

WCET | State Authorization Network



2021 WINNER

Slippery Rock University

*Bringing Order to Chaos –
SARA Data Collection*

Presented by
LisaMarie Weinzetl

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?

- States maintain the authority to regulate out-of-state postsecondary institutions that offer or participate in activities located in their state.
- Knowing the **location** of students and institutional **activities** is step one in complying with state oversight:
 - State institution approval
 - Professional licensure program approval
 - Participation in reciprocity
- 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/STATEAUTHORIZATION

Who is Slippery Rock University

- * Founded in 1889
- * Member of Pennsylvania State System of Higher Education
- * 1 hour north of Pittsburgh
- * Enrollment of 8,424 – 6,921 UG & 1,504 Grad
- * 150+ UG majors and 40 grad degrees & certificates



Challenge

Organize *quality* state & CIP information for almost 4,000 experiential learning placements for SARA Data Reporting and compliance, while minimizing faculty time invested.

Initial Effort

Student's Last Name	Student's First Name	Banner Id	Level U or G	Program	College	Part of an Online Program?	Is the internship required by your major?	Name of Site	City	State	Zip	Semester	2 digit CIP Code
												201912	
												201912	
												201912	
												201912	
												201912	
												201912	
												201912	
												201912	
												201912	
												201912	

*Relied on faculty to provide all the information including CIP code – faculty push back
*Covid struck...

Updated Spreadsheet

Field Experience - Winter 2021

FACULTY NAME			ID	DEPARTMENT Parks, Conserv&RecreationTherpy												
Last Name	First Name	ID	Student Level	Program	College	Course	Section	CRN	Part of an Online Program	Is the Internship Required	Name of Site	City	State	2 Digit CIP	On-site/Remote	If Virtual/Remote See * Below
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		

*If virtual/remote ELA, what state is the student physically located in while completing the ELA?

How We Did It...

- * It was a total TEAM effort
 - *Institutional Research
 - *Developed original spreadsheet
 - *Involved with updating the spreadsheet
 - *Ensures correct information is pulled
 - *Friend & co-worker who is determined and has mad computer skills!
 - *Found Macro that is used
 - *Taught herself how to use the mail merge attachment feature
 - *Taught me how to use it
 - *Created instructions

2 Reports Needed

1) Workbook with faculty specific student information

Field Experience - Winter 2021

FACULTY NAME		ID	DEPARTMENT Parks, Conserv&RecreationTherpy													
Last Name	First Name	ID	Student Level	Program	College	Course	Section	CRN	Part of an Online Program	Is the Internship Required	Name of Site	City	State	2 Digit CIP	On-site/Remote	If Virtual/Remote See * Below
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		
			U	Park& Resource Management (BS)	HE	PCRM351	01	12360	No					31		

*If virtual/remote ELA, what state is the student physically located in while completing the ELA?

2 Reports Needed

2) Spreadsheet listing faculty that is use for mail merge

ACADEMIC_PERIOD	SCHEDULE	INSTRUCTOR_LAST_NAME	INSTRUCTOR_FIRST_NAME	INSTRUCTOR_ID	EMAIL	ACTUAL_ENROLLMENT	COLLEGE	DEPARTMENT	PERCENTAGE_OF_RESPONSIBILITY	COURSE_REFERENCE_NUMBER	Merge_path
202112	PR					15	BU	SPMT	100	12304	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00635664.xlsx
202112	IN					1	BU	AEF	100	12248	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00731421.xlsx
202112	IN					7	BU	HAI5	100	12314	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\01227818.xlsx
202112	PR					2	HE	PCRT	100	12475	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00684410.xlsx
202112	PR					1	HF	MUSI	100	12542	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00537512.xlsx
202112	PR					12	BU	SPMT	100	12281	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00538863.xlsx
202112	PR					10	HE	PCRT	100	12360	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00539386.xlsx
202112	IN					1	HF	HCSS	100	12422	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00635815.xlsx
202112	IN					1	BU	COMM	100	12286	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00536970.xlsx
202112	PR					2	HF	CSLD	100	12547	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00916032.xlsx
202112	IN					1	HE	CPSC	100	12316	X:\StateAuthorization\Reports\Field Experiences\2021-2022\202112\A\00635826.xlsx

Faculty Excel Workbook

1) Workbook with faculty specific information

Field Experience - Winter 2021

FACULTY NAME		ID	DEPARTMENT Healthcare Adm & Info Systems													
Last Name	First Name	ID	Student Level	Program	College	Course	Section	CRN	Part of an Online Program	Is the Internship Required	Name of Site	City	State	2 Digit CIP	On-site/Remote	If Virtual/Remote See * Below
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	06	12502	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		
			U	Hlth Care Admin & Mgmt (BS)	BU	HCAM450	03	12314	No	No				51		

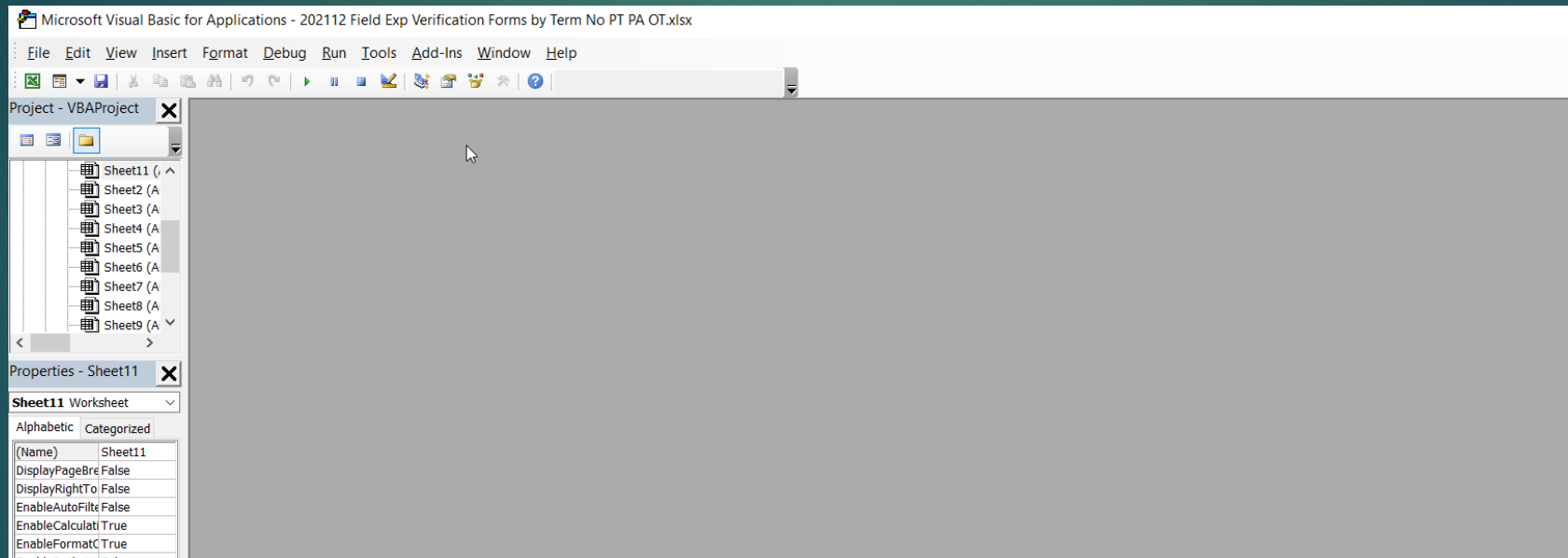
*If virtual/remote ELA, what state is the student physically located in while completing the ELA?

1
2
3
4
5
6
7
8

▶ ...
A00538863
A00539386
A00635664
A00635815
A00635826
A00684410
A00731421
A00916032
A01: ...

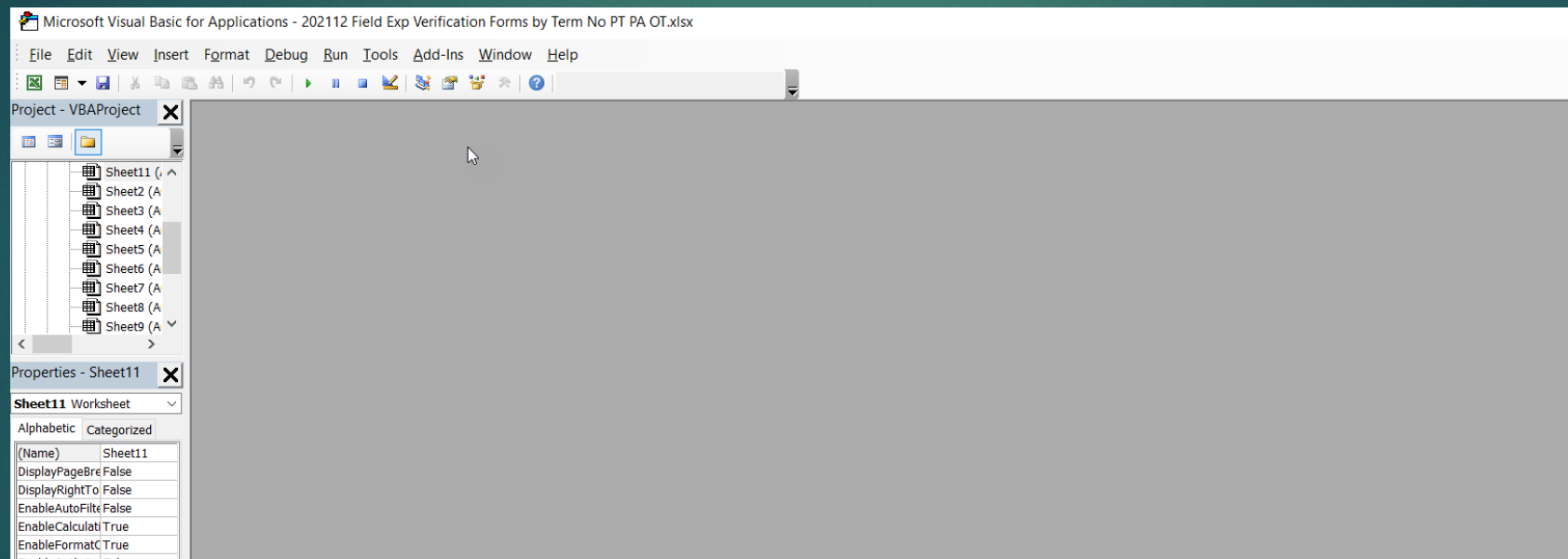
Splitting the Workbook into individual files...

On a spreadsheet in the workbook, use ALT +F11 to open the Microsoft Visual Basic Applications



Splitting the Workbook into individual files...

Under Insert, select Module.

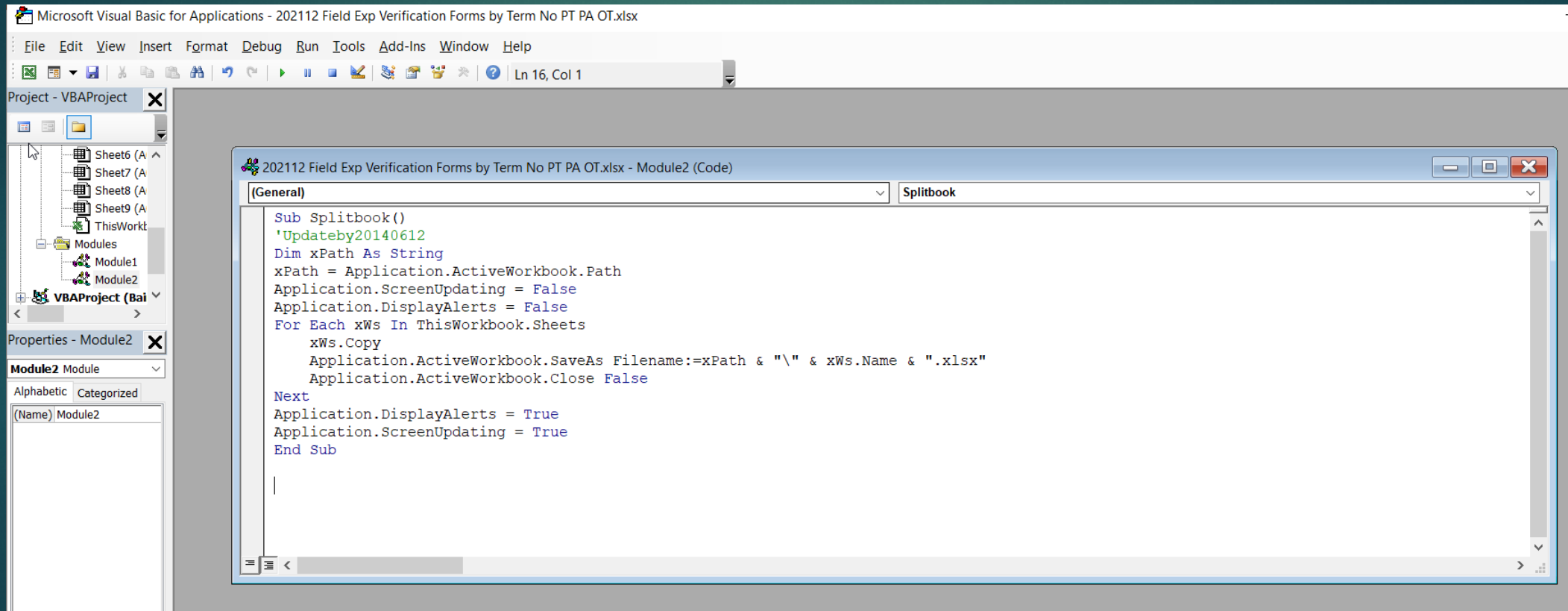


Splitting the Workbook into individual files...

Insert the formula shown, then press F5. Workbook will be separated into individual spreadsheets based on faculty id.

```
Sub Splitbook()  
'Updateby20140612  
Dim xPath As String  
xPath = Application.ActiveWorkbook.Path  
Application.ScreenUpdating = False  
Application.DisplayAlerts = False  
For Each xWs In ThisWorkbook.Sheets  
    xWs.Copy  
    Application.ActiveWorkbook.SaveAs Filename:=xPath & "\" & xWs.Name & ".xlsx"  
    Application.ActiveWorkbook.Close False  
Next  
Application.DisplayAlerts = True  
Application.ScreenUpdating = True  
End Sub
```

Splitting the Workbook into individual files...


















The screenshot displays the Microsoft Visual Basic for Applications (VBA) editor interface. The main window is titled "202112 Field Exp Verification Forms by Term No PT PA OT.xlsx - Module2 (Code)". The code editor shows a VBA subroutine named "Splitbook" with the following code:

```
Sub Splitbook()  
    'Updateby20140612  
    Dim xPath As String  
    xPath = Application.ActiveWorkbook.Path  
    Application.ScreenUpdating = False  
    Application.DisplayAlerts = False  
    For Each xWs In ThisWorkbook.Sheets  
        xWs.Copy  
        Application.ActiveWorkbook.SaveAs Filename:=xPath & "\" & xWs.Name & ".xlsx"  
        Application.ActiveWorkbook.Close False  
    Next  
    Application.DisplayAlerts = True  
    Application.ScreenUpdating = True  
End Sub
```

The interface also shows a Project Explorer on the left with a tree view containing "Sheet6 (A)", "Sheet7 (A)", "Sheet8 (A)", "Sheet9 (A)", "ThisWorkt", "Modules", "Module1", "Module2", and "VBAProject (Bai)". The Properties window at the bottom left shows "Module2" selected.

Splitting the Workbook into individual files...

Name	Status	Date modified	Type	Size
 202112 Email body.docx	✓	12/20/2021 1:56 PM	Microsoft Word D...	62 KB
 202112 Field Exp Verification Forms by T...	✓	12/20/2021 12:44 PM	Microsoft Excel W...	53 KB
 A00536970 - Copy.xlsx	✓	12/20/2021 12:46 PM	Microsoft Excel W...	20 KB
 A00536970.xlsx	✓	12/20/2021 12:46 PM	Microsoft Excel W...	20 KB
 A00537512.xlsx	✓	12/20/2021 12:26 PM	Microsoft Excel W...	19 KB
 A00538863.xlsx	✓	12/20/2021 12:26 PM	Microsoft Excel W...	20 KB
 A00539386.xlsx	✓	12/20/2021 12:26 PM	Microsoft Excel W...	20 KB
 A00635664.xlsx	✓	12/20/2021 12:26 PM	Microsoft Excel W...	20 KB
 A00635815.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	19 KB
 A00635826.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	19 KB
 A00684410.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	19 KB
 A00731421.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	19 KB
 A00916032.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	19 KB
 A01227818.xlsx	✓	12/20/2021 12:27 PM	Microsoft Excel W...	20 KB
 Copy of 202112 Internship Mail Merge Fil...	✓	12/20/2021 2:12 PM	Microsoft Excel W...	19 KB

Merge Spreadsheet

2) Merge Spreadsheet with faculty information

ACADEMIC_PERIOD	SCHEDULE	INSTRUCTOR_LAST_NAME	INSTRUCTOR_FIRST_NAME	INSTRUCTOR_ID	EMAIL	ACTUAL_ENROLLMENT	COLLEGE	DEPARTMENT	PERCENTAGE_OF_RESPONSIBILITY	COURSE_REFERENCE_NUMBER	Merge_path
202112	PR					15	BU	SPMT	100	12304	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00635664.xlsx
202112	IN					1	BU	AEF	100	12248	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00731421.xlsx
202112	IN					7	BU	HAIS	100	12314	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A01227818.xlsx
202112	PR					2	HE	PCRT	100	12475	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00684410.xlsx
202112	PR					1	HF	MUSI	100	12542	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00537512.xlsx
202112	PR					12	BU	SPMT	100	12281	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00538863.xlsx
202112	PR					10	HE	PCRT	100	12360	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00539386.xlsx
202112	IN					1	HF	HCSS	100	12422	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00635815.xlsx
202112	IN					1	BU	COMM	100	12286	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00536970.xlsx
202112	PR					2	HF	CSLD	100	12547	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00916032.xlsx
202112	IN					1	HE	CPSC	100	12316	X:\State Authorization\Reports\Field Experiences\2021-2022\202112\A00635826.xlsx

Merge Path, blue column, needs to be manually added

Adding Merge Column

Adding mail merge attachment path column

1. In the new column title MERGE FILE PATH, enter formula on second cell of column:
 - a. = "C:\xxxxxx\xxxxxxxx\" & (F2) & ".xls"
 - i. Yellow highlighted will change according to actual file location
 - ii. Blue highlighted will change according to identifying column location
 - iii. Green highlighted must match extension of file type for attachment, xls, pdf . . .
2. Press enter
3. Click in the cell containing the new formula
4. Double click on square in bottom right corner of cell to copy formula down column
5. Highlight column
6. Click copy
7. Click Paste value from pull down menu in top ribbon bar
8. Save
9. You will use this excel spreadsheet later as the source for the Mail Merge (with attachments)

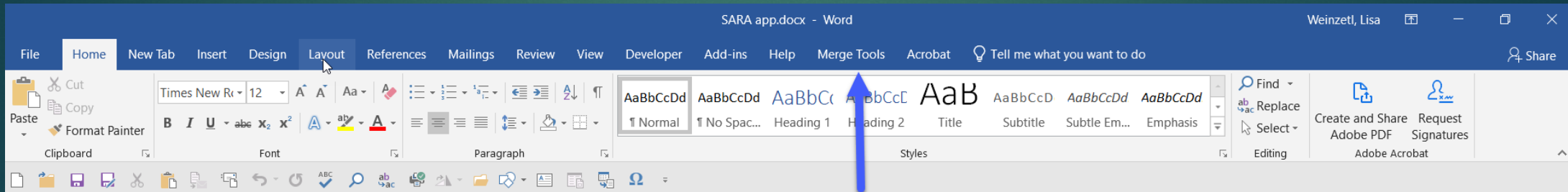
Merging with Attachments

Create Mail Merge Document

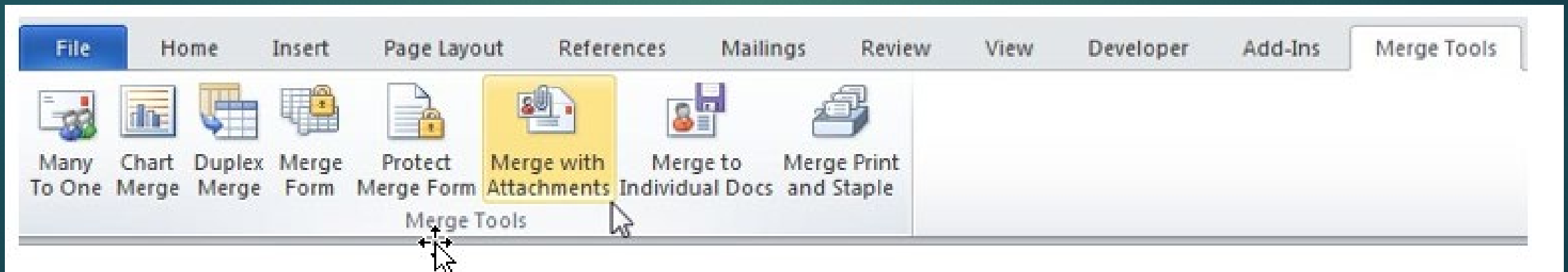
1. Open new Word document
2. Draft email body.
3. Start Mail Merge in Mailings tab
4. Choose "letters" from drop-down
5. Select Recipients
6. Use an existing list
7. Choose excel file with mail merge attachment path column added
8. Edit Recipient List: recipients can be checked/unchecked here, click ok
9. After mail merge document is complete, save, and then follow Merging with Attachments directions.

Adding Attachments

Click on Merge Tools section on the ribbon



Click on the Merge with Attachments button



I don't have Merge Tools on My Ribbon...

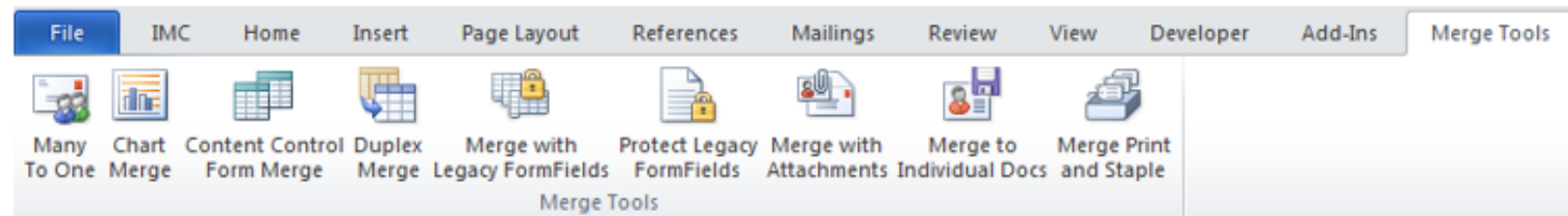
Save this file in the Word Startup folder. In Windows XP the default location for that folder is

C:\Documents and Settings\[User Name]\Application Data\Microsoft\Word\STARTUP

In Windows Vista and Windows 7, 8 and 10, it is

C:\Users\[User Name]\AppData\Roaming\Microsoft\Word\STARTUP

When you have done that, the tab shown below will be added to the Ribbon:



If this add-in does not do exactly what you require, I offer a service to create customized versions.

You can contact me with your requirements at dougrobbinismvp@gmail.com

Sending Emails with Attachment

The screenshot shows the 'Mail Merge with Attachments' dialog box. It has a title bar 'Mail Merge with Attachments ©2012 - Doug Robbins'. The main area is titled 'Select the merge fields that contain the path and filename of attachments'. It features a list of fields on the left: 'Email', 'Subject', and 'Link'. The 'Subject' field is selected and highlighted in blue. To the right of this list are 'Add >>' and '<< Remove' buttons. A box on the right contains the text 'Attachment' and is marked with a blue circle containing the number '1'. Below this is a text box containing the file path 'C:\Brisbane MVP Presentation\Merge to Email Body with Attachments\IMG_201'. There are 'Delete Attachment' and 'Browse for attachments to be included with all messages' buttons. The 'Merge Destination' dropdown is set to 'Merge to Email as PDF Attachment' and is marked with a blue circle containing the number '2'. Below this is the section 'Select Fields containing data to be used as the filename for each document that is created.' with a list of fields: 'Log', 'Addressee', and 'Company'. The 'Log' field is selected and highlighted in blue. To the right are 'Add >>' and '<< Remove' buttons. Below this is a checked checkbox 'Include Date' with the value '20150301' and a 'File Text' field. The 'Select the Field containing the Email Addresses.' section has a dropdown set to 'Email', marked with a blue circle containing the number '3'. The 'Select the Field containing the CC Addresses.' section has a dropdown set to 'Subject'. Below this is a checked checkbox 'Data Source contains a Subject Field Select field' and two text boxes: 'Text for Subject of Email' and 'Text after Subject Field', the latter marked with a blue circle containing the number '4'. At the bottom, there is an unchecked checkbox 'Include Salutation in E-mail message' and a 'Text for covering Email message.' text box. At the very bottom are 'Continue' and 'Cancel' buttons.

- #1 Move Merge Path from the left to the right.
 - #2 Email Message is the Merge Destination Field
 - #3 Select Email
 - #4 Add information for the subject line
- Hit Continue...


Collecting Data for SARA Reporting


Cut and paste information from completed spreadsheets into one spreadsheet

Last Name	First Name	ID	Level	Program	College	Course	Section	CRN	Online Program	ELA Required	Name of Site	City	ST	Credits	On-site/Remote	Remote Site	Semester
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	Wellington Retreat/Forbes	Lantana	FL	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	BHS - Emergency Medicine	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	Dr. Michael Abdul-Malik	Hermitage	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	2	13353	No	Yes	AHN - Forbes Region	Monroeville	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	Wellington Retreat/Forbes	Lantana	FL	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	AHN - Allegheny Orthopedic	Grove City	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	WVU Medicine Emergency	Morgantown/Bridgeport	WV	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	2	13353	No	Yes	BHS - FastTrack	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	Specialty Orthopedic	Hermitage	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	BHS - Family Health Center	Clarion	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	BHS - Primary Care	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	2	13353	No	Yes	BHS - Emergency Medicine	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	3	13349	No	Yes	HVHS-ASP Orthopedic	Beaver	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	5	14752	No	Yes	BHS - Cardiovascular	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	3	13349	No	Yes	BHS - Slippery Rock	Slippery Rock	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	3	13349	No	Yes	BHS Primary Care	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	BHS - Primary Care	Butler	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	BHS Primary Care	Evans City	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	4	13350	No	Yes	Titusville Area Hospital	Titusville	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	4	14001	No	Yes	Specialty Orthopedic	Hermitage	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	Wellington Retreat/Forbes	Lantana	FL	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	HVHS - Surgical Associates	Bridgewater	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA773	4	14001	No	Yes	AHN - Grove City	Grove City	PA	51	On Site		202109
				Physician Asst. Studies (MS)	HE	PA772	1	13347	No	Yes	BHS Primary Care	Butler	PA	51	On Site		202109


Pivot Table Set Up

PivotTable Fields



Choose fields to add to report: 






Search 

Site
 City
 ST
 Sem
 CIP
 Remote?

More Tables... 

Drag fields between areas below:

 Filters	 Columns

 Rows	 Values
ST 	Count of CIP 
CIP 	

Reporting Data

Row Labels	Count of CIP
AZ	6
31	1
51	4
52 -	1
CA	5
51	5
CO	2
31	1
51	1
CO	1
31	1
CT	1
51	1
DC	1
51	1
DE	2
51	2
FL	46
13	1
42	1
43	1
51	39
09	1
31 -	1
50	1
51	1



CONGRATUATIONS
SLIPPERY ROCK UNIVERSITY!

Thank You For Listening!

wcetsan.wiche.edu/resources/sansational-awards