Table of Contents

Introduction to EDvera ................................................................. 2
Signing into EDvera, Setting and Resetting Your Password............. 3
Updating Institution Profile Data.................................................. 4
Updating Institution Users and Contacts..................................... 5
Editing Your User Profile............................................................ 5
EDvera Notifications .................................................................. 6
Viewing and Beginning New Documents...................................... 9
Reversions and Stages of Review .................................................. 9
Communicating Using Comments............................................... 10
SARA Institutional Applications................................................... 13
Paying MA SARA Fees................................................................. 14
CSVP Annual Reports ................................................................. 19
FARM Annual Reports................................................................. 20
Introduction to EDvera

The Massachusetts Department of Higher Education (DHE) launched the MA-SARA Portal in April 2021 to streamline the submission of institutional initial and renewal State Authorization Reciprocity Agreement (SARA) applications. The MA-SARA Portal is built upon the EDvera platform. EDvera is a cloud-based system that organizes and streamlines how applications, renewals and reports are submitted and processed. Since initially launching the MA-SARA Portal in April 2021, the DHE has expanded its use of EDvera to include other application and annual reporting processes managed by the DHE that relate to institutional compliance with DHE regulations, e.g., 610 CMR 2.00, 610 CMR 12.00, 610 CMR 13.00, and 610 CMR 14.00.

In addition to collecting application data and attachments from institutions, EDvera also has robust notification and communication features that allow institutions to communicate directly with DHE staff within each “Document” – Documents are the EDvera technical term for institutional applications and reports that institution staff fill out and submit to DHE staff.

EDvera helps to consolidate submission and communication about institutional applications and reports, and significantly reduces the amount of time required for institutions to submit applications and reports, as well as the amount of time needed for DHE staff review. For questions regarding Documents, their submission procedures, and using EDvera, please contact the appropriate DHE team for each Document as provided on the websites below. Although EDvera is a common platform, it is used by multiple DHE teams who each manage their own Documents and submission procedures.

Campus Safety & Violence Prevention (CSVP) Annual Reports
https://www.mass.edu/strategic/csvp.asp

Financial Assessment & Risk Monitoring (FARM) Annual Reports
https://www.mass.edu/strategic/farm.asp

State Authorization Reciprocity Agreement (SARA) Applications
https://www.mass.edu/foradmin/sara/home.asp

The DHE also makes resources available for each Document in the “End-User Help” section of EDvera. Which can be accessed by clicking the “?” icon in the top right-hand corner of EDvera, and selecting the “End-User Help” webpage. You can also navigate directly to
Signing into EDvera, Setting and Resetting Your Password

To sign into EDvera, you will need a user account created by DHE staff who oversee the applicable application or annual report Document(s). After a user account has been created for you, you will receive an invitation email from MADHE no-reply@edvera.com:

CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail system. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Hello, alex.nally@mass.gov. Thank you for signing up with EDvera

Set your password to complete your account registration through the link below.

Set my password
After you create a password, you will be able to login by going to https://madhe.edvera.com and logging in using your email address and password.

If you need to reset your password, DHE staff can initiate a password reset for you, or you can initiate a password yourself by clicking on the “Forgot your password?” link, or by navigating to https://madhe.edvera.com/new_password.

**Updating Institution Profile Data**

After successfully logging in, you will be brought to your institution’s Dashboard page where you can view Institution, Regulatory, and Contact Information. You can update contact information for the institution as a whole by clicking on the “Edit Phone, Fax, and Web”
Updating Institution Users and Contacts

User accounts and institutional contacts are primarily controlled by DHE staff. Some Documents will allow you to add new users, but only DHE staff can remove institutional users/contacts. To remove or update institutional users or contacts, please contact DHE staff.

Editing Your User Profile

Institutional users have the ability to update their personal user account profiles:

1. Left Click your name/avatar in the upper right-hand corner
2. Hover over “Profile”
3. Hover over and left click “Edit Profile”
4. Update your profile fields – do not fill out Gender, Birth Date, Hired, or Terminated
5. Once completed, click “Save”
EDvera Notifications

When Documents are submitted for DHE staff review, and whenever the status of a Document changes or DHE staff add a Comment to a Document, you will receive an email notification and a notification within EDvera by default. To view your Notifications:
1. Left Click your name/avatar in the upper right-hand corner
2. Hover over and left click “Notifications”
3. All of your notifications and communications from DHE can be found here

If you feel the need to change your notification settings, you may do so:

1. Left Click your name/avatar in the upper right-hand corner
2. Hover over “Profile”
3. Hover over and left click “Notify Settings”
4. Click on “(Un)subscribe from/to all notifications” to either unsubscribe or subscribe

The default setting is for you to receive all email notifications regarding your institution’s profile and Documents. It is **highly recommended** you keep these notifications enabled. These notifications will replace all DHE email communications regarding Documents.
Viewing and Beginning New Documents

To view your institution’s Documents, click on the Documents tab in the top left-hand corner of EDvera. Note, you will only be able to view Documents affiliated with your role for the institution. Only DHE staff can change a user’s role.

To begin a new Document, navigate to Documents, click on the “+ Start Document” button and select the appropriate Document.

Reversions and Stages of Review

Each Document has its own review process, as shown on the “Status” tab of any Document. If DHE needs you to provide additional information on a Document, DHE staff will Revert the Document and add a Comment in the Document explaining what changes need to be made or the information that needs to be provided.

If you are required to re-submit any documents, DHE will “Revert” your application. You will receive an email notification of the reversion, and any comments from DHE explaining what needs to be re-submitted.

You will be able to update the fields in the application itself, and click “Submit” when you have finished updating or uploading the additional documentation. Below are two example notification emails when the status of an application changes.
Communicating Using Comments
All communications regarding your application will take place in the MA-SARA Portal through the “Comments” tab of your application. To view the Comments tab of an application, click on your application in the Documents window, and then click on the Comments tab within the Document.

Any text that you provide in this comment field will be sent via email and the MA-SARA portal to DHE staff.

Any responses to you, or other comments/attachments from DHE will be sent to you in the same way, and can be found in the Comments tab.
A comment was added to Massachusetts SARA Institution Renewal Application for test3

If you would like to send DHE an email or attachment regarding your application, you may type or paste it here.

Click here to see where this comment was added

Attachments:
- blank.pdf

Massachusetts SARA Institution Renewal Application

Comment successfully added.

Add your comment here.
SARA Institutional Applications

Note: the Massachusetts SARA application Documents in EDvera incorporate the NC-SARA institutional applications, therefore the NC-SARA PDF applications do not need to be submitted to DHE. You already submit them by submitting the Massachusetts SARA application Document. Instructions specific to the renewal process will be emailed from EDvera 90 days before your institution’s SARA expiration date each year.

Last Updated: April 11, 2022
Instructions for how to submit an institutional SARA application can be found at https://www.mass.edu/foradmin/sara/applications.asp. Answers to FAQs, and example submission materials are available at https://www.mass.edu/foradmin/sara/faq-resources.asp. A complete summary of the applicable application fees are posted at https://www.mass.edu/foradmin/sara/fees.asp.

**Paying MA SARA Fees**

Submission of the Massachusetts SARA Fee is required in order for you to be able to submit your institutional SARA application to DHE for review. After you’ve completed Tabs 1-6 of the institutional application, you will need to submit payment of the Massachusetts SARA Fee on Tab 7 which will automatically calculate based on your IPEDS Final FTE figure in accordance with the MA SARA Fee Schedule:

1. Fill out the name and address which align with either the credit card or e-Check/ACH bank account that you will use for the transaction (sometimes these may be different from your name – check with your institution’s finance staff)
2. Provide contact information for the institution’s billing contact
3. Click submit to be taken to the nCourt payment page
4. Enter your payment information and accept terms and conditions
5. Provide a phone number for text message confirmation (optional)
6. Click “Submit Payment”
7. You will be taken to a payment confirmation page in the MA SARA Portal – print or screenshot this page for your records

**8. Log back in to the MA SARA Portal and re-open your application (under the “Documents” tab)**

9. Confirm the transaction ID on Tab 7 aligns with the transaction ID you saved from Step 7
10. Click “Submit” to officially submit your Massachusetts SARA Application for DHE review

DHE has partnered with nCourt, an electronic payments service vendor, to process your electronic SARA fee payments via EDvera. Payments **must** be submitted via your Document, otherwise your Document will not be submitted to DHE staff for review. Remember to log back into EDvera to submit the application after your payment is completed, otherwise DHE staff will have no way of knowing your application is ready for review.
Massachusetts SARA Institution Initial Application

Payment

PLEASE NOTE: Fill out the following fields in accordance with the credit card or bank account's official holder as they appear on the credit card itself or the bank statement to ensure your payment is processed successfully. If the name on the credit card is Jane Smith, please use Jane Smith instead of your own name if your name does not match the name on the credit card. Similarly, please be sure to provide the appropriate first and last name format for the bank account if you are submitting an ACH wire transfer payment. Finally, please also be sure to provide the appropriate address of the institution which is currently provided for the credit card or bank account which you are using to submit this fee.

Fields marked with an * are required

Personal information

Phone number: 6179949810
Email address: sara@u_mass.edu

Financial information

Payer first name (on card or account): SARA
Payer last name (on card or account): Inquiries
Payer address 1 (on card or account): One Ashburton Place
Payer city: Boston
Payer state: MA
Payer zip: 02110

Submit Payment

Balance Due

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial application fee</td>
<td>Pending</td>
<td>Charge (Debit)</td>
<td>$2,000.00</td>
</tr>
</tbody>
</table>
You have elected to pay the following items:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Fee</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Convenience Fee: $0.70
Total Amount Due: $0.693.70

Billing Information

- Company Name
- OR
- First Name
- Last Name
- Street
- City
- State/Territory
- Phone Number
- Email
- Confirm Email

Payment Information

- Credit/Debit Card
- Electronic Check/ACH
- Card Type
- Card Number
- CVV Code
- Expiration

Important Information

- Please provide the correct billing address associated with the account being used to make the payment.
- To receive an email confirmation of your payment, please include a valid email address.
- If you would like a text notification payment confirmation sent to your mobile phone, enter the following:

Mobile Number

Please verify the above information before the Submit Payment button is pressed. Do not click Submit Payment button more than one time.

Institution must first accept the terms and conditions before it is able to submit the payment.
For Electronic Check/ACH transactions, the payment form is similar, but users will receive the following pop-up (shown on the next page):

Update: To prevent a bounced payment and associated fees, please notify your bank and ensure that debit blocking is removed or add nCourt Originator ID 0008801625 to your approved list.
Payment received, your transaction ID is:
a385314a-4035-474a-a181-5d5a5912c23c

We have successfully processed your Massachusetts SARA Fee, and your application has been updated to reflect this payment. For your reference, the transaction ID is above.

PLEASE NOTE: ADDITIONAL ACTION IS STILL REQUIRED IN ORDER TO COMPLETE THE APPLICATION SUBMISSION PROCESS.

In order to officially submit the institutional application for review by the Massachusetts SARA team, for security purposes, you are required to log in again with your MA-SARA Portal credentials by clicking "Login" below. Once you are logged in, you must go to page 7 of your institutional application and click "Submit" to complete the application submission process. After doing so, you will receive confirmation that your application has been submitted to be reviewed for completeness. If you have any questions please do not hesitate to contact the Massachusetts SARA team via email at SARArequests@dhe.mass.edu.

Login

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Back to top


affiliated with the unit or account? *

Payee city: Boston
Payee state: MA
Payee zip: 02108

Payment received, your transaction ID is:
a385314a-4035-474a-a181-5d5a5912c23c

Balance Due

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application Fee</td>
<td>2021-03-16</td>
<td>Payment</td>
<td>-$5,000.00</td>
</tr>
<tr>
<td>Initial Application Fee</td>
<td>2021-03-16</td>
<td>Charge</td>
<td>$5,000.00</td>
</tr>
</tbody>
</table>

Save and Exit  Save  Submit

Clicking this Submit button is what officially submits the application for DHE review.

CSVP Annual Reports

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Back to top
Resources for the CSVP Annual Reports are available at the following links (EDvera login required):

- CSVP Report Template
- FAQs - CSVP Annual Report
- 2021 CSVP Annual Report Start Guide
- DHE Campus Safety and Violence Prevention (CSVP) Webpage
- For questions email alex.nally@dhe.mass.edu or arobbins@dhe.mass.edu.

**FARM Annual Reports**

Resources for the FARM Annual Reports are available at the following links (EDvera login required):

- FARM Report Template
- 2021 FARM Annual Report Start Guide
- DHE Financial Assessment and Risk Monitoring (FARM) Webpage
- For questions email DHE.FARMSubmissions@mass.gov.