Prepare/ Approve an Other Stanford Faculty (OSF) Form

1. Either click on the link in the SeRA Systems email you received prompting your OSF action item or log into https://sera.stanford.edu/

2. From your SeRA landing page under the “Open Tasks” section, click on the ID# titled “Prepare OSF Form”. The screen will refresh to the Prepare OSF Form page.

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
   a. If any of the data is incorrect, on the right-hand menu underneath “Actions” select “Send to someone else to edit”
   b. Enter SUNet ID in the “Name” field and select from the populated pick list. It may take a few seconds for the list to populate.

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

6. Enter your location details in the “Location” section
   a. 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
b. 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 & FYIs**” tab to verify appropriate individuals are listed
   a. 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
   a. 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. The screen will redirect to the OPACS screening website. 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. The screen will redirect back to the SeRA. A confirmation date stamp will now be displayed after completion of the OPACS task.

16. Review the proposal information and certify its accuracy.
   a. If there are any changes that need to be made, click on the “Edit OSF Form” button.
to edit the form yourself, or select “Return for Corrections” to return the form to the administrator that prepared it.

b. If you select “Edit OSF Form”, you will be returned to the “Prepare Other Stanford Faculty Form” and be able to make any necessary changes.

c. When done editing the OSF form click “Continue to Certification” at the bottom of the page. You will be redirected back to the Certification page

17. Check the box next to “I Accept”. Upon doing so a date/timestamp will display with your name.

18. Click the "Complete Certification" button

19. You will be returned to your SeRA home page and the PDRF will no longer be listed under the “Open Tasks” section

   a. Note: the overall PDRF will not route to the specific institutional official for review until all OSFs have completed their certifications and any applicable Dean of Research, Export Control, and/or SLAC review tasks have been completed.