the Confex system to view submissions at https://paa.confex.com/paa/2017/gateway.cgi and beginning October 7, you will be able to start reviewing and grading submissions. You will be prompted to create log-in credentials which will allow access to work on your session(s). You must make your decisions for your primary and any overflow session(s) by October 28.
Once you’ve logged into Confex, you’ll be in the User Portal. If you click on Assigned Entries and then your session title (image 1, arrow 1) you will see all of the papers that have been submitted so far. Clicking on Review and then the session title will bring you to the review portal. You will not be able to access the review portal until October 7.

Accessing Information about Submissions

Once submissions have closed and Confex is fully open, you can read each paper online by using the “review submission” button. You also have the option of: (1) downloading all submitted papers and their details into a Word document, or (2) downloading the same information onto an Excel spreadsheet. You can access these options via the menu on the far left of the screen when you are in the Review Control Panel (see Review Control Panel topic below). You may find it easiest to first read through papers offline using the Word document, and then use the Excel spreadsheet to record preliminary decisions and experiment with different groupings for your session. As you enter your decisions, you can click the Excel spreadsheet link to get an up-to-date spreadsheet.

By October 28th, you will need to enter final decisions about each submission’s status into Confex (see Entering Decisions, below).

Conflicts of Interest

As a general rule, organizers should not review their own papers or papers from close collaborators, current students, or recent former students. When decision access is granted on October 7, the first thing you should do is "reject" any paper of a collaborator or someone else with whom you have a real or perceived conflict of interest so that it can receive full consideration in any secondary session to which it was submitted or by the Program Committee. In addition, please answer “yes” to the question regarding whether the paper should be transferred because of a conflict of interest. For any questions or concerns about conflicts of interest, please email the Program Committee (paa2017@popassoc.org).
Review Control Portal

Once you’ve clicked through to the Review Control Portal from the User Portal you will find a list of all the submissions to your session, and information about them. Clicking on a paper title and clicking the Review Selection button, will allow you to review that paper (image 2, arrow 1).

The information is organized as follows:

SUBMISSION NUMBER( ): PRESENTING AUTHOR; TITLE

The parentheses that appear after the submission number will contain either a 1 or a 2 (to denote whether your session is the first or second choice of the submitter) or the letter U to designate that the paper is now unavailable to you. If a paper is unavailable, that means that the first choice organizer has chosen it for a session.

Additionally, as you begin to designate papers as either “Accept/Request” or “Reject/Yield”, this information will be added to the end of the line for that submission, as either “=Accepted” or “=Rejected”.

Dual Submissions

Many authors designate both a first and second choice session. If your session is the author’s first choice, you have priority in accepting the paper. If your session is the author’s second choice, the other organizer must yield the paper before you are able to accept it.

If you are the second choice organizer of a paper that you’d like to have in your session, then choose accept the paper and click the submit button. The first choice organizer will get an email notification and they can either decline your request by accepting the paper for their own session and eliminating your further access to it; or they can reject the paper and give you exclusive control over it. You will be emailed their decision in either case.

Please do not wait to make decisions until the last minute. Because many authors submit to two sessions, sorting this out among organizers takes time. Thus, we strongly encourage you to begin making decisions soon after Confex opens up for decisions.

Overflow Sessions

Although you may accept papers that you intend for a proposed overflow session, you should be aware that not all proposed overflow sessions can be accommodated. The program committee will provide information via email on whether a proposal for an overflow session is expected as a function of the number of papers submitted to your session. A small number of sessions that received very large numbers of submissions will be asked to propose two overflow sessions.

It is vital for the quality of the program and for fairness to all authors, that you propose additional sessions if, and only if, you have sufficient high-quality papers with related content. More overflow sessions are usually proposed than can be accommodated in the program. Nonetheless, the overflow sessions contribute significant breadth and depth to the annual meeting. The Program Co-Chairs will provide more information about overflow session proposals via email at the end of the paper submission period.
Entering Decisions

**Important Note:** Once you have accepted/requested a paper, it is extremely difficult to change its status. Do not Accept/Request papers until you are certain that you want them, and do not Reject/Yield papers until you are certain that you do not want them. You must complete and enter your decisions for all submissions by October 28.

For each submission, you must assign one of the following decisions:

<table>
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<tr>
<th>Decision</th>
<th>Description</th>
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<tr>
<td><strong>Accept/Request</strong></td>
<td>Mark a paper as accepted/requested for your session or for an overflow session if you wish to use the paper. If your session is the author’s first choice, submitting an Accept/Request decision will immediately prevent further access to the paper by the other session organizer. If your session is the author’s second choice, submitting an Accept/Request decision will send an email to the organizer of the “first choice” session requesting that she/he yields the paper to you.</td>
</tr>
<tr>
<td><strong>Reject/Yield</strong></td>
<td>If you do not intend to use a paper in your session or proposed overflow session(s), choose “Reject/Yield” (either because you do not want the paper or you are willing to yield it to the other session organizer). You should also use this option if you cannot review the paper because of a conflict of interest. Submitting a Reject/Yield decision will immediately end your access to the paper. You cannot reverse a Reject/Yield decision.</td>
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</table>

There is an “Undecided” option which you can use as you work toward final decisions. If you click “Accept/Request” or “Reject/Yield” by mistake, please click “Undecided” before you click the "Submit" button to record your decision.

In addition to the basic Accept/Request versus Reject/Yield outcome, you will be asked whether or not the paper should be transferred because you have a conflict of interest (image 2, arrow 2). If the answer is yes, the paper’s final status should be Reject/Yield.

The online review form allows you to store notes (see image) without making an accept/reject decision. If you are unsure about a paper, you may use that note field to store a preliminary decision while leaving the paper in an "Undecided" status. Then you can return at any time prior to October 28th to submit your final decision.

If you have requested a paper to be yielded to your session, you should keep some papers in the “Undecided” category until you hear from the other primary choice organizer(s). Once you learn the status of your requested paper(s), update the final decisions for the “Undecided” papers.

You should accept 4 papers for your primary session and an additional 4 if you have enough good papers to suggest an overflow session. In rare cases, sessions that receive an unusually large amount of submissions will be able to suggest a second overflow session and, thus, should accept a total of 12 papers.

For each of the papers designated “Reject/Yield”, please assign a poster grade if the author wishes it to be considered for a poster. (On the review page under the paper title, it will indicate whether the author is willing to do a poster. image 2, arrow 3) **This is very important;** the four-category rating is essential for
effectively evaluating poster submissions. Avoid giving all posters the same rating. Instead, please distribute your ratings across the four categories, drawing on the views you formed regarding the submission's scientific merit when you considered the submission for your session. Please use the “A” rating only for submissions that are so good that you regret that you could not accept them.

<table>
<thead>
<tr>
<th>Poster A</th>
<th>You recommend the paper for a poster session with great enthusiasm.</th>
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<tbody>
<tr>
<td>Poster B</td>
<td>You recommend the paper for a poster session.</td>
</tr>
<tr>
<td>Poster C</td>
<td>You recommend the paper for a poster session with reservations.</td>
</tr>
<tr>
<td>Poster D</td>
<td>You do not recommend the paper for a poster session.</td>
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</table>

Poster ratings must also be finalized by October 28.

After you have graded each paper, click the submit button (image 2, arrow 4).
Notes for Sessions with Two Organizers

If you are co-organizing your session with someone else, each of you has the ability to enter information and submit decisions. However, you should not enter and submit "Accept Request" or "Reject/Yield" decisions until both of you are in agreement about the paper's outcome. If you want to enter a note about a paper that your co-organizer can see, enter the note and make sure that the "Undecided" button is turned on when you click the "Submit" button.

Completing Primary Sessions and Setting up Overflow Sessions

Once you’ve graded all papers and accepted four, in the Assigned Submissions Panel, click the Return to User Portal link under “options.” From there, click the title of your session to go to the Session Builder, which is where you will arrange papers for your session.

Every organizer will see their primary session title and an overflow session in the top section of the Session Builder. Session Builder will default to showing your primary session, but clicking on either session will show you the papers assigned to that session in the bottom section. At this point, all of the assigned papers will be in your primary session with the accepted papers shaded in off white, ungraded papers in purple (all of your papers should be graded at this point) and rejected papers in orange.

If you are setting up an overflow session, check the box in front of the four papers to select into that session. Next click the () edit icon at the bottom of the section (if you hover over it with your cursor, it will say “Transfer Selected Abstract”) and a pop-up will show your session title. Check the box in front of the title, click okay, and then click the save icon. These papers are now in your overflow session, which you can order once you’ve finished your primary session.

The next step is to arrange your papers in presentation order. Click the number in front of the paper title and choose a new number from 1-4. Once you’ve ordered all of your papers, click the save icon.

To complete session set-up, add your chair and discussant (see more information about chairs and discussants below). In the top section of the Session Builder click the edit icon in front of the organizer’s name. This will open a pop up box. Click “Add People.” Check the role (either chair or discussant) and enter the search criteria (first name, last name or email address) and click search. The site will check to see if this person is already in the member database. If you see their name, select it, or select and edit if you need to change any information (such as a new affiliation). If they are not found, the system will request their email address, affiliation, and country of residence.

To set up your overflow session, click on the edit icon in front of the generic title in the top section of the Session Builder, compose a new appropriate session title in the pop-up box and click save. Click the edit icon under people to add the chair and discussion just as you did for your primary session. Click on the title of the overflow session and you will see the papers that you transferred from your primary session in the lower panel. Arrange these papers in presentation order and click the save icon.
Chairs and Discussants

All primary and overflow sessions must have a chair and discussant. Session organizers are usually expected to chair their session, although they can designate a different person if desired. Session organizers will need to recruit a chair for each overflow session that is approved. Session organizers also need to recruit one or two discussants for each session. Chair and discussant decisions should be finalized and entered into Confex by January 12, 2017. Click here to view a list of those volunteering to be a chair or discussant. Please note that you will need to confirm chairs and discussants before adding their names to ensure that they will attend. You can enter your desired chair and discussant before receiving confirmation that your overflow session has been accepted because that will be taken into consideration when approving the overflow session.

Author Notification

All author notifications are handled centrally using standard email templates; so you do not need to take any action. If you communicate directly with the authors, you should be careful to tell those in the “Overflow Session” category that you have recommended their paper for inclusion in an additional session but must wait to see if the session is approved.

Low-Submission Sessions

Some sessions may receive too few papers to support a high-quality primary session. The Program Co-Chairs will review session statistics to identify sessions with few submissions. After consulting with the organizer and co-organizer, these sessions may be combined with other sessions or cancelled.

Notifications about Acceptance of Proposed Overflow Sessions

The Program Committee will decide on overflow sessions and notify you and paper authors of their decisions no later than December 15. If your overflow session is approved, you do not need to notify the authors of these decisions because all notifications are handled centrally.
Contact

For assistance contact Bobbie Westmoreland in the PAA Office at bobbie@popassoc.org or (301) 565-6710, x1001 (M-Th). For technical support: help@popassoc.org or https://paa.confex.com/paa/feedback.epi

Urgent technical questions may be asked by phone at 401-334-0220 at (Mon-T 9:00 a.m.-6:00 p.m. ET). When asked, please enter support code 1463

For questions about organizers’ responsibilities: paa2017@popassoc.org