Prepare/ Approve an Other Stanford Faculty (OSF) Form

1) Log into the SeRA web portal using the email that was sent to you, or at https://sera.stanford.edu/

2) On your “My Projects” page (landing page) and in the “Open Tasks” section, click on the ID# titled “Prepare OSF Form”

3) Complete your task by navigating through each section in the “OSF Information” tab

4) Verify that the data in the “Proposal Details” section is correct
   - If any of the data is incorrect, you can utilize the right-hand menu (RHM) and underneath “Actions” to “Send to someone else to edit”
     - Enter SUNet ID in the “Name” field - please be sure to wait until the pick list displays and select from that list, otherwise you will experience an error message indicating that user does not exist in the system

5) Enter in any missing information in the “Stanford Faculty” section

6) Enter your location details in the “Location” section
   - IF a building location is specified, a Room # IS REQUIRED
   - A room# CANNOT be entered if a building location is not specified in the “Building” field
   - IF a building location is not listed or available as a selection, please enter the information in the “Other Location” field
7) Review the “Approvers & FYI's” tab to verify appropriate individuals are listed
   - Dependent upon your Department or School, you may or may not have to list anyone
     here- please check with your Department Administrator for confirmation

8) Click the “Continue to Certification” button at the bottom right side of the page
   - This action sets the Prepare task to “Approve OSF form (OSF)”

9) On the “Certification of Responsibilities” page, click on the “+” sign in the “Other Stanford Faculty Details”
   section to view information such as effort type additional approvers, etc.

10) Click the "Outside Professional Activities Certification" button to disclose any potential personal financial interests
11) Expand the “Stanford Policy” and read through all of the information within the “OUTSIDE PROFESSIONAL ACTIVITIES CERTIFICATION SYSTEM (OPACS)” section

12) Answer “Yes” or “No” to the “Do you (or your dependents) have financial interests that reasonably appear to be related to this research?” question

13) Click on the “Add Stanford Non-Faculty” button to add Stanford non-faculty (staff & students) who have personal financial interest to disclose

14) Click “Next”

15) You will land back on the SeRA Approval page

16) A confirmation date stamp will now be displayed after completion of the OPACS task

17) Review the proposal information and certify its accuracy

18) If there are any changes that need to be made, please click on “Edit OSF Form” button or to route to someone else to make the changes, click on “Return for Corrections”
19) You will be returned to the “Prepare Other Stanford Faculty Form”
20) Make the necessary changes
21) Click “Continue to Certification”

22) Re-review the proposal information and certify its accuracy
23) Check "I Accept"
   • A date/ timestamp will now display with your name

24) Click the “Complete Certification” button

25) You will be returned to your Home page and the PDRF will no longer be listed in the “Open Tasks” section
   • Note that if there are other OSF’s with either approval or prepare form tasks, it will not make its way to your Institutional Official, until all of those have been completed
   • Please note that this also includes Dean of Research, Export Control and SLAC review tasks