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/XXXXXXXXXXXXXXXX’ – 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.

Choose open access for your article

Dear [Author],


Open access publication for your paper in Accounting History has been requested by Jane Smith (University of Plainville).

Select your publishing route

Please note, to make your paper open access, an article processing charge (APC) is payable by you or a bill payer of your choice: 3,000.00 USD (subject to tax where applicable). This offer expires on Friday 29 May 2020. After this date, you may not be able to make your article open access for the same price.

Benefits of open access:
- free to read – no subscription required
- gain high visibility and global exposure to a multidisciplinary audience
- a route to be compliant with funder and institution open access mandates

Visit SAGE’s Open Access Portal to learn more and choose your publishing route.

Best wishes,
SAGE Publishing Open Access Team
openaccess@sagepub.com

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/YYYYYYYYYYYY’ 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’)

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

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.
• **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

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.

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