Training Session for Session Organizers (SO)

Andrew Nix, Review Chair, WVU
Stacey Cooper, Senior Manager, Conference E-Tools, ASME

January, 2024
Contents

(~30 min) • Roles of Session Organizer (SO)  
by Andrew Nix (Review Chair)

(~20 min) • Training of the webtool  
by Stacey Cooper

(~10 min) • Q&A
• This session is primarily for SO only.
• There will be future separate training sessions for reviewers for both their roles/responsibilities and the use of the webtool.
Review Chain – Decisions

The review process is evaluating two publication paths: Conference & Journal

<table>
<thead>
<tr>
<th>Input</th>
<th>Conference</th>
<th>Journal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation</td>
<td>SO</td>
<td>SO</td>
</tr>
<tr>
<td>Final Recommendation</td>
<td>SO</td>
<td>RC</td>
</tr>
<tr>
<td>Final Decision</td>
<td>RC</td>
<td>JE</td>
</tr>
</tbody>
</table>

Process is posted on the website under Author Resources.

Journal decisions can be appealed to the editors after the conference.
Review Chairs Track Distributions

Shahrokh Shalpar
• Aircraft Eng (01)
• Coal, Biomass, H2, & Alt (03)
• Fans & Blowers (10)
• Steam Turbines (21)
• Struct & Dyn (22-28)

Rudy Dudebout
• Combustion (04)
• Cycle Inno (06)
• Energy Storage (09)
• Oil & Gas (20)
• Supercrit CO2 (30)

Andrew Nix (Review Chair)
• Turbomachinery (31-38,40)

Marc Polanka
• Ceramics (02)
• Controls, Diag, Instr (05)
• Education (07)
• Electric Power (08)
• Heat transfer (11-15)
• Industrial & Cogen(17)
• MMM (18)
• Microturbines (19)
• Wind Energy (41)
High publication standards – intent of ASME / IGTI to present and publish **high quality** papers

- Effective communication and interaction between authors, reviewers and session organizers
- Shared responsibility of reviewers and session organizers
- Review chain is the key to paper quality
- Timely actions are important – staying on schedule makes it easier to maintain quality standards and remedy any problems
Tasks for SOs

- Responsibility
- iThenticate check
- Conflicts of interest (COI)
- Organizing the review process
Important Note

- You are the most important link for the entire review process!
- For the majority of cases, your decision will be the final decision for the paper*.

* Info on supporting details for recommendations is available in backup slides
• The SO is not a reviewer.
• SO job is to coordinate and interpret the input of the reviewers, not to override it.*

* More info on decision tree is available in backup slides
iThenticate Check

- As soon as a paper is uploaded, check iThenticate score
- Anything > 15% has to be checked carefully *

* More details are provided in backup slides
Reviewer Requirements

• Line up reviewers **early** and assign in the Webtool;
  – **Three** reviewers for each paper
    • Preferably industry, government and academia, but **at least two** of these three sectors are required
  – No two reviewers of a paper can be from the same organization
  – No reviewer can be from the same organization as authors
  – If needed, ask your Track Organizer for help in reviewer selection
  – These requirements are **non-negotiable** and will be **checked** centrally. Misses must be fixed, and this causes a huge amount of delay and rework. Do it right the first time!

• Need TO/PC/VC chair to check and enforce this.
Authorship conflicts

- A TO/PC/VC who is an author of a paper is not allowed to take any action on that paper.
  - The Review Chair can be engaged to review and accept abstracts, and to provide consultation with the Session Organizer if needed.

- A Session (Co-) Organizer who is an author of a paper is not allowed to take any action on that paper.
  - That paper should be moved to a different session.
  - If this is impossible, a Co-chair with no conflicts of interest can be enlisted to coordinate those reviews, including making recommendations.

* More info on COI is available in backup slides,
Lining up Reviewers

- Suggest lining up reviewers as soon as you know your session, even though they cannot be assigned in the tool until the drafts are in.

- Consider authors from previous years, other SOs; get a co-organizer from a different sector to help find diverse reviewers; trade contacts with other SOs

- Use direct contact such as email or phone to get commitment. Don’t rely on just assigning someone in the tool.

- You do not need more than three reviewers.

- The reviewer no longer has to accept the review in the tool. A declining reviewer will be automatically removed as a reviewer in the tool, the SO doesn’t have to remove them, and a notification email will be sent to the SO to flag that a new reviewer must be selected.

- New reviewers can be created in the database.
Reviewer Anonymity

- Please keep the identity of reviewers confidential
  - From authors and from the other reviewers on the paper
  - From the community at large

- Best practices
  - Use caution with emails looking for reviewers, agreeing to be a reviewers, or communicating with reviewers
  - Use blind copy (bcc)
  - Avoid Reply to All
  - Reviewers should make sure that review comments do not identify them. Check that your .pdf files do not identify you or your organization.
Decisions

• SO decision MUST be supported by reviewer comments
• Score-based decision tree in backup slides
• Explain clearly
  1. Conference Recommendation
  2. Journal Recommendation
• Engage your TO or Review Chair Team Member for tough cases!
• Discuss Rejections with your Review Chair Team Member

Review chair team:
• Andrew Nix
• Marc Polanka
• Rudy Dudebout
• Shahrokh Shalpar
At the conference

• Session Organizer and Co-Organizer organize the reviews
• Session Chair and Co-Chair run the sessions at the conference
  – Are ideally the same but this doesn’t always work
  – Chairs may change and will be entered into the system in March
• Moderate the session
• Q&A: ask people to introduce themselves, speak clearly
• Provide feedback form to ASME: attendance, best papers, no-shows, etc.
Schedule
Important Notes

• Paper submissions deadline was Jan 5 (Fri), 2024

• Draft paper review complete by Feb 9 (Fri), 2024

• You must have all your papers reviewed about one week before: This gives you ~3 weeks!

• Early reviewer lined-up is crucial and key to a successful and timely review process!
# Schedule

## Important Dates

<table>
<thead>
<tr>
<th>Month</th>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>Oct</td>
<td>27</td>
<td>October 27, 2023 Abstract Submission</td>
</tr>
<tr>
<td>Nov</td>
<td>24</td>
<td>November 24, 2023 Notification of Abstract Acceptance</td>
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<tr>
<td>Jan</td>
<td>05</td>
<td>January 05, 2024 Submission of Full-Length Paper for Review</td>
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<tr>
<td>Feb</td>
<td>09</td>
<td>February 09, 2024 Paper Review Complete</td>
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<tr>
<td>Feb</td>
<td>16</td>
<td>February 16, 2024 Paper Acceptance Notification</td>
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<tr>
<td>Mar</td>
<td>01</td>
<td>March 01, 2024 Submission of Revised Paper for Review (if required)</td>
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<tr>
<td>Mar</td>
<td>18</td>
<td>March 18, 2024 Author Notification of Acceptance of Revised Papers</td>
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<tr>
<td>Apr</td>
<td>15</td>
<td>April 15, 2024 Submission of Copyright Form</td>
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<td>Apr</td>
<td>18</td>
<td>April 18, 2024 Final Paper Submission</td>
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<tr>
<td>May</td>
<td>02</td>
<td>May 02, 2024 Final Paper Decision Notification</td>
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Notes on Schedule

- Process has many steps that must be done in series
- If you are late or incomplete to a deadline, it puts untenable pressure on the downstream steps
- Deadlines are completion dates, not start dates
- Start early!
- TO/VC/PC, SO all need to check, monitor, support, and push along progress and quality throughout their span of responsibility
  - Send reminders to start tasks and meet deadlines
  - Check status and address problems regularly
- RCs cannot manage an estimated 1500 papers and 4500 reviewers without your help!
<table>
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<tr>
<th>Start, deadline</th>
<th>Task</th>
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<tbody>
<tr>
<td>Now - Jan 19</td>
<td>Line up co-organizer to help with reviews. Diversity will help find reviewers. Line up reviewers for your session. Check iThenticate scores; reject if high plagiarism, discussing with TO and RC. <strong>Assign all reviewers by Jan 19</strong> Meet requirements for reviewers; avoid all conflicts of interest</td>
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<tr>
<td>Jan 19 - Feb 02</td>
<td>Check reviews as they come in; if inadequate, have TO or RC return the review and request improvements in the comment box.</td>
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<tr>
<td>Feb 02 - Feb 09</td>
<td>Follow up late reviews to get them completed ASAP. Make your recommendations for conference and for journal. For scores &lt;100, follow process to consider rejection; engage RCs</td>
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<tr>
<td>Feb 09 - Mar 01</td>
<td>Energetically work to close any late items</td>
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<tr>
<td>Mar 01 - Mar 15</td>
<td>Process all revised drafts – send for re-review or do the re-review yourself. Engage RCs to consider rejects</td>
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<tr>
<td>Apr 18</td>
<td>Submission of final paper. Follow up on any unsubmitted final papers – right away</td>
</tr>
<tr>
<td>Apr - Jun</td>
<td>Update session info in tool – chair, co-chair, paper order, session name</td>
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**SO is key!!**
Dos

• Fill the comments for organizers with a short summary of the paper review results; precise information on why (not) acceptance, why (not) journal, why (not) best paper e.g. One strong support for journal, but 2 against, after re-review one changed opinion and now recommended => allows to follow your reasoning in final decision

• Initiate a re-review process when almost journal recommendation, even if no major revisions required (e.g. one reviewer voted for and one says almost). Contact only that reviewer that almost recommended journal => avoids tedious appeal process afterwards
Dos and don’ts

Dos

Example communication with review chair team:

<table>
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<tr>
<th>Description</th>
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<tbody>
<tr>
<td>Decision</td>
</tr>
<tr>
<td>Accept</td>
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</table>

Comments For Organizer - Only one review has been received for the revised draft, and it is positive for conference presentation.
- Two out of three reviews were positive for the initial draft.
- The authors’ addressed majority of the comments.
- The manuscript has not been recommended for journal publication.

Comments For Author: Based on the revised draft and the subsequent review, the manuscript is recommended for publication at the conference. However, this manuscript is not recommended for journal publication.

Is Best Paper: No
Is Journal Quality: No
Don’ts

- Write to authors their paper has been approved for conference/journal -> only recommendation (final vote by review chair/journal editor)

- Assume a reviewer has accepted your invitation when no response is obtained

- Recommend for best paper/journal with less than 2 votes

- Leave the comments for organizers empty -> a small summary is very helpful and speeds up the process

- Fill the comments for organizers with a summary of the paper’s technical content
BACKUP
Backup

- iThenticate check (pp. 24-25)
- COI (pp. 26-27)
- Paper quality initiative (pp. 28-31)
- Decision tree for recommendation (pp. 32-35)
- Supporting details for recommendation (pp. 36-41)
- Responsible review chairs (RC) for tracks (p. 42)
• Prior to assigning reviewers, organizers will need to analyze any matching results over 15%

• Two areas of concern: plagiarism (copying someone else’s work), and lack of originality (copying your own previous published work)

• When assessing a paper, consider:
  – Is there any source with high degrees of match (>15%), or are there just lots of <1% matches of phrases?
  – 50x <1% = no problem
  – 1x 50% = problem
  – If there is a source with a high match, has that source been properly referenced in the paper?
  – Are the matches limited to the introduction, description of the analysis, experimental setup, etc., or are there high matches in the results and conclusions portions of the paper?
If you have concerns, discuss it with TO/VC/PC and RC. For feedback from ASME, submit a request to https://airtable.com/appKe8wyTv3RoG8qS/shrc4rgubaoKlbmFB

Outcomes can be:

• Reject the paper outright.
• Caution the author about the concerns and request changes. These changes can include properly referencing papers with matches, and/or to reword sections to reduce the degree of outright copying. SO should check the final paper to make sure these directions have been followed, and alert the review chair if there are still concerns. Proceed with reviews; reviewers should also comment on matches.
• Let the paper go through with reviews with no special action.
Review chain conflicts

• No organizer should serve as a reviewer for a paper in their area of responsibility. This includes Review Chairs and Vice Chairs, Committee Chairs and Vice Chairs, Track Organizers, and Session Organizers.

• For example, a Track Organizer may not do a review for a session in his/her track, and a Session Organizer may not review a paper in his/her session.
Organizational conflicts

- A **Session Organizer** should **not handle the reviews** for a paper whose **author is from the same organization**.
  - A Co-chair with no conflicts of interest can be enlisted to coordinate those reviews, including making recommendations.

- A **Committee Chair, Co-Chair, or Track Organizer** should **not be involved** in a review of a paper whose **author is from the same organization**.
  - If the SO would like some consultation, the Review Chair team can be engaged.

- **No reviewer for a paper** can be from the **same organization as any of the authors**.
Paper quality initiative –

Process for poor papers
Will continue with the paper quality processes used in TE2018 Oslo
Use reviewer template to require comments, plus rating buttons incorporated into the webtool
Use paper score from reviewer ratings as a guideline for further action
Review Chairs to engage early in the process to make decisions on papers with low scores or high iThenticate scores
Encourage rejections of initial drafts where appropriate – where a revision is unlikely to result in a good quality paper

SO comments from TE18: “I asked for a revision, wanting to give the author the benefit of the doubt, but I should have just rejected the initial draft, it would have been better for everyone in the long run.”
Score Calculation

Per reviewer:

\[
Score = 2 \cdot Originality + 2 \cdot ScientificRelevance + 2 \cdot EngineeringRelevance + 1.5 \cdot Completeness + 1.5 \cdot Acknowledgment + 1.2 \cdot Organization + 1.2 \cdot clarity
\]

<table>
<thead>
<tr>
<th>Rating</th>
<th>Numerical Score</th>
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<tbody>
<tr>
<td>Poor</td>
<td>1</td>
</tr>
<tr>
<td>Marginal</td>
<td>2</td>
</tr>
<tr>
<td>Acceptable</td>
<td>3</td>
</tr>
<tr>
<td>Good</td>
<td>4</td>
</tr>
<tr>
<td>Honor</td>
<td>5</td>
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</tbody>
</table>

- Overall paper score = sum of three reviewer scores
- **Total maximum paper score = 171**
- Paper score if all reviews acceptable = 102.6
Reviewer provides recommendations, radio buttons, and comments in template.

- Ideally this will all be consistent, realistically it frequently will not be.

SO considers all reviewer inputs as well as the calculated score

SO can override recommendations and reject a paper if all these are true:

1. **Score is below 100** – paper falls below Acceptable standards
2. 2 reviewers recommend Major Revisions or Reject
3. Comments from 2 reviewers support this low score, i.e., point out significant shortcomings that are unlikely to be fixed in a revision
4. SO discusses the paper with RC / VRC and they both agree to reject
   - SO should initiate this discussion if 1, 2, and 3 are all true
   - Committee chair and vanguard are copied on communication, can offer input if desired

Gives SO more leeway, and more responsibility, to interpret the reviewers’ input. Involves RC earlier in the decision process.
Decision trees for recommendations
• 2 reviewers say Accept or Accept with Minor Revision, 2 Journal, and their comments support these recommendations:
  – Recommend Accept and check Journal box

• 2 reviewers say Accept or Accept with Minor Revisions, 1 Journal and 1 supportive Journal comments
  – Request revision to try for Journal; explain clearly in the comments

• 2 reviewers say Require Revision
  – Request revision; explain clearly in the comments
• 2 reviewers say Reject
  – Reject

• 2 reviewers say Require Revision or Reject
  – Study comments – is paper likely to be modified to meet requirements?
  – If no, **consult with Review Chair** and agree on a path
  – Strongly consider Reject; otherwise Request Revised Draft
What to do when you get wildly disparate reviews?

- Score probably doesn’t mean much in this case
- Carefully read each review. Consider the relative expertise of your three reviewers, as well as the sector they represent relative to the authors.
- Consult with Vanguard and Review Chair and agree on a path.
- Best path is to go with the majority opinion of the reviewers.
- Make sure you explain your rationale in the comment boxes in the tool.
Supporting details for recommendations, with example SO comments
Recommend to Accept

In the comments for authors:

- Give a summary of your rationale for your recommendation for conference
- Give a summary of your rationale for or against journal
- Explain that the **final decision will be made by the review chair**
- Remind the authors that they still need to submit their final paper, by the deadline of April 11, 2023, preferably earlier

In the comments for organizers:

- Give a summary of the review process and your rationale leading to your recommendation – especially useful for review chair on difficult cases
Example SO comments

“Based on the reviews received I am pleased to inform you that I am recommending to the Review chair to accept your paper for publication at the conference. The reviewers made some helpful suggestions to improve the paper which I ask you to consider when preparing the final manuscript. Note you must still upload your final paper no later than April 11, 2023.”

- plus, one of these -

“I am recommending the paper for journal publication based on the recommendations of the reviewers. The findings have not been published before and shed new light on an important problem in the field. The ideas presented are innovative and promise new technological developments with impact in the field.”

“I am recommending the paper for journal based on one reviewer recommendation as well as an email exchange with reviewer #2 to clarify his views, which supported a journal recommendation. The findings . . . .”

“I am not recommending the paper for journal based on the recommendations of the reviewers. The approach has limited applicability and the paper lacked guidelines that could advance the field and be useful to the design community.”
• If one reviewer says Journal and another indicates the paper is close to journal, you may offer a revision to improve chances of a Journal recommendation.

• Make this very clear to the authors and to the re-reviewers.

• When the revision comes in:
  – Ask for a re-review from a reviewer who indicated possibility of Journal and ask that he be clear about his assessment of the revised paper for journal.
  – Do not ask for a re-review from a reviewer who already recommended Journal, or a reviewer who gave a very negative review. This is a waste of time.

• If the paper now has two reviewers recommending journal, make sure you check the Journal box and explain in your comments
Example SO comments

“Your paper received one Journal recommendation and other comments that indicate that a Journal recommendation is within reach. Therefore I am requesting a revised draft, which I then will reconsider for Journal. The reviewer comments offer good suggestions and guidance on what would be required for Journal.

If you would like to pursue a Journal recommendation at this point, submit a revised draft, highlighting your changes, and also submit a rebuttal that responds to reviewer comments. This needs to be done no later than February 24, 2023.

If you do not want to take this step, simply resubmit your original draft. It will be recommended to be accepted for conference based on the initial reviewer recommendations, but it will not recommended for Journal. In either case, you will still need to also upload a final paper before the deadline of April 11, 2023.”
Requiring a Revision

• Request Revision if:
  – 2 reviewers say Revision  -and-
  – There is an excellent chance the authors will make all the required changes for the paper to be acceptable  -and-
  – Score > 100  -or-  Review Chair concurs to ask for revision

• Do this as soon as possible, don’t wait for the deadline

• In the comment box:
  – Summarize your recommendation with reasons
  – Request authors to upload revised draft by February 24, 2023
  – Have authors highlight changes and provide a rebuttal in response to reviewer comments
Example SO comments

“I am recommending that this paper not be accepted in its current form, but I will consider a major revision. This is consistent with the recommendations of the reviewers, who note that this result contradicts other published findings, and this issue is not addressed at all in the paper. The current findings must be explained in context of previous work for the paper to be accepted.

You may submit a revised paper for reconsideration before February 24, 2023. Please highlight the changes and include a rebuttal that responds to the reviewer comments, especially those deemed necessary for acceptance.”
Paper Review Process Training
by Stacey Cooper
Overview of webtool organization - SO

My submissions
- Authors

My reviewing assignments
- TO – accept/reject abstracts
- Reviewer – review draft papers
- Review chair – final decision

Reviewer Team Manager
- Review chairs and conference organizers – see all sessions, organizers, abstracts/papers, status

My sessions
- TO – go into session, pull abstracts into sessions
- TO – assign session organizer, change title, description
- SO – add co-chair, change title, description
- SO or TO – reorder papers, remove papers, add to other sessions

Organizer tools
- All organizers – shows big list of all abstracts and papers
- All organizers – can export excel file showing all papers
- SO – assign reviewers, view reviews, make “decision”
• Click on “List Paper” to view the submissions.
Search: Enter any text that may be displayed in one of the columns.

Column Sorting: Click on the arrows next to the column to sort in ascending or descending order.

List Abstracts will take you to the paper review management screen.
Filtering

- Filter by
  - Track
  - Session
  - Submission Status
  - Review Status

- Filtering will remain in place as you navigate through multiple pages.
Paper Actions

• View
  • Opens a new window to view submission details (abstract, authors, draft paper submission, revised draft paper submission).
  • Click on the navigation links to view desired page.

• Manage
  • Assign Reviewers
  • Make Decision on Papers
  • Click on Paper Title to view submission details.

• View Comments
  • View Reviewer Inputs
Assigning Reviewers

- Click on “Add Reviewer” to search the reviewer database.
Assigning Reviewers

- Search by
  - First or last name
  - Email address
  - Keywords
  - Company

- The number of papers assigned to the review will be displayed.

- Click “Assign” to add the reviewer
  - Reviewers will receive an email notification for each assignment.
Can’t Find Your Reviewer

- Go back to the previous screen that lists all papers and click on the “Add Reviewers” button.
- A new window will open where you can enter the reviewer’s name and email address.
- Select to assign them to the Draft Paper and Revised Draft Paper Round.
- Reviewer will receive an email letting them know they have been added to the database.
- Wait approximately 20 minutes before assigning them to review a paper.
Reviewer Opt-In

• Reviewers can still opt-in on their own at https://asme-turboexpo.secure-platform.com/a/judgeSolicitationProfiles/create?solicitationId=223

• Make sure your reviewer completes the opt-in process.
  – Some new users to ASME stop the process after creating their ASME account.
    • THEY HAVE NOT COMPLETED THE PROCESS!!

Thank you for signing up for the OMAE reviewer database.

The Review Process
The purpose of review is to determine whether a paper is acceptable for publication, needs revision, or should be rejected. Recommendations must be supported by specific and critical comments. Reviewing is a confidential process involving only the reviewer, program-making agency, and the editorial department. Papers recommended for publication should be of high quality and of current technical interest. If rejection is recommended, keep in mind that you should state reasons in a professionally appropriate manner.

Please review the ethical obligations of reviewers before you begin reviewing papers.

• Reviewers will become available for assignment approximately 20 minutes after seeing the above text.

Reviewer process (for reference)

There is no Submit button, only Save (scroll to the very bottom of inputs). Review is available to SO as soon as it is Saved.

Review can be changed until the SO makes a recommendation decision. If the SO needs more info from the reviewer, the reviewer can add it in the system without further intervention.

Click here if you can’t review the paper. Please email the SO as well.

iThenticate info

Click here to download the paper.

Inputs go here. Keep scrolling down.
View Reviewer Comments

• Go to Actions > View Comments
• A new window will open displaying all reviewer inputs

• Go to Reviewer Reports > Reviewer Comments
• This will download a comma separated file (csv) with all reviewer inputs that can be imported into Excel.
Make a Decision on the Paper

- Go to Actions > Manage
- This will take you to the paper management screen.
Make a Decision on the Paper

- Click on the “Decision” tab
Make a Decision on the Paper

- Make your decision selection
  - Selecting “accept” will display the honors and journal recommendation options.

- Organizers can enter optional comments fellow Organizers.

- Fill in the required comments for the authors.

Note: Do not select “Accept” if you want the author to submit a revised draft. For example, the paper is acceptable but if they revise the paper, it can be journal quality. You must select “Revision Required.”
Questions/Help

• For any problems, submit a help desk ticket to https://airtable.com/appKe8wyTv3RoG8qS/shrc4rgubaoKlbmFB.
• Visit the online help center at https://asme-turboexpo.secure-platform.com/a/page/Help/organizer_resources
• Join us for our twice-weekly help center calls

<table>
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<th>Thursdays @ 2:00 pm New York Time</th>
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Join online
Meeting ID: 812 794 064
Password: 708266
One Tap Mobile:
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Dial by Your Location
+1 929 205 6099 US (New York)
+1 669 900 6833 US (San Jose)
877 853 5247 US Toll-free
888 788 0099 US Toll-free
Meeting ID: 812 794 064
Find your local number [here](#).