



## Instructions and Guidance for Submitting a Proposed SARA Policy Modification

***Please use the instructions and guidance below to submit a complete proposal. Following these guidelines will help ensure your proposal moves forward for consideration as expeditiously as possible. Proposals will be made visible to the public on the NC-SARA website shortly after a review to ensure all required elements have been completed.***

### IMPORTANT NOTES - NEW FOR 2025!

There are several new text fields for 2025 PMP submissions, including “Problem to be Solved”, “Blackline Text”, and “Notes”. We’ve included guidance below on what you should include in those parts of your submission.

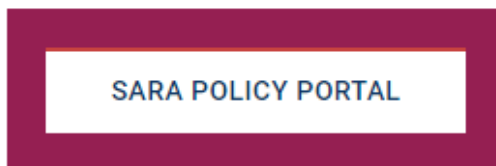
Please also carefully review the new guidance for the “Rationale for Change” field. The regional compacts via their regional steering committees are asking all proposers to provide additional information that will be helpful during the review process.

### ***Per Section 8.2 of the SARA Policy Manual:***

Proposed policy modifications shall clearly specify the following information: (i) section(s) of the *SARA Policy Manual* that will be amended or impacted by the proposal; (ii) specific amendatory language for each proposal; (iii) rationale for the proposal; and (iv) identification of the person or entity submitting the proposal.

### **How to Submit a Proposal**

From the [Participate in SARA Policy Modifications webpage](#), click the “SARA POLICY PORTAL” button.



Next, click the button titled “Create a Policy Modification Proposal.”

Create a Policy Modification Proposal

A welcome screen (screenshot below) will prompt you to log in with your existing credentials or register if you are new to the site. Click the “Log In” button on the bottom right of the screen or the link in the body of the message.

## Create a Policy Modification Proposal

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### Welcome to the SARA Policy Modification Portal!

We're excited about your interest in contributing to the SARA Policy modifications process. To proceed with creating a SARA Policy Modification Proposal, please [log in](#). If you're new to our site or don't have an account yet, you can easily register after clicking the "Log in" button.

### Important Note for State Portal Entities and Regional Compact Directors:


If you already have login credentials for the SARA Portal, please use the same information to sign in here. There is no need to register for a new account.

× Close

👤 Log In


Next, type your login credentials and click the “Log in” button at the bottom of the screen, or click “Need to register?” or “Forgot your password?”


- If you are a regional compact staff member or a SARA State Portal Entity staff member, use your regular SARA Portal username and password.

 **NC  
SARA**

**National Council for  
State Authorization  
Reciprocity Agreements**

**MHEC • NEBHE • SREB • WICHE**

 Username

 Password

**Log in**

[Forgot your password?](#) [Need to Register?](#)

**You are now logged in to the SARA Policy Modification Portal and will be able to begin a proposal submission.** Note: The portal homepage will look the same as the page you saw before you logged in, except now in the upper right corner you should see the circle icon with a person in it rather than a “Log in” button.



Click the button in the middle of the page titled “Create a Policy Modification Proposal.”

Create a Policy Modification Proposal

### Screen 1 - CREATE POLICY MODIFICATION PROPOSAL

On this screen, you will see several fields (some prepopulated) with the following information:

- First Name (text box)
- Last Name (text box)
- Email Address (text box) – *Please double check that your email address is correct as this is the address that will be used for future communications about your proposal. If your email address is not correct, please reach out to us at [info@nc-sara.org](mailto:info@nc-sara.org), as you will not be able to update the email address yourself.*
- Organization Type (drop-down menu)
  - College and University Staff
  - Individual
  - NC-SARA Staff
  - Other Organization
  - Regional Compact/Steering Committee
  - State Portal Entity Staff
  - NC-SARA Board

A text box will appear for you to enter the name of your organization, unless you select *Individual, NC-SARA Staff, or NC-SARA Board*. Note: There is a limit of 80 characters in the text box.

After you have entered the required information, click the “Next” button on the bottom right side of the screen to continue.

Next

## Screen 2 - CREATE A POLICY MODIFICATION PROPOSAL

Please reference the [SARA Policy Manual – Version 24.2 – December 16, 2024](#). A direct link to the manual is included on this screen.

To submit a SARA policy modification proposal, you will be asked for the following information on this screen, all of which will be visible to the public in the portal after your proposal has been submitted and reviewed:

### Title of Your Proposal (text box)

- Enter a title that reflects the essence of the proposal. If possible, include in the title the section of the manual that is impacted as well as a few words summarizing the proposed change.
  - *Example: “Sec. 2.3 (a) Member Withdrawal – Change Time to 60 Days”*
- There is a limit of 55 characters for the title of the proposal, so use your best judgment when creating a proposal title, keeping in mind reviewers may find descriptive titles more helpful because they will be reviewing many proposals.

### Proposal Type (drop-down menu)

- Select **New Policy** if the proposal is to create new SARA policy.
  - A drop-down menu listing all existing sections of the *SARA Policy Manual* will appear in the left side box. In addition, there will be an option to select “New Section Not Already in Manual.”
  - Use the scroll bar to navigate to the section(s) of the *SARA Policy Manual* where you propose to place the new policy.
  - Next, click the top arrow between the boxes to add that section to the box on the right side. Repeat those steps if there is more than one section where you are proposing to add the new policy language.
  - If you want to remove a section from the box on the right, click to highlight the section and then click the lower arrow between the boxes.
- Select **Modification** if the proposal is to modify existing SARA policy. **Please carefully identify the section(s) the proposal would affect.**
  - A drop-down menu listing all sections (with subsections) of the *SARA Policy Manual* will appear in the left side box.
  - Use the scroll bar to navigate to the section(s) of the *SARA Policy Manual* that your proposal would affect.
  - Next, click the top arrow between the boxes to add that section to the box on the right side. Repeat those steps if there is more than one section that the proposal would affect.
  - If you want to remove a section from the box on the right, click to highlight the section and then click the lower arrow between the boxes.

### **Problem to be Solved (text box)**

Please identify the issue or topic your proposal seeks to address. Your explanation must be entered in the text box. Do not simply write “See attachment.”

If available, please attach documentation, preferably recent empirical evidence and data, defining the scale and/or severity of any problems related to the issue you are seeking to address with your proposal. Note: You will be able to upload documentation on the next screen.

### **Rationale for Change (text box)**

Please provide the rationale that supports your proposal, including any pertinent information or data to inform the reader. Your explanation must be entered in the text box. Do not simply write “See attachment.”

In order for your proposal to receive full consideration please be sure to respond to the items below in your **rationale**:

- Please provide an explanation for how you believe your proposal will positively address the issue you defined in the “Problem to be Solved” field.
- Does your proposal reference a proposal submitted in a prior Policy Modification Process cycle? If yes, please provide the PMP number(s) and describe how this proposal is similar to or different from the prior submission(s).

### **Suggested Language Modification (text box)**

In the text box, please enter the specific policy language you are proposing to change or add. Do not simply write “See attachment.”



*See below for guidance about how to redline your changes and use the strikethrough and underline features to help ensure reviewers don't miss important elements of the proposed change(s).*

**Please do not use font colors other than black and red.**

For a **policy modification**, use the strikethrough button for text you are proposing to delete, use the underline button for new language you are proposing, and use the font color button to highlight in red all changes (strikethrough language AND new underlined language).

- Example of suggested language modification: A member state may withdraw from SARA by providing ~~90~~ 60 days written notice from the state’s SARA State Portal Entity to its regional compact and the appropriate regional SARA steering committee.



= *Strikethrough* - for text you are proposing to delete



= *Underline* - for new language you are proposing



= *Font color* - to highlight in red all changes (both strikethrough language AND new underlined language). Select the text, click the arrow, click any shade of red, then click Done.

For **new policy**, underline all new language and use red font color.

- Example of proposed new policy: The SARA Policy Manual will be sent electronically to all SARA SPEs and participating institutions no less than quarterly.

**Please carefully check the information you have added in this text box. If you copy and paste it from another document, it is possible there will be some added characters, different font type or color, etc. Make corrections as needed.**

### **Blackline Text (text box)**

In addition to redlining modified or new policy proposal text, please submit a “clean” blackline text version to show exactly how the final language would appear in the manual if approved.

- Example blackline text for suggested language modification: A member state may withdraw from SARA by providing 60 days written notice from the state’s SARA State Portal Entity to its regional compact and the appropriate regional SARA steering committee.
- Example blackline text for proposed new policy: The *SARA Policy Manual* will be sent electronically to all SARA SPEs and participating institutions no less than quarterly.

### **Notes (text box)**

Please use this optional field to provide pertinent information not already included in the “Problem to be Solved,” “Rationale for Change,” or “Suggested Language Modification” text boxes, such as where proposed new language would be placed in the *SARA Policy Manual* (see below for more guidance), how the placement of new language may affect renumbering or relettering of other sections, whether you worked with other individuals/groups to develop this proposal submission, whether other submitted proposals were withdrawn or amended later in the process to align with your submission, etc.

If needed, you may submit additional materials as an attachment on the next screen. (See Screen 4 instructions below.)

**Placement of new SARA policy:** When new SARA policy is proposed to be added as a new section or subsection within an existing section or subsection, the section or subsections following the proposed new policy may need to be renumbered or relettered. For example, adding new policy as “a” in an existing section or subsection that already includes “a”, “b”, and “c” would result in the need to reletter “a” to “b”, “b” to “c”, etc. To avoid this, when proposing new SARA policy, please consider one of the following two options:

- Add the new SARA policy to an existing section or subsection of the *SARA Policy Manual*.
  - Example: add new policy as part of the existing subsection “1.1.c” rather than creating “1.1.d”.
- Add the new SARA policy as its own new section or subsection at the end of the existing subsection.
  - Example: add new policy as “d” in an existing section or subsection that already includes “a”, “b”, and “c”.

After you have entered information in each of the fields on this screen, click the “Next” button on the bottom right side of the screen to continue. Or, if you would like to return to the previous page, click the “Previous Page” button. (Do not use the back button of your browser or it will take you back to the NC- SARA policy webpage.)



### Screen 3 - CREATE A POLICY MODIFICATION PROPOSAL

On this screen you will see a summary of the information you provided on Screen 2.

- Review the information carefully, using the scroll bar to navigate to the bottom if some information is not visible.
- If the information is correct, click the “Next” button on the bottom right side of the screen to continue.
- If the information is not correct, click the “Previous” button on the bottom right side of the screen to return to Screen 2, where you can correct the information as needed.





## Screen 4 - CREATE A POLICY MODIFICATION PROPOSAL

Attachments - Would you like to attach any files to your submission?

On this screen, you may attach a document(s), using the “Upload Files” button. Alternatively, you may drag and drop files into the “Or drop files” box.

- Attaching a document is recommended if you have supporting information to supplement your proposed change(s), problem to be solved, and/or rationale for change.
- **Note: Your proposed change(s), problem to be solved, and rationale for change must be typed in the text boxes on Screen 2. It is not sufficient to type “See attachment” in the *Problem to be Solved, Rationale for Change, and/or Suggested Language Modification* text boxes. Attachments are only to be used to provide supplementary information.**
- We recommend that you attach documents as pdfs, but the system will accept most standard file formats.
  - **Tip:** Use a file name that will be easy to reference and that’s relevant to the proposal.
    - Example: *“Supplement for proposed change to Section 2.3 (a) Member Withdrawal” – or*
    - Example: *“Additional data for change to Section 2.3 (a) Member Withdrawal – Change Timeframe to 60 Days”*

After you have uploaded attachments, or if you don’t wish to attach files, click the “Next” button on the bottom right side of the screen.

A blue rectangular button with the word "Next" in white text.

## Screen 5 – CREATE A POLICY MODIFICATION PROPOSAL

You have now completed your proposal submission, and the following confirmation screen will appear:

## Create a Policy Modification Proposal

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Thank you for your interest in SARA Policy and for submitting a SARA Policy modification proposal. In a few minutes, you will receive an email with the details of your submission and a link to return to your submission, should you want to view your proposal.

SARA Policy Modification Team

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Close

Click the “Close” button on the bottom right of the screen.

Close

This takes you back to the portal homepage. If you would like to submit another proposal, click the button titled “Create a Policy Modification Proposal” and repeat the steps above.

Create a Policy Modification Proposal

Otherwise, you may log out of the portal by clicking the icon in the top right corner of the screen and then clicking “Log Out.”



Proposals will be made visible to the public on the NC-SARA website shortly after a review to ensure all required elements have been completed.

You may edit or withdraw your proposal after submission prior to the submission deadline (February 7, 2025). Please reference the document ***Directions for Editing or Withdrawing a Proposed SARA Policy Modification*** on the [Participate in SARA Policy Modifications webpage](#).

**For assistance with or questions about this process, please email**  
[info@nc-sara.org](mailto:info@nc-sara.org)