The Out-of-State Learning Activity Compliance Organizer and Checklist

a.k.a.

the Distance Education Compliance Management Tool

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### Out-of-State Learning Activity Compliance Organizer and Checklist (version 2.0)

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>CATEGORY DESCRIPTION</th>
<th>TASKS</th>
<th>IMPORTANT DETAILS/NOTES</th>
<th>IDEAS FOR HOW TO COMPLETE TASKS</th>
<th>General Supplemental Resources</th>
<th>Institution-Specific Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Management</td>
<td>3</td>
<td>Determine what information should be shared from the Online learning staff with students who inquire about an online class or program and develop process for sharing it.</td>
<td>For example, if a student from another state contacts the Online learning staff about a class or program, should we immediately direct them to the SARA student information page?</td>
<td>Survey academic units</td>
<td>Refer to <a href="https://www.nc-sara.org/content/sara-manual">https://www.nc-sara.org/content/sara-manual</a>.</td>
<td></td>
</tr>
<tr>
<td>Short Courses/Residency Programs</td>
<td>4</td>
<td>Identify situations in which faculty members hold courses or residency programs that would trigger physical presence (see Important Details/Notes). Institutions must seek approval from a state if short courses and residency programs occur when faculty meet with students in the same physical location as the students, require more than 20 classroom hours in one six-month period, and/or meet together for more than two meetings, totaling six hours or fewer.</td>
<td>Recognize that these would NOT include courses or programs in which the institution's faculty members are present. As of March 2019, all 50 states except California, the District of Columbia, and territories except the CNMI are members of NC-SARA. California does not require institutions to seek approval to enroll fully distant students in courses and programs. Your institution would need to seek approval from the appropriate organization if it wants to enroll a fully distant student who resides in the CNMI.</td>
<td>Consult with your institution's Office of Institutional Research or other office responsible for collecting and reporting data to IPEDS.</td>
<td>Refer to <a href="https://www.nc-sara.org/content/sara-manual">https://www.nc-sara.org/content/sara-manual</a>.</td>
<td></td>
</tr>
<tr>
<td>Fully Distant Students</td>
<td>5</td>
<td>Identify who will, when necessary, seek approval from non-SARA states and territories to enroll out-of-state fully distant students in courses and programs.</td>
<td>Create a new process or identify an existing process for collecting number and location of fully distant students, each term or at some regular interval, multiple times per year.</td>
<td>Consult with your institution's Office of Institutional Research or other office responsible for collecting and reporting data to IPEDS.</td>
<td>For a data collection tool, see UVA's State Authorization Questionnaire 2018.</td>
<td></td>
</tr>
<tr>
<td>Experimental Learning Placements (or &quot;supervised field experiences&quot;)</td>
<td>6</td>
<td>Identify programs that place students in degree-required experiential learning placements (include licensure-related experiential learning placements), especially programs that place students in non-SARA states and territories. Be very clear about regulations in border states. Recognize that these would NOT include courses or programs in which the institution's faculty members are present.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Purpose of Out-of-State Learning Activity Compliance Organizer and Checklist

• User-friendly guide
• To-Do list and tracker
• Master with links to supplemental documents
Organizer and Checklist Details

• Excel spreadsheet (easily sortable)
• Customizable and shareable (CC-BY-NC-SA license)
• 8 categories
• 42 tasks
Categories

• Leadership
• Institutional Policy
• Process Management
• Short Courses/Residency Programs
• Fully Distant Students
• Experiential Learning Placements (or Supervised Field Experiences)
• Licensure Programs
• International Students
Task Data

- Category
- Category Sorting Code
- Task Description
- Important Details/Notes
- Ideas for How to Complete Tasks
- General Supplemental Resources
- Institution-Specific Resources
- Institution Notes
- Target Date for Completion
- Person/Group Responsible
- Completed/In Place (Y/N)
The Organizer and Checklist in Action
# JMU Organizer and Checklist

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>CATEGORY SORTING CODE</th>
<th>TASKS</th>
<th>IDEAS FOR HOW TO COMPLETE TASKS</th>
<th>General Supplemental Resources</th>
<th>Institution-Specific Resources</th>
<th>JMU Notes</th>
<th>Target Date for Completion</th>
<th>Person/Group Responsible</th>
<th>Completed/In Progress (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully-Distant Students</td>
<td>5</td>
<td>Create a new process or identify an existing process for collecting number and location of fully distant students each term or at some regular interval multiple times per year.</td>
<td>Consult with your institution’s Office of Institutional Research or other office responsible for collecting and reporting data in PESD.</td>
<td>Refer to <a href="https://www.nc-sara.org/content/saramanual">https://www.nc-sara.org/content/saramanual</a>.</td>
<td>Student Check-in Form built into MyJedison is not available as a public link.</td>
<td>Have identified the “Local Address” in Student Semester Check-in Form resource for location. After consultation with University Registrar and IT, OIT and Student Administrators drafted IT to make it a required field (August 2018). Plan to be required starting in Spring 2019. Data query results can be compared with list of non-SARA states and appropriate actions taken.</td>
<td>10/19/19</td>
<td>Sarah and Lou Hedin (CM)</td>
<td>FALL 2019</td>
</tr>
<tr>
<td>Experiential Learning (Majors for &quot;supervised field experience&quot;)</td>
<td>6</td>
<td>Identify programs in degree required experiential learning placements (include network-related experiential learning placements), especially programs that place students in non-SARA states and territories.</td>
<td>For a data collection tool, see JMU’s State Authorization Questionnaire 2018. Internship Coordinators: <a href="https://www.jmu.edu/spaces/johnson/Internship/internship-coordinators.pdf">https://www.jmu.edu/spaces/johnson/Internship/internship-coordinators.pdf</a>. Contact: Lou Hedin at Office of Institutional Research for list of placements in placement-type surveys. Ask data to be organized by semester, college, department.</td>
<td></td>
<td>State Authorization Compliance Workgroup</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experiential Learning (Majors for &quot;supervised field experience&quot;)</td>
<td>6</td>
<td>Inform required departments and programs that more than 10 placements at the same organizational location, at the same time, and in the same program require special approval by the state.</td>
<td>Find venues for meeting with all department heads/academic units heads. See NC-SARA Manual 2019 version 13.5, Section 15.11 on Supervised Field Experiences. ties Proposal for Academic Development holds regular meetings with all ACHs.</td>
<td>12/4/19: All Proposal leadership meeting. Mattie agreed to give her time on an ACH meeting agenda. Sarah will coordinate with admin. 1/18/19: Presented to ACHs that regular meeting with Tie Proposal leadership. Distributed key details and provided overview of concept, goals and reporting requirements.</td>
<td>11/19/19</td>
<td>Sarah/Hubb</td>
<td>SPRING 2019</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Create and use a process for regularly collecting location data of students placed in degree required out of state.</td>
<td>Have identified the “Local Address” in Student Semester Check-in Form as source for location. After consultation</td>
<td></td>
<td>Fall 2019</td>
<td></td>
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</tbody>
</table>

**SANsational Award Webinar ~ December 10, 2019**
JMU Organizer and Checklist

• Organizes big picture and small details
• Guides in identifying and creating processes for tracking, data collection, and reporting
• Provides a central location to record notes, update, and link to reference documents
• Will serve as a guide and record for the next person
• Helped me to identify
  • 3 primary issues/groups to address first
  • who should be involved
  • who needs to do what
JMU programs designed to lead to professional licensure for professions governed by state boards required for major or professional licensure AND formal agreement required.

Field Placement is required.

Professionals are licensed in the state or territory where they practice.

- Field Placement: Required for major or professional licensure AND formal agreement required.
  - Partners: OIR and Academic Units
  - Consulting Partners: Legal Counsel
  - Track and Report Location
  - Monitor for special circumstances and act as needed

Fully Distant* Students Online/Off-Site

- Defined as “student and faculty separated by physical distance”
- Track and Report Location
- Monitor for special circumstances and act as needed
- Partners: OIR and IT

Application for SARA Renewal Agreement to comply with requirements and report data reviewed and signed by Provost in March.

Location in the USA

- Research and Inform
  - Partners: Researcher and Academic Units

**SANsational Award Webinar ~ December 10, 2019**
Distance Education Compliance Management Tool

Smartsheet

Cheryl Carroll

December 10, 2019
Tracking Distance Education Compliance

- Categorize by Construct: Leadership, Institutional Policy, Process Management, On-Premise Learning Activities, Professional Licensure Programs, Courses/Programs for fully online students, Institutional Policy
- Tasks, Notes, Target Dates, Person Responsible
- Documents, Emails, Notes, Hyperlinks all incorporated within each task respectively
- Reports summarizing each Category
- Sending Update Request
- Input form to add new tasks
- Tracking via Smartsheet
UVA Programs Leading to Licensure/Certification (PLC) – preliminary

- Curry School: 19 programs
- School of Nursing: 9 programs
- Engineering School: 3 programs
- Law School: 3 programs
- Architecture School: 4 programs
- School of Medicine: 1 program
NC-SARA Annual Out-of-State Learning Placements Reporting by CIP
AY 2018 - 2019 University of Virginia

- 04) Architecture and Related Services 67 students; 11 states
- 30) Multi/Interdisciplinary Studies 78 students; 1 state
- 22) Law Programs 25 students; 3 states
- 51) Health Professions and Related Programs 89 students; 25 states
- 52) Business Programs 26 students; 1 state

- Resulting authorization required in D.C., New York and Pennsylvania based on greater than 10 students placed in those locations in a particular CIP code.
Fully Online Programs
AY 2018 - 2019 University of Virginia

- Newly launched in 2019: Online Learning @ UVA
  Tracked via Smartsheet
Opportunities

• Revise and share revisions
• Build a database for large-scale programs/large institutions
• Regular updates
• Sub-checklists/Other checklists
Access Free Copy of Worksheet

http://www.jmu.edu/online/state-authorization/checklist/

Access Free Sample of Smartsheet Tool

https://app.smartsheet.com/sheets/7jp27jXr7jhjMfGPfHv3gVc9GxxH9fR8Hp76G6P1
Questions and Suggestions
Contact Information

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