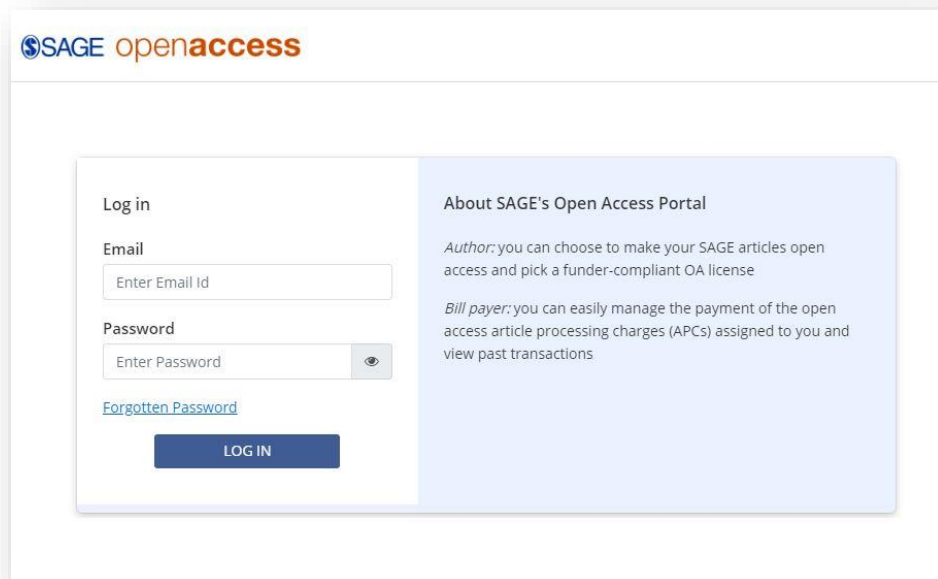




SAGE Open Access Portal User Guide

For Authors Publishing Open Access in a Subscription Journal



Thank you for your interest in publishing open access (OA) with SAGE. The following instructions will guide you through how to use the SAGE Open Access Portal.

openaccess.sagepub.com



After your article has been accepted for publication, following the peer review process, you will be contacted to make your article OA where your article is eligible for an open access agreement. You will receive an email from openaccess@sagepub.com with a subject line of 'Choose the publication route for your article 10.XXXX/XXXXXXXXXXXXXXXXXX' – see image below. To request open access for your article, you must email openaccess@sagepub.com.

- The email will include an expiration date of 14 days by which you need to respond – not responding by this date could affect your quoted article processing charge (APC).
- The email invites you to select the publishing route for your article. Begin by clicking on the links provided



STEP 1: Choose Open Access – This first step will give you the option to choose to publish open access. You will also see the article processing charge (APC) applicable to make your article OA. If you choose this route, you will be walked through additional steps, detailed below. If you choose to decline publishing open access, your article will be published via the subscription route. Please note: If you have any co-authors, any single author on the article can act on behalf of all the authors. All authors will be notified (copied) of the actions taken but only one author can complete the process.



STEP 2: Register/Log In – Once you’ve chosen to publish open access, you will be asked to complete the registration process. Select your name from the dropdown list of authors and create a password to register. If you are a returning user, enter your previously created password to log in.



STEP 3: License Selection – After registering on the portal you will be prompted to select a license type for your article. You will need to tell us who owns the copyright of your contribution, accept the terms and conditions, and warrant that you are authorized to sign on behalf of any other contributing authors. At this point, your license selection is complete and you will receive another email from openaccess@sagepub.com with a subject line of ‘Open access license chosen for your paper 10.XXXX/XXXXXXXXXXXXXXXXXX’ confirming your selection. If you have any co-authors, they will be copied on this email. Please note that if you are an author at an institution that has an open access agreement with SAGE and no APC is required, this will be your final step to complete.



STEP 4: Assign Payer – Your next and final step will be to assign a payer for your APC. Please note that this is a required step in order to complete your workflow. Your options will typically include one or more of the following choices—each is reviewed in detail below:

- A predetermined funding agency or institution
- Choose a different bill payer
- Yourself (‘I am the bill payer’)

Bill Payer Options

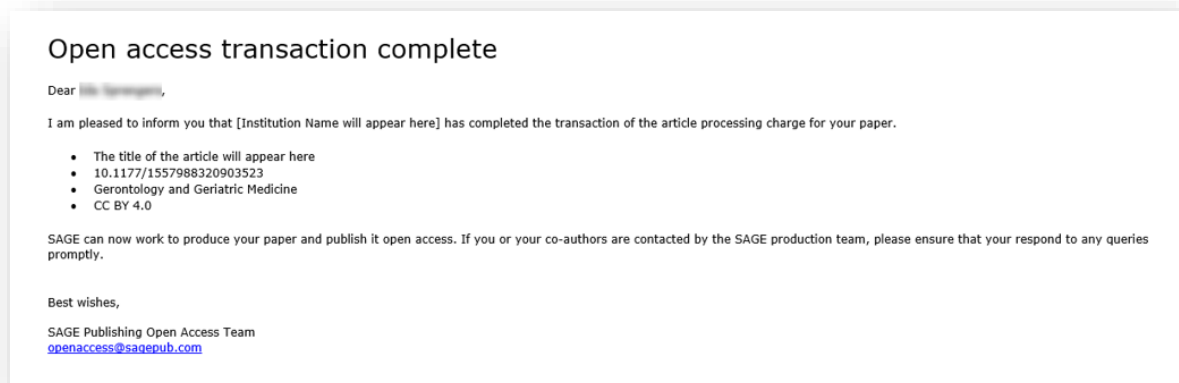
A predetermined funding agency or institution

If you have a predetermined funding agency or institution listed as a possible bill payer and you select this route, they will be notified by email. If they approve to pay your APC, you will be notified via email and no further action is required as the funding agency or institution will complete the payment steps. If they decline, you will be notified via email and will need to sign in again to the SAGE Open Access Portal to either nominate an alternative bill payer or select yourself as the bill payer and complete the payment steps as outlined below.

Choose a different bill payer

Whoever you nominate will receive an email from SAGE Open Access titled 'You have been nominated as bill payer 10.XXXX/XXXXXXXXXXXXXXXXXX' which invites them to review the APC request. Authors are also copied on these emails.

- **Bill Payer Approves:** If your nominated bill payer approves, you will be notified via email and no further action is required as the nominated bill payer will complete the payment steps. If the bill payer agrees to pay the APC for your article, you will receive a final email confirming this with a subject line of 'Transaction complete for your article'



- **Bill Payer Declines:** If your nominated bill payer declines, you will be notified via email as well as within the SAGE Open Access Portal. Bill Payer will include their reason for declining. You will need to sign into the SAGE Open Access Portal again to either nominate an alternative bill payer or select yourself as the bill payer and complete the payment steps as outlined above.

[Choose a different bill payer for open access APC](#)

Dear [Name],

At your request, we contacted Nominated Bill Payer (SAGE) to ask them to pay the open access article processing charge (APC) for your paper

- The title of the article will appear here
- 10.1177/1557988320903524
- Gerontology and Geriatric Medicine

They did not agree to pay the article processing charge (APC) for your paper because "Reason XYZ".

[Assign Different Bill Payer](#)

Please note that your article will not be published open access until a different bill payer agrees to pay the APC.

Please log into [SAGE Open Access Portal](#) where you can either assign yourself as the bill payer or to choose a different bill payer.

Best wishes,

SAGE Publishing Open Access Team
openaccess@sagepub.com

Yourself ('I am the bill payer'):

If you select yourself as bill payer, you will be taken through the following workflow:

- **Step 1 – Confirm Billing:** here you will be able to review your APC pricing information and enter your billing address details.

The screenshot shows the 'Confirm Billing' step of the SAGE openaccess workflow. At the top, a progress bar indicates four steps: 1. Confirm Billing (active), 2. Preview Invoice, 3. Make Payment, and 4. Order Confirmation. The main heading is 'Paying your Article Processing Charge'. Below this, a table displays pricing details in GBP. To the right, 'SAGE choice' article details are shown, including the article title, type, DOI, journal, and author information. At the bottom, a 'Billing Address' form is partially visible, with a 'First Name' field containing the text 'Published'.

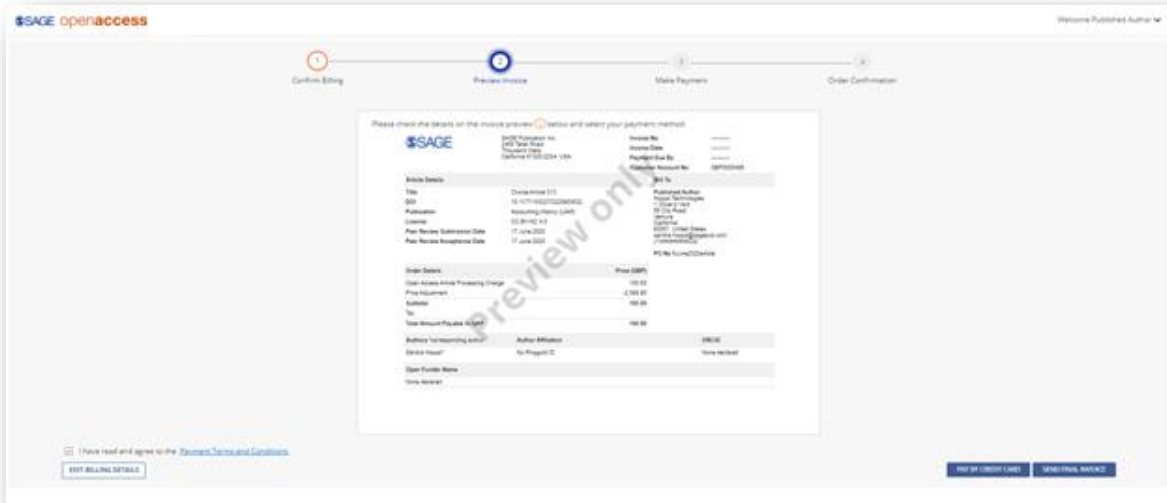
Pricing Details	Price (GBP)
Open access article processing charge	100.00
Price Adjustment	-2,099.90
Subtotal	100.00
Tax (0%) (Tax is calculated based on your account's billing address)	0.00
Total	100.00

SAGE choice
Article Details
Article
Choice Article 313
Article Type
Article
DOI
10.1177/1032373220903532
Journal
Accounting History
Journal Type
Hybrid
Authors
Sandra Hopps
Corresponding author

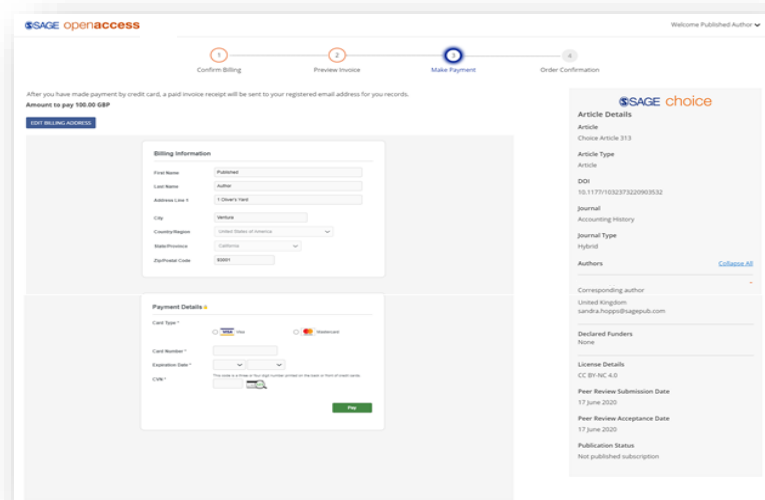
[Collapse All](#)

Billing Address
(If changes are made, tax will be re-calculated on the Preview Invoice page)
First Name*
Published

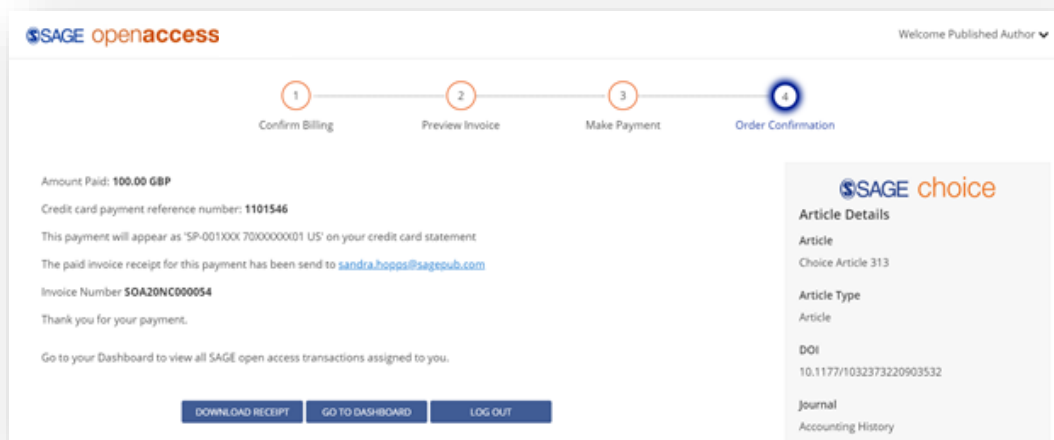
- **Step 2 – Preview Invoice:** here you will review a Preview of your invoice based on the information you entered on the previous page. You can make further edits to your billing details or if you are ready to proceed, agree to the Payment Terms and Conditions and select your preferred payment option which include:
 1. Pay by credit card
 2. Send final invoice (which can be paid via bank/wire transfer or credit card)



- **Step 3 – Make Payment:** you will complete this step only if paying your APC by credit card. If paying by credit card for the first time, you will need to enter all required billing information and payment details. Once you hit 'Pay' you will progress to Step 4 and will simultaneously receive a confirmation of payment email from SAGE Accounts Receivable - Open Access.



- **Step 4 - Order Confirmation:** If you paid by credit card (Step 3 above) or if you choose to be sent the final invoice, you will then finish here where you will see a summary of your article's details including Invoice number and APC amount. From here you can
 - Download the Invoice. The invoice will also be sent to you via email. You can pay the invoice via bank/wire transfer or credit card.
 - Return to your main dashboard within the SAGE Open Access Portal
 - Log out



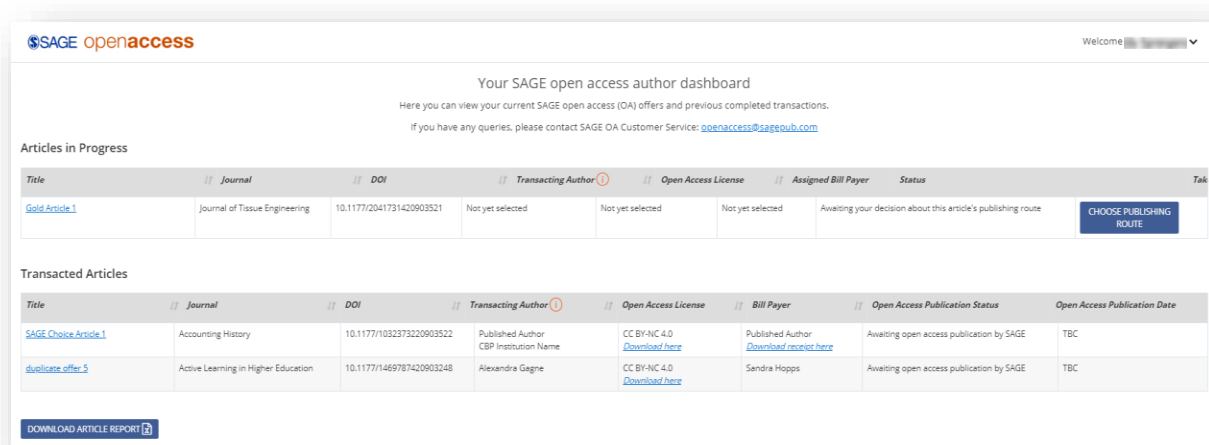
PLEASE NOTE:

You may only have Steps 1-3 to complete; Step 4 (Assign Bill Payer) will not appear for you **if your institution has an open access agreement that has paid the APC** or if you are an author at an institution that has centralised bill paying arrangements with SAGE **through which payment of the APC has been agreed under a pre-approval workflow**. Where this applies, you will be notified that your institution has agreed to pay the APC.

RETURNING USERS:

Once registered on the SAGE Open Access Portal, you can log in at openaccess.sagepub.com any time to access 'Your SAGE open access author dashboard' (see Image below) where you can:

- View Articles in Progress
- View Transacted Articles
- Download an Article Report



The screenshot shows the 'Your SAGE open access author dashboard' with a welcome message and a 'Welcome' dropdown menu. Below the header, there is a section for 'Articles in Progress' with a table containing one article. The table has columns for Title, Journal, DOI, Transacting Author, Open Access License, Assigned Bill Payer, and Status. A 'CHOOSE PUBLISHING ROUTE' button is visible next to the article. Below this is a section for 'Transacted Articles' with a table containing two articles. The table has columns for Title, Journal, DOI, Transacting Author, Open Access License, Bill Payer, Open Access Publication Status, and Open Access Publication Date. A 'DOWNLOAD ARTICLE REPORT' button is located at the bottom left of the dashboard.

Title	Journal	DOI	Transacting Author	Open Access License	Assigned Bill Payer	Status	Take
Gold Article 1	Journal of Tissue Engineering	10.1177/2041731420903521	Not yet selected	Not yet selected	Not yet selected	Awaiting your decision about this article's publishing route	CHOOSE PUBLISHING ROUTE

Title	Journal	DOI	Transacting Author	Open Access License	Bill Payer	Open Access Publication Status	Open Access Publication Date
SAGE Choice Article 1	Accounting History	10.1177/1032373220903522	Published Author CBP Institution Name	CC BY-NC 4.0 Downloaded here	Published Author Downloaded here	Awaiting open access publication by SAGE	TBC
duplicate offer 5	Active Learning in Higher Education	10.1177/1469787420903248	Alexandra Gagne	CC BY-NC 4.0 Downloaded here	Sandra Hoppis	Awaiting open access publication by SAGE	TBC

For your Articles in Progress, you can:

- Choose a license
- Assign a bill payer
- Pay an APC

For your Transacted Articles, you can view:

- Publication status
- Article details

CONTACT US:

At any point in your open access publishing route, you may contact SAGE directly at openaccess@sagepub.com with questions.