



NC-SARA's STATE PORTAL ENTITY (SPE) OFFBOARDING CHECKLIST

We are grateful for your service as a State Portal Entity staff member! This checklist has been prepared as an optional tool to assist with a smooth transition. After notifying your SARA director, please consider providing the following information to relevant stakeholders.

IMPORTANT NOTE

- o Please be sure your regional education compact SARA director is aware of your transition.

HELPFUL INFORMATION TO PROVIDE TO YOUR SPE REPLACEMENT

- o Status of SARA-participating institutions in your state, including:
 - o Table of institution renewal timelines - state review and SARA participation fee deadline.
 - o Pending issues or concerns (e.g., provisional status, participation date changes, extensions).
- o Key points of contact for SARA work (e.g., internal colleagues, regulatory counterparts, regional education compact staff, NC-SARA staff).
- o Notification of the availability of NC-SARA's SPE Onboarding Process (more information available by emailing info@nc-sara.org).

HELPFUL INFORMATION TO PROVIDE TO YOUR [REGIONAL EDUCATION COMPACT SARA DIRECTOR](#) AND NC-SARA AT INFO@NC-SARA.ORG

- o Your last day as a SARA SPE or the last day you will need access to your licenses (SARA Portal, SPE-secure website, Litmos - NC-SARA's LMS), if different dates.
- o If your replacement has been identified, please provide the following:
 - o Name
 - o State that they will represent
 - o Email address
 - o Title
 - o Phone number
 - o Work address
 - o State SARA Website URL
 - o Whether to add them to the [SPE Directory on NC-SARA's website](#)
 - If so, whether to list them as primary, secondary, or tertiary
 - o Whether they will need access to the SARA Portal