

Jana Walser-Smith, SAN Director:

Record to this computer. Hello everyone and welcome. I am Jana Walser-Smith with the State Authorization Network here specifically to talk to you about the SANSational Awards. And in that spirit, I'm happy to introduce you all to Dr. Malea Fields, who serves as Associate Vice President of Accreditation, Licensure and State Authorizations, as well as the accreditation liaison officer. We also have Dr. Miguel Valenzuela, Director of Accreditation, Licensure, and State Authorizations, and Ms. Rebecca Zacarias, who serves as the support staff with The Chicago School. We are so very excited about The Chicago School and their award-winning licensure program submission, the SANSational Award project titled Personalized Licensure Advising and Disclosure again is an award-winning project this year. Before I let them talk to you about their project and their process, I just want to give a little background on the SANSational Awards. Please keep in mind that these SANSational Awards were established way back in 2015 and they were really used as a means to recognize outstanding efforts by SAN member institutions and SAN member organizations. These institutions and organizations go through great hoops to develop high quality comprehensive solutions to challenging state authorization issues. The award recognizes these solutions that these institutions have prepared that not only meet the need of regulators, these solutions meet the needs of the institution, and more specifically, they meet the needs of the students. These efforts serve as models which can be adapted and replicated by other institutions. So without further ado, I do want to turn things over to this phenomenal team out there in the Los Angeles area. Malea, please take it away.

Malea Fields, The Chicago School:

Thank you, Jana, and I want to thank you. We're very happy to have received this award. My team and I have worked very hard for the past five or so years on state authorizations and licensure. Prior to 2019, there was minimal work had been done around licensure requirements, round disclosures around state authorizations, and in 2019, we recognized the institutions need to develop a process to determine and track where our program offerings lead to professional licensure. [inaudible 00:03:01] has proactively conducted an annual audit all programs that lead to professional licensure. And again, with me, I know you introduced us, but I would like to give my team a little chance to talk a little bit about themselves, maybe how long they've been here, and really sort of what they help oversee. I'm the Associate Vice President for the office, and I've been with The Chicago School since I think 2015.

Jana Walser-Smith, SAN Director:

Perfect.

Miguel Valenzuela, The Chicago School:

Yeah, so again, Miguel Valenzuela. I've been with The Chicago School since 2016, May specifically, May of 2016. And as far as what we do, I mean it's pretty much all in our title, so accreditation, licensure, state authorizations, we oversee that for the institution.

Jana Walser-Smith, SAN Director:

Okay, perfect. Rebecca?

Rebecca Zacarias, The Chicago School:

Hi everyone. My name is Rebecca Zacarias. I've been with the Chicago School since 2018, so five years now. Initially, I started as administrative assistant to the office, and with the role given to us to oversee

licensure activity, I was handed that... well, I don't completely oversee it, but I have been given more responsibilities to take on licensure oversight for our institution.

Jana Walser-Smith, SAN Director:

Perfect. Perfect. Thank you.

Malea Fields, The Chicago School:

And as you can see, we're a pretty small team, but we're very tight-knit and collaborative, so we have worked very hard to do what needs to be done. So the title, Licensure Story: When Obstacles and Challenges Lead to Wins, we do see our new process or our current process as a win. And I will hand the next slide over to Rebecca.

Rebecca Zacarias, The Chicago School:

Yeah, so as Dr. Fields mentioned, it was in 2019 that our institution learned about the new federal government requirement that institutions make available to the public and to prospective students information about where our programs lead to professional licensure. Since then, our office has worked hard to figure out which process worked best for us. We found that conducting an annual audit was the best approach to staying up to date with any state licensure requirement changes. Next slide. So here's a little graph that we put together to explain what the process looks like for us. So the routine audit begins with a review of each state's licensing laws and regulation, which are published on the state licensing board website. So what our office does is we go through each state's board website and we find out what the educational standards for licensure are in that state, and then all of those findings are then transferred over to a database through which information about existing licensure requirements and changes may be tracked and archived.

Once that research process is completed, the database is sent to the program chair to provide a secondary review and to solicit appropriate feedback. As the program expert, the chair is asked to work collaboratively with our office by reviewing the information and determining whether their program's curriculum meets or does not meet licensure requirements or whether a determination has not been made once the review process has been completed. Our office works closely with the Legal Affairs Office for approval of all licensure disclosure changes to ensure federal and state compliance. Access to this database may be provided to appropriate parties including faculty, staff, and administration. Next slide. So here's an example of what this database looks like. Unfortunately, it's a little pixelated, but we wanted to give you an idea of what this database looks like.

So in the far left, we have the first column, which is a list of each state. Each state is hyperlinked to the webpage for that state board. That gives access to us and to the program chair so that they can easily go into the webpage if they wish to look at information. But in the second column is the program title. The next column, we place all educational requirements as well as experience requirements. Right next to that, the license title, I mean, most states have the same title, but some have different titles for certain professional license.

We have a column where we insert any proposed legislation that we found out about. We don't see any here, but if you were to scroll down, you would see examples of information that we find. We also... This is an example of our clinical mental health counseling program. So CACREP accreditation is often a route towards licensure eligibility, so we put that so that the chairs can know whether or not CACREP accreditation is required. And then we have also a column where we or our office can place any comments and the chair can also place comments and at the very end towards the right is where the

chair will then make the determination of whether or not their program curriculum leads to licensure requirements in that state.

Miguel Valenzuela, The Chicago School:

I want to give a little bit from the student's perspective, so the location disclosure from their perspective. As the student begins the admission process by completing an interest application, students are asked to disclose not only their state of residence, but any state they're also intending to be licensed in after completion of their program. They're immediately notified via an automated pop-up link that is generated through the audit that Rebecca has just talked about. And if their program does not meet licensure requirements for any state they choose, if they continue to enroll, they are then counseled by the program expert and asked to acknowledge the information provided on licensure for the states.

Additionally, we built into the student portal that if they make an address change, they will again receive an immediate popup letting them know that the state they are changing to does not meet licensure requirements. And again, when this happens, they're routed to a counselor to further acknowledge. A final aspect of this is the 14 day requirement. So if the institution becomes aware of a change in state requirements through our annual and biannual audit process that the state no longer meets those licensure requirements, we then notify the affected students and provide them counsel and obtain formal acknowledgement that they are aware of the changes and how it may affect their licensure eligibility.

With the licensure disclosure requirements set forth by the federal government, The Chicago school has found this disclosure approach to be effective for developing and maintaining licensure disclosures that accurately reflect information about the institution's programs' license eligibility at each state. Additionally, knowing that state regulations continuously change and or adopt new guidelines, our office conducts a mid-year licensure review. And in addition to that routine annual audit, here's an example of one of our programs and how it's available on our public website for viewing. Each program has three areas identified for the disclosure, where the program meets the licensure requirements, where the program does not meet the licensure requirements, and where the program has yet to determine licensure eligibility. We also include hyperlinks to the appropriate board within the state, which takes them to the current rules log and regulations for student specific licensure that they will ultimately intend to seek.

Malea Fields, The Chicago School:

That's our process. That's what we do. That's what we've developed.

Jana Walser-Smith, SAN Director:

This seems really, really authentic and it seems like something that again, can be replicated. If you could, and anybody on the team who feels so fortunate to answer the question, what was the toughest part about putting this together? Talk to someone at an institution, just trying to start their program, what's the toughest thing that you had to deal with?

Miguel Valenzuela, The Chicago School:

I mean, I could add one thing and then everyone else can contribute. So I mean, let's just say the rationale for the database that we've built internally for ourselves. There are organizations that have licensure requirements posted and listed from each state. Unfortunately, we noticed that many of them

weren't up-to-date or weren't reflecting appropriate information. So we on ourselves now have instituted that biannual audit where we go and continuously look at any laws regulation changes that the boards have published, and update our internal guide appropriately because that's essential for our programs moving forward, especially through the audit and making sure that our students first and foremost have the most up-to-date information and accurate information for where licensure meets does not meet or we have not [inaudible 00:12:42].

Jana Walser-Smith, SAN Director:

Can I ask, how often are you guys looking at the regulations? Is it once a year or twice? What's your cadence?

Miguel Valenzuela, The Chicago School:

So it's actually twice a year. We do an annual audit that starts in our fall term that includes multiple stakeholders, including chairs, directors of clinical training, just to make sure... they're the program experts. They understand what courses count for which regulation, and then we do a supplementary audit that we will do in January just to see if there are any new regulations or changes. Typically, states give fair warning whether it's a year, two years, three years before the laws are instituted. However, [inaudible 00:13:24] experience, there was one state, not to be named, that made a rule change in December, published it in January, and that is kind of why we've instituted this new biannual audit.

Jana Walser-Smith, SAN Director:

That second review?

Miguel Valenzuela, The Chicago School:

Mm-hmm.

Jana Walser-Smith, SAN Director:

Perfect. Now, I understand that this is... I say this about the SAN team, a small but mighty team. Can you talk to our members about how you guys divide and conquer that research piece? In other words, how do you split up who's doing what, who's taking counseling, who's taking nursing? Is there a split or how does that happen?

Malea Fields, The Chicago School:

So it took us quite some time, and we're still in the process of getting that database to where it's easier, more comprehensive. But quite honestly, Rebecca has taken the bulk of reviewing all states, doing the initial large audit, and then she consults often with Miguel, and if questions come up, they'll review together. One of the other... I know you asked about challenges. One of the challenges was for us to take and create this culture with our chairs so that they understand that this is an ongoing collaborative process and we need their help and involvement. So luckily, I think we're at the point where when the chairs get the audit from Rebecca, they know what to do. There are very few questions, clarity, and then we get the audits back.

But for this particular process, really Rebecca does the heavy lifting for us.

Rebecca Zacarias, The Chicago School:

Yeah, and to answer your question also about the challenges, it is a very tedious process. The research aspect of it can take a while. So for this past audit, we had Miguel step in and take on some of the programs because we wanted to make sure that we had the reviews done in a timely matter. So that's where Miguel stepped in and he was like, "Which programs do you need help with?" I told him, and through that help, we were able to finish it much faster. But once we... Because we've already developed this process, really what it takes now is going to the websites and seeing if there have been any changes. So we already have the database, and I typically check how up to date the laws and regulations are on the website because published in 2019 or last updated in '22, and then when I see it has been updated, then we make sure to investigate and see what is different from last year's findings.

Jana Walser-Smith, SAN Director:

The point I try to ask everyone, and I ask this on behalf of the members, if you had to give any piece of advice about starting a project like this, say it's a person new to compliance, new to the role, and have seen your project and say, "Hey, this is something that could work for our institution," what piece of advice would you give someone wanting to start something like this, where to start or what would you tell them?

Miguel Valenzuela, The Chicago School:

I'll start slowly and I'll just take it from us. It's a very iterative process, so as we continue, we make it grow and take assessment seriously. When it comes to these kind of projects, I would just say, go one state at a time. Take your time. Be thorough because there are very confusing words that laws likes to use or regulatory bodies like to use. And don't forget to seek help when needed and be collaborative in the efforts.

Rebecca Zacarias, The Chicago School:

I would add to that and say, Miguel said, "Don't be afraid to seek help." And that can sometimes mean reaching out to the boards because sometimes they have different definitions for certain terminology. So to not be afraid to see clarity, because it is always better to have that clarity instead of assuming and trying to guess what certain requirements mean. So sometimes some boards are more responsive than others, but [inaudible 00:18:01] I think we're really good about working hard to get that answer.

Jana Walser-Smith, SAN Director:

[inaudible 00:18:06] Perfect. Perfect.

Rebecca Zacarias, The Chicago School:

Multiple emails, I'm calling. So that's one of the pieces of advice that I would give.

Miguel Valenzuela, The Chicago School:

And I'll add one more as well.

Jana Walser-Smith, SAN Director:

Okay. Please.

Miguel Valenzuela, The Chicago School:

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Know the program that you're going to be seeking licensure for or information on because as Rebecca stated earlier in the presentation, programmatic accreditation can matter sometimes depending on the program and the board's granting automatic approval based upon the programmatic accreditation. So understand what your programs offer, what they're doing before you go through the rules and regulations because the answer might already be as simple as programmatic accreditation meets this jurisdiction's requirement, you qualify.

Jana Walser-Smith, SAN Director:

Perfect. Well, this was a wealth of knowledge. Malea, I've told you before, you've got a small dream team there and a team that everyone can be proud to know that you guys are doing this great work there. Thank you for sharing this work with the State Authorization Network and also with our members. We appreciate all that you do.

Malea Fields, The Chicago School:

Jana...