

# Automating Licensure Disclosure in a Decentralized Multi-System Institution and the JMU Automation-Enhanced Process

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**2025 NASASPS Annual Conference**

**NATIONAL ASSOCIATION OF STATE ADMINISTRATORS  
AND SUPERVISORS OF PRIVATE SCHOOLS**

**April 27-30 | St. Louis, MO**

# Federal Regulations



November 8, 2022

Dear Student—

Our records indicate that you have been accepted into an academic program designed to lead to professional licensure or certification. That program is Master of Science (M.S.) in Accounting.

The Federal regulation 34 CFR 668.43(a)(5) requires James Madison University (JMU) to disclose whether its degree programs meet U.S. jurisdictions' educational requirements for professional licensure. If a prospective student of a program is located in a jurisdiction for which JMU cannot determine if a prospective student's credits will satisfy all of that jurisdiction's educational requirements for professional licensure, we must notify the prospective student directly.

Your application to the M.S. in Accounting program indicates that when you submitted the application, you were located in Virginia. As stated on JMU's website, JMU cannot determine whether the curriculum will meet Virginia's educational requirements for professional licensure. Although the opportunity is available for students to take all courses required for professional licensure, eligibility is dependent on which elective courses you choose and when you enroll. Thus, JMU cannot determine if the credits you complete as part of its M.S. in Accounting program would be accepted towards licensure qualification in Virginia.

If you wish to pursue professional licensure in Virginia, we recommend you contact Virginia's associated licensing agency to determine all educational requirements. This is the same process that needs to be followed if you apply for licensure in any jurisdiction.

More information is available at <https://boa.virginia.gov/>. For information regarding professional licensure in a different jurisdiction, please visit <https://www.jmu.edu/online/state-authorization/student-policies/licensure.shtml#Index>. To speak with someone in JMU's M.S. in Accounting program, visit <https://www.jmu.edu/cob/msa/> for contact information.

Sarah Cheverton  
Online Learning and State Authorization  
Office of Online Strategy  
James Madison University  
Gabbins Hall 113

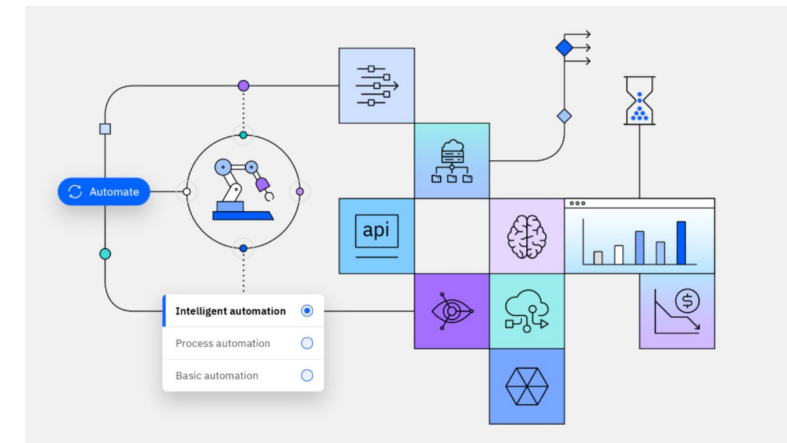
## § 668.43 Institutional and programmatic information.

- (a) Institutional information that the institution must make readily available to enrolled and prospective students under this subpart includes, but is not limited to—
  - (1) The cost of attending the institution, including—
    - (i) Tuition and fees charged to full-time and part-time students;
    - (ii) Estimates of costs for necessary books and supplies;
    - (iii) Estimates of typical charges for room and board;
    - (iv) Estimates of transportation costs for students; and
    - (v) Any additional cost of a program in which a student is enrolled or expresses a specific interest;
  - (2) Any refund policy with which the institution is required to comply for the return of unearned tuition and fees or other refundable portions of costs paid to the institution;
  - (3) The requirements and procedures for officially withdrawing from the institution;
  - (4) A summary of the requirements under § 668.22 for the return of title IV grant or loan assistance;
  - (5) The academic program of the institution, including—
    - (i) The current degree programs and other educational and training programs;
    - (ii) The instructional, laboratory, and other physical facilities which relate to the academic program;
    - (iii) The institution's faculty and other instructional personnel;
    - (iv) Any plans by the institution for improving the academic program of the institution, upon a determination by the institution that such a plan exists;
    - (v) If an educational program is designed to meet educational requirements for a specific professional license or certification that is required for employment in an occupation, or is advertised as meeting such requirements, a list of all States where the institution has determined, including as part of the institution's obligation under § 668.14(b)(32), that

# Automation

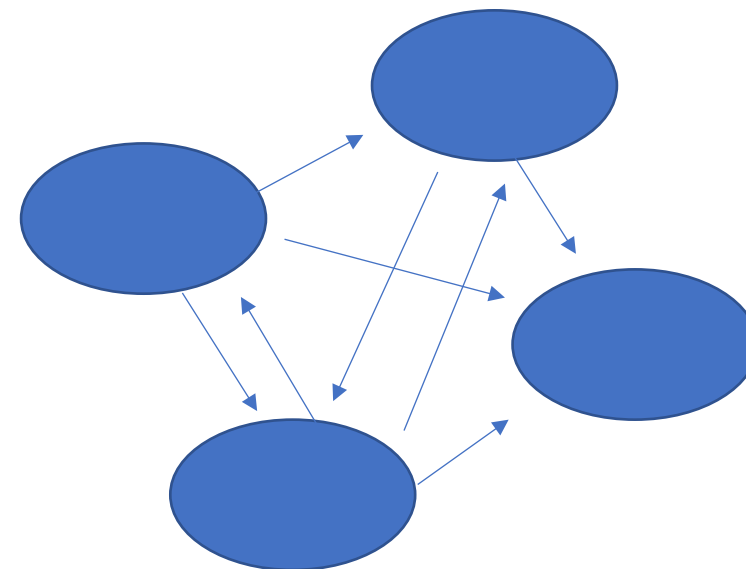
Automation is the application of technology, programs, robotics or processes to achieve outcomes with minimal human input.

<https://www.ibm.com/think/topics/automation>



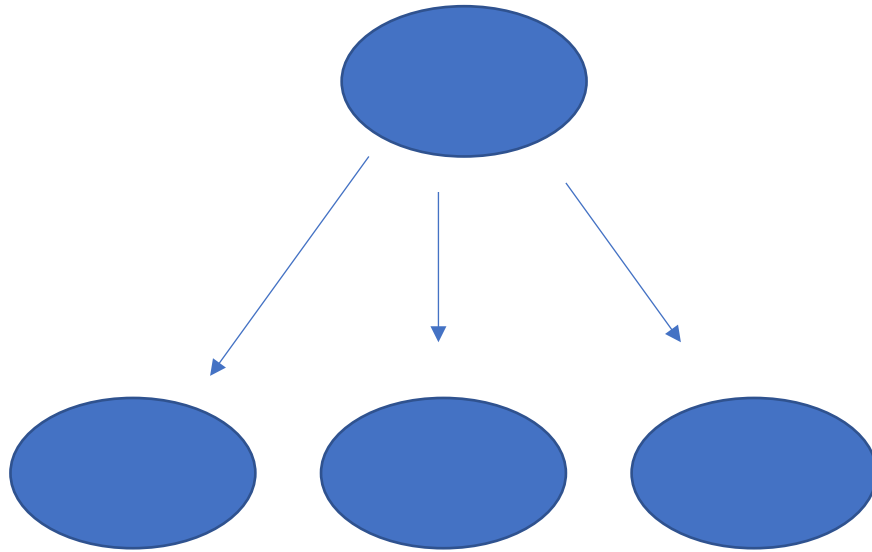
# Collaboration

working together via a process of iteration and feedback

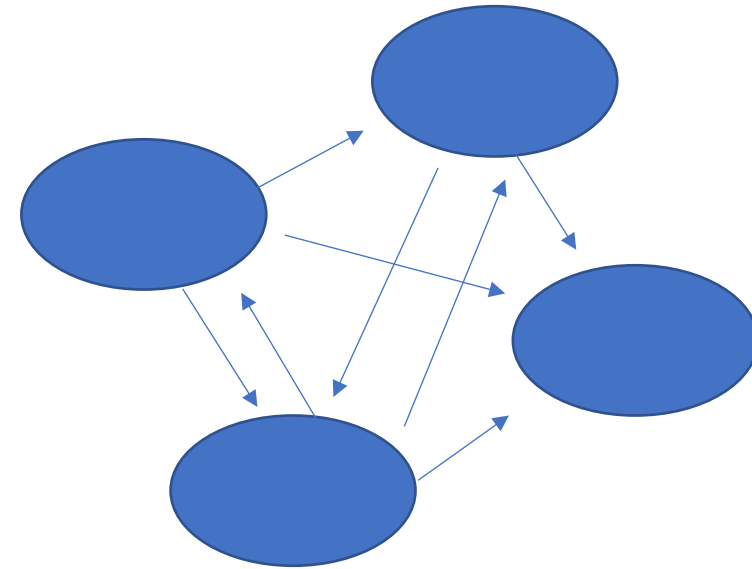




# Cooperation vs Collaboration



Cooperation

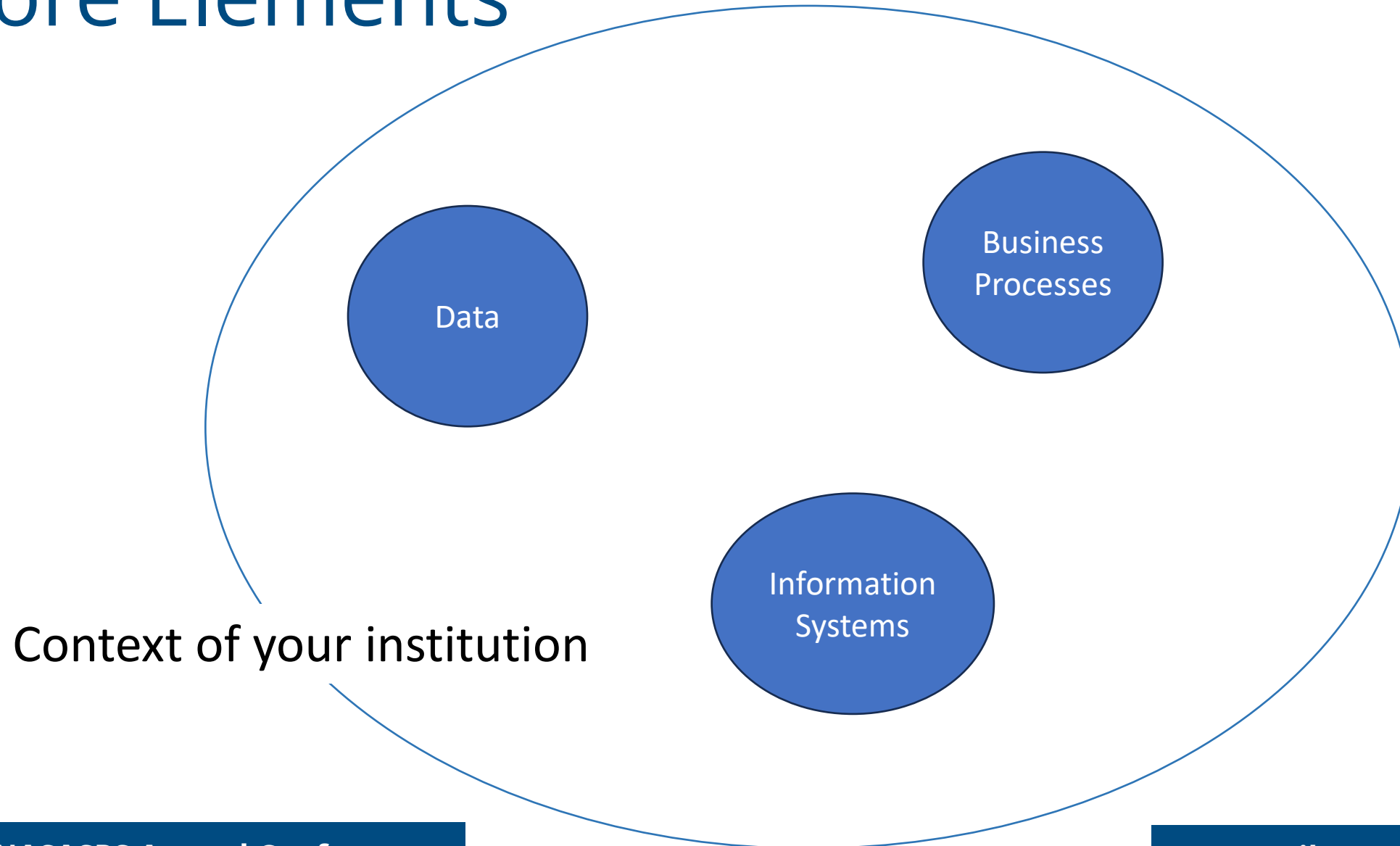


Collaboration

# A "Multi" Environment

- Laws, regulations, and policies
- Institution- and state-specific
- Academia- and business-orientation
- Various Information systems
- Multi-unit organization

# Core Elements



# Data

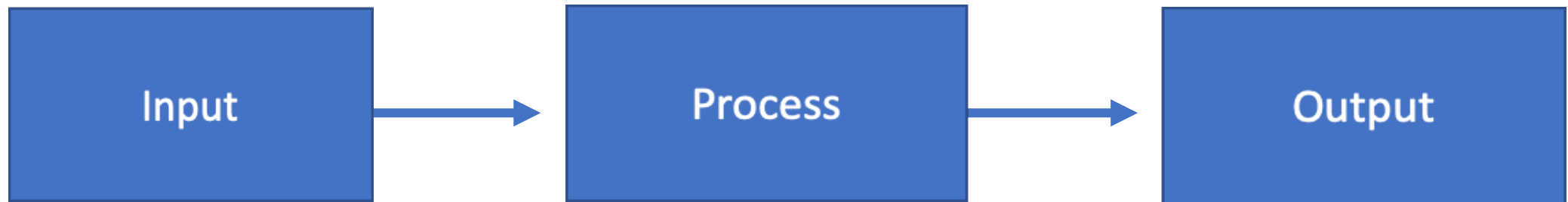
Discrete values needed to complete the task

- Prospective and Enrolled Student Data
  - Location (expected and current)
  - Academic program
  - Name
  - ID number
  - Email address
- Licensure Program
  - Name
  - System ID#
  - Website URL
  - Contact name
- State Determination Data (i.e., Meets/Does Not Meet Requirements)
- State Licensing Board website URLs



# Business Process

Collection of activities that create a product or a service of value to the organization, its business partners, and/or its customers. It processes inputs into outputs.



Capturing Location Successfully and Unsuccessfully  
Using Student Semester Check-In Process

Business Process

Previous  
semesters

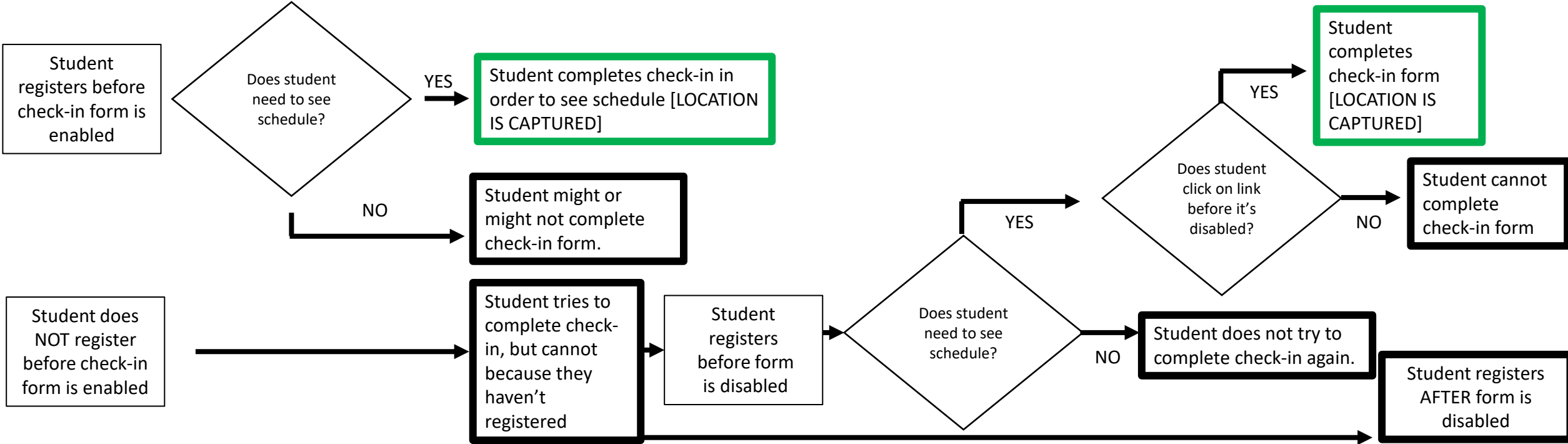
Beginning of  
Semester

Timeline

Mid-  
Semester

Student Check-In  
Enabled

Student Check-In  
Disabled



# What is an Information System?

Designed to collect data and produce useful information for decision making purposes.

Hardware

Software

Data

Procedures

People

# Information Systems

## and requirements analysis

- Systems
  - Student Information System (SIS)
    - PeopleSoft, Banner, etc.
  - Application System
    - Common App, ApplyWeb, SOPHAS, etc.
  - Document Management System
    - OnBase, Sharepoint
  - Institution's Website Tools
    - Cascade (centrally managed with distributed access)
- Requirements Analysis
  - What must the system do to support the business process?

# Institutional Context

Example: JMU

- General
  - Public R2 Doctoral Institution
  - 22K students
  - 7 Colleges
  - Licensure Programs:
    - 28 non-Teacher Ed programs (54 with teacher ed)
    - Undergrad, Adult Degree and Grad licensure programs
  - Most online programs are graduate
- Multiple IS systems across multiple areas
- New president starts July 1
- Interim Provost
- Re-engineering Madison project
  - Complete replacement of information systems over 8-10 years (in year 3)

# Institutional Context (cont.)

Example: JMU

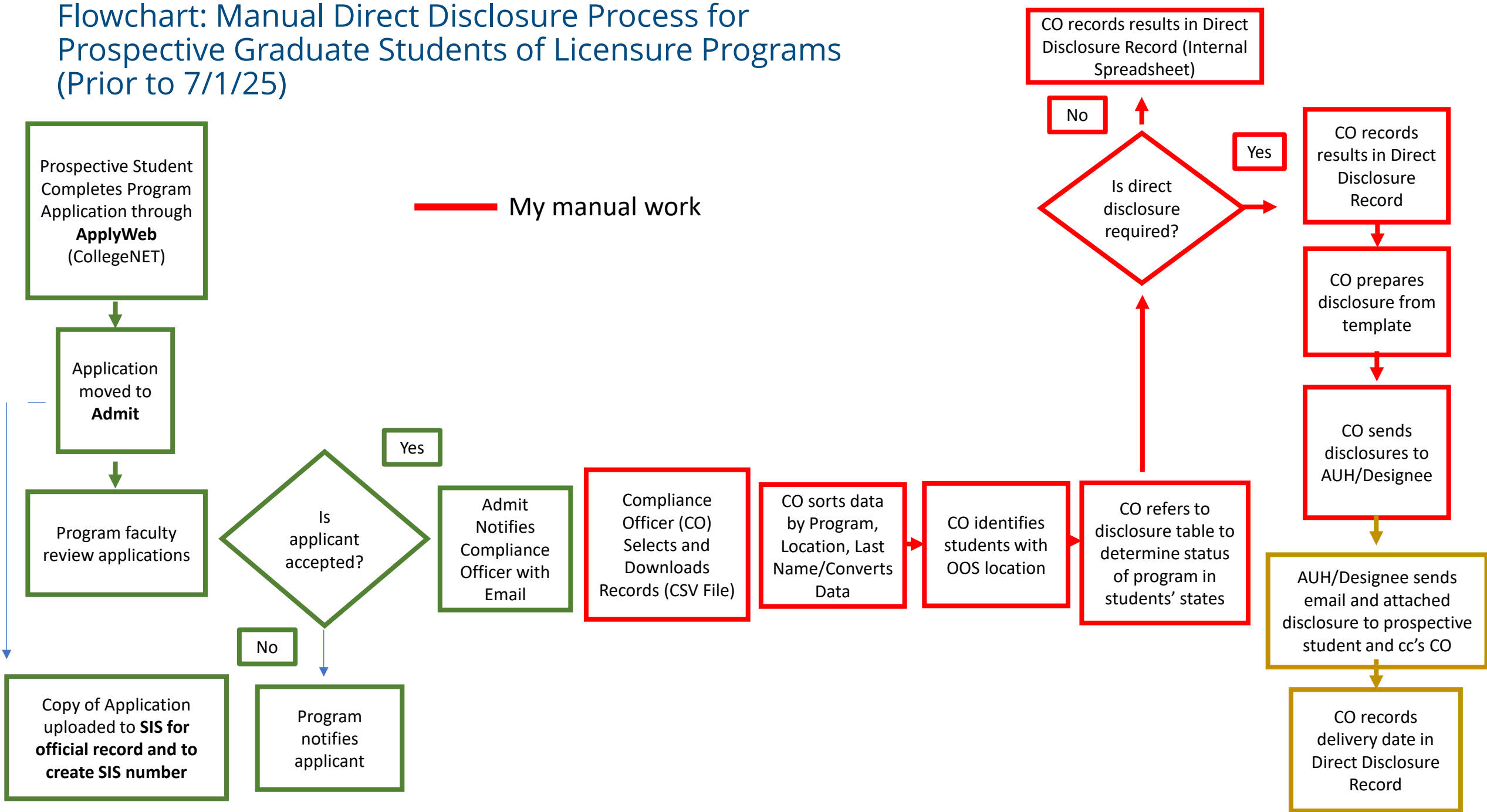
- My knowledge, skills, role, place
  - State Authorization Regulation and Policy
  - Public and Direct/Individualized Disclosure Process
  - Experience overseeing enterprise system acquisition and management
  - Access to/ability to create/update State Authorization website content
  - Process-orientation
  - Long-term employee/years of building working relationships across University
  - Office of one
- Need from others
  - Access to & working knowledge of specific systems
  - Authority to make decisions involving specific processes and systems
  - Database and system development skills



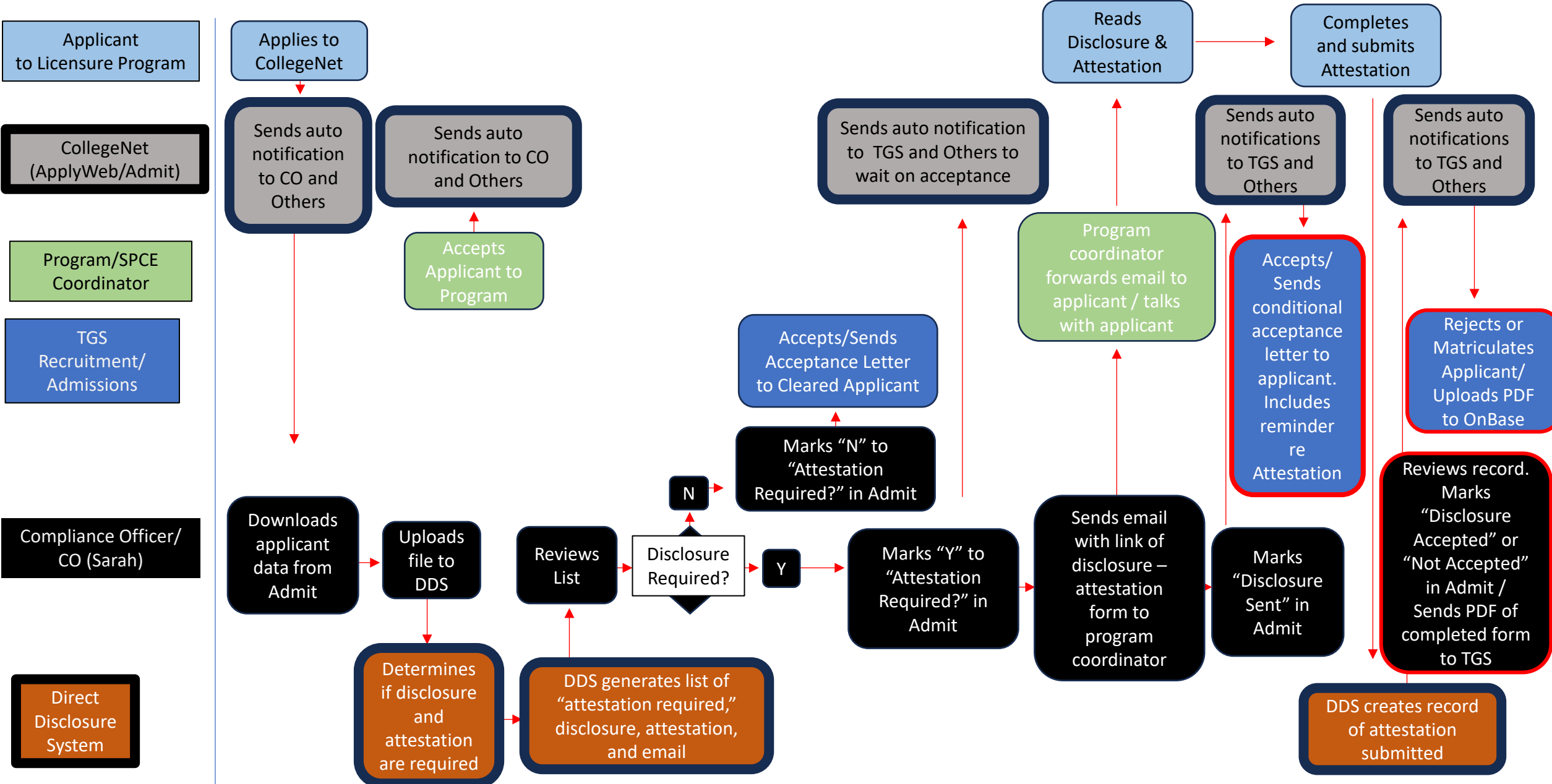
# Purpose of Presentation

- Demonstrate automation-enhanced direct disclosure process and share development steps

# Flowchart: Manual Direct Disclosure Process for Prospective Graduate Students of Licensure Programs (Prior to 7/1/25)



# Direct Disclosure & Attestation Process for Graduate Licensure Programs



# Purpose of Presentation

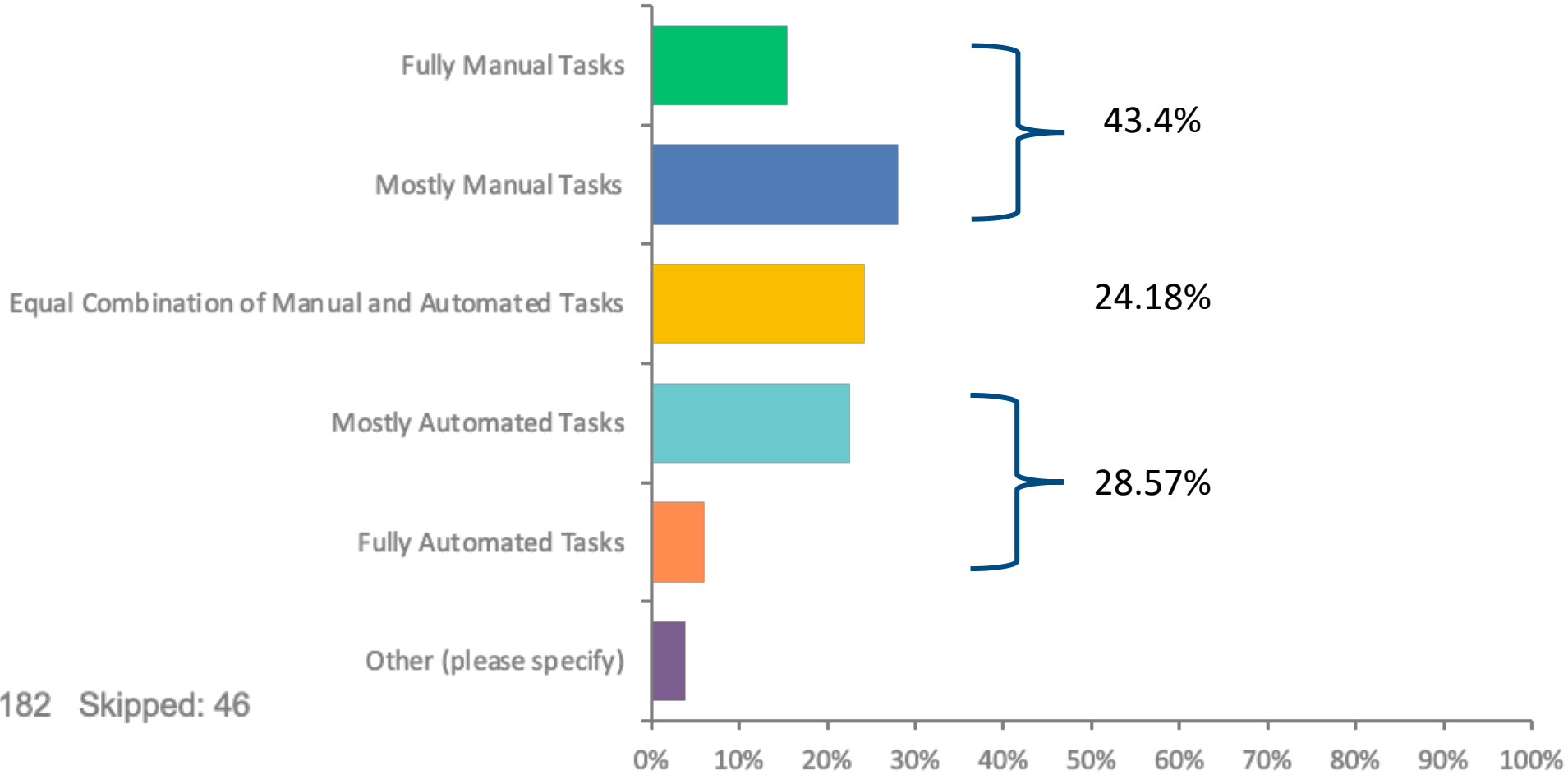
- Demonstrate automation-enhanced direct disclosure process and share development steps
- Tools to lead and manage the collaborative development process.
  - Guiding Questions
  - The Data List worksheet
  - Collaborators Diagram template
  - Process Diagram template

# SAN Survey on Professional Licensure Compliance

## Relevant Results

**Q23: In general, how would you describe the level of automation built into your institution's direct disclosure process? Please use the following definitions of fully manual and fully automated to answer this question:**

**Fully Manual processes require individuals to manually download and upload data, determine licensure eligibility based on a student's location, create individual direct disclosure notifications, and notify relevant departments on a case-by-case basis. Fully Automated processes, once set up, handle direct disclosures with minimal, if any, manual tasks required.**



Answered: 182   Skipped: 46



# Our Story:

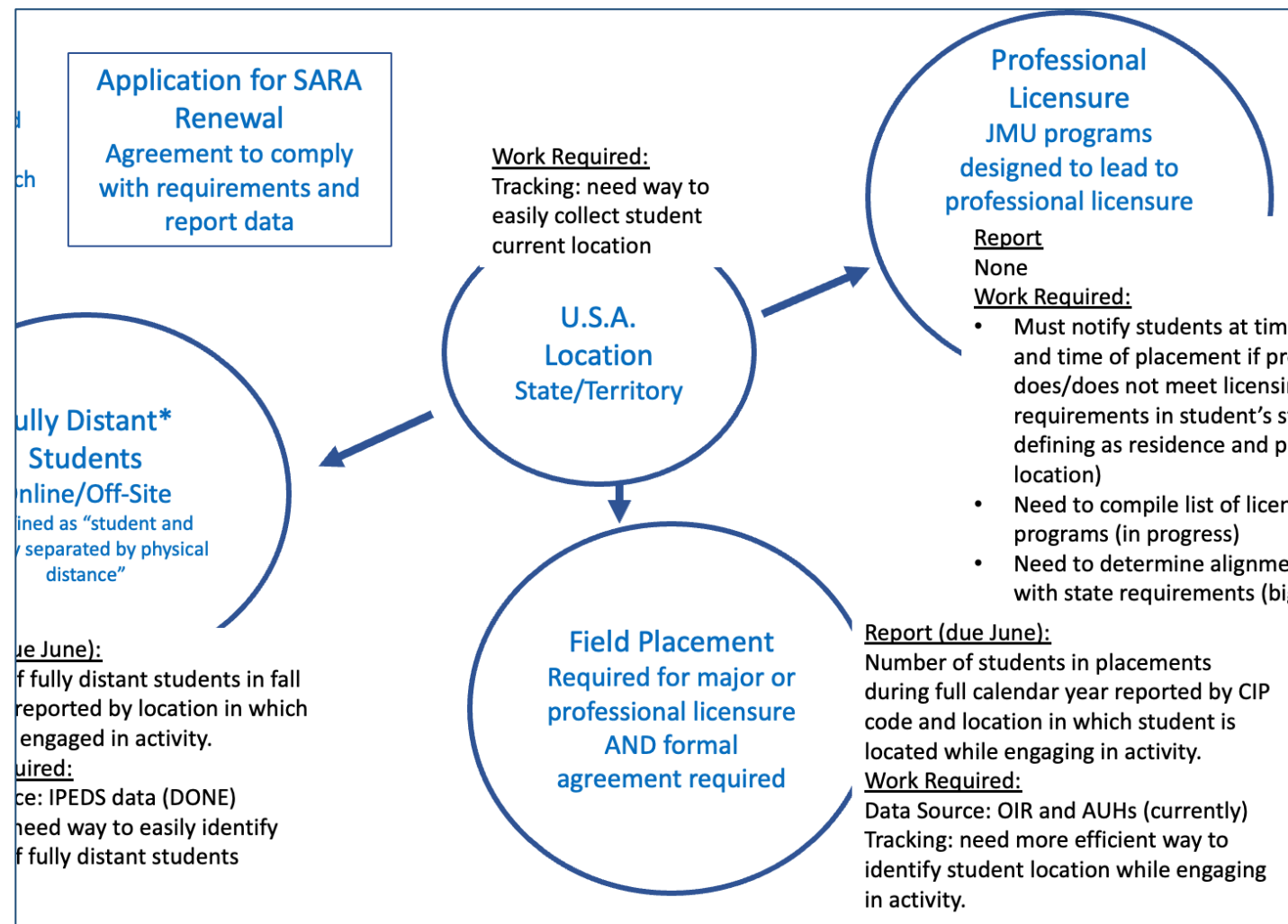
## How did we end up with an automation-enhanced process?

# The lead-up.....

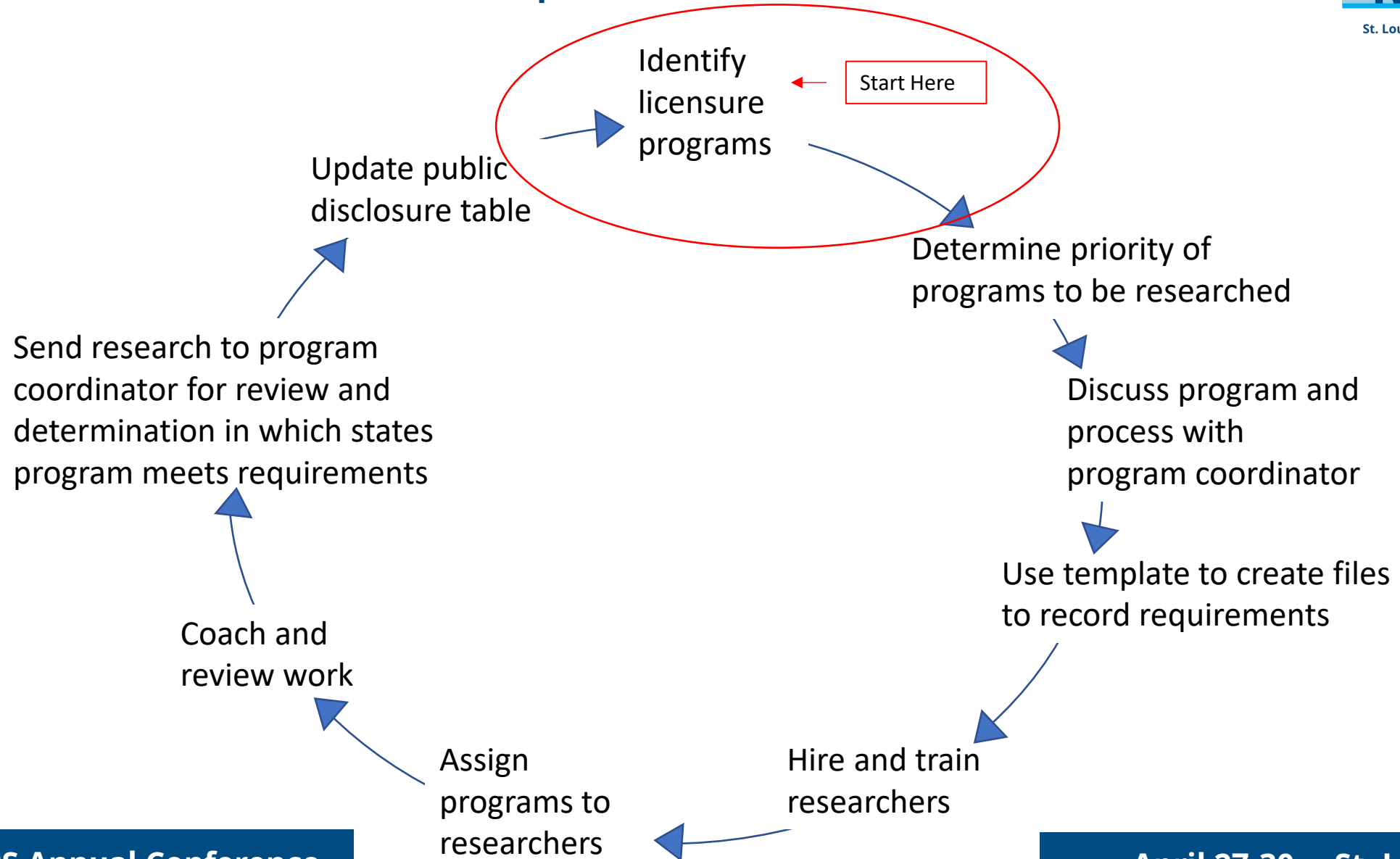
## Sarah's First Unattractive But Functional Diagram

# Educate Stakeholders

- Provost
- College Deans
- College Associate Deans
- Licensure Program Coordinators
- Office of Registrar
- Office of Institutional Research
- IT Department
- Others



# Process for Licensure Requirements Research



# Licensure Programs Master List (spreadsheet zero)

Data Source: Departments and Central Offices

	A	B	C	D	E	F	G	H	I	J	K
	Disclosure Required	Justification for Y/N	Title and Special Considerations	Display Name for Disclosures	TGS Admit Code (If graduate)	Code Level (If graduate)	Active/Inactive	Online Program ?	Title of Licensing Credential/Profession	Programatic Accreditation	Program Webpage
1		the two msn programs:									
10											
11	Y	Students must select either Family Nurse Practitioner or Adult-Gerontology Primary Care Nurse Practitioner concentration. To practice, must pass associated certification exam. The good thing is we can use the requirements research for the two MSN programs.	Nursing Practice, D.N.P. with Concentration in Family Nurse Practitioner	Nursing Practice, D.N.P. with Concentration in Family Nurse Practitioner	80500000	Subplan	Active	Hybrid		CCNE (Commission on Collegiate Nursing Education)	<a href="https://www.jmu.edu/chbs/nursing/dnp/admission-with-bsn.shtml">https://www.jmu.edu/chbs/nursing/dnp/admission-with-bsn.shtml</a>
12	Y		B.S.N., Bachelor of Science in Nursing	Nursing, B.S.N.	N/A	N/A	Active	N		CCNE (Commission on Collegiate Nursing Education)	<a href="https://www.nursing.jmu.edu/bsn/index.html">https://www.nursing.jmu.edu/bsn/index.html</a>
13	Y	"Core courses online"	M.S.N., Master of Science in Nursing with Concentration in Adult/Gerontological PCNP	Nursing, M.S.N. with Concentration in Adult/Gerontological PCNP	2530250	Subplan	Active	Hybrid		CCNE (Commission on Collegiate Nursing Education)	<a href="https://www.nursing.jmu.edu/msn/anp.html">https://www.nursing.jmu.edu/msn/anp.html</a>
14	Y	"Core courses online"	M.S.N., Master of Science in Nursing with Concentration in Family Nurse Practitioner	Nursing, M.S.N. with Concentration in Family Nurse Practitioner	2530500	Subplan	Active	Hybrid		CCNE (Commission on Collegiate Nursing Education)	<a href="https://www.nursing.jmu.edu/msn/familynurse.html">https://www.nursing.jmu.edu/msn/familynurse.html</a>
15	Y		M.O.T., Masters of Occupational Therapy	Occupational Therapy, M.O.T.	66005700	Plan	Active	N		ACOTE (Accreditation Council for Occupational Therapy Education)	<a href="https://healthprof.chbs.jmu.edu/ot/index.html">https://healthprof.chbs.jmu.edu/ot/index.html</a>
	Y		M.P.A.S., Master of Physician Assistant Studies	Physician Assistant Studies, M.P.A.S.	58007000	Plan	Active	N		ARC-PA (Accreditation Review Commission on Education for the Physician Assistant)	<a href="https://healthprof.jmu.edu/pa/index.html">https://healthprof.jmu.edu/pa/index.html</a>

## One for each program

	A	B	C	D	E
1	State/Territory	Profession (Title in State)	LicensingBoardName	LicensingBoardURL	SourceEdRequirements (link
2	Alabama (AL)	Speech-Language Pathologist/School Speech-Language Pathologist	Alabama Board of Examiners for SpeechPathology and Audiology	<a href="http://abespa.alabama.gov/">http://abespa.alabama.gov/</a>	<a href="http://abespa.alabama.gov/PDF/rules/Rules&amp;Regulation.pdf">http://abespa.alabama.gov/PDF/rules/Rules&amp;Regulation.pdf</a>
3	Alaska (AK)	Speech-Language Pathologist	Alaska Department of Commerce, Community, and Economic Development–DIVISION OF CORPORATIONS, BUSINESS AND PROFESSIONAL LICENSING	<a href="https://www.commerce.alaska.gov/web/cbpl/ProfessionalLicensing/AudiologistsandSpeech-LanguagePathologists.aspx">https://www.commerce.alaska.gov/web/cbpl/ProfessionalLicensing/AudiologistsandSpeech-LanguagePathologists.aspx</a>	<a href="http://www.akleg.gov/basis/statutes.asp#08.11.010">http://www.akleg.gov/basis/statutes.asp#08.11.010</a>
4	American Samoa (AS): CND	Speech-Language Pathologist	American Samoa Health Services Regulatory Board (possibly -- cannot find a website for the organization)	<a href="https://asbar.org/code-annotated/31-1005-health-services-regulatory-board-powers-and-duties/">https://asbar.org/code-annotated/31-1005-health-services-regulatory-board-powers-and-duties/</a>  NOTE: This is the closest we can find to a licensing board website. This is on the American Samoa Bar Association.	Cannot find.
5	Arizona (AZ)	Speech-Language Pathologist	Arizona Dept. of Health Services, Office of Special Licensing	<a href="https://www.azdhs.gov/licensing/special/index.php#speech-hearing-home">https://www.azdhs.gov/licensing/special/index.php#speech-hearing-home</a>	<a href="https://www.azleg.gov/viewdocument/?docName=html01.htm">https://www.azleg.gov/viewdocument/?docName=html01.htm</a>
6	Arkansas (AR)	Speech-Language Pathologist	Arkansas Board of Examiners in Speech-Language Pathology and Audiology	<a href="https://www.abespa.com/">https://www.abespa.com/</a>	<a href="https://www.abespa.com/wp-content/uploads/2018/09/ABEPA-2018-2019-Rule-Book.pdf">https://www.abespa.com/wp-content/uploads/2018/09/ABEPA-2018-2019-Rule-Book.pdf</a>
7	California (CA)	Speech-Language Pathologist	California Speech-Language Pathology and Audiology and Hearing Aid Dispensers Board	<a href="https://www.speechandhearing.ca.gov/">https://www.speechandhearing.ca.gov/</a>	<a href="https://www.speechandhearing.ca.gov/applicants/applicants.html">https://www.speechandhearing.ca.gov/applicants/applicants.html</a>
	Colorado (CO)	Speech-Language Pathologist	Colorado Dept. of Regulatory Agencies–Office of Speech-Language Pathology Certification	<a href="https://dpo.colorado.gov/SLP">https://dpo.colorado.gov/SLP</a>	<a href="https://www.sos.state.co.us/CCR/GenerateRulePdf.do">https://www.sos.state.co.us/CCR/GenerateRulePdf.do</a>



# Determination

State/Territory	um/Internship Requirement	Other Requirement	ProgramStatus (Meets, Does Not Meet)	Justification/Explanation	ConfirmDate
Florida (FL)	linical practicum, internship, or field experience services, as required in the accrediting standards and Related Educational Programs for mental		Does Not Meet Requirements	JMU's program does not currently offer a course in Human Sexuality and therefore does not fully meet Florida's educational requirements for professional licensure as a Mental Health Counselor	7/14/23
Georgia (GA)			Meets Requirements		7/14/23

# Public Disclosure Webpage

Required IT to build table and enable me to update content by uploading Excel file.

<div><div><div>☰</div><div><b>JMU</b></div><div>JAMES MADISON UNIVERSITY</div></div><div>INFO FOR ▾</div><div>Search JMU 🔍</div></div>			
Academic Program	Review Date	State	Disclosure
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Alabama</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Alaska</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">American Samoa</a>	Does Not Meet Requirements (Cannot Determine). Cannot Determine. Licensing Board website not available
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Arizona</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Arkansas</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">California</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Colorado</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP) Concentration	6/2024	<a href="#">Connecticut</a>	Meets Requirements.
Nursing, M.S.N., Family Nurse Practitioner (FNP)	6/2024	<a href="#">Delaware</a>	Meets Requirements.

# Enrolled Student Location

## Student Semester Check-In Form

**JAMES MADISON UNIVERSITY.**


MyMadison

Student

MyAccounts


MyServices

Main Menu ▾

Alexis 

You are currently enrolled in the following classes:

Summer Session 2019 Schedule

	Class	Schedule	Aid Eligible
	WRTC 103-4104 LEC (50820)	Online	TBD*

Select the location where you will be while taking courses this semester:

▾

☐ I have reviewed my current class schedule

# Direct Disclosure Process for Enrolled Students

▼ My Favorite Queries	
Query Name	Description
JET001	Online courses offered
JIDLS006	Student location by term
JIDLS006A	List of program, plan, subplan

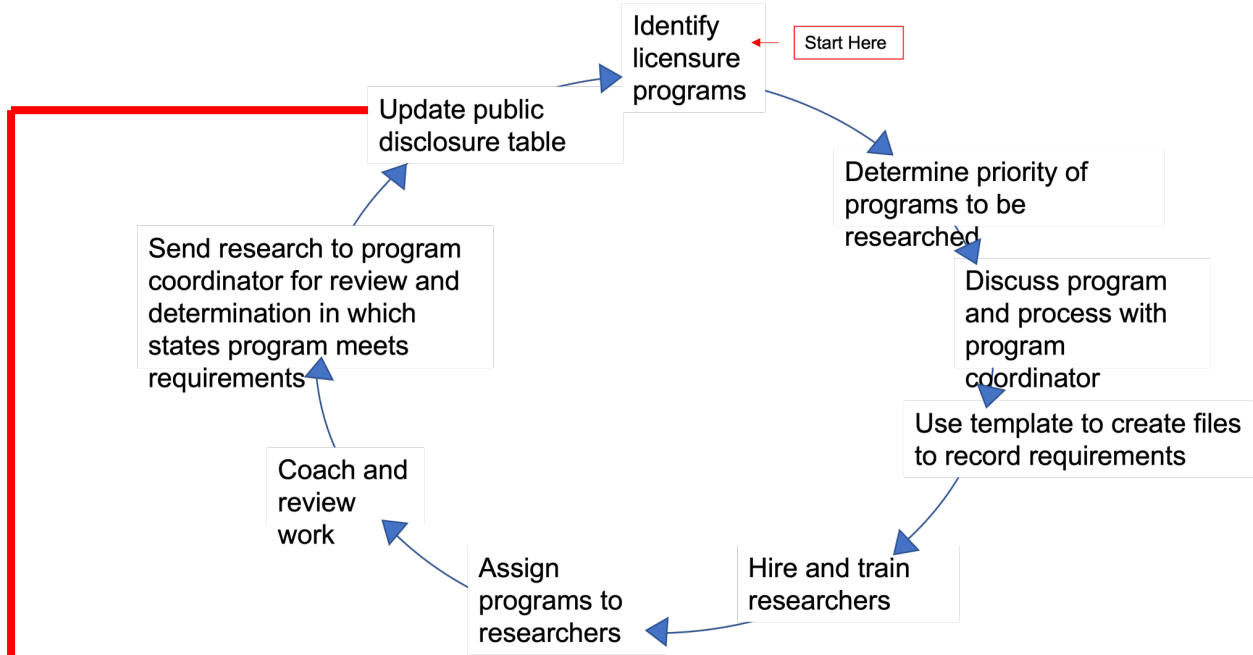
Run query, “Student location by term”

	B	C	D	E	F
me	Location code	Location description	Residency state	Academic Career	Degree conferred by plan
1	VA	Virginia	VA	UG	Bachelor of Science in Nursing
2	VA	Virginia	IL	GR	Master of Phys Asst Studies
3	VA	Virginia	VA	UG	Bachelor of Science in Nursing
4	FL	Florida	FL	GR	Master of Science
5	VA	Virginia	NJ	UG	Bachelor of Science
6	VA	Virginia	VA	UG	Bachelor of Science
7	VA	Virginia	VA	UG	Bachelor of Science in Nursing
8	VA	Virginia	VA	UG	Bachelor of Science in Nursing
9	VA	Virginia	VA	UG	Bachelor of Science in Nursing
10	VA	Virginia	MD	UG	Bachelor of Science in Nursing
11	VA	Virginia	VA	UG	Bachelor of Science in Nursing
12	VA	Virginia	VA	GR	Master of Science in Nursing
13	VA	Virginia	VA	UG	Bachelor of Science in Nursing
14	VA	Virginia	VA	UG	Bachelor of Science in Nursing

Sort query results by program and identify students located outside of Virginia

JMU Professional Licensure Program Status by Jurisdiction Index			
Use the dropdown menus to select a specific program or state/territory. Use the search box on the right to search.			
Show 25 entries		Search:	
Select Program -Make a Selection-		Select State -Make a Selection-	
Academic Program	Review Date	State	Disclosure
Au.D., Doctor of Clinical Audiology	6/2020	Alabama	Meets Requirements.
Au.D., Doctor of Clinical Audiology	6/2020	Alaska	Meets Requirements.
Au.D., Doctor of Clinical Audiology	1/2021	American Samoa	Not Yet Determined.
Au.D., Doctor of Clinical Audiology	6/2020	Arizona	Meets Requirements.
Au.D., Doctor of Clinical Audiology	6/2020	Arkansas	Meets Requirements.

Refer to Public Disclosure Table to determine if program meets requirements in student’s state



Licensure Requirements Research Process

Dear FULL NAME FIELD --

Our records indicate that this semester you will be enrolled in an academic program designed to lead to professional licensure or certification. That program is **PROGRAM DISPLAY NAME FIELD**.

The Federal regulation 34 CFR 668.43(a)(6) requires James Madison University to disclose whether its degree programs meet U.S. jurisdictions' educational requirements for licensure or certification. In preparation for the semester, you should have been asked to complete a "check-in" form in the MyMadison Student Center and to indicate where you would be located when enrolled in courses related to that program. This notification is based on your response to the "location" question on the form. If the location information was not provided, the notification is based on your state or territory of residence. This notification is based on the state or territory of **LOCATION FIELD**.

The **PROGRAM DISPLAY NAME FIELD** program meets the educational requirements established by the associated licensing board in Virginia. Unfortunately, JMU has determined that the

If warranted, create and send appropriate direct disclosure

# Direct Disclosure Process for Prospective Students

(of licensure programs)

# Where is prospective student data?

- The Graduate School
- School of Professional and Continuing Education
- Undergraduate programs



# Key Decision

- Focus on online and hybrid graduate programs first
  - Most vulnerable to ineligibility
  - Limit complexity in development phase

# Questions

## 2. Data

- What data is required for the process? Is there a centralized database that is regularly maintained?
- What and where are the sources? Is data distributed across systems?
- Do I need access to the data? If so, how will I access it (will I need a query or can I simply download the data)?
- How must the data be formatted for use with certain systems?

## 3. Processes

- What specific process do I want to automate? What is my scope?
  - i. Is this part of a larger process? Does it include multiple “sub-processes”?
  - ii. Are there other parallel processes I would want automated? If so, which one is the most important one or has the highest priority?
- Do I own the process from beginning to end or do different units own different parts? What units are involved? What parts of the process do they own?
- Can I clearly describe MY process as it is now? Can I describe the pain points in the process? Can I identify the non-negotiables?
- What is the “business logic,” i.e., what is the logic used to make a determination or decision? Example: If a prospective student is located in Wisconsin and the program does not meet the requirements for licensure in Wisconsin, the student cannot be enrolled

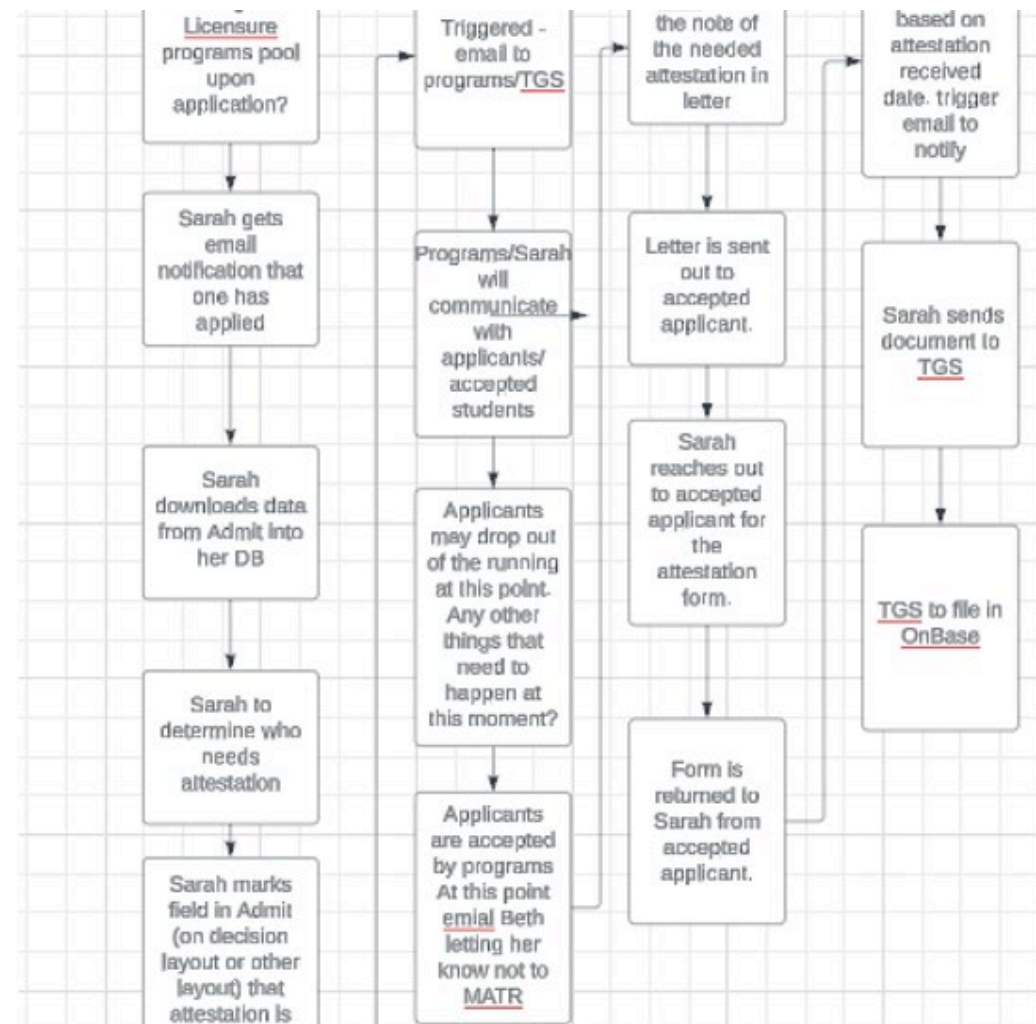
## 4. Systems

- What systems would be involved in the process I want to automate? Are there multiple application and student management systems? Which ones are the most relevant to my project? Which ones do I need to keep in mind for further automation at a later time?
- Are the current systems flexible, i.e., customizable?
- Do our systems “talk” to each other or will certain steps still require manual processes

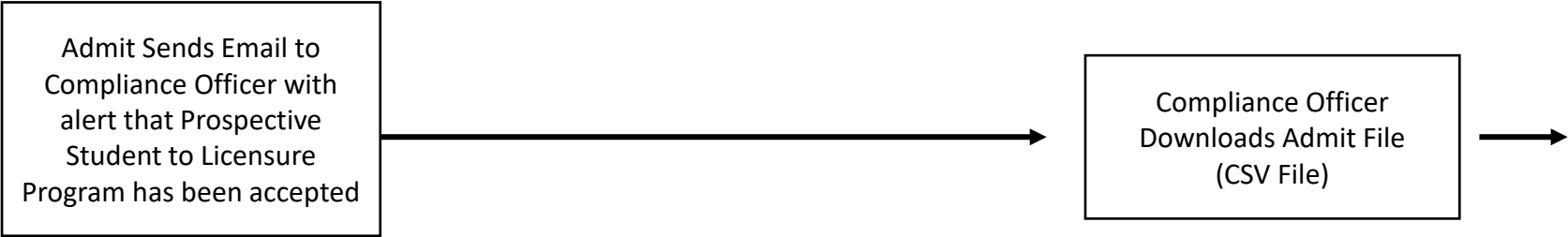
# Document Flow Diagram

created by TGS Doc Manager

- Check for understanding
- Explain TGS document flow to me
- Identify pinch points



# Download Admit File



Applicant Accepted into Licensure Program

TA

TGS Admissions <grad@jmu.edu>

To: ○ Cheverton, Sarah - cheverse

Hello Sarah,

We have received an acceptance for the following applicant:

PeopleSoft ID 112518013

Name Paige Elizabeth Stuart

Term Fall 2023

Program Speech Language Pathology - MS

Local State NY

Thank you,  
TGS Admissions  
540-568-6131

Auto-generated email alert

Licensure programs - Sarah Cheverton

Applications

Actions Searches Reports

	Tags	First Name	Middle Name	Last Name	Program Recommendation	Action Reason	Current Term	Original An
+ Physician Assistant Studies								
+ Clinical & School Psychology								
+ Clinical Mental Health Counseling Concentration								
+ Clinical Audiology								
+ Speech Language Pathology - MS								
- Athletic Training								
<input type="checkbox"/>	Decision Date Set, Decision Released, International	Kha		Awairi	Deny		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	B		ey	Matriculate (TGS Only)		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	R		ove	Matriculate (TGS Only)		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	C			Matriculate (TGS Only)		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	A			Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	S		ein	Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	M		lli	Conditional		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	S			Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	Kenle		older	Matriculate (TGS Only)		Summer 2023	Summer 20

Admit System (TGS)

# Sort Data

Manually Sort Data  
by Program,  
Location, Last Name

First Name	Middle Name	Last Name	Program name	Program Name for Disclosure	State Abbv	State Full Name
Allysa			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	FL	Florida
Kaela			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	IL	Illinois
Grethel			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Brian			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Molly			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Grace			a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	NH	New Hampshire



# Identify Prospective Students with OOS Location

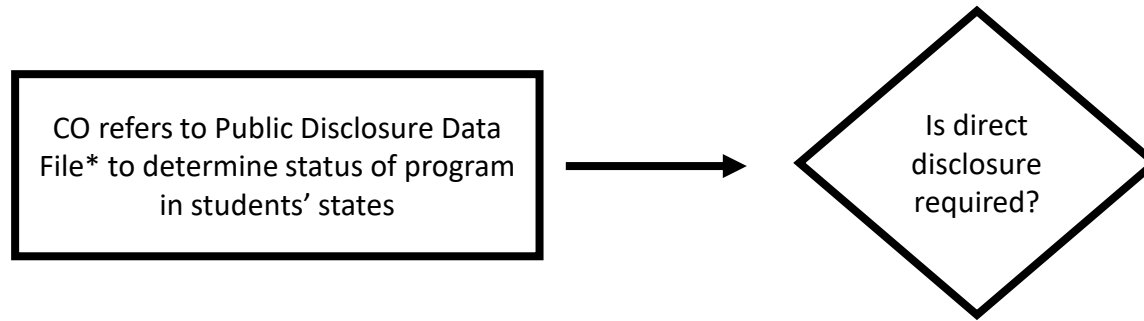


St. Louis, Missouri | April 27-30, 2025

CO identifies all  
with OOS location

First Name	Middle Name	Last Name	Program name	Program Name for Disclosure	State Abbv	State Full Name
Al		sa	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	FL	Florida
Ka		ber	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	IL	Illinois
Gr		rnink	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Br		e	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Mc		art	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	MD	Maryland
Gr		lett	a Master of Arts (M.A.) degree in School Psychology is awarded at the completion of Level I of the program and a comprehensive examination. An Educational Specialist (Ed.S.) degree in School Psychology and Counselor Education with a concentration in School Psychology is awarded at the completion of Level II of the program	School Psychology and Counselor Education with a Concentration in School Psychology, MA/Ed.S.	NH	New Hampshire

# Refer to the Public Disclosure Data File to Determine if Disclosure is Required



ProgramDescr	STATE	STATUS	exception	url
M.S., Master of Science in Speech Language Pathology	North Dakota	Meets Requirements.	Might be additional requirements for school-based position. Refer to <a href="https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf">https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf</a> .	<a href="https://www.asha.org/advocacy/state/info/ND/licensure/">https://www.asha.org/advocacy/state/info/ND/licensure/</a>
M.S., Master of Science in Speech Language Pathology	Northern Mariana Islands	Not Yet Determined.	Might be additional requirements for school-based position. Refer to <a href="https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf">https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf</a> .	<a href="http://www.myfloridalicense.com/DBPR/certified-public-accounting/">http://www.myfloridalicense.com/DBPR/certified-public-accounting/</a>
M.S., Master of Science in Speech Language Pathology	Ohio	Not Yet Determined.	Might be additional requirements for school-based position. Refer to <a href="https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf">https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf</a> .	<a href="http://codes.ohio.gov/orc/4753.06v1">http://codes.ohio.gov/orc/4753.06v1</a>
M.S., Master of Science in Speech Language Pathology	Oklahoma	Meets Requirements.	Might be additional requirements for school-based position. Refer to <a href="https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf">https://www.asha.org/siteassets/uploadedfiles/slp-state-teacher-requirements-licensing-trends.pdf</a> .	<a href="https://www.ok.gov/obespa/documents/Licensure%20Act2018.pdf">https://www.ok.gov/obespa/documents/Licensure%20Act2018.pdf</a>

# Enter Required Data into Customized Disclosure

Enter URL for Program's Website

**NOTE:** Disclosure form currently completed manually, but moving toward using mail merge

Title and Special Considerations	Program Webpage	
M.S., Master of Science in Speech Pathology (Online)	<a href="https://www.csd.jmu.edu/online_ms/index.html">https://www.csd.jmu.edu/online_ms/index.html</a>	
M.S.N., Master of Science in Nursing with Concentration in Clinical Nurse Leader. Per Andrea Knopp, program prepares for CNL certification exam but certification is not required for employment nor is regulated. See "Although you are not technically		

DOES NOT MEET ED REQUIREMENTS – Prospective Student  
DRAFT

Dear **STUDENT FULL NAME**

Our records indicate that you have been accepted into an academic program designed to lead to professional licensure or certification. That program is **PROGRAM\_NAME**.

The Federal regulation 34 CFR 668.43(a)(5) requires James Madison University (JMU) to disclose whether its degree programs meet U.S. jurisdictions' educational requirements for professional licensure. If a prospective student of a program is located in a jurisdiction for which JMU's program does not meet its educational requirements for professional licensure, we must notify the prospective student directly.

Your application to the **PROGRAM\_NAME** program indicates that when you submitted the application, you were located in **LOCATION**. Depending on which elective courses you choose, JMU's **PROGRAM\_NAME** program might not meet all of **LOCATION**'s educational requirements for professional licensure. Thus, JMU makes no representation that the credits you complete as part of its **PROGRAM\_NAME** program would be accepted towards licensure qualification in **LOCATION**.



If you wish to pursue professional licensure in **LOCATION**, we recommend you contact **LOCATION**'s associated licensing agency to determine all educational requirements. More information is available at **[LINK TO STATE/TERRITORY LICENSING BOARD]**. For information regarding professional licensure in a different jurisdiction, please visit <https://www.jmu.edu/online/state-authorization/student-policies/licensure.shtml#Index>. To speak with someone in JMU's **PROGRAM\_NAME** program, visit **[LINK TO PROGRAM'S WEBSITE]**.

Sarah Cheverton  
Online Learning and State Authorization  
Office of Associate Provost for Online Strategy  
James Madison University



Lots of Spreadsheets  
Lots of Templates  
Lots of Manual Work



# Initial Efficiency Efforts:

## Excel Formulas - Convert, Compare & Determine

### Formulas for Disclosure Spreadsheets

#### FOR LICENSURE-STATUS-DATA.XLS: CREATE MATRIX SHEET

=INDEX(All!\$E\$2:\$E\$2296,MATCH(1,(A2=All!\$C\$2:\$C\$2296)\*(\$J\$1=All!\$D\$2:\$D\$2296),0))

#### FOR TGS ADMIT DATA SP23 MAY 4 SOURCE FILE PULLING STATUS DATA FROM LICENSURE-STATUS-DATA FILE (MATRIX SHEET): Use Cmd+Enter

=INDEX('[licensure-status-data.xlsx]Matrix'!\$B\$2:\$BE\$19,MATCH(P2,'[licensure-status-data.xlsx]Matrix'!\$A\$2:\$A\$19,0),MATCH(X2,'[licensure-status-data.xlsx]Matrix'!\$B\$1:\$BE\$1,0))

#### TO SEE IF LAST NAME IN SOURCE FILE IS IN DISCLOSURE RECORD FILE

=VLOOKUP(D2,[DIRECT DISCLOSURE RECORD...]\$C\$2:\$C\$93,TRUE,FALSE)

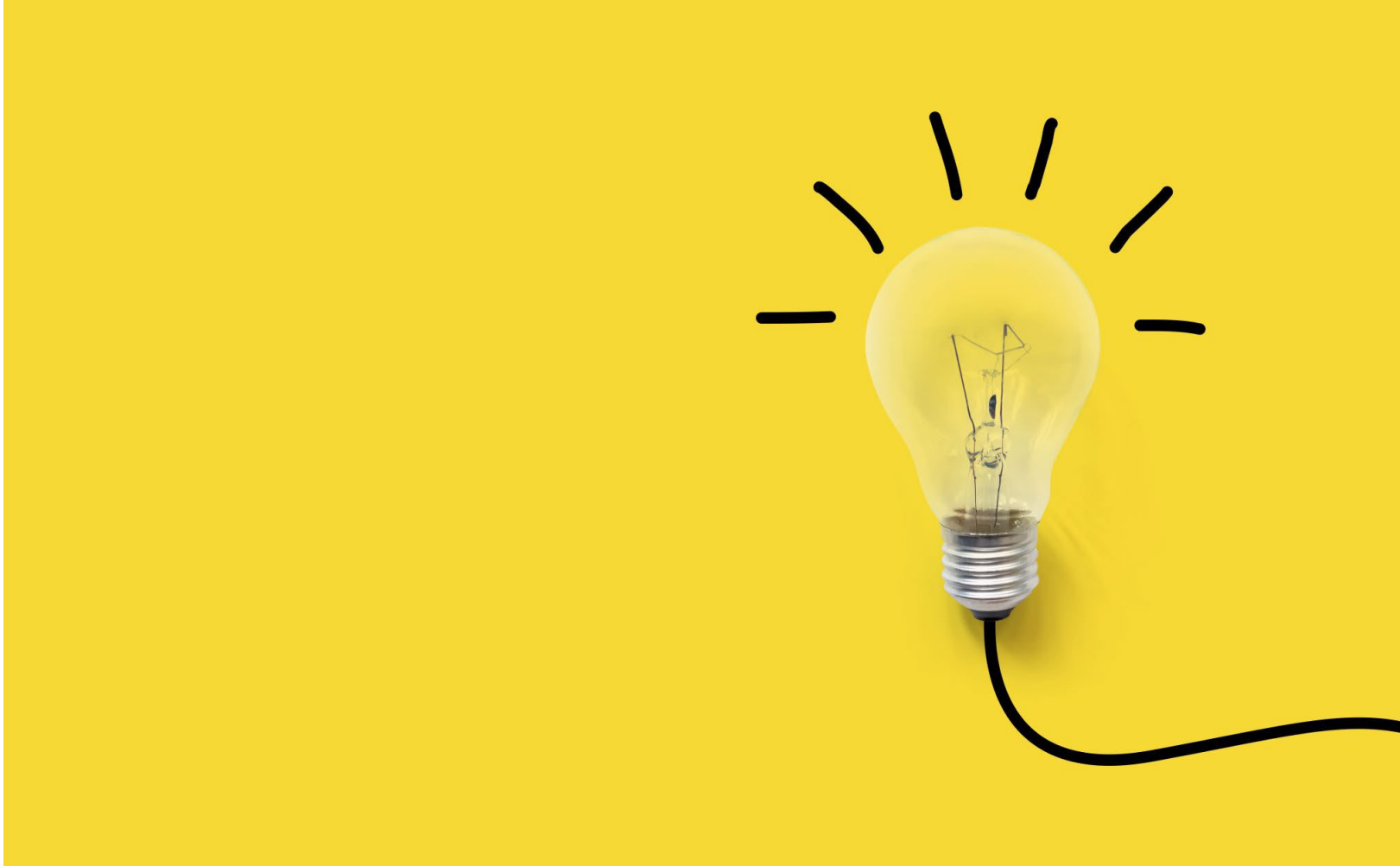
#### To pull State URL from licensure status data spreadsheet (use Cmd+Enter):

=INDEX('[licensure-status-data.xlsx]All'!\$G\$2:\$G\$2296,MATCH(1,(P2='[licensure-status-data.xlsx]All'!\$C\$2:\$C\$2296)\*(X2='[licensure-status-data.xlsx]All'!\$D\$2:\$D\$2296),0))

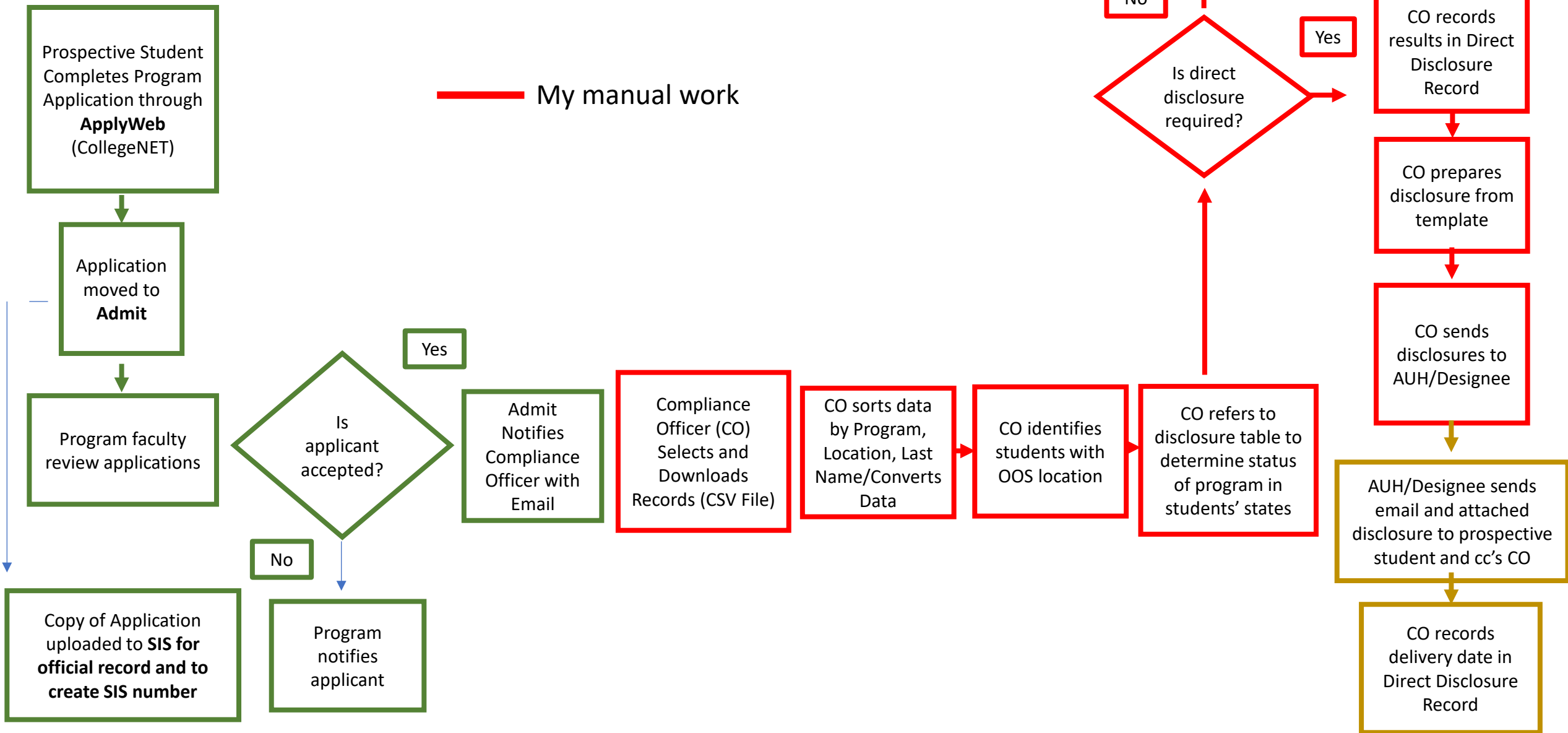
# Manual Process

- Slow
- Too complicated and fragile
- Error-prone
- Problematic for the “Lottery Plan”

# System Automation



# Flowchart: Manual Direct Disclosure Process for Prospective Graduate Students of Licensure Programs (Prior to 7/1/25)





Submitted a  
Tech Solution  
Request (TSR)  
to Central IT

December 2023

Technology Solution Request (TSR)  
Sarah Cheverton, State Authorization Compliance Office of Online Strategy and University Studies  
June 1, 2023

**Summary of Submission**  
Automate process of creating and delivering custom

**The Need**  
Automated process that imports required data from enrolled students whose attributes warrant a personalized disclosure template, uses that template to create a licensure program context, and provides the disclosure interface.

**Purpose**  
The purpose of the disclosure process is to comply with regulations that supports recruitment and retention efforts. The purpose is to increase the efficiency and effectiveness of the process by providing disclosures in all required cases. This will help to envelop the teacher licensure and BSN programs and any new regulations might take effect July 1, 2024.

Since 2020, the personalized disclosure process has been in place with a limited scope. Specifically, because teacher licensure is a time it and the BSN undergraduate program seemed at less risk of non-compliance, staff authorization staff decided that while the disclosure process was in development, they would

HomeService CatalogService ListKnowledgeMy RecordsIT Onboarding

EditSaveCancelRefreshDeleteAttach (2)Record 1 of 2Current RecordListGrid

Software Change 4063

Awaiting Resource

Submitter Details

eID:CHEVERSE

Name:CHEVERSE

Phone:540/568-5321

Department:University Programs

Title:State Comp Officer Dist Learn

Key Dates

Submitted:12/14/2023

Requested Launch:1/1/2024

Planned Move:1/1/0001 12:00 AM

Implemented:1/1/0001 12:00 AM

Add Comment

Change Description

Short Description:

Automate Required Disclosure Process for Licensure Programs

The Need

Automated process that imports required data from various systems, identifies prospective and enrolled students whose attributes warrant a personalized disclosure, selects the appropriate disclosure template, uses that template to create a personalized disclosure customized with licensure program context, and provides the disclosure through the appropriate student portal interface.

System Details

Type:New Work

System:Student Administration Systems

Environment:

Module:Campus Community

Service:Student Administration Systems

Tier:3 - Medium-Low

Class:3 - Medium-Low

New Work Details

Data Description:

Involves a subset of Graduate Applicant data from Admit System

Customers Benefit:

Enables prospective students of licensure programs to make

Office Savings:

Staff time and PT wages

Impacted Users/Group/Dept:

All colleges and departments that offer programs designed

# And then .....

Sarah to boss: “I wish I could find someone to build a database or some kind of system to make the process more efficient. I submitted a Technical Solution Request (TSR) to our IT Department, but you know how long that could take, especially considering the Reengineering Madison project.”

CONTEXT

Boss to Sarah: “Do you know David Yang?”



Thus began our journey towards real automation...

# Questions

- Data
- Processes
- Systems
- Context
  - Collaborators
  - Constraints

**Guiding Questions** are designed to help you determine if working towards automating your institution and, if so, how to do so effectively.

## 1. Goal(s)

- What is the goal (are the goals)? What problem(s) am I trying to solve to achieve with this automation?
- Am I hoping to improve efficiency? If so, for whom?
- Will automation reduce risk?
- Will automation improve accessibility for the prospective student? the process (e.g., program coordinators)?
- Will automation result in more reliable and secure recordkeeping?

## Data

- What data is required for the process? Is there a centralized database maintained?
- What and where are the sources? Is data distributed across systems?
- Do I need access to the data? If so, how will I access it (will I need to download the data)?
- How must the data be formatted for use with certain systems?

## Processes

- What specific process do I want to automate? What is my scope?
  - Is this part of a larger process? Does it include multiple "sub-processes"?
  - Are there other parallel processes I would want automated the most important one or has the highest priority?
- Do I own the process from beginning to end or do different units own parts? What units are involved? What parts of the process do they own?
- Can I clearly describe MY process as it is now? Can I describe the process? Can I identify the non-negotiables?
- What is the "business logic," i.e., what is the logic used to make a decision? Example: If a prospective student is located in Wisconsin, does not meet the requirements for licensure in Wisconsin, the student is not enrolled.

## Systems

- What systems would be involved in the process I want to automate? application and student management systems? Which ones are the project? Which ones do I need to keep in mind for further automation?
- Are the current systems flexible, i.e., customizable?
- Do our systems "talk" to each other or will certain steps still require manual intervention (e.g., transferring data)?

## 5. Context

### • Collaborators

- Who are the key stakeholders to make decisions?
- Who makes decisions about the process?
- What expertise is needed to accomplish the process?
- What are my strengths? What expertise can I contribute to the process or automation?
- Who has the expertise I don't have?
- Who has access to the required data and systems? Can I be given access to certain data and systems if that would improve efficiency?

### • Constraints

#### i. Institutional Constraints

- What are the risks to the institution of NOT working towards process automation?
- How many programs and potential students does this impact? Would I consider this number significant? Would the administration consider this number significant? Might a relatively low number lead to a low sense of urgency in light of other pressures?
- What challenges is my institution currently facing/handling? How might automating processes *increase* those challenges? How might automation help to *mitigate* those challenges (e.g., would it save the institution money)?
- What major projects or initiatives are currently active or will be active in my area or across the institution that will require significant technical and other resources?

#### ii. Program and Collaborator Constraints

- What schedule do various application processes follow? When do programs accept applications? What is the lead time before an enrollment decision is made? When does a new session start? How can we ensure that we have time to complete the review and determination process?
- What are my collaborators' constraints? Will automating these compliance tasks create *more* work for some of them? Will automating my work move manual work to a collaborator's area?

#### iii. Compliance Unit Constraints

- What are my own constraints? Are there sufficient resources in my area to effectively meet compliance expectations? Do I have the skills, knowledge and/or system access required to move forward? If not, who does?

## 6. Monitoring the Process

- Do I observe unexpected benefits arising from the process?
- Do I observe any unexpected problems arising from the process?



# Collaborators



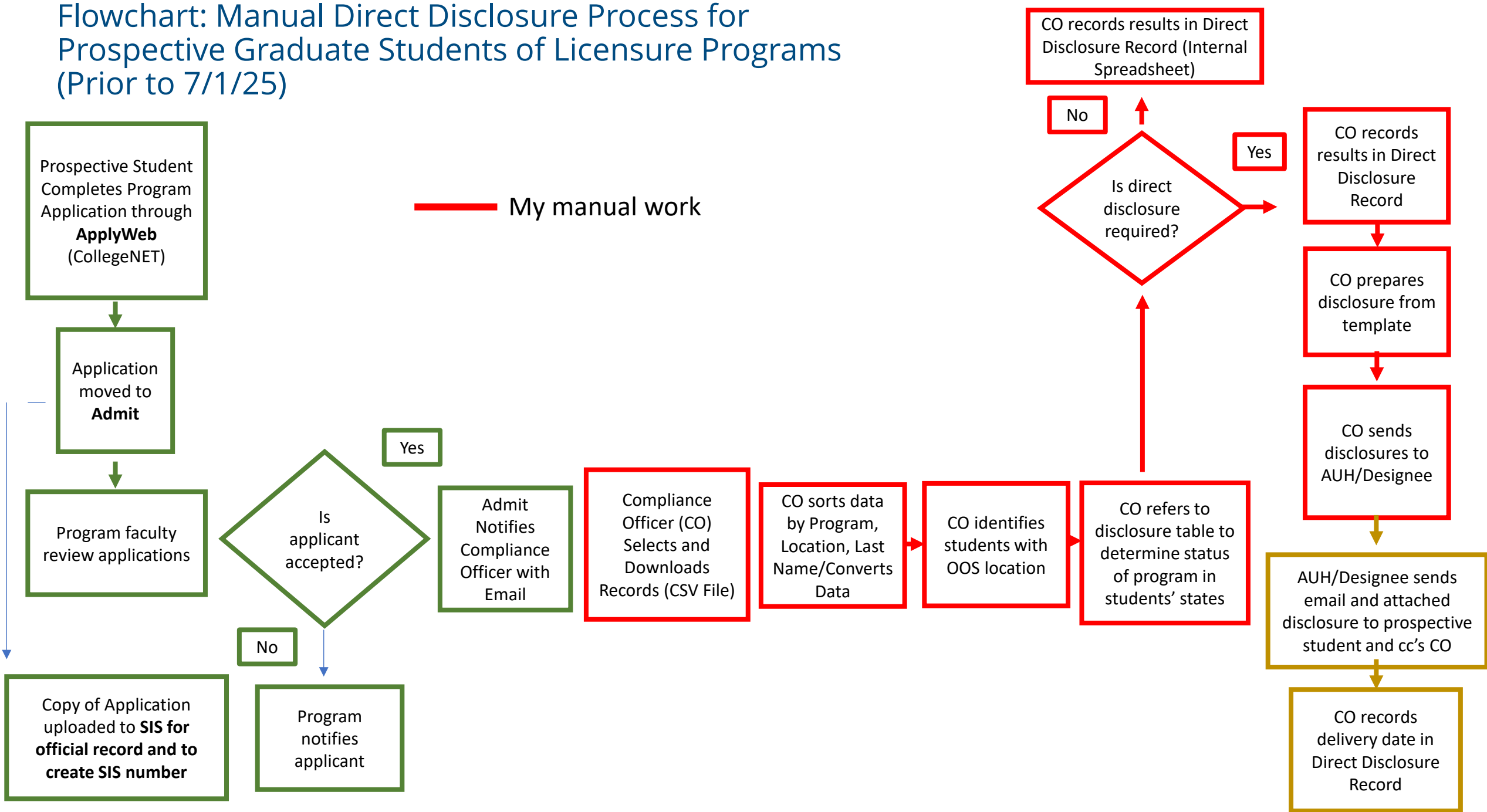
# Automation Process: A Developer's High-Level Perspective

- **Design Process**
- **Functional vs. Non-Functional Requirements**
  - *What the system should do vs. How it should perform*
- **Technical & User Requirements**
  - *Underlying technologies - User needs and expectations*
- **Regulatory & Compliance Considerations**
- **Software Development Life Cycle & Data Security Concerns**

# Effective Early Collaboration with Developers

- **Keep It Focused:** Avoid information overload in early meetings.
- **High-Level Overview:** Share the big picture and desired outcomes.
- **Define Clear Goals, for example:**
  - Save time: by processing the data file (functional Req.)
  - Save time: total time to process the data file (non-functional req.)
  - Reduce manual work: the system will generate a disclosure link (functional req.)
  - Improve data organization: defines quality of data handling (non-functional req.)
- **Illustrate Your Current Process:**
  - Provide a brief description or a simple flowchart
  - Enables the developer to better visualize and plan the solution

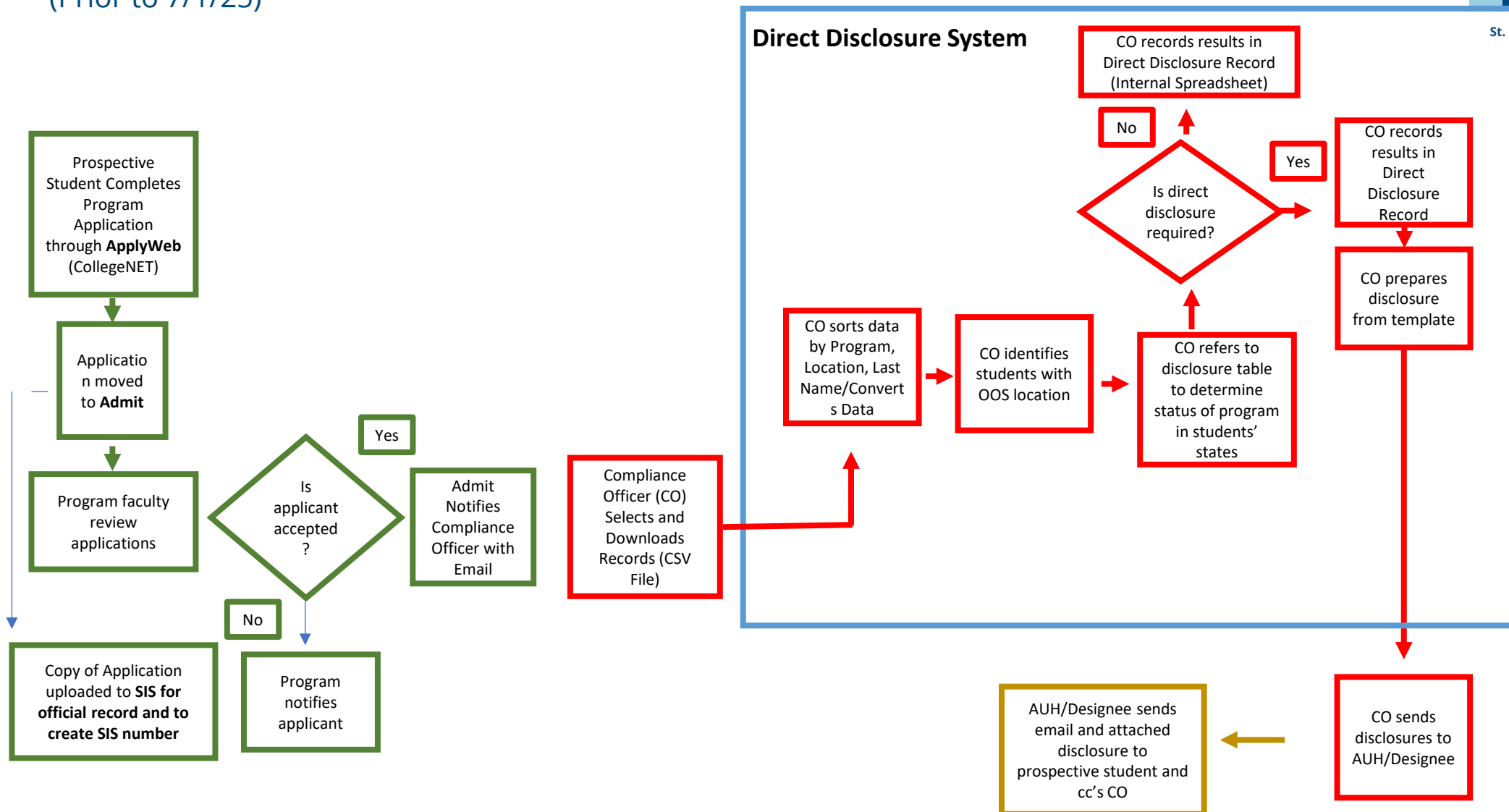
# Flowchart: Manual Direct Disclosure Process for Prospective Graduate Students of Licensure Programs (Prior to 7/1/25)



# Mapping the Current Process

- . Understand the current workflow
- . Identify key stakeholders and collaborators
- . Review the existing data system and its structure
- . Pinpoint all manual steps for potential automation

# Flowchart: Manual Direct Disclosure Process for Prospective Graduate Students of Licensure Programs (Prior to 7/1/25)





# Design Process Overview

- **Requirements Analysis:** Define what the software must do (e.g., upload a data file, generate output list)
- **System Design:** Plan overall architecture and logic
- **User Interface:** Ensure usability and clarity
- **Technology Stack:** HTML/CCS, Java Servlet, MS SQL Server
- **Data Structure Agreement:** Align on input file format and information recorded in the database

# Admit Data Structure

Licensure programs - Sarah Cheverton

Applications

ActionsSearchesReports

Download

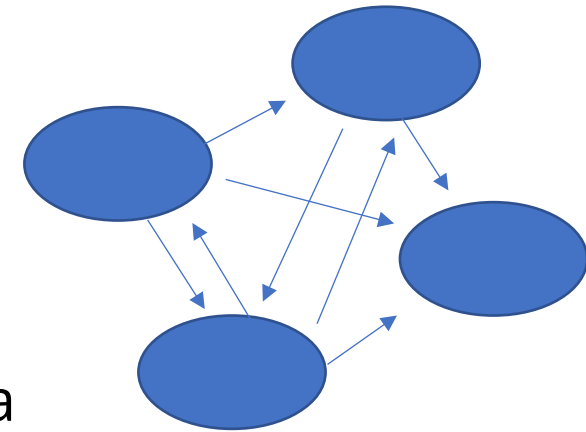
Concentric	Program name (for templates)	Street 1	Street 2	Apart	City	State	Zip Cod	Application	Email
MJR_CONCE	MJR_ACAD_PROGRAM_NAME	MAIL_STRI	MAIL_ST	JMUC	MAIL_CITY	MAIL_ST	MAIL_ZI	JMUG-PL	EMAIL
	Educational Leadership Graduate Certificate	308			Zion Cross	VA	22942	4/9/25	le
EduLeadersh	Education with a concentration in Educational Leadership	21			Richmond	VA	23222	4/7/25	ca
	Educational Leadership Graduate Certificate	22			Waynesbo	VA	22980	4/9/25	ko
EduLeadersh	Education with a concentration in Educational Leadership	23			Manakin S	VA	23103	4/12/25	ad
	Educational Leadership Graduate Certificate	45			Rockingha	VA	22801	4/16/25	ch

<input type="checkbox"/>	Decision Date Set, Decision Released	Brenn	asley	Matriculate (TGS Only)	Summer 2023	Summer 20	
<input type="checkbox"/>	Decision Date Set, Decision Released	Rya	llove	Matriculate (TGS Only)	Summer 2023	Summer 20	
<input type="checkbox"/>	Decision Date Set, Decision Released	Cas		Matriculate (TGS Only)	Summer 2023	Summer 20	
<input type="checkbox"/>	Decision Date Set, Decision Released	Abb		Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	Sam	tein	Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	Mar	elli	Conditional		Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	Syd		Conditional	After Decision - WAPP	Summer 2023	Summer 20
<input type="checkbox"/>	Decision Date Set, Decision Released	Kenleio	older	Matriculate (TGS Only)	Summer 2023	Summer 20	

Admit System (TGS)

# Software Development Life Cycle: Agile Methodology

- **Iterative Development:** Develop in cycles with regular feedback
- **Customer Collaboration:** Work closely with stakeholders throughout the process
- **Communication:** Maintain open and frequent communication
- **Focus on Usable Software:** Prioritize functional software over excessive documentation
- **Responding to Change:** Able to adapt quickly to changes in data structure or regulations



# Compliance & Legal Considerations

- **Institutional Compliance:** Does the system align with regulations (e.g., affect funding, legal risks)?
- **Regulatory Satisfaction:** Is a digital signature/consent acceptable?
- **Data Evidence:** Is there sufficient evidence if challenged by a student?
  - Unique link sent to student's email
  - Timestamp and IP address recorded

# Data Security Concerns

- **Institution's Data Security Policy:** Ensure adherence to institutional guidelines
- **Protected Data:** Includes name, email, and address; no highly confidential data stored
- **Data Storage:** All data stored in JMU IT-managed MS SQL Server Farm
- **Access Control:** System access via JMU official login credentials
- **End-to-End Security:** Utilizes HTTPS/SSL for secure communication

# JMU Data Storage Standard

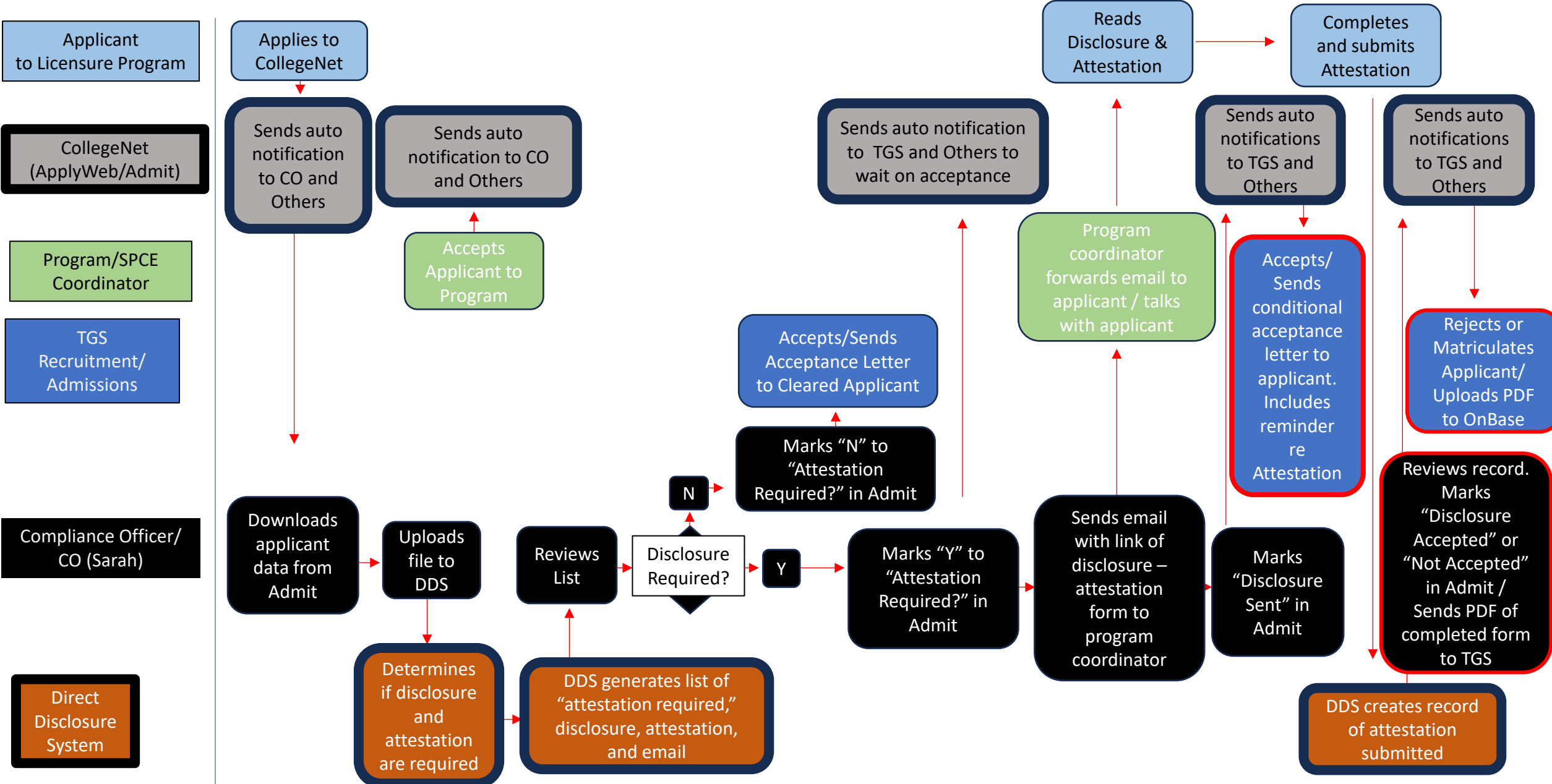
James Madison University Information Technology

	Public Data	Protected Data			High Confidential (HC) Data			
		FERPA	PII	Other Protected	GLBA	Health	Research*	General HC
JMU File Shares	✓	✓	✓	✓	!	!	!	!
OneDrive	✓	✓	✓	✓	✗	✗	✗	✗
SharePoint	✓	✓	✓	✓	!	!	!	!
Teams	✓	✓	✓	✓	!	!	!	!
Email	✓	✓	✓	✓	✗	✗	✗	✗
Other M365 Apps	✓	✓	✓	✓	✗	✗	✗	✗
JMU Managed Workstation	✓	✓	✓	✓	✗	✗	✗	✗
Portable Storage	✓	!	!	!	✗	✗	✗	✗
Non-Microsoft Cloud Storage (e.g. Dropbox, Google)	✗	✗	✗	✗	✗	✗	✗	✗

*\*Research containing highly confidential data. All other research data should follow requirements for protected and public data.*

# JMU's Direct Disclosure System

# Direct Disclosure & Attestation Process for Graduate Licensure Programs





# Direct Disclosure System

## JMU State Licensure Requirements & Disclosure



JMU E-ID \*

JMU Password \*

Login

m



# Direct Disclosure System

## JMU Licensure Disclosure

Upload your data file:

**Choose File** TGS\_Admit\_Data\_AP\_POOL\_FA24\_SEPT\_11\_2024.xlsx

Upload

Generate: [Records](#)

[Download File](#)



# Direct Disclosure System

## Student Licensure Disclosure List

Count	PPS ID	First Name	Last Name	Program Name	Program ID	State	Status	Email	Web-Link
1				Education, M.Ed., Concentration in Educational Leadership	2270000	Texas	DNM	<a href="#">Email</a>	<a href="#">Link</a>



# JMU Licensure Disclosure

2025-04-16

Dear [REDACTED]

Our records indicate that you have been accepted into an academic program offered by James Madison University (JMU) and designed to lead to professional licensure or certification. Please read this disclosure and the attestation carefully as it could affect your enrollment.

The Federal Department of Education regulation 34 CFR 668.43(c)(1) requires JMU to directly disclose whether this degree program meets U.S. jurisdictions' educational requirements for professional licensure. Per a related regulation, 34 CFR 668.14(b)(32), if a prospective student is located in a jurisdiction for which the program *does not meet* the jurisdiction's educational requirements for professional licensure and/or other requirements, JMU cannot enroll you into that program unless you submit the attestation below indicating that, upon successful completion of the program you plan to work in a jurisdiction for which the program *does meet* the educational requirements for licensure and other requirements.

Our records indicate that you were accepted into JMU's Education, M.Ed., Concentration in Educational Leadership program. Your program application indicates that you are located in the jurisdiction of Texas.

While this program meets the educational requirements established by the associated licensing board in Virginia, JMU has determined that its curriculum does not fully satisfy your jurisdiction's educational and/or other requirements for professional licensure or certification associated with that program.

In order to enroll you in the program, you must submit the Intended Work Location Self-Attestation statement below indicating that, upon successful completion of the program you plan to work in a jurisdiction for which JMU's program does meet the educational requirements for licensure and other requirements. JMU's Intended Work Location Self-Attestation form is below. A list of eligible jurisdictions is available in a dropdown menu within the form. You can also review the list of eligible jurisdictions at <https://www.jmu.edu/online/state-authorization/student-policies/licensure.shtml>.

Information regarding professional licensure in your jurisdiction in an occupation related to the program in which you have been accepted is available on [your jurisdiction's licensing board website](#). To speak with someone in JMU's program, visit the [program's website](#) for contact information.

Sarah Cheverton  
Online Learning and State Authorization  
Office of Associate Provost for Online Strategy  
James Madison University  
Gabbin Hall 113  
540.568.5321  
cheverse@jmu.edu

2025-04-16

Academic records indicate that I have been accepted into an academic program offered by James Madison University (JMU) and designed to lead to professional licensure or certification (herein after referred to as "licensure program"). I understand that some or all of the program's courses will be delivered in an online or hybrid format.

My program application indicates that I am located in a jurisdiction for which the licensure program does not or might not meet educational and/or other requirements. If I plan to be located in that jurisdiction at time of enrollment into the program and upon successful completion of the program pursue licensure and employment in that jurisdiction, JMU cannot, per Federal Regulation 34 CFR 668.14(b)(32), enroll me into the licensure program.

However, per the regulation, JMU can enroll me into the program if I complete and sign this Intended Work Location Self-Attestation before or at the time of initial enrollment into the program. This self-attestation discloses my intentions and plans for professional licensure upon graduation from JMU and outlines future plans for employment.

Intended Profession: I have been accepted and plan to enroll into JMU's Education, M.Ed., Concentration in Educational Leadership program, a program designed to lead to professional licensure. I plan to pursue professional licensure as a [Enter Profession Here](#).

Jurisdiction at Start of Program: I confirm and agree that as of today, the jurisdiction where I will be physically living when I start my JMU program is [Please Select a state](#).

Intended Work Location Upon Successful Completion of the Program: I hereby attest that, upon successful completion of my program, I plan to pursue professional licensure/certification and employment in [select one of the options]:

- ☐ a jurisdiction for which the program meets the educational and other requirements for licensure. I plan to seek licensure and employment in [Please Select a state](#), a state in which JMU's program meets the requirements.
- ☐ a jurisdiction not listed in the drop-down menu above. I understand this option makes me ineligible for enrollment.
- ☐ I decline to provide the requested information. I understand this option makes me ineligible for enrollment.

By completing the information below and clicking the submit button, I attest that the information provided in this Intended Work Location Self-Attestation is accurate as of today's date.

First name: [REDACTED]

Last name: [REDACTED]

JAC # (if available) [REDACTED]






E-Mail: [REDACTED]

Please verify and, if necessary, correct your name and email address. Then submit your attestation.

Submit

# Email with link (manual)

## Important Information Regarding JMU's Licensure Programs

 Cheverton, Sarah - cheverse  
 To:  Snead, Cecil - snead2cc  
Cc:  Johnson, Beth - johns8ba;  Estes, M

Cecil  
Cc Cheryl, Michele and Lynette

My message to [REDACTED] below. (1) making it clear that the program is not my message below. **When you forward the**

If [REDACTED] submits the attestation and indicate that she plans to pursue licensure and employment to indicate that [REDACTED] can be matriculated. If [REDACTED] pursues licensure in Virginia, I will need her documents to TGS for storage with other

Sarah

Dear [REDACTED]  
cc Dr. Snead, Dr. Estes, JMU Graduate School

I am JMU's State Authorization Compliance Officer. My job is to ensure that JMU complies with federal Department of Education regulations. Some regulations can affect enrollment into programs designed to lead to licensure or certification. You have been accepted into such a program at JMU. Therefore, please read this message carefully and follow the instructions to ensure you are eligible for enrollment into the program.

Your program application indicates that when you applied, you were located in a U.S. state or territory for which our program does not meet educational requirements for licensure, or we have not yet determined if it does. To enroll you into the program, you need to indicate that you either plan to be located in Virginia when the program starts and/or you plan to pursue licensure and employment in a U.S. state or territory for which the program meets the requirements.

To make this as easy as possible for you, we have created a **JMU Licensure Disclosure and Attestation** customized to you (see link below). This online document explains the regulation and provides an **opportunity for you to attest that as of this day you plan to be located in Virginia at the start of the program and/or pursue licensure and employment in a state or territory for which the program meets educational requirements for licensure** (a list of those jurisdictions is provided in the document). If you select that option, we can enroll you into the program. The form includes other options, including one to decline to make the attestation, in which case we cannot enroll you.

To read the disclosure, select an attestation option, and submit the document, please go to your customized [JMU Licensure Disclosure and Attestation](#). Once we receive confirmation that you have submitted the document, JMU's Graduate School will notify you accordingly.

Please feel free to contact me if you have questions. My contact information is in my signature line below.

# Direct Disclosure System

## JMU Licensure Disclosure

Upload your data file:

**Choose File** No file chosen

Upload

Generate: [Records](#)  
[Download File](#)





# Record of Review for Disclosure

467910	Sa		GR	Physician Assistant Studies, M.P.A.S.	MO	2024-09-09	Admit	MR	ab	2@g
518625	Sa		GR	Speech Language Pathology, M.S.	CA	2025-01-22	Admit	MR	sa	rca@
467933	Co		GR	Clinical and School Psychology, Psy.D.	CA	2024-09-09	Admit	DNM	cj	gmail
467956	Ka	Malek	GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	ka	k@ca
467979	Ma		GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	po	gmai
468002	El		GR	Physician Assistant Studies, M.P.A.S.	MD	2024-09-09	Admit	MR	el	gmai
468025	Ma		GR	Clinical and School Psychology, Psy.D.	MD	2024-09-09	Admit	DNM	ma	ll200:
468048	Ma	on	GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	ma	@gma
468071	Ha	athy	GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	ha	thy52
468094	Jin	am	GR	Clinical and School Psychology, Psy.D.	No State	2024-09-09	Admit	N/A	su	@gma
468117	Da		GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	da	o@gn
514807	Ch		GR	Education, Certificate in Educational Leadership	VA	2024-09-26	Admit	MR	ac	ukes.j
514899	Ch		GR	Education, Certificate in Educational Leadership	VA	2024-10-24	Admit	MR	ac	ukes.j
468140	Al		GR	Physician Assistant Studies, M.P.A.S.	CO	2024-09-09	Admit	DNM	ac	n3@gl
468163	Ch		GR	Speech Language Pathology, M.S.	VA	2024-09-09	Admit	N/A	ch	ee@g
468186	Yu		GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	yu	@gma
468255	Sa		GR	School Psychology and Counselor Education, Ed.S.	VA	2024-09-09	Admit	MR	sa	@gma
468232	An		GR	Physician Assistant Studies, M.P.A.S.	VA	2024-09-09	Admit	MR	an	gmail

# Record of Attestation



submitDate	profession	programID	ProgramName	jurisdictionState	workState	EligibleState	fName	lName	jacNumber	email
2024-08-02 15:36:07.625	teacher	7100500	Education, Certificate, Educational Leadership	WV	Virginia	Eligible				

profession	programID	ProgramName	jurisdictionState	workState	EligibleState
teacher	7100500	Education, Certificate, Educational Leadership	WV	Virginia	Eligible



# Notify Core Collaborators

- Before sending email, mark “Yes” to “Need Attestation?” variable in Admit system for those needing disclosure (and “No” for everyone else)
  - Admit system alerts Graduate Admissions to pause matriculation for “Yes” applicants
- If Attestation is submitted, mark “Yes” to “Attestation Received?”
  - Will be adding field for, "Eligible to Enroll?" ("Yes" or "No")
- If Attestation is declined, mark “Declined” to “Attestation Declined?”

# The Compliance Officer's Experience



- . Did the system helped Sarah to be more efficient?
- . Did the system helped Sarah be more organized with the data?
- . Does she feel the system would help JMU to be in compliance?

# The Compliance Officer's Experience



- Automation saves hours of manual labor spent in
  - determining prospective student status
  - creating personalized disclosures
  - communicating with various campus units and prospective students, and
  - creating records of interactions.
- Interactive HTML document replaces PDF file sent as attachment
- Resource file used in the DDS to determine student status is also used to populate public disclosure table.

# Pinch Points

- TGS – an additional layer of manual work (to remember to look at the status)
- TGS – has to wait for me to do the weekly review before matriculating applicant
  - We agreed that I will do the review process every Monday morning. If they need it during the week, can ask me to do it.
- Compliance Officer – have to mark “Yes” or “No” to “Attestation Required” variable row-by-row

# In Process

- Build state requirements database (in process!)
  - Enable researchers to more easily enter and maintain data
  - Enable reviewers (program coordinators) to more easily review and approve data
  - Allow more efficient communication among compliance officer, researchers, and reviewers
  - Enable requirements to automatically populate data resource file for Disclosure Determination System.

# Future

- Add question to graduate application to replace use of local address
  - “Where do you expect to be located when starting the program?”
- Add tool into DDS to process SIS enrollment data with check-in location
- Integrate system and process in JMU’s future new central student information system to automate communication with the prospective student.



In conversation with  
project manager!



# Questions?



**2025 NASASPS Annual Conference**

**NATIONAL ASSOCIATION OF STATE ADMINISTRATORS  
AND SUPERVISORS OF PRIVATE SCHOOLS**

**April 27-30 | St. Louis, MO**



# Thank you!

Sarah Cheverton ([cheverse@jmu.edu](mailto:cheverse@jmu.edu))

David Yang ([yangsx@jmu.edu](mailto:yangsx@jmu.edu))

