

# Out-of-State Learning Activity Compliance Organizer and Checklist 2019 V2

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## Purpose of Checklist

The Out-of-State Learning Activity Compliance Organizer and Checklist will help you successfully tackle the State Authorization challenge of consolidating all the required tasks, deadlines and communications in a prioritized order to develop, implement and maintain a distance education compliance program. This simple and free tool will help you organize tasks around key elements such as building leadership, developing institutional policy, and creating and managing processes that enable your institution to meet compliance expectations.

## Format

The spreadsheet was developed in Microsoft Excel for Mac, Version 16.16.2. It can easily be saved in .csv format with no loss of content; however, the “freeze panes” setting will be removed. The spreadsheet format was selected to enable easy sorting of content by type of data. It is formatted in 8.5 x 14 landscape. Printing requires 3 sheets of paper per the complete set of columns. Credits and pagination appear in the headers and footers.

## Availability and Open Licensing

The Compliance Checklist is freely and openly available under a Creative Commons CC-BY-NC-SA license (Attribution-NonCommercial-ShareAlike). This means that anyone who downloads the form can share, remix, transform, or build upon the material as long as the user gives appropriate credit, does not use the material for commercial purposes, and distributes their contributions under the same license as the original. See [Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License](https://creativecommons.org/licenses/by-nc-sa/4.0/).

The Checklist is easily customizable and institutions are encouraged to revise and share. A copy is available at <http://www.jmu.edu/online/state-authorization/checklist/>.

## Spreadsheet Headings (Data for each task)

Category

Category Sorting Code

Task Description

Important Details/Notes

Ideas for How to Complete Tasks

General Supplemental Resources

Institution-Specific Resources

Institution-Specific Notes

Target Date for Completion

Person/Group Responsible

Completed/In Place (Y/N)

## Categories and Summary of Tasks

### ***Leadership***

Identify and inform key stakeholders around requirements for out-of-state learning activities, fully distant learning, professional licensure and participation in SARA. Inform Provost, other senior leadership, and legal services and establish avenue for regular communication. Establish leadership teams and working groups as needed.

### ***Institutional Policy***

Locate and identify existing policies and work towards creating a comprehensive institutional policy for activities related to state authorization and, if applicable, SARA participation. Ensure that procedures meet requirements as outlined in related state and federal policy documents and, if applicable, current SARA Manual. If a SARA participant, identify contacts at State Portal Agency.

### ***Process Management***

Identify existing institutional and unit-level processes related to managing and communicating to students and institutional units about out-of-state learning activities, fully distant learning requirements, and professional licensure. Identify gaps. Revise and create processes as necessary to close gaps and enable efficient reporting.

### ***Short Courses/Residency Programs***

Identify situations in which faculty members hold courses or residency programs that would trigger physical presence and seek approval as necessary.

### ***Fully Distant Students***

Create and use a process for collecting the number and location of all fully distant students each term or at some regular interval multiple times per year. Process should include steps to ensure that institution has approval to enroll students from those locations.

### ***Experiential Learning Placements/Supervised Field Experiences***

Identify programs that place students in degree-required experiential learning placements. Inform responsible departments and programs of reporting criteria and special conditions around placement. Create and use a process for regularly collecting location data for each student placement/field experience each term or at some regular interval multiple times per year.

### ***Licensure Programs***

Identify units that offer licensure-related programs and determine in which states and territories programs do and do not meet relevant state licensing board requirements. Identify special circumstances such as intra-state compacts. Ensure that information regarding a program's ability to meet those requirements is available to all students admitted to the program and, in some cases, sent directly to students. Establish processes to regularly update information.