SANsational

Innovative Solutions to State Authorization Challenges

ABOUT THIS AWARD

The **SANsational Award** recognizes outstanding efforts by State Authorization Network (SAN) member institutions and organizations in developing a high-quality, comprehensive solution to a challenging state authorization issue.

Works recognized present solutions that meet the needs of regulators, the institution and, most especially, students.

These efforts serve as models which can be adapted or replicated by others. Projects showcase good practice in state authorization work while encouraging others to strive for continued progress.

View more award winning projects online
WCETSAN.WICHE.EDU/RESOURCES/SANSATIONAL-AWARDS

WHY COMPLY?

SANsational
Innovative Solutions to State Authorization Challenges

- States maintain the authority to regulate out-of-state postsecondary institutions that offer or participate in activities located in their state.

- Participation in Title IV federal financial aid programs requires notifications for in-person and distance education programs leading to professional licensure as required by 34 CFR 668.43(a)(5)(v) and 34 CFR 668.43(c)

- Institutional compliance takes a village:
  - Align on purpose and cross-institution responsibilities
  - Select the right tool(s) to support functions

More on How it Works
WCETSAN.WICHE.EDU/RESOURCES/PROFESSIONAL-LICENSURE

Slate Customer Relationship Management (CRM) as a Tool for Compliance Management for Professional Licensure Programs – A Partnership Between Offices

FRANKLIN UNIVERSITY

Kate Grimes, Director of Academic Compliance
Sarah Christian, Accreditation Specialist

Main campus in Columbus, Ohio

Participating SARA institution since 2015

Enrollment: 4,729 UG; 1,530 GR; 541 Doctoral

Accredited by the Higher Learning Commission

Primarily online delivery

Average Student Age: 34

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Continuous Improvement

Present

- Different CRM application
- Different staff working on the project
- Almost 700 campaign variations running for current students alone

- Slate CRM implemented
- A primary Accreditation and Authorization contact and a Student Affairs CRM specialist
- A handful of campaigns

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What is a CRM/CRM Campaign?

Customer Relationship Management (CRM) systems are tools for managing interactions (communications) with customers.

A CRM campaign from our office is designed to automatically email a student under certain conditions (related to their academic program and reported location).

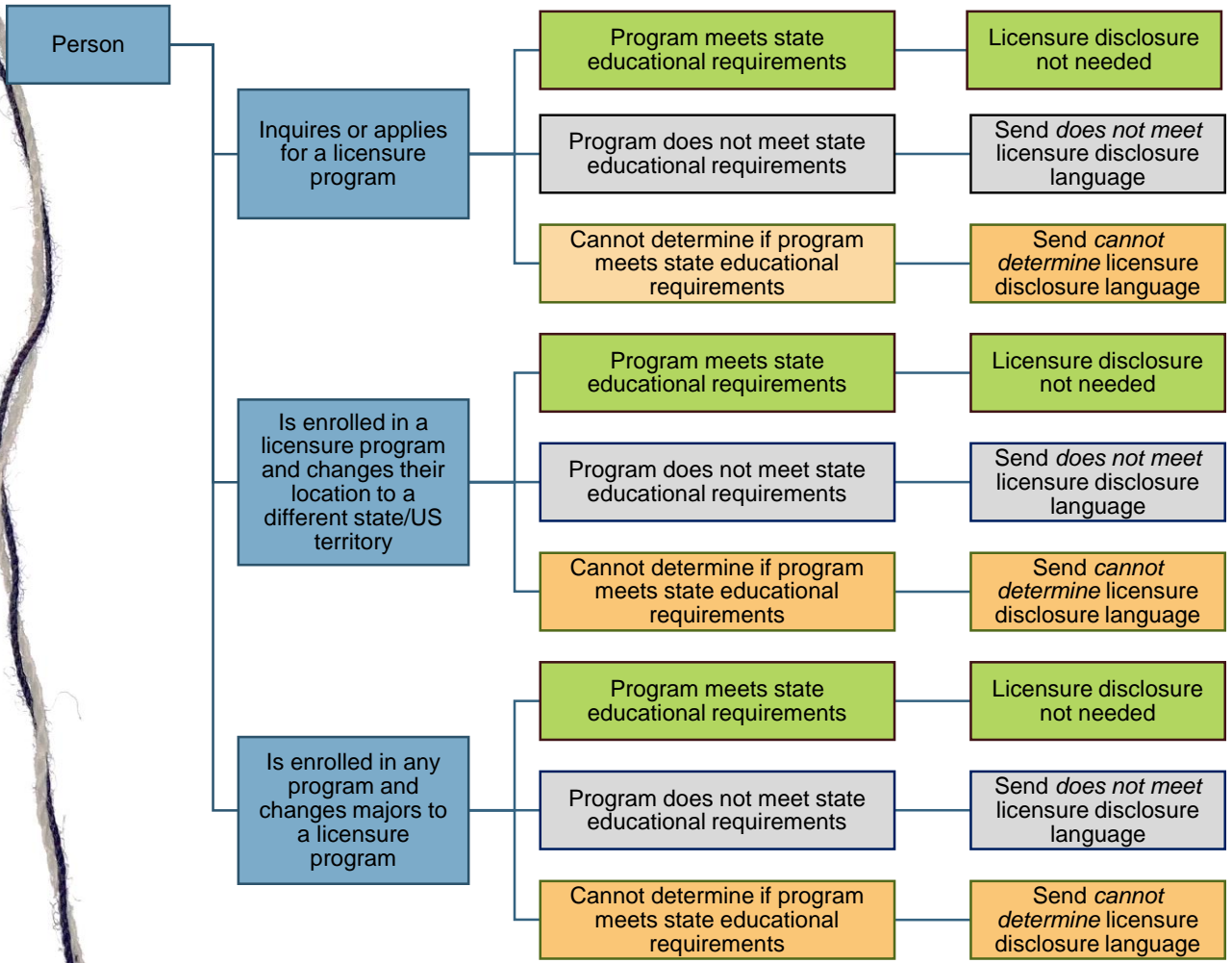Slate was developed by Technolutions specifically for use at higher education institutions.

Slate as a CRM is web-based, user-friendly, and customizable which makes collaboration easier. This particular CRM treats a person as a whole record, whereas our previous CRM required one management group to work on current students and one to work on applicants.
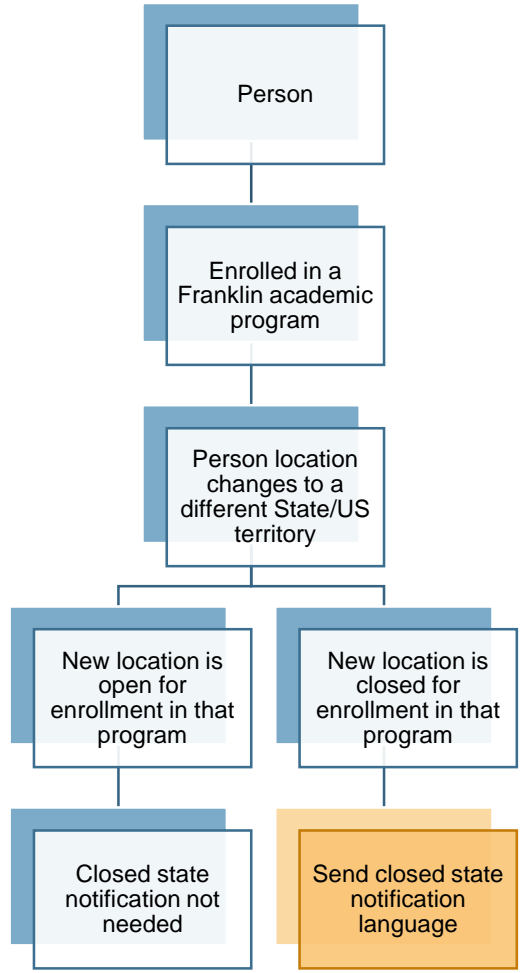

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Workflows – The Key to Building Our Slate Campaigns

Direct Disclosures for Professional Licensure Programs

Person

Inquires or applies for a licensure program
- Program meets state educational requirements → Licensure disclosure not needed
- Program does not meet state educational requirements → Send *does not meet* licensure disclosure language
- Cannot determine if program meets state educational requirements → Send *cannot determine* licensure disclosure language

Is enrolled in a licensure program and changes their location to a different state/US territory
- Program meets state educational requirements → Licensure disclosure not needed
- Program does not meet state educational requirements → Send *does not meet* licensure disclosure language
- Cannot determine if program meets state educational requirements → Send *cannot determine* licensure disclosure language

Is enrolled in any program and changes majors to a licensure program
- Program meets state educational requirements → Licensure disclosure not needed
- Program does not meet state educational requirements → Send *does not meet* licensure disclosure language
- Cannot determine if program meets state educational requirements → Send *cannot determine* licensure disclosure language

State Authorization Compliance

Person
↓
Enrolled in a Franklin academic program
↓
Person location changes to a different State/US territory
↓
- New location is open for enrollment in that program → Closed state notification not needed
- New location is closed for enrollment in that program → Send closed state notification language

Examples – Student Communications and History

Closed Location Notification Email

From: admissions
Sent: Friday, July 9, 2021 3:51 PM
To:
Subject: ALERT Regarding Your Recent Change of Address

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Dear Rosa,

This notification is in regard to your recent change in state of residence.

It has come to our attention that you have recently relocated to a state that is currently closed to your program of study. State regulations regarding program approval, experiential learning activities, and/or faculty requirements prevent Franklin University from offering this program to students in your new state of residence.

Please contact your academic advisor immediately to discuss your options for continued enrollment at Franklin University.

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Franklin University is committed to being an inclusive community free from all forms of discrimination and harassment
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Professional Licensure Disclosure Email

From: admissions
Sent: Friday, July 9, 2021 3:51 PM
To:
Subject: Professional Licensure Disclosure Notification

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Dear Nancy,

Thank you for your interest in Franklin University. You are receiving this disclosure to ensure you obtain necessary information to understand if your program of interest meets the educational requirements for licensure or certification in the state where you are located. Please see below for information about licensure or certification specific to your program of interest.

Advanced Practice Registered Nurse
Franklin University cannot determine if the Family Nurse Practitioner (FNP) track of the Master of Science in Nursing (MSN) program meets the educational requirements for graduates to be eligible to apply for advanced practice nursing licensure in New Jersey.

Please note: Many states offer multiple pathways to APRN licensure, including accepting the results of a national certification exam, or recognizing a license earned in another state. Alternative pathways to licensure and additional requirements, other than educational, are not considered for the purpose of this disclosure. Please visit our Professional Licensure webpage for further information.

Franklin University makes every effort to ensure the information provided above is accurate and current. However, as eligibility requirements are subject to change at any time, please visit the New Jersey Board of Nursing to confirm licensure requirements.

Please contact your advisor if you have any questions.

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Franklin University is committed to being an inclusive community free from all forms of discrimination and harassment

Communication History in Slate

2021 April

04/28 3:07:58 PM	Email Opened (+3)	RE: FW: Clarify please	iPhone 📍 United States
04/28 2:55:46 PM	Email Link Clicked (+2)	RE: FW: Clarify please sos.ga.gov/index.php/licensing/plb/45	iPhone 📍 United States
04/28 2:53:03 PM	Sent Message	RE: FW: Clarify please	
04/28 9:43:39 AM	Received Message	FW: Clarify please	
04/27 10:06:06 PM	Email Link Clicked (+5)	Professional Licensure Disclosure Notification www.franklin.edu/about-us/university-details/state-authorization...	iPhone 📍 United States
04/27 9:08:49 PM	Email Opened (+1)	Professional Licensure Disclosure Notification	iPhone 📍 United States
04/27 9:05:28 PM	Email Link Clicked (+2)	Professional Licensure Disclosure Notification sos.ga.gov/index.php/licensing/plb/45	iPhone 📍 United States
04/27 8:01:40 PM	Sent Message	Professional Licensure Disclosure Notification	

With our redesign in Slate, we had to take advantage of dynamic content and slightly complex queries to make this manageable long-term. An additional factor that can influence implementation time is something that regularly challenges any college or university office – managing competing priorities with existing staff resources.

The project benefited from cross-departmental teams working together: Accreditation & Authorization, Student Affairs, and Marketing.

Ongoing communication between offices is essential to ensure existing campaigns are functioning properly and updated when needed, as well as to accommodate adding campaigns when new programs are launched.

A CRM campaign is just one piece of a strong compliance toolbox.

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CONGRATUATIONS
FRANKLIN UNIVERSITY!

Thank You For Listening !

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