



# SARA Portal UX Working Group

## Working Group members:

**Casey Kohler** - Associate for Higher Education, New York State Education Department, New York SPE

**Raymond Audett** - Director, Information Technology & Salesforce Architectural Strategist, NC-SARA

**Beverly Wade** - Senior Administrator, State & Institution Engagement, NC-SARA

**Jevonda Keith** - Executive Director of Postsecondary Licensing, Kentucky Council on Postsecondary Education, Kentucky SPE

**Joshua Fischer** - Program Specialist, Missouri Department of Higher Education and Workforce Development, Missouri SPE

**Lanna Dueck** - Executive Director of the Arizona SARA Council, Arizona SPE

**Magda Rivers** - Division Director, Nonpublic Postsecondary Education Commission (NPEC), Georgia SPE

**Sara Appel** - Director of M-SARA, Policy & Research, Midwestern Higher Education Compact (MHEC)

**Shelley Plutto** (WICHE) Project Manager, W-SARA, Policy Analysis and Research

**Emily Jacobson** - Director, State Partnerships & Services, NC-SARA

**Austin Kelly** - Salesforce Developer, NC-SARA

**Nick Ortiz** - Digital Platforms Administrator

**Sarah Levy** - Senior Director, Policy & Regulatory Affairs, NC-SARA

**Jared Abdirkin** - Director, Institutional Engagement & Initiatives, NC-SARA

**Angela Lee** - Senior Director, State Partnerships & Engagement

# SPE Dashboard Upgrades

- Dashboard now includes a pie chart of expiring institutions (30, 60, 90 days)
- Key metrics displayed for at-risk institutions
- Easy to read report with color coded urgency
- Scrollable report prioritizes institutions by expiration date
- Old dashboard was a basic report, difficult to interpret



# Old SPE Dashboard

- Old dashboard was a basic report, difficult to interpret at times
- Displayed key metrics for SPEs to refer to, but in a basic manner
- Gave the appearance of a half dozen reports squished together
- SPE had to scroll through to find relevant information

**SPE Dashboard**  
Dashboard for SPE Community Page  
As of Aug 23, 2024 7:40 AM-Viewing as Raymond Austitt

Refresh Edit

---

**Expired Institutions - STATE**

Account Name ↑	State/Province (text only)	Participation Status	Current Participation End Date	Expiration Exception Granted
Barton College	North Carolina	Expired	4/24/2024	<input type="checkbox"/>
Brunswick Community College	North Carolina	Expired	4/27/2024	<input type="checkbox"/>
Charlotte Christian College and Theological Seminary	North Carolina	Expired	4/21/2024	<input type="checkbox"/>
Forsyth Technical Community College	North Carolina	Expired	5/7/2024	<input type="checkbox"/>
Miles College	Alabama	Expired	6/7/2024	<input type="checkbox"/>
Mitchell Community College	North Carolina	Expired	3/29/2024	<input type="checkbox"/>
North Park University	Illinois	Expired	7/9/2024	<input type="checkbox"/>

[View Report \(Expired Institutions - STATE\)](#)

**State Institution List**

Account Name ↑	Participation	Institution Status	Current Participation En...
4-States Academy of Cosmetology		Eligible for Participa	-
4-States Okmulgee Academy of Cosmetology		Eligible for Participa	-
A. I. Prince Technical High School		Eligible for Participa	-
A. T. Still University of Health Sciences	Active	Participant	6/8/2025
A & W Health Care Educators		Eligible for Participa	-
A1 Business and Technical College		Eligible for Participa	-
AAMORP, Inc.		Eligible for Participa	-

[View Report \(STATE\\_Institution List\)](#)

**Grace Period End Date in 30 days**

Account Name ↑	State/Province (text only)	Participation Status	Institution Status	Current Participation End Date
Coastal Alabama Community College	Alabama	Renewing	Participant	8/19/2024
Davidson-Davie Community College	North Carolina	Renewing	Participant	8/8/2024
Howard University	District of Columbia	Renewing	Participant	8/17/2024
SUNY Broome Community College	New York	Renewing	Participant	8/20/2024

[View Report \(Grace Period End Date in 30 days\)](#)

**Active Institution Contacts**

Full Name ↑	Account Name	Email
2021 Stakeholder Feedback	The Art of Education University	information@inc-saras.org
A. Cris Hamilton	The University of Texas at Austin	cris.hamilton@atx.utexas.edu
Aaron Panke	Nicollet Area Technical College	apanke@nicolletcollege.edu
Aaron Pritchett	Mississippi College	apritchett@mc.edu
Aaron Proffitt	God's Bible School and College	aproffitt@gbs.edu
Aaron Skira	Wright State University	aaron.skira@wright.edu

[View Report \(STATE\\_Institution Contacts\)](#)

**Participation End date within 90 days**

Account Name	Current Participation End Date ↑	Participation Status	Institution Status	SPE Approved
Allen University		New	Eligible for Participation	<input checked="" type="checkbox"/>
Gordon-Cowell Theological Seminary		New	Eligible for Participation	<input type="checkbox"/>
Northeastern Junior College	6/30/2024	Active	Participant	<input type="checkbox"/>
Hunter College of the City University of New York	7/5/2024	Active	Participant	<input checked="" type="checkbox"/>
College Unbound	8/23/2024	Renewing	Participant	<input type="checkbox"/>
Greenville University	8/23/2024	Renewing	Participant	<input checked="" type="checkbox"/>
Washington Adventist University	8/24/2024	Renewing	Participant	<input checked="" type="checkbox"/>

[View Report \(Participation End date in 90 days\)](#)

**Renewed in Last 30 Days**

Account Name	Paid Date ↑
Edward Waters University	7/24/2024
Martin Community College	7/24/2024
Arkansas Colleges of Health Education	7/24/2024
Meadville-Lombard Theological School	7/24/2024
Allegheny College of Maryland	7/24/2024
Oakland Community College	7/24/2024
Palm Beach State College	7/24/2024

[View Report \(Renewed in Last 30 Days\)](#)

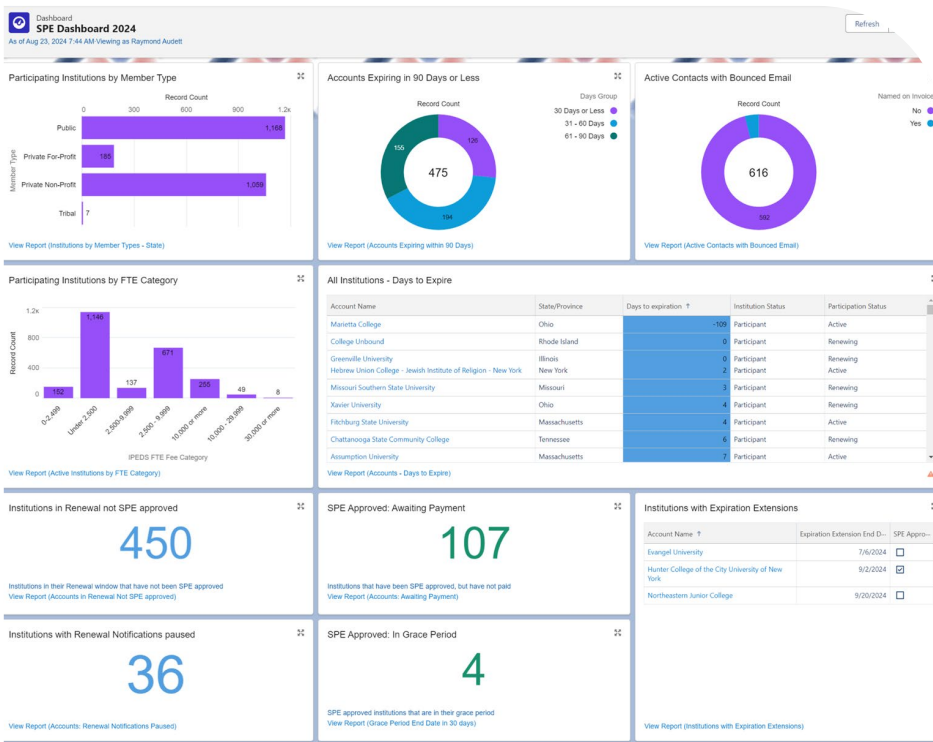
**My Institutions on Provisional**

Account Name	Active Provisional Record: Provisional ...	Provisional Effect--	Provisional Reasons	Provisional Days--
Nazarene Bible College	Provisional-0004	12/16/2021	- The Institution is on provisional or probationary status or the equivalent with its Institutional Accrediting Agency.	-134
Eastern Nazarene College	Provisional-00021	7/19/2021	- Current investigation by its home State related to the Institution's academic quality, financial stability or student consumer protection.	-26
Moreland University	Provisional-00100	8/5/2023	- The Institution has a change of ownership as determined by the Home State.	-18
Union Institute & University	Provisional-00101	8/31/2023	- Required by the U.S. Department of Education	8

**Active Contacts with Bounced Emails**

Account Name ↑	Last Name	Email	Named on In-
Adams State University	Allard	allard@adams.edu	<input type="checkbox"/>
Allen Technical College	Burdette	burdette@atc.edu	<input type="checkbox"/>
Albany State University	Carol S. O'Dell	carol.dell@asurams.edu	<input type="checkbox"/>
Albizu University	Ramos	vgramos@albizu.edu	<input type="checkbox"/>
Allen University	Long	long@allenuniversity.edu	<input type="checkbox"/>

[View Report \(Active Contacts with Bounced Emails\)](#)



# SPE Dashboard: Key Improvements

- Information is displayed clearly for at-a-glance interpretation.
- Quickly digestible information like "Number of Participating Institutions" grouped by member type.
- Donut chart displays institutions by participation end date.
- Scrollable "Days to Expire" report prioritizes institutions by expiration date.

# Pausing Renewal Notifications

- SPEs can pause automated renewal notifications in the SARA Portal while reviewing applications.
- Reminders are automatically un-paused after SPE approval.
- This ensures payment reminders are sent out.



# Improvements to Manage Bounced Contacts

01 — Red flag image identifies bounced contacts.

02 — Button added to quickly unbounce contacts.



03 — SPE Dashboard revamped to report bounced contacts.

04 — "Named on Invoice" contacts are high priority as bounced status impacts entire account.

# Enhancements is coming soon

- **Contact Roles:** Improved communication by clarifying roles and ensuring contacts receive relevant emails.
- **EKB:** One stop shop for support needs, replacing the PDF handbook.
- **E-Forms:** Streamlines the SARA process through electronic forms.



# Contact Role Improvements

**Goal 1:** Improve communication by clarifying roles and ensuring contacts receive relevant emails.

**Goal 2:** Make roles more meaningful and user-friendly for institutions and SPEs.

- **Example of a Current Issue:** "Named on Invoice" designation automatically makes contact the primary contact, leading to them receiving all emails.
- **Potential Solution:** Consider splitting "Named on Invoice" into separate roles:
  - Primary Billing Contact (receives billing and SARA participation emails)
  - Primary SARA Contact (receives all SARA-related emails)
- **Ultimate Goal:** Intuitive and functional contact management for everyone involved, which can then be built within the Electronic Institution Application



# External Knowledgebase (EKB)

- EKB is a one-stop shop for support needs, accessible within the SARA Portal.
- EKB is a self-help resource for SPEs, replacing the PDF handbook.
- Articles can be updated individually for efficiency.
- SPEs can submit cases to NC-SARA for issues not covered in articles.
- SPEs can schedule time with the IT team for tech-related issues or training.





# E-Forms: Revolutionizing SARA Processes

- The SPE initiates the Electronic form from the SARA Portal on the Account record, NC-SARA is then notified to complete their portion.
- The form is sent for signatures via DocuSign to the Institution Authorized Signatory Contact, the SPE Staff, the Regional Compact SARA Staff, and NC-SARA.
- The completed document is emailed to everyone involved and a copy is attached to the Account in Salesforce.
- The form can be submitted in advance, and held until a specific date to process automatically.
- \*For those who cannot use this, the fillable pdf will still be accessible on the website, and we are also including a streamlined way of accessing that form right from the portal as well.

# SARA Portal Enhancements Roadmap

- Branch Campu Implementation
- Data Reporting 2025: CSV upload tool for institutions.
- Electronic Institution Application



# Contact Presenters

Casey Kohler -  
[casey.kohler@nysed.gov](mailto:casey.kohler@nysed.gov)

Ray Audett - [raudett@nc-sara.org](mailto:raudett@nc-sara.org)

## Working Group members:

**Casey Kohler** - Associate for Higher Education, New York State Education Department, New York SPE

**Raymond Audett** - Director, Information Technology & Salesforce Architectural Strategist, NC-SARA

**Beverly Wade** - Senior Administrator, State & Institution Engagement, NC-SARA

**Jevonda Keith** - Executive Director of Postsecondary Licensing, Kentucky Council on Postsecondary Education, Kentucky SPE

**Joshua Fischer** - Program Specialist, Missouri Department of Higher Education and Workforce Development, Missouri SPE

**Lanna Dueck** - Executive Director of the Arizona SARA Council, Arizona SPE

**Magda Rivers** - Division Director, Nonpublic Postsecondary Education Commission (NPEC), Georgia SPE

**Sara Appel** - Director of M-SARA, Policy & Research, Midwestern Higher Education Compact (MHEC)

**Shelley Plutto** - (WICHE) Project Manager, W-SARA, Policy Analysis and Research

**Emily Jacobson** - Director, State Partnerships & Services, NC-SARA

**Austin Kelly** - Salesforce Developer, NC-SARA

**Nick Ortiz** - Digital Platforms Administrator

**Sarah Levy** - Senior Director, Policy & Regulatory Affairs, NC-SARA

**Jared Abdirkin** - Director, Institutional Engagement & Initiatives, NC-SARA

**Angela Lee** - Senior Director, State Partnerships & Engagement