

# National Council for State Authorization Reciprocity Agreements

## State Portal Agent Process Guide

Version 1.1

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National Council for  
State Authorization  
Reciprocity Agreements

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to state oversight of distance education*

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# 1. Brief Overview

## Initial Institutional Application:

The State Portal Agent (“SPA”) receives an application from an institution wishing to participate in SARA. The SPA sends the institution an email stating an application has been received and is under review. The SPA then approves or denies the application. If denied, the SPA must provide a written response to the institution stating the reason(s) for the denial.

If the State Portal Agent (“SPA”) approves the institution, the State Portal Agent (“SPA”) must then approve the institution in the NC-SARA SalesForce system and select the institution type – Public, Private / Non-Profit, Independent/ For-Profit / Tribal. The State Portal Agent (“SPA”) then sends an email to the institution informing them of approval and instructing them to register in the system and pay using the following link:

<http://nc-sara.wiche.edu/institutions?token=9ccbbf7d871bb9791113f6ce82e69ea8>

All state approved institutions are required to register using the above link in the SalesForce system. At the time of registration, the institution will be provided with an invoice and an option to pay NC-SARA national fees either by credit card at the time of registration or instructions on paying by check. After the money is received by NC-SARA and posted by the accounting department, the institution is sent an electronic system-generated welcome letter from NC-SARA. The State Portal Agent is copied on this email. The institution is then a full-fledged SARA member and will be added to the list of participating institutions on the NC-SARA.org website. Many State Portal Agents (“SPA”) also choose to send their own follow up “Welcome New Member”.

## Renewals:

Institutions must renew their participation approval every 12-months, with the anniversary of that renewal falling on the date a year after their official participation start date (the date the NC-SARA fee was posted). Ninety (90) days prior to that renewal date, the SalesForce system will send a notification email to the primary institution contact on file in the system and to the respective State Portal Agent (“SPA”) contact. If necessary, a 30-day reminder email will also be generated. The institution must complete the renewal application available at <http://nc-sara.org/files/docs/renewal%20application%202.pdf> and submit that application to its local state portal agency. If reapproved, the State Portal Agent (“SPA”) will inform the institution and log-in to the SalesForce portal and approve the institution using the same procedure used for the initial approval. The SalesForce system will automatically send out an email with an institution-specific link for the institution with which the institution primary contact will review the existing account information, edit if necessary, and pay another year of NC-SARA fees. As before, once payment is received and posted by NC-SARA, an additional 12-months of institutional participation is established.

For late fees, grace periods, and other scenarios, please see Section 3.

## Complaint Reporting:

States participating in the State Authorization Reciprocity Agreements shall report the following information to the National Council for State Authorization Reciprocity Agreements on a quarterly basis:

1. The number of complaints from out-of-state students, by institution, appealed to the state’s SARA portal agency after the person making the complaint has completed the institution’s and/or governing board’s (if relevant) complaint resolution process;
2. The resolution of those complaints in the aggregate, by SARA institution; the number resolved in favor of the person making the complaint, the number resolved in favor of the institution, the number resolved by agreement, and the number still pending resolution.

## 2. Initial Application Approval Process



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## State Portal Agency

### Initial Institutional Approval Process

#### 1) Approval of Initial institutional membership in Salesforce

Once a state portal agency (“SPA”) has approved an institution to participate in SARA, the SPA need to approve the institution and set the member type in the Salesforce system by logging into: <https://wiche.force.com/sara/login>

1. Go to the “Accounts” tab.
2. Choose “Institutions awaiting approval” from the “View: \_\_\_\_” dropdown menu.
3. Click “Go”.

*\* Note: if institution is not listed, contact NC-SARA staff.*

4. Locate the institution name
5. Click the underlined institution name to enter the account record
6. In the institution account record, select “Edit” again
7. Click the drop down menu on “SARA Member Type”.
8. Select: Public, Private/Non-Profit, Independent/For-Profit, Tribal
9. Click Save
10. Click “Approve Institution”

#### 2) After the state portal agency has approved an institution for participation in SARA in Salesforce...

After the “SPA” approves an institution, they must send the institution the link to the payment/registration form to finalize participation. **Note: all institutions are required to submit this form, regardless of payment method.** Once payment is received, the institution is officially participating in SARA and will be listed on the nc-sara.org site.

**The NC-SARA payment/registration form is at:**

<http://nc-sara.wiche.edu/institutions?token=9ccbbf7d871bb9791113f6ce82e69ea8>

**3) Once payment is received, the institution and state portal agency contact will receive a system-generated Welcome Letter notification of official membership and access to NC-SARA approved logos:**



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Approved Institution

**4) Notice for state and institution PR/press/promotional efforts:**

When using Lumina Foundation’s name, please follow the guidelines on page 2.

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## Approval – System Process Detail

Once an institutional application for SARA participation has been received, reviewed, and approved by the State Portal Agency.

- Log-in to the SalesForce portal at <https://wiche.force.com/sara/login> with your username and password
- Navigate to the “Accounts” tab
- Choose “Institutions awaiting approval” from the dropdown menu – “Institutions” or “recently viewed accounts” are also options
- Click “Go”

**Home** Accounts Contacts Complaint Report

Welcome to the NC-SARA Community

**Messages and Alerts**

**APPROVING INSTITUTIONS**

To approve Institutions from the list:

- 1.) Go to the "Accounts" tab.
- 2.) Choose "Institutions awaiting approval" from the "View:" dropdown. Click "Go".

**Click on Accounts tab to locate institutions**

- Locate the name of the institution you wish to approve by selecting the alphanumeric with which the name of the institution begins

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Home Accounts Contacts Complaint Report

Messages and Alerts

**Institutions awaiting approval** List Feed

Approve Institutions

Action	Account Name	Billing City	SARA Account Category	SARA Membership Start	SARA Membership End
Edit   +	College of Covid Reporting...	Hobart	Member	12/5/2014	12/4/2015
Edit   +	Goshen College	Goshen	Member	12/18/2014	12/17/2015
Edit   +	University of Southern Indi...	Evansville	Member	12/11/2014	12/10/2015
Edit   +	Indiana State University	Terre Haute	Member	7/15/2014	1/15/2016
Edit   +	Purdue University - North...	Westville	Member	1/26/2015	1/25/2016
Edit   +	Saint Mary-of-the-Woods...	Saint Mary-Of-The-Woods	Member	7/21/2014	1/21/2016
Edit   +	Saint Mary's College	Notre Dame	Member	1/20/2015	1/19/2016
Edit   +	Purdue University	West Lafayette	Member	1/26/2015	1/25/2016
Edit   +	American College of Educ...	Indianapolis	Member	12/8/2014	12/7/2015
Edit   +	Bethany Theological Sem...	Richmond			
Edit   +	Ball Memorial Hospital	Muncie			
Edit   +	Calumet College of St. Jo...	Whiting			
Edit   +	Christian Theological Se...	Indianapolis			
Edit   +	Concordia Theological Se...	Fort Wayne			
Edit   +	DePauw University	Greencastle			
Edit   +	Earlham College	Richmond			
Edit   +	University of Evansville	Evansville			
Edit   +	Franklin College	Franklin			
Edit   +	Good Samaritan Hospital	Vincennes			
Edit   +	Hanover College	Hanover			
Edit   +	Holy Cross College	Notre Dame			
Edit   +	International Business C...	Fort Wayne			

From this screen, you will be able to see both unapproved institutions (they have no **SARA Account Category** or **Participation State** or **End Date**) and institutions within their 90-day renewal period. Renewal institutions will be addressed specifically in Section 3 of this document. Renewal institutions have the **Account Category** and **start/end** dates filled in. You can sort this data view by clicking on the column headers.

- Select the underlined institution name to enter account record
- Select “Edit” in the account record
- Click on the drop down menu on “SARA Member Type” and choose Public, Private, Independent or Tribal
- Click “SAVE”
- Next, click the “Approve Institution” button

The screenshot displays the 'Earlham College' account record in the Salesforce portal. The page is divided into several sections:

- Navigation:** Home, Accounts, Contacts, Complaint Report.
- Messages and Alerts:** A sidebar containing instructions for approving institutions and reporting complaints.
- Account Detail:**
  - SARA Institution OPEID: 179,300
  - SARA Member Type: (Dropdown menu)
  - SARA Membership Fee, Start Date, End Date: (Fields)
  - Parent Account: (Field)
- Address Information:**
  - Billing Address: 801 National Avenue, Richmond, IN 47374-4095
  - Phone: 765-983-1200
  - Fax: (Field)
  - Website: <http://www.earlham.edu>
- System Information:**
  - Account Name: Earlham College [View Hierarchy]

Two red callout boxes provide instructions:

- Step 1:** To approve an institution, simply hit this button. (Points to the 'Approve Institution' button)
- Step 2:** Select this button to set SARA Member Type. (Points to the 'Edit' button)

- Once the State Portal Agent has approved an institution in the Salesforce portal, the State Portal Agent (“SPA”) will need to send an approval email to the institution contact informing that person of the institution’s approval and instructing the institutional personnel to register the institution in the Salesforce system and pay the NC-SARA annual fees at this link:

<http://nc-sara.wiche.edu/institutions?token=9ccbbf7d871bb9791113f6ce82e69ea8>

**All institutions MUST register in the system in order to become members.**

**SAMPLE: State Portal Entity Approval Letter**



**Department of Getting Things Done**

April 16, 2015

Dr. J. Sherman  
ACME University  
123 Alpha Street  
Boulder, Colorado 80301

Dear Dr. Smith;

I am pleased to inform you that the application from ACME University to participate in the State Authorization Reciprocity Agreement (SARA) has been approved by the Department of Getting Things Done, which is recognized by your regional compact for your region as your State Portal Entity.

To finalize participation in SARA, you must complete and submit the registration and payment form at:

<http://nc-sara.wiche.edu/institutions?token=9ccbbf7d871bb9791113f6ce82e69ea8>

Once payment is received by the National Council for State Authorization Reciprocity Agreements (NC-SARA), your institution is considered to be officially participating in SARA and you will receive your official Welcome email and be listed on the [nc-sara.org](http://nc-sara.org) site.

Please let me know if you have any questions about your membership in SARA.

Sincerely,

H. Allison  
Director,  
Department of Getting Things Done

Institutions will register and be directed to a webpage with the payment invoice. Institutions will have the option to pay by credit card at this point or will be provided with instructions on how to pay by check.

- Once payment is received and posted, the institution is an official SARA participant.
- An automatically generated official “Welcome” letter is emailed through the Salesforce system. It is sent to the registered Primary Institution Contact in the system, to the State Portal Agency contact, and to NC-SARA.
- The institution will be added to the list of participating institutions on the NC-SARA website.
- SARA participation is valid for 12-months

## SAMPLE: NC-SARA Automatically Generated Welcome Letter



# National Council for State Authorization Reciprocity Agreements

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**Marshall A. Hill**  
Executive Director

**Paul Lingenfelter**  
Chair, NC-SARA Board

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\*Member of NC-SARA Executive Committee

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October 19, 2015

XYZ University  
P.O. Box 1234  
Anytown, OH 12335-0001

Dear J. Smith,

On behalf of the National Council for State Authorization Reciprocity Agreements, I am pleased to welcome XYZ University as an institutional participant in the SARA initiative. Your institution is listed on our website ([www.nc-sara.org](http://www.nc-sara.org)) and we encourage you to inform students of your participation. We have logos that you may use to help do that; use whichever you prefer. To access the logos, visit: [www.nc-sara.org/logos](http://www.nc-sara.org/logos) (login: Institution; password: saralogo).

A great deal of work has gone into the development and implementation of the SARA initiative. We know that SARA will increase administrative efficiency and lower the costs of obtaining authorization to provide postsecondary distance education in states that join. These benefits will result in increased access as institutions like yours are able to more widely distribute academic programs and accept enrollments from students in many other states.

But increased access and efficiency will mean little if they are not accompanied by high quality. That is why all SARA institutions are committing to several steps designed to ensure that courses and programs they offer through the SARA initiative provide high-quality opportunities that can help students reach their goals.

Thank you for joining us in this work and best wishes for your continued success.

Sincerely,

Marshall A. Hill  
Executive Director  
National Council for State Authorization Reciprocity Agreements



# National Council for State Authorization Reciprocity Agreements

## State Portal Agency

### Institutional RENEWAL Approval Process

#### 1) Eligibility

Institutions previously approved by their home state portal agency as SARA participating institutions are eligible for renewal. During the review process portal agencies may pay particular attention to institutions operating under provisional admission (Section 3(2)).

#### 2) Process

State portal agencies shall review institutional renewal applications to confirm the institution's past compliance with SARA policies and standards and affirm its willingness and ability for continued future compliance. The following steps provide general guidelines that will govern the renewal process.

Via a Salesforce generated email, NC-SARA provides to institutions a notice of upcoming renewal 90-days and 30-days prior to the institutional renewal date. The portal agency is also notified of the institutional renewal notice. The chief executive officer or chief academic officer of the institution completes and submits the application to their state portal agency within 30 days of receipt of such notice to allow proper time for the review process.

#### 3) SPA Process

The portal agency shall review the application, approve, deny or return the application for additional information, render a decision, and notify the institution no later than 30 days after receipt.

If approved for continued membership, the "SPA" logs into the salesforce portal at

<https://wiche.force.com/sara/login>

- Navigate to the "Accounts" tab
- From the Dropdown menu, select "Institutions"
- Click "Go"
- Locate the institution for renewal approval
- Click the underlined institution name to enter the account record
- Click "Approve Institution". *Please note this is the same button that is used for both the initial institution approval as well as renewal approval. **The renewal option is only functional within the 90-day renewal window.***

The "SPA" should inform the institution to expect an email from the Salesforce system which will contain the link to complete the renewal process and payment.

**Grace Period:** There is a 30-day post-expiration date grace period for situations when the renewal review takes longer than anticipated due to issues that arise outside the institution's or SPA's control.

**Late Fee:** Following the 30-day grace period, institutions not yet completing the renewal process are allowed an additional five business days to complete the process; however, a 25% late fee is automatically will be added for renewals that occur during that five-day period. Once the institution pays its annual fee thereby completing the renewal process, renewal starts at the end of current membership NOT the date the renewal fee is paid.

**Late Fee Waiver:** A waiver on an institutional late fee can only be obtained by approval. The Regional Director will review the circumstances regarding the request for a waiver and propose the recommendation to the NC-SARA Executive Director. The NC-SARA Executive Director will formally grant or deny the waiver. If approved, the institution must pay by check. Late fees cannot be waived on credit card purchases.

**Expiration:** If an institution does not complete the renewal process within the five business days following the 30-day grace period, the institution is no longer a participating SARA institution and will be removed from the NC-SARA website and not eligible to reapply for 180 days. Should the institution wish to rejoin, it would begin as a new applicant institution.

**Appeal Process:** If institutional membership renewal is denied, the portal agency will provide to the applicant institution a written reason for the denial. The institution may appeal the denial of its renewal application to its regional compact to ensure SARA policies and standards were upheld during the review process.

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## Renewal - System Process Detail

Ninety (90) days and thirty (30) days (if necessary) before institutional participation/ membership expiration, the Salesforce system automatically sends a renewal notification to the Primary Institution Contact and to the State Portal Agency contact. Changes to the Primary Institution Contact information have to be made by the NC-SARA staff by request.



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Congratulations ACME University on completing your first year of institutional participation in SARA! Consistent with SARA renewal policies, this notice is provided to you no later than 90 days before your upcoming membership renewal date 10/16/2015.

Please utilize the link below to access the renewal application, which must be forwarded to your state's SARA portal agency within 30 days of your receipt of this notice. Upon approval by your state's portal agency, a payment link will automatically be generated for you to submit the appropriate annual fee to complete your SARA participation renewal for the next year.

If you have any questions, please feel free to contact [info@nc-sara.org](mailto:info@nc-sara.org).

Renewal Application: <http://nc-sara.org/files/docs/renewal%20application%20.pdf>

Thank you and have a great day!

Sincerely,  
NC-SARA staff

---

The institution fills out and submits the renewal application to the local State Portal Agent.

The State Portal Agent (“SPA”) has 30-days (per NC-SARA *Policies and Standards*, Section 3 (4)) to review the application and either approve, deny, or return the application for additional information, render a decision and notify the institution.

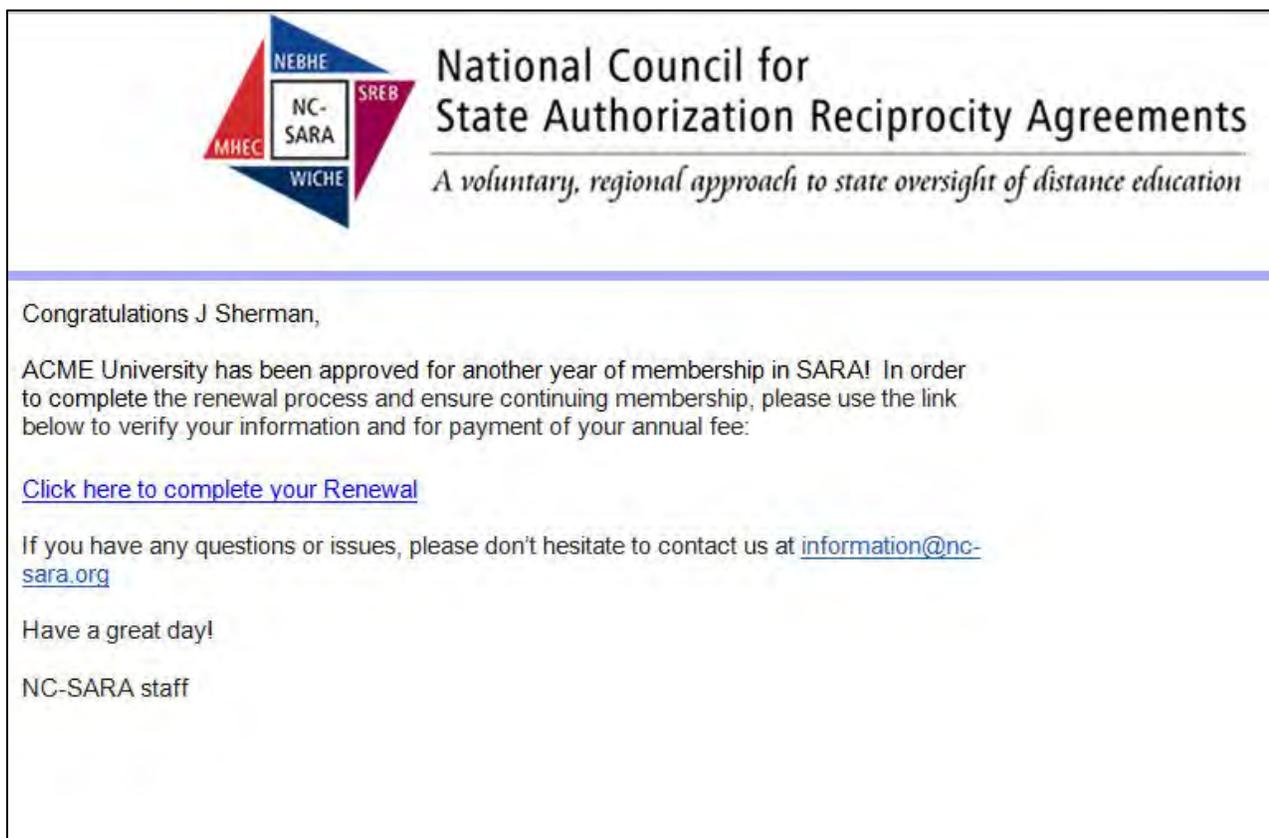
If the institution is approved for continued SARA participation, the SPA logs in to the Salesforce Portal at <https://wiche.force.com/sara/login>

- Navigate to “Accounts” tab
- From the dropdown menu, select “Institutions”
- Click “Go”
- Locate the institution for renewal approval
- Click on the “edit” link to the left of the institution name
- Click “Approve Institution”.

*\*\*Please note this is the same button that is used for both the initial institution approval as well as renewal approval. The renewal option is only functional within the 90-day renewal window.*

- Once the institution is approved, the Salesforce system sends out an automatically generated email to the Institution Primary Contact with an institution-specific renewal URL.

*\*\*\*We strongly recommend that the SPA inform the institution to expect this email with the payment link sent via the system and should they not receive it immediately, to inform NC-SARA so the link can be sent manually and payment made promptly as to ensure continued membership participation.*



- This URL allows the Institution Primary Contact to review and edit the existing account information for that institution (name, address, contact info), and allows the institution to pay either by credit card or check.

Home | Contact Us

NC-SARA Institution Form [Help me, SARA!](#)

**Institution Information**

Institution Name	Acme University	Institution OPEID	00012345
Street Address	123 Alpha Street	City	Johnson
State	MO	ZIP/Postal Code	63501
Website	http://WWW.ATSU.EDU		

**Choose Existing Primary Contact or Create New Primary Contact**

First Name	J	First Name	
Last Name	Sherman	Last Name	
Title	Senior Vice President	Title	
Phone	(555) 123-1234	Phone	
Email	name@email.com	Email	
SARA Contact IPEDS	1,234	SARA Contact IPEDS	
SARA Contact Annual Fee	\$4,000	SARA Contact Annual Fee	
Select the Primary Contact	Existing Primary Contact		

**Institution FTE Enrollment**

FTE Enrollment Per Latest IPEDS:

Under 2,500 : \$2,000  
 2,500 - 9,999 : \$4,000  
 10,000 or more : \$6,000

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- Once payment is received and posted, the institutional participation will be renewed for another 12-months.

**\*Grace period:** NC-SARA currently allows for a 30-day post-expiration date grace period for all institutions, though we hope it is rarely needed. Please work with your institutions to complete the renewal process prior to the expiration date.

**\*Notification:** NC-SARA is currently running weekly reports to inform the State Portal Agencies and Regional Directors of any institutions nearing expiration so they can aid in following up with those institutions and ensure that the renewal notification emails have been received by the appropriate person at the institution.

**\*Late fee:** Following the 30-day grace period, a five business day extension is granted for institutions that have not yet completed the renewal process, but this five day extension comes with a late fee of 25%. Following this extension, the institution is removed as a SARA participant and the institution must wait 180 days before applying again for SARA participation. Should the institution wish to reapply to participate in SARA at the conclusion of the 180 days, it would do so as a new applicant institution.

**\*Late fee waiver:** A waiver of an institutional late fee can only be obtained by NC-SARA approval. The Regional Director will review the circumstances reflected in a waiver request and possibly recommend to the NC-SARA Executive Director that the late fee waiver be granted. The NC-SARA Executive Director will formally grant or deny the waiver. If approved, the institution must pay by check. Late fees cannot be waived on credit card purchases.

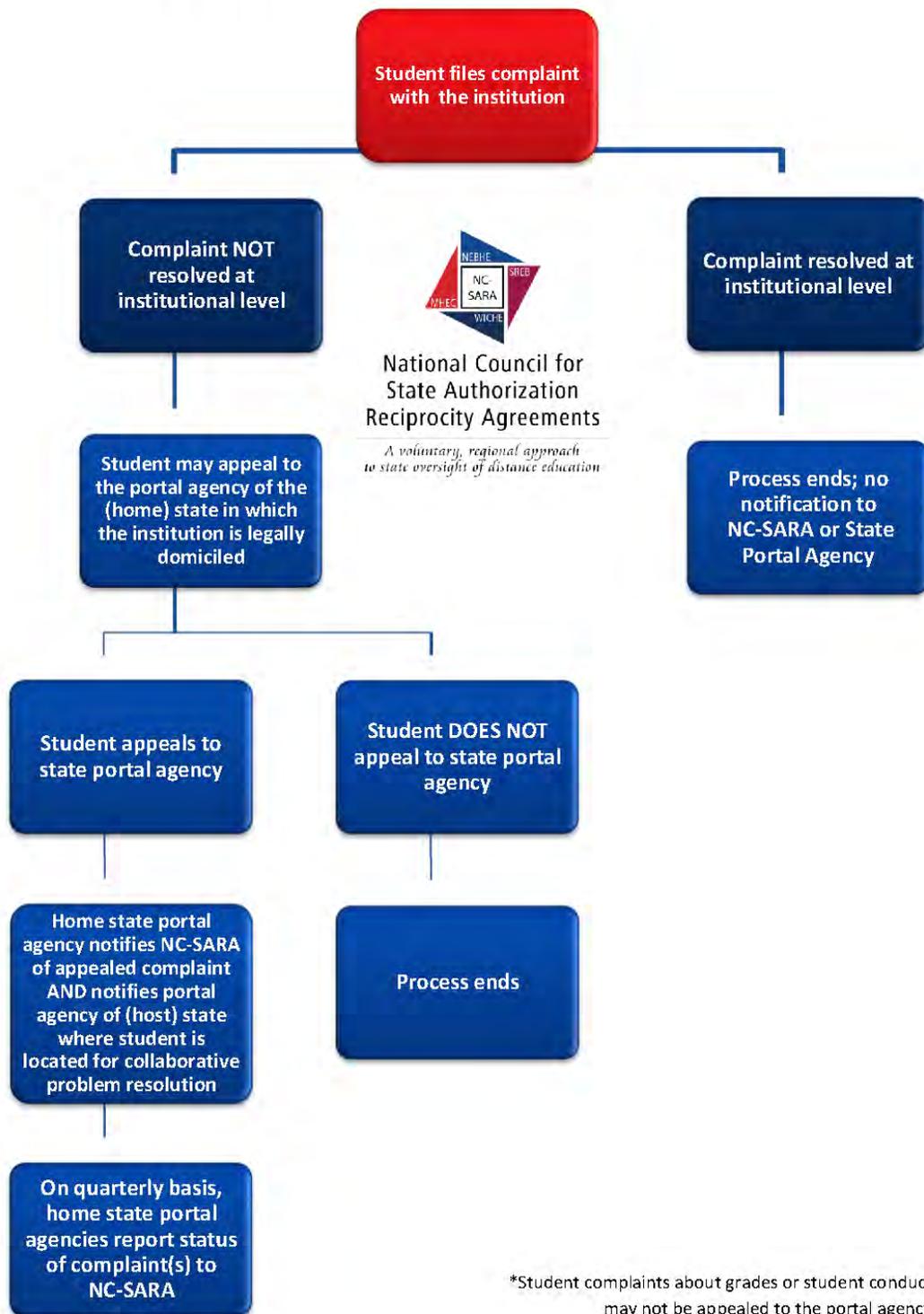
**\*Appeal process:** If renewal participation is denied, the State Portal Agency will provide to the applicant institution a written reason for the denial. The institution may appeal the denial of its renewal application to its Regional Compact to ensure SARA policies and standards were upheld during the review process.

*\*Please review the NC-SARA Policies & Standards document for actual policies*

<http://nc-sara.org/files/docs/FINAL%20SARA%20General%20Policies%20released.pdf>

## 4. Complaint Reports

### SARA Student Complaint Process



## Complaint Reporting - System Process Detail

From the Policies and Standards document

<http://nc-sara.org/files/docs/FINAL%20SARA%20General%20Policies%20released.pdf>

### Section 7. Complaint Resolution Reporting for States Participating in SARA

States participating in the State Authorization Reciprocity Agreements shall report the following information to the National Council for State Authorization Reciprocity Agreements on a quarterly basis:

1. The number of complaints from out-of-state students, by institution, appealed to the SARA State Portal Agency after the person making the complaint has completed the institution’s and/or governing board’s (if relevant) complaint resolution process;
2. The resolution of those complaints in the aggregate, by SARA institution: number resolved in favor of the person making the complaint, number resolved in favor of the institution, number resolved by agreement, and number pending resolution.
3. The reporting by SARA states of such complaints effective in April 2015.

The number of complaints appealed to the state portal agency will be placed within the context of the institution’s total out-of-state distance education enrollments, as follows:

Student complaints appealed to SARA portal agencies (Date to Date)*						
	Number of complaints appealed to the portal agency*	Institutional out-of-state distance ed enrollments	Number resolved in favor of student	Number resolved in favor of institution	Number of negotiated resolutions	Number still under consideration
Alaska						
SARA Institution 1						
SARA Institution 2						

\* After completion of the institutions full complaint resolution process.

NC-SARA will not collect individually identifiable student data and will comply with the Family educational Rights and Privacy Act (FERPA).

### SalesForce Complaint Reporting Process

- Complaint Reports are due approximately 21-days after the end of the calendar year quarter
- The SalesForce system will send an email to the State Portal Agency contact with a notification that Complaint Report filing has begun. The State Portal Agent (“SPA”) has 21-days to complete the complaint report. Weekly reminders are sent out until the SPA has completed the report.
- The State Portal Agent (“SPA”) contact will log in to the SalesForce portal and navigate to the “Complaint Reports” tab
- Fill in all fields
  - In the case of no complaints, a zero will still need to be entered for tracking purpose and verification of report information.
- Hit “Save and Submit”

## 5. NC-SARA Process and Administration - Frequently Asked Questions

### >>I want to approve an institution, but do not see it listed in my Salesforce dashboard.

Occasionally there are institutions that did not make it in the initial batch upload when the system was built. In those cases, all you need to do is email NC-SARA at [nc-sara@nc-sara.org](mailto:nc-sara@nc-sara.org) with the following information:

Full Institution Name  
OPEID  
Address

If there is no OPEID number, please inform NC-SARA as an unofficial OPEID number needs to be assigned by NC-SARA.

*Note: If an institution has been manually entered, it will appear in the "Institutions" section of your Salesforce dashboard, NOT in "Institutions awaiting approval"*

**APPROVING INSTITUTIONS**

To approve Institutions from the list:

- 1.) Go to the "Accounts" tab.
- 2.) Choose "Institutions awaiting approval" from the "View" dropdown. Click "Go".
- \* Note: if institution is not listed, contact NC-SARA staff.
- 3.) Check the box next to the institutions you'd like to approve.
- 4.) Click "Approve Institutions".

**Approve a single Institution:**

- 1.) Go to the "Accounts" tab.
- 2.) Choose "Institutions awaiting approval" from the dropdown. Click "Go".
- 3.) Click on the name of the institution you'd like to approve.

Action	Account Name	Phone	SARA Account Category
<input type="checkbox"/> Edit	Alexandria School of Scientific Therapeutics	765-724-9152	
<input type="checkbox"/> Edit	American College of Education		Member
<input type="checkbox"/> Edit	Anabaptist Mennonite Biblical Seminary	574-295-3726	
<input type="checkbox"/> Edit	Ancilla College	574-936-8898	SPA approved
<input type="checkbox"/> Edit	Anderson University	765-649-9071	Member
<input type="checkbox"/> Edit	Avant Gard The School		
<input type="checkbox"/> Edit	Aveda Frederic's Institute		
<input type="checkbox"/> Edit	Aviation Institute of Maintenance - Indianapolis	317-243-4519	
<input type="checkbox"/> Edit	Ball Memorial Hospital	765-747-4372	
<input type="checkbox"/> Edit	Ball State University	765-289-1241	Member
<input type="checkbox"/> Edit	Bethany Theological Seminary	765-983-1800	

### >>There are several at the State Portal Agency staff entering data. Can multiple accounts be created for login and email communication in Salesforce?

Unfortunately, the system generates the message to the primary State Portal Agent only. We are still working on adding multiple contacts in the system to receive messages and hope to have this issue addressed in the future. For messages that are not generated by the Salesforce system but are sent by the NC-SARA staff directly, inform the staff at NC-SARA and they will add you to their distribution list.

### >>Can I create another Salesforce account for other individuals at the State Portal Agency?

Our Salesforce system has limited user accounts and therefore only one account is allowed per state portal agency. Although we cannot setup multiple users in Salesforce or for security reasons use a group email address as the Salesforce primary contact email, we can, however, allow for the use of a group email address for the State Portal Agency contact information on [nc-sara.org](http://nc-sara.org) to direct incoming applications and inquiries.

### >>How can I tell if an institution has paid?

If the institution is a new participant, the primary State Portal Agent contact will be copied on the official Welcome Letter sent by the Salesforce system. This letter is automatically generated when the NC-SARA fee payment has been posted. A similar email will be sent for successful renewals. You can also check your Salesforce dashboard under "Institutions". If an institution has paid, the dates will be filled in appropriately.

**>>An Institution primary contact has changed. How does this get changed in the system?**

The NC-SARA staff can change that for you. Please provide the name, title, email, and phone for the new Primary Institution Contact. Additionally, when an institution has been approved for renewal, institutional personnel will have an opportunity to review the existing information in the system and make any needed changes.

**>> I can't find my password. Can you send it to me?**

Per standard security procedures, no one has access to your system password other than the owner of that account, the SPA primary contact. However, NC-SARA staff can do a password reset. Simply inform the NC-SARA staff you need a password reset, and they will have the system send the registered primary contact an email with reset instructions.

**>>Where do institutions mail their NC-SARA dues if they are paying by check?**

At present, NC-SARA is operating under the W9 of the Western Interstate Commission for Higher Education (WICHE) while the details of the 501(c)(3) status are finalized. Checks should be made out to:

**WICHE / NC-SARA  
3035 Center Green Drive, Ste 200  
Boulder CO 80301**

**>>An institution is requesting a copy of the NC-SARA W-9**

While the details of the NC-SARA 501(c)(3) status are finalized, NC-SARA is operating under the W-9 of the Western Interstate Commission for Higher Education (WICHE). A copy of the W-9 can be found at this link: <http://nc-sara.org/files/docs/WICHE%20W9.pdf>

**>>What methods of payment does NC-SARA accept for participation fees?**

NC-SARA **only** accepts checks and credit card payment. An institution can choose its payment preference when registering in the SalesForce system after initial participation or renewal approval. At this time, no other payment options are available.

**>>Can an institution pay for multiple institutions at the same time? (For example, a university system has several campuses with separate OPEID numbers but would like to just do one payment)**

We can now accept payment from a single entity "system" for multiple institutions under these conditions:

- Each Institution must still apply independently, and once approved, each institution will still need to individually register in our system so we have the primary contact info, etc. for future correspondence.
- If paying for several institutions at once, we can **ONLY** accept a check. A credit card payment will not work in this scenario.
- The "system" paying for all the institutions will need to enclose a list of each institution included in the payment and corresponding institution fee with the check so we can ensure each institution is allotted the correct amount.
- Renewal applications will still be reviewed and approved individually by the state SARA entity. Again, the system can choose to pay for a group of individual institutions by a single check, expiration dates and late fees will not be waived for any institution included in the group if the payment is delayed while waiting on an individual institution approval. In this case, a separate invoice will be created for the late fee as needed

## 6. Helpful Links

SalesForce login: <https://wiche.force.com/sara/login>

Initial Institution Registration and Payment link:

<http://nc-sara.wiche.edu/institutions?token=9ccbbf7d871bb9791113f6ce82e69ea8>

Institution Renewal verification and payment link: *institution specific URL generated by SalesForce*

Complaint Reporting: <https://wiche.force.com/sara/login>

SARA Application: <http://nc-sara.org/application/institutional-approval>

SARA Renewal Application: <http://nc-sara.org/renewal-process-institutions>

SARA Policies and Standards: <http://nc-sara.org/files/docs/FINAL%20SARA%20General%20Policies%20released.pdf>

W-9: <http://nc-sara.org/files/docs/WICHE%20W9.pdf>

Email address for general questions: [Information@nc-sara.org](mailto:Information@nc-sara.org)