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Introduction
The National Council for State Authorizations Reciprocity Agreements (NC-SARA) requires participating institutions to report exclusively distance education (EDE) enrollment and out-of-state learning placements (OOSLP) annually. The data are to be reported to NC-SARA through an online reporting portal between May 15 and June 15, 2022. Institutions that do not report to IPEDS still need to report to NC-SARA.

This NC-SARA Data Reporting Handbook (handbook) provides detailed information about data reporting requirements, including step-by-step instructions to submit data through the online reporting portal. In addition to this handbook, please review the updated Data Sharing Agreement (DSA). The CEO or CAO of participating institutions affirms the institution’s agreement with the DSA as part of the initial application process and annual renewal.

For the purposes of this handbook, “state” is defined as a state, commonwealth, organized territory, or district (District of Columbia) of the United States. In addition, the term “exclusively distance education enrollment” is used synonymously with the IPEDS’ term “enrolled exclusively in distance education” courses.

Data to be Reported
1) Exclusively Distance Education Enrollment (EDE enrollment): Institutions must annually report the number of students engaged exclusively in distance education who are enrolled at the institution. The EDE enrollment data **must be disaggregated by state, territory, or district** where the activity takes place. These EDE enrollment data need to include both degree and non-degree for-credit courses.

   • For EDE enrollment reporting, institutions should report the same distance education data they reported for IPEDS’ EF reporting but **disaggregate the data by state**. If the institution does not report to IPEDS, use the IPEDS’ guidelines to report to NC-SARA.

2) Out-of-State Learning Placements (OOSLP): Institutions participating in SARA must also annually report to NC-SARA the number of their students engaged in certain OOSLP activities, such as clinical rotations, internships, student teaching, etc., disaggregated by state and two-digit Classification of Instructional Programs (CIP) codes as assigned by the U.S. Department of Education.

Detailed data reporting requirements are found in the sections dedicated to Exclusively Distance Education Enrollment Reporting and Out-of-State Learning Placement Reporting that follow in this handbook.

Reporting Time Frame
The reporting timeframe for NC-SARA data reporting is May 15 through June 15, 2022.

Both the EDE enrollment and the OOSLP data are reported to NC-SARA in the spring following the due date for institutions to report their previous year Fall Enrollment (EF) data to the federal government’s Integrated Postsecondary Education Data System (IPEDS).

New SARA institutions report as follows:
• Institutions that began participating in SARA on or before December 31, 2021 are required to report 2021 data to NC-SARA in 2022.
• Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023. These institutions do not need to report any 2021 data during the 2022 reporting period.

NC-SARA Guidance Regarding Institutional Data Reporting
This handbook provides guidance to SARA-participating institutions about how to submit institutional EDE enrollment and OOSLP data to NC-SARA. While NC-SARA makes every effort to provide clear instructions, the variety of institutional practices in determining student location, tabulating EDE enrollment and OOSLP data, and delivering distance education make perfectly accurate reporting across institutions unattainable at present. Please use your best judgment and adopt and document an approach that ensures your institution’s reporting is consistent from year-to-year and captures the requested information.

Important Guidance
NC-SARA offers five important points of guidance:
1) Enlist the help of the person who does your institution’s reporting to IPEDS (because they are intimately familiar with the world according to IPEDS);
2) Report EDE enrollment as you do to IPEDS in the EF report\(^1\);
3) Report OOSLP for the calendar year by collecting learning placement data from the academic departments that make such placements across state lines;
4) If in doubt, use your best professional judgment, exercised within the spirit and intent of SARA; and
5) Please read the entire handbook before submitting your data or asking questions; there are FAQs at the end of each section of the handbook.

How to Report Your Data
Participating-SARA institutions who were approved on or before December 31, 2021, will receive an e-mail with a link to the online reporting portal on May 15, 2022. This web link will provide access to the online reporting portal with two tabs: one tab for EDE enrollment reporting and the second for OOSLP reporting. The data reporting process should be managed in the same way that other required reporting is for your institution. Please use your existing policies for data collection and records retention to ensure reliable data reporting from year to year.

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What is New or Notable?
NC-SARA recognizes that the past two years have not been typical for many SARA-participating institutions. The commitment to reporting 2020 data, even while the COVID-19 pandemic had shut down many campuses, is a testament to the commitment of the staff and leadership of participating institutions. NC-SARA is aware of and thankful for this level of commitment. Reporting 2021 data in 2022 will present a new set of challenges.

The following items are new or notable for the current reporting period:

- **Follow IPEDS Guidance for Reporting Emergency Remote Learning.** IPEDS has provided guidance on how to report courses that have changed modality or used mixed modality in response to the COVID-19 pandemic. IPEDS uses the term “remote learning” to describe courses that would otherwise have been delivered in person. NC-SARA requests that participating institutions report remote learning as they did for IPEDS EF. Details regarding how to account for remote learning courses are covered in the Exclusively Distance Education Enrollment Reporting section of this handbook. The IPEDS guidance regarding reporting emergency remote learning has not changed for 2021.

- **Report All OOSLP Activities.** NC-SARA also recognizes that many OOSLP activities scheduled to take place in 2021 may have been disrupted. If learning placements were started, but not completed, please report them. Additional details regarding OOSLP reporting are covered in the OOSLP Reporting section of this handbook.

- **Do not report virtual learning placements.** As has been the case, do not report 100% virtual learning placements.

- **Special guidance for institutions new to SARA-participation.** Institutions that began participating in SARA on or before December 31, 2021 are required to report 2021 data to NC-SARA in 2022. Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023. These institutions do not need to report any 2021 data during the 2022 reporting period.

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Institutions that began participating in SARA on or before December 31, 2021 are required to report their 2021 data to NC-SARA in 2022.

Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023.

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**Coming in 2023: Branch Campus Reporting Will Be Mandatory**

In support of transparency, and to give institutional staff ample time to make plans to be able to comply, beginning with reporting of fall 2022 data in the spring of 2023, branch campus reporting will be mandatory. It is important to note that branch campus reporting was originally planned to be mandatory for 2021 data reporting in 2022. However, due to a desire to ensure that the data reporting guidelines and examples for branch campus reporting are clear and to give institutional staff more time to set up systems to collect and report these data, NC-SARA has postponed this requirement for another year.
**Section I: Exclusively Distance Education Enrollment Reporting**

NC-SARA has been requiring participating institutions to report exclusively distance education (EDE) enrollment since 2015. This section of the handbook provides details about what data are reported and why.

**Exclusively Distance Education Enrollment Defined**

Institutions must report the number of students engaged exclusively in distance education who are enrolled at the institution. The EDE enrollment data must be disaggregated by state, territory, or district where the activity takes place. These EDE enrollment data include both degree and non-degree for-credit courses.

For EDE enrollment reporting, institutions should report the same distance education data they reported for IPEDS’ EF reporting but **disaggregate the data by state**. If the institution does not report to IPEDS, use the [IPEDS’ guidelines](https://surveys.nces.ed.gov/ipeds/public/survey-materials/faq?faqid=3) to report to NC-SARA.

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Institutions that do not report to IPEDS still need to report their exclusively distance education enrollment to NC-SARA.

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**How Does NC-SARA Use the Data?**

NC-SARA publishes EDE enrollment data through the [NC-SARA Data Dashboards](https://nces.ed.gov/sara/data/dashboards). They include all data reported to NC-SARA since data reporting was required for 2015 data in the spring of 2016. The dashboards include several separate tabs with different information that may be useful to a variety of SARA stakeholder groups. You may sort the NC-SARA Data Dashboards by year, SARA student status, regional compact, state, and institution. The following EDE enrollment data are available in the dashboards:

1. **Total Exclusively Distance Education Enrollment** - this tab includes overall EDE enrollment counts by state based on institution location. It also includes trends and a list of the top institutions.
2. **Incoming Exclusively Distance Education Enrollment** - this tab focuses on students coming **TO** a state - that is, those students enrolling in an institution within the state but living elsewhere. It includes which states are sending the most students and what types of institutions students are attending.
3. **Outgoing Exclusively Distance Education Enrollment** - this tab focuses on students **FROM** a state - that is, those students that live in a state but attend an institution elsewhere. It includes which states are receiving the most students and what types of institutions students are attending.

A screenshot with an example of the total exclusively distance education enrollment data dashboard is in Figure 1. Prior to 2021, EDE enrollment data were available in tables on the NC-SARA website; now all prior years’ data is available through the [NC-SARA Data Dashboards](https://nces.ed.gov/sara/data/dashboards).

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Who Should Report the Data?
All active institutional SARA contacts will receive an e-mail notice prompting reporting. Please determine who is going to coordinate the NC-SARA data reporting for your institution internally.

How Do We Access the Reporting Portal?
The e-mail you receive from NC-SARA will contain a link to the online reporting portal. The portal has two tabs: one tab for EDE enrollment reporting and a second tab for OOSLP reporting. For 2021 reporting in the spring of 2022, the link will be sent on May 15, 2022. Use these tabs to access the online reporting forms to report your institution's data to NC-SARA.

When is the Reporting Period?
The IPEDS reporting schedule is consistent each year, and NC-SARA's reporting window is also consistently May 15 through June 15. Please be sure to add the NC-SARA reporting window to your institution's existing data reporting calendar.

What Data are Reported?
NC-SARA exclusively distance education (EDE) enrollment reporting requirements are based on federal IPEDS data collection. Institutions report their exclusively distance education enrollment in the EF component of their submission to the federal IPEDS data collection. The EF data are reported through April of the following year. Exclusively distance education enrollment data for 2021 are
reported to IPEDS in the winter/spring of 2022 and to NC-SARA in the spring of 2022 during the annual reporting window.

**IPEDS Distance Education Reporting**

IPEDS defines a distance education course as “a course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education.” The definition also includes detail regarding delivery modality; the full definition is in Appendix A IPEDS’ Distance Education Definitions. NC-SARA uses the IPEDS’ definition of distance education. Using the IPEDS’ definition and data is intended to lessen the reporting burden for participating institutions, since most are already reporting to IPEDS.

Importantly, IPEDS’ distance education reporting requires providing enrollment data in four categories. These categories are listed below:

1. All students enrolled
2. Students enrolled exclusively in distance education courses
3. Students enrolled in some but not all distance education courses
4. Student not enrolled in any distance education courses

In addition to these fields, the data provided for students enrolled exclusively in distance education courses is disaggregated by where the students are located. These five IPEDS categories include:

1. Students enrolled exclusively in distance education courses and are located in the same state/jurisdiction as institution
2. Students enrolled exclusively in distance education courses and are located in U.S. not in the same state/jurisdiction as institution
3. Students enrolled exclusively in distance education courses and are located in U.S. state/jurisdiction unknown
4. Students enrolled exclusively in distance education courses and are located outside U.S.
5. Students enrolled exclusively in distance education courses and location of student unknown/not reported

NC-SARA EDE enrollment reporting includes **only students enrolled exclusively in distance education (EDE) courses.** NC-SARA requests institutions disaggregate the EDE data reported to IPEDS by state for purposes of NC-SARA distance education enrollment reporting. For the purposes of this handbook, the term exclusively distance education enrollment is used synonymously with the IPEDS language: only students enrolled exclusively in distance education courses. Figure 2 details the reporting requirements of NC-SARA and IPEDS EF for distance education enrollment.

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For NC-SARA Reporting, Please:

- Report EDE enrollment delivered *both in the home state of the institution and outside the home state of the institution*.
- While IPEDS EF requests *aggregated* data for your institution’s out-of-state students within the United States, for this SARA report, *disaggregate those enrollments by the state, territory, or district where the students are located, including the home state.*
- Use the means you currently employ to determine students’ locations.
- Report the actual number of students enrolled in each state. If your institution reports all zeroes, please use the Comments field to indicate either that you had no EDE enrollment to report or the reason why state-level data was not provided.
- Institutions that began participating in SARA on or before December 31, 2021 are required to report their 2021 data to NC-SARA in 2022. Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023. These institutions do not need to report any 2021 data during the 2022 reporting period.

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4 At its May 2018 meeting the NC-SARA Board determined that beginning in spring 2019, participating institutions shall *report in-state enrollment* to NC-SARA in addition to the out-of-state enrollment. Institutions currently report those enrollments to IPEDS.

**Reporting Emergency Remote Learning Implemented in Response to the COVID-19 Pandemic**

IPEDS has provided guidance to institutions regarding how to report emergency remote learning that would otherwise have been delivered in person. NC-SARA reporting requirements are aligned with this guidance; the complete information regarding emergency remote learning reporting is available on the IPEDS' Distance Education in IPEDS website. IPEDS has a staffed help desk available at 866-558-0658 or ipedstools@rti.org for specific questions your institution may have about how to report your remote learning offerings.

Full instructions for the 2021-22 IPEDS EF reporting are available on the IPEDS’ website. Institutions that do not report to IPEDS still need to report to NC-SARA.

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**Document Your Approach.** As with all SARA reporting, it is best practice to document the decisions made regarding reporting emergency remote learning so that the same process can be followed in subsequent years and your institutional data reported to NC-SARA is consistent.

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**Reporting Military Students**

Report military students as you would all students: *according to their location while taking the particular course or courses during the time period covered* in the 2021 IPEDS EF report.

- Do not report a student’s military mailing address (APO, FPO, DPO, AE, AP, AA, etc.). The location of the student is reported, not the mailing address of the student.

This is contrary to the IPEDS’ instructions that say to use the student’s permanent address for students enlisted in the military on active duty. The IPEDS’ instructions regarding the location of students enrolled in distance education are available in the Distance Education section of the [FAQ for EF reporting](https://surveys.nces.ed.gov/ipeds/public/survey-materials/faq?faqid=3).

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NC-SARA requires institutions to report military students’ location while taking a course. This differs from IPEDS’ instructions.

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**Notes:**


Instructions for Exclusively Distance Education Enrollment Data Reporting
You do not have to enter all your institution’s data at one time. There is a Save and Return button that allows you to save your work and come back to complete it later.

1. Gather your data. You need the exclusively distance education (EDE) enrollment data that your institution reported to IPEDS for its 2021 EF reporting. You will report two data points from the EF IPEDS reporting:

   1) Students enrolled exclusively in distance education courses and located in same state/jurisdiction as institution
   2) Students enrolled exclusively in distance education courses and located in U.S. but not in same state/jurisdiction as institution

   Be sure to report students located in the same state/jurisdiction as the institution; these data are required by NC-SARA. Institutions report these enrollments to IPEDS. If your institution does not report to IPEDS, use the IPEDS guidance to report these data to NC-SARA.

   \[\text{Save the Data: There are two options to save your data. Save and Return button allows you to save your work and come back to it later. Save and Submit button is used to submit your institution’s data to NC-SARA.}\]

2. Choose the Exclusively Distance Education Enrollment tab. To begin reporting your EDE enrollment data, use the drop-down menu just below the Exclusively Distance Education Enrollment tab on the data reporting portal to choose the current year 2021. You can also view prior years’ data reporting by choosing those years in the drop-down menu. Figure 3 is a screenshot of the Exclusively Distance Education Enrollment tab in the online data reporting system.

   \[\text{Figure 3. Reporting Portal Drop Down Menu to Choose Current Year 2021}\]

3. Enter your institution’s data for SARA states. Enter the disaggregated EDE enrollment data for SARA member states/district/territories in the first section of the online reporting form. The form will sum and report total EDE enrollment to help validate the data as you enter it. See the screenshot in Figure 4 that shows the SARA States section of the reporting form.
Note: The following district and territories participate in SARA and are listed alphabetically with the other SARA states on this page:

- District of Columbia (DC)
- Commonwealth of Puerto Rico (PR)
- U.S. Virgin Islands (VI)

Figure 4. Exclusively Distance Education Enrollment Reporting Form for Member States

[Table showing SARA States Total Exclusively Distance Education Enrollment]

No Exclusively Distance Education Enrollment to Report?
If your institution does not have exclusively distance education enrollment to report, please check the box at the top of the form that says, “This institution has zero Exclusively Distance Education Enrollment to report” and use the Comments field to explain why there are no EDE enrollment data to report, then continue to the Confirmation and Authorization section of the form to complete your data submission to NC-SARA.

4. Enter your institution’s data for non-SARA states. Enter the disaggregated EDE enrollment data for each non-participating U.S. territory and the state of California in the next section of the online reporting form, Non-SARA States and Territories. The online reporting form provides fields for data entry for the state of California and the territories that are not members of SARA:

1. California (CA)
2. American Samoa (AS)
3. Commonwealth of the Northern Mariana Islands (CNMI)
4. Guam (GU)
5. Republic of the Marshall Islands (MH)
6. Federated States of Micronesia (FM)
7. Republic of Palau (PW)
The screenshot in Figure 5 lists non-member states and territories. The form will sum and report total EDE enrollment to help validate the data as you enter it. NC-SARA will report these EDE enrollment data as an aggregate total for Non-SARA States and Territories.

5. **Provide explanations in the Comments field.** Use the Comments field to explain anomalies in your reporting, such as how the COVID-19 pandemic may have affected enrollment, your ability to report accurately, significant increases or decreases in EDE enrollment, etc. You can also use this field to provide clarifying context for the data you report.

   - Please do not ask questions in this field that need a response during the reporting window, as this field will not be actively monitored. Please e-mail data@nc-sara.org directly for any data enrollment questions you may have.
   - Please do not use the Comments section to update your institution’s SARA contact information; contact your SARA state portal entity to update that information. The list of state portal entities is available on the NC-SARA website.

See the screenshot of the Comments field in Figure 6.
6. **Complete the Confirmation and Authorization section.**
   - Verify the OPEID number for your institution (if you report to IPEDS).
   - Provide the name, title, and e-mail address for the person at your institution who could answer questions about your data if they arise.
   - Indicate whether the reporting includes enrollment from branch campuses.

See the screenshot in Figure 7 of the **Confirmation and Authorization** section of the EDE enrollment reporting form.

**Figure 7. Distance Education Enrollment Online Reporting Form Confirmation and Authorization Section**

![Confirmation and Authorization Section](image)

7. **Submit your institution’s data.** Finally, click **Save and Submit** to send your enrollment reporting to NC-SARA. All of the institution’s active SARA contacts will receive an e-mail from NC-SARA confirming receipt of the enrollment data submission.

**For Help or Technical Support:**

- Please e-mail [data@nc-sara.org](mailto:data@nc-sara.org) directly for any data questions you may have.
- If you find an error in your institution’s reporting after you submit it, please email [data@nc-sara.org](mailto:data@nc-sara.org) to request NC-SARA staff unlock your online reporting form so that you can make the changes you need to make. This option is only available until the deadline, June 15. After that time, all data are locked, and changes can no longer be made.
Frequently Asked Questions: Exclusively Distance Education Enrollment Reporting

1. Do all SARA institutions need to report their data, even if they just recently started participating in SARA?

Institutions that began participating in SARA on or before December 31, 2021 are required to report their 2021 data to NC-SARA in 2022. Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023. These institutions do not need to report any 2021 data during the 2022 reporting period.

2. My institution does not participate in federal financial aid programs, so we do not report our enrollment to IPEDS. What should we do about reporting to NC-SARA?

Report to NC-SARA with the same end goal: report the number of students your institution enrolled in Fall 2021 exclusively via distance education, disaggregated by state, territory, or district. Apply IPEDS’ definitions throughout that process. IPEDS provides reporting guides, a searchable and downloadable glossary, and other helpful material online.

3. Where can I find my institution’s exclusively distance education enrollment data?

Where you would find enrollment data varies from institution to institution. Most institutions have someone who does institutional research (IR). Large institutions will have an IR department; small institutions may locate IR staff within various departments: academic affairs, registrar, business office, etc. You want to find the person who manages your institution’s IPEDS’ reports; she/he is designated the IPEDS Keyholder. If you do not know where to look, first ask your department head.

4. How should we report emergency remote learning that was implemented in response to the COVID-19 pandemic?

Report emergency remote learning enrollment to NC-SARA as you did to IPEDS given the instructions and guidance provided regarding emergency remote learning on the Distance Education in IPEDS website. If you have questions about what to report, you can reach the IPEDS Help Desk at 866-558-0658 or ipedstools@rti.org.

5. Do we report “hybrid” courses?

No. You do not report these courses because you only report the enrollment “exclusively in distance education” courses.

6. How is “distance education” defined?

The U.S. Department of Education (ED) provides the following definition:

**Distance education** means “education that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously. The technologies may include--

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(1) Internet;
(2) One-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
(3) Audioconferencing; and
(4) Video cassette, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course in conjunction with any of the technologies listed above.”

Because this is the definition used by IPEDS, it is the definition that NC-SARA uses for exclusively distance education enrollment reporting.

7. What about IPEDS’ “exclusively distance education” provision?

Reporting directions from IPEDS also specify that they collect as distance education enrollments only those enrollments in “A course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education.” (This is often referred to as the “100 percent rule.”) Because that provision should be applied to the distance education enrollment your institution reported to IPEDS on the fall enrollment report, it should also be applied to the disaggregated data that you report to NC-SARA in the same way.

8. My institution has some uncommon operating policies or distance education activities. (Examples: flexible course-start calendar, flexible “blended” courses, consortial arrangements with institutions in other states, etc.) How should we deal with those matters?

Our general answer to such questions is to deal with the issue in the same way it was managed in your institution’s IPEDS EF report. If your institution does not report to IPEDS, use your best professional judgment to report as if you had reported to IPEDS under their provisions. Please document your approach to ensure consistency in your reporting from year to year.

9. Do I have to report exclusively distance education enrollment that take place from a branch campus?

Branch campus reporting remains voluntary at this time. However, beginning with reporting for 2022, during the reporting period in the spring of 2023, branch campus reporting will be mandatory.

NC-SARA will provide additional guidance regarding branch campus reporting in 2022 in preparation for required reporting in 2023.

**Basic Branch Campus Example:** A SARA-participating institution is located in West Virginia with a branch campus location in Pennsylvania. See the example below.

If a branch campus student, living in Pennsylvania, attends exclusively distance education classes delivered through the West Virginia campus, these exclusive distance education enrollments ARE reportable to NC-SARA.

10. How do we determine the location of a student?

Institutions should use the same data regarding the location of their distance education students that they used for distance education enrollment reporting to IPEDS.
NOTE: “Location” is the state, territory, or district where the student is located while receiving the instruction and does not refer to the student’s official state of residence.

Remember, if you do not know where your students are located, you cannot accurately report to IPEDS (and NC-SARA) and you cannot know whether your institution is in compliance with the laws, rules, and regulations that cover those locations.

11. IPEDS reporting allows institutions to report certain student enrollments as “location unknown.” Does NC-SARA?

No, NC-SARA does not allow institutions to report “location unknown” for the reasons mentioned above.

12. Do we report non-credit activities in other states?

No, you do not report non-credit activities because you do not report such activities to IPEDS.

13. Do we report international students?

It depends on the circumstances. If an international student is physically located in the U.S. (or territories) and that student is taking exclusively distance education courses, then you would report the EDE enrollment in the state where the student is physically located.

In any other circumstances, you would not report international students. SARA, as an agreement between member U.S. states, territories, and districts, does not involve other countries or affect international enrollment.

14. Any special points relating to reporting military students?

Report military students as you should all students: report them according to their location while taking the particular exclusively distance education course or courses during the time period covered in the IPEDS EF report. Do not report a student’s military mailing address (APO, FPO, DPO, AE, AP, AA, etc.). The location of the student is reported, not the mailing address of the student. This is based on SARA policy and is contrary to the IPEDS’ instructions that say to use the student’s permanent address for students enlisted in the military on active duty. The IPEDS’ instructions regarding the location of students enrolled in distance education are available in the Distance Education section of the Fall Enrollment FAQ.9

15. When is the data due to NC-SARA?

NC-SARA requires annual reporting of exclusively distance education data. The NC-SARA reporting period is May 15 - June 15 each year. Please make sure that institutional research staff add this reporting window to their regular reporting calendars.

16. Will NC-SARA be providing any additional help about this for institutions that need it?

Yes, NC-SARA will offer a webinar to answer questions prior to the 2021 data collection period in the spring of 2022. The webinar will be recorded and will be available on the NC-SARA website.

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17. Will NC-SARA audit our enrollment reporting?

No, currently NC-SARA is relying on institutions to submit information that is as accurate as possible. We encourage you to document your approach for consistency in your institution’s reporting from year to year. However, NC-SARA may corroborate data reporting or ask for clarification if the institution’s data is outside of the historic norm.

**Technical Support & Help**

The reporting forms are designed as data entry pages in the online portal. Detailed instructions for data entry are provided in this handbook. One link will be emailed, with **two tabs**. The first tab is to report exclusively distance education enrollment and the other tab is to report the out-of-state learning placements.

If you encounter any technical issues or questions about data reporting, please contact NC-SARA for support at: [data@nc-sara.org](mailto:data@nc-sara.org).
Section II: Out-of-State Learning Placement Reporting
NC-SARA has been requiring participating institutions to report out-of-state learning placements (OOSLP) since 2018. This section of the handbook provides details about what data are reported and why.

Out-of-State Learning Placements Defined
Learning placements are a critical component of many instructional programs. They include activities such as clinical rotations, student teaching, internships, and other similar activities. Though learning placements occur in a variety of disciplines, they are particularly common in certain fields, such as health-related disciplines and education. They are often a required part of obtaining a degree and/or license to practice a particular profession. **Out-of-state learning placements are simply learning placements that occur in a state other than the home state of the institution.**

Why NC-SARA Requires Out-of-State Learning Placement Reporting
During the development of SARA, parties agreed to work toward having SARA-participating institutions provide information about out-of-state learning placements. These learning placements are of interest because they help describe interstate learning activity. State regulators and other stakeholders are interested in how resources in the state are used to support learning placements.

How Does NC-SARA Use the Data?
NC-SARA currently publishes OOSLP data aggregated by state and CIP program area in the NC-SARA Data Dashboards. NC-SARA may publish OOSLP data aggregated by program area (two-digit CIP code) by reporting institutions on its website. The OOSLP data reported include:

- Out-of-State Learning Placements by Placement Location (Incoming/TO)
- Out-of-State Learning Placements by Institution Location (Outgoing/FROM)

A screenshot with examples of Incoming OOSLP data displayed are in Figure 8. All prior years’ data for Incoming and Outgoing OOSLP are available in the Data Dashboards as well.
What Data are Reported?
OOSLP reporting includes on-ground students as well as distance education students’ OOSLP.

Learning placements should be disaggregated by state/district/territory and by two-digit Classification of Instructional Programs code (CIP). *There are no changes to the Criteria for Inclusion in OOSLP Reporting for 2021 in 2022.*

Please note two important characteristics of OOSLP reporting:

1. SARA OOSLP reporting comprises ALL OOSLP, including on-ground learning placements in another state, not just those associated with distance education students.
2. At this time, virtual learning placements across state lines are not reported to NC-SARA.

Please note that beginning with reporting for 2022 in the spring of 2023, branch campus reporting will be required.
Classification of Instructional Programs (CIP)
One fundamental characteristic of SARA is its reliance on certain previously existing, workable mechanisms (such as accreditation, federal financial responsibility composite scores, etc.), rather than inventing similar mechanisms anew. Because it is used by almost all U.S. institutions of higher education, NC-SARA is using the CIP system to categorize and report OOSLP.

According to National Center for Education Statistics (NCES), the Classification of Instructional Programs (CIP) provides a taxonomic scheme that supports the accurate tracking and reporting of fields of study and program completion activity\textsuperscript{10}. Developed by NCES in 1980, the CIP has been revised five times, most recently in 2019 for use in 2020. The 2020 CIP Codes are used for reporting to NC-SARA beginning with 2020 OOSLP reporting in the spring of 2021.

The highest order of the taxonomy has 47 two-digit CIP codes that represent program areas. Each program area code may be further subdivided, resulting in either two digits (xx), four digits (xxxx), or six digits (xx.xxxx). Figure 9 is a screenshot that illustrates the initial portion of the CIP code for program area Education\textsuperscript{11}. Appendix B provides additional detail about CIP codes and links to all 47 two-digit CIP codes that represent the program areas.

\textbf{Figure 9. CIP Code Example for Education (CIP #13.0)}

Institutions have already assigned CIP codes to their academic programs, and NC-SARA does not expect or desire institutions to revisit those decisions for the purpose of SARA reporting. Rather, SARA institutions are to report learning placements categorized by the codes already assigned to the related programs.


Characteristics Required for Inclusion of OOSLP

There are no changes to the Criteria for Inclusion in OOSLP Reporting for 2021 in 2022.
NC-SARA requires reporting by two-digit CIP code only. For example, a SARA institution would report, for each state/district/territory other than its own, the number of students placed during the calendar year of 2020, disaggregated by two-digit CIP code and the state/district/territory where the placement was made. These two-digit CIP codes are referred to as program areas. There is infinite variety in the characteristics of learning placements, including what they are called (internships, rotations, student teaching, etc.), their duration, whether they are required or optional, whether they are arranged by the student or the institution, whether they are supervised or unsupervised, etc. For this reason, and to increase consistency across institutional data, NC-SARA defined a specific list of characteristics that are to be met for this collection process.

Criteria for Inclusion in OOSLP Reporting

Institutions should report out-of-state learning placements that meet the following criteria:
2. The placement is outside the home state of the SARA institution.
3. The placement involves the physical presence of the student at the out-of-state location(s).
4. One or more of the following is true:
   a. The placement is an activity required for degree completion.
   b. The placement is an activity required for professional licensure.
   c. The placement is offered for credit.
   d. The placement is offered for a fee.

Placements that meet the above criteria should be reported as follows:
• Disaggregate by two-digit CIP code;
• Disaggregate by the state in which the placement was made.

Liberal Arts: Unless your institution has a different schema, all majors related to Liberal Arts should be reported as Liberal Arts and Sciences, General Studies and Humanities (24). If your institution does report Liberal Arts courses using a different method, use it and document your process for consistency in reporting from year to year.

• Please Note: Do not report learning placements that were intended to be in-person but occurred remotely due to the COVID-19 pandemic.

When in doubt, report the OOSLP. The intention of NC-SARA is that institutions report relevant learning activity that occurs across state lines.

Who Should Report my Institution’s Data?
Please determine who is going to coordinate the NC-SARA data reporting for your institution internally. All active institutional contacts will receive an e-mail notice prompting reporting. The email will include a secure web link to access the online reporting portal. The portal has two tabs, one to report EDE enrollment and one to report OOSLP. For 2021 data reporting in the spring of 2022, the link will be sent on May 15, 2022. Use this link to report your data to NC-SARA. Institutional contacts will also be sent automated confirmation notices when your institution’s data have been submitted, one for each data report.
Scope and Limitations of SARA
An understanding of SARA policy related to learning placements is important for those implementing distance education (including OOSLP) at their institutions.

SARA institutions, under specified conditions, may place a limited number of students in such learning placements in other SARA states without securing prior authorization for those placements. Importantly though, if such placements are part of a degree program intended to prepare students for professional licensure in another state, prior approval by the other state’s professional licensure board that oversees practice of the discipline may be required. SARA participation does not include such professional licensure approval. In some states, an even broader range of activities fall under the jurisdiction of licensing boards.

In making learning placements in another state, institutions are obliged to comply with the relevant laws, rules, and regulations of the state where these placements are made. Rules and regulations on such matters may be those of a state education agency or may come from a professional licensure board located in the state where the placement is made. There is enormous variety among states as to how they oversee the licensure of professions. Detailed information is available in the Professional Licensure Directory on the NC-SARA website.

Where are these numbers housed at an institution?
The required OOSLP data may not be housed in a central location since these data are not reported to IPEDS.

- This information may be housed in the departments or programs that manage learning placements for students.
- Some institutions collect this information from their various academic departments and house it in a centralized location, such as a compliance office, the registrar, or institutional research (IR).

To obtain the data, start with the person/people carrying out the institutional research function. Since related programs (and their CIP codes) tend to be housed in the same department or college, collecting the information at the college level (for large universities) or department or program level (for smaller institutions) can provide a good starting point.

Institutions do not report their in-state learning placements to NC-SARA. Only out-of-state learning placements are reported to NC-SARA.
**Instructions for OOSLP Data Reporting**

You do not have to enter all your institution’s data at one time. There is a **Save** button that allows you to save your work and come back to complete it later.

1. **Gather your data.** Using the criteria provided by NC-SARA, prepare your data to report by CIP program area (two-digit code) and state/territory/district. A **Sample Learning Placement Reporting Matrix** is available on the **Institution Directions for Data Reporting** tab of the NC-SARA website to help organize the data.

   **Choose the OOSLP tab.** To begin reporting your OOSLP data, access the second tab, **Out-of-State Learning Placements (OOSLP)** to open the online reporting form. Then use the drop-down menu on the far left of the screen to choose the current year 2021.

   **Save The Data:** The **Save** button allows you to save your work and come back to it later.

2. **Enter your institution’s OOSLP data.** Report the OOSLP data for each state and program area (2-digit CIP code). See the screenshot in Figure 10.

   - Note that you can add another CIP code with the blue link **Add another CIP/State** at the bottom of the screen. Once you have chosen a state, continue to add CIP codes and enter the learning placements for each CIP code for the state. Use the **Save** button to save your work frequently.

   **Figure 10. Initial OOSLP Screenshot for NC-SARA Online Reporting Form**

   ![Initial OOSLP Screenshot for NC-SARA Online Reporting Form](image)

   **Navigating Between Survey Screens.**
   Use the **Previous** button to save your work and return to the prior page.
   Use the **Next** button to save your work and advance to the next page.
No OOSLP to Report?

If your institution does not have OOSLP to report, please check the box at the top of the form that says, “This institution has zero out-of-state learning placements to report” and use the Comments field to explain why there are no OOSLP data to report, then continue to the Confirmation and Authorization page to complete your submission to NC-SARA.

3. **Continue adding OOSLP data.** Use the Add another CIP/State link to input your institution's data by CIP code and state until you are done. The screenshot in Figure 11 shows the OOSLP data entry form with data entered.

Continue to expand the form to enter all your institution’s OOSLP data. The form will sum and report total OOSLP to help validate the data as you enter it. Use the Next button to advance to the Comments field.

**Figure 11. OOSLP Data Entry Screenshot with Data Entered in the Form**

4. **Provide explanations in the Comments field.** Use the Comments field to explain anomalies in your reporting, such as how the COVID-19 pandemic may have affected learning placements, your ability to report accurately, significant increases or decreases in OOSLP, etc. You can also use this field to provide clarifying context for the data you report.
   - Please do not ask questions here that need a response during the reporting window, as this field will not be actively monitored. Please e-mail data@nc-sara.org directly for any data questions you may have.
   - Please do not use the Comments section to update your institution’s SARA contact information; contact your SARA state portal entity to update that information. The list of state portal entities is available on the NC-SARA website.

See the screenshot of the Comments field in Figure 12.

**Figure 12. OOSLP Reporting Form Comments Field**
5. **Complete the Confirmation and Authorization Section.**
   - Verify the OPEID number for your institution (if you report to IPEDS).
   - Provide the name, title, and e-mail address for the person at your institution who could answer questions about your data if they arise.
   - Indicate whether the reporting includes OOSLP from branch campuses.

   See the screenshot in Figure 13 of the **Confirmation and Authorization** section of the online OOSLP reporting form.

   **Figure 13. OOSLP Reporting Form Confirmation and Authorization Section**

6. **Submit your survey data.** Finally, click **Save and Submit** to send your OOSLP reporting to NC-SARA. All of the institution's active SARA contacts will receive an e-mail from NC-SARA confirming receipt of the enrollment data submission.

**For Help or Technical Support:**

- Please e-mail [data@nc-sara.org](mailto:data@nc-sara.org) directly with any questions you may have.

- If you find an error in your institution’s reporting after you submit it, please email [data@nc-sara.org](mailto:data@nc-sara.org) to request NC-SARA staff unlock your online reporting form so that you can make the changes you need to make. This option is only available until the deadline, June 15. After that time, all data are locked, and changes can no longer be made.
Frequently Asked Questions: Out-of-State Learning Placements Reporting

1. **Do all SARA institutions need to report their data, even if they just recently started participating in SARA?**

   Institutions that began participating in SARA on or before December 31, 2021 are required to report their 2021 data to NC-SARA in 2022. Institutions whose participation began after December 31, 2021 are required to report 2022 data in 2023. These institutions do not need to report any 2021 data during the 2022 reporting period.

2. **Does NC-SARA have a basic form that my institution can adapt to survey our academic departments or colleges for this information?**

   Yes, NC-SARA provides a basic OOSLP spreadsheet template that you may use to collect this information. Download the **Sample Learning Placement Reporting Matrix**, a spreadsheet that you can adapt for your reporting from the **Institution Directions for Data Reporting** section of the NC-SARA website.

3. **Do we report undergraduate students, graduate students, or both?**

   Both undergraduate and graduate students are reported, combined into a single number. All OOSLP that meet the criteria should be reported for on-campus and distance education students.

4. **Do we report placements that are required for professional licensure, degree completion, or both?**

   Assuming other required criteria are met, learning placements required for professional licensure as well as those required for degree completion should be reported.

5. **What about out-of-state learning placements that are field trips, service learning, short courses, or volunteer hours?**

   None of these learning placements are reported to NC-SARA.

6. **Should institutions report virtual internships?**

   No, if the internship is fully online and the student is not physically present in another state, the institution does not report a virtual learning placement. This includes placements that were originally intended to be in-person but occurred completely remotely due to the COVID-19 pandemic.

7. **Since some students will have multiple placements, do we count the number of individual placements in the various states or the number of students who were placed?**

   Count each student learning placement. If a student has multiple placements in the same state, count each placement. If a student has multiple placements in more than one state, count each placement, attributing them to the relevant states. See the examples below.

   **Example:** Three University of Texas at El Paso (UTEP) nursing students each do a single clinical rotation at each of two hospitals in Las Cruces, New Mexico, and one rotation at a hospital in Phoenix, Arizona. UTEP would report three placements in
New Mexico and three placements in Arizona, all under CIP code 51, Health Professions and Related Programs.

*Example:* A student at University of Colorado at Denver participated in an OOSLP in spring 2021 under CIP code 13 in Arkansas; this same student then participated in another OOSLP in fall 2021 under CIP code 46 in Washington. UCD would report two placements, one in each state. If both learning placements were in the same state, both placements would be reported, one under each CIP Code.

8. **What if the OOSLP is through a third-party medical/dental/psychology placement database – do institutions report these (under what circumstances)?**

   Yes, the institution needs to report any physical placements in another state regardless of the source of the placement.

9. **If a SARA institution has state authorization in more than one state, does the institution report OOSLP in another state where they have authorization?**

   Yes, NC-SARA is interested in collecting all activities, so institutions should report all their OOSLP in states outside of the state where the institution that is granting the degree or preparation for professional licensure is located (home state).

10. **What if my institution has none of this information?**

    Use this handbook and the *Sample Learning Placement Reporting Matrix* to establish a system to collect and report the information. Document the steps so that your institution can provide accurate learning placement data each year. This reporting is a requirement of participation in SARA.

11. **What about reporting placements in non-SARA states/territories?**

    Report all learning placements disaggregated by states/district/territories. NC-SARA will aggregate and report those placements under the designation *Placements in Non-SARA States/Territories*, as was done with exclusively distance education enrollment reporting as states gradually joined SARA.

12. **Do we report international students?**

    It depends on the circumstances. If an international student is physically located in the U.S. (or territories) and that student is participating in a learning placement in a U.S. state, territory, or district other than the home state of the institution, you would report the OOSLP in the state where the student is physically located. In any other circumstances, you would not report international students. SARA, as an agreement between member U.S. states, territories, and districts, does not involve other countries or affect international enrollment.

13. **If a student is student-teaching in another state, and they are going to be a mathematics teacher, do we report the placement under CIP code 27 (Mathematics and Statistics) or CIP code 13 (Education)?**

    Report under the CIP code for the discipline within which the activity is managed by the institution. In this case, it is most likely to be CIP code 13 Education, but institutions differ in
their assignment of these codes. Use the CIP codes assigned by your institution and document your approach for consistent reporting in the future.

14. Do I have to report out-of-state learning placements that take place from our branch campus?

You have the choice to report these out-of-state learning placements for calendar year 2021. Beginning with calendar year 2022 reporting in 2023, branch campus reporting will be required.

NC-SARA will provide additional guidance regarding branch campus reporting in 2022 in preparation for required reporting in 2023.

Branch Campus Examples: A SARA-participating institution is located in West Virginia with a branch campus location in Pennsylvania. See the examples below.

Example 1: If a branch campus student, living in Pennsylvania, attends exclusively online classes delivered through the West Virginia campus and participates in a learning placement in Pennsylvania, these learning placements ARE reportable to NC-SARA.

Example 2: If a branch campus student, living in Pennsylvania, attends exclusively online classes delivered through the West Virginia campus and participates in a learning placement in West Virginia, these learning placements ARE NOT reportable to NC-SARA.

15. Will NC-SARA be providing any additional help about this for institutions that need it?

Yes, NC-SARA will offer a webinar to answer questions prior to the 2021 data collection period in the spring of 2022. The webinar will be recorded and will be available on the NC-SARA website.

Technical Support & Help
The reporting forms are designed as data entry pages in the online reporting portal. Detailed instructions for data entry are provided in this handbook. One link will be emailed, with two tabs. The first tab is to report exclusively distance education enrollment and the other tab is to report the out-of-state learning placements.

If you encounter any technical issues or questions about data reporting, please contact NC-SARA for support at: data@nc-sara.org.
Appendix A: IPEDS' Distance Education Definitions

The following definitions are provided by The Department of Education, National Center for Educational Statistics (NCES)\(^\text{12}\).

**Distance Education** - Education that uses one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously. Technologies used for instruction may include the following: Internet; one-way and two-way transmissions through open broadcasts, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communication devices; audio conferencing; and video cassette, DVDs, and CD-ROMs, if the cassette, DVDs, and CD-ROMs are used in a course in conjunction with the technologies listed above.

**Distance Education Course** - A course in which the instructional content is delivered exclusively via distance education. Requirements for coming to campus for orientation, testing, or academic support services do not exclude a course from being classified as distance education.

**Distance Education Program** – A program for which all the required coursework for program completion is able to be completed via distance education courses.

**NC-SARA Uses IPEDS Definitions**

NC-SARA relies on the existing definitions and reporting schedules required by the federal government’s [Integrated Postsecondary Education Data System](https://surveys.nces.ed.gov/ipeds/public/glossary) (IPEDS). Using these existing structures and processes, that are familiar to institutional staff, is part of NC-SARA’s commitment to not creating an undue additional reporting burden for participating institutions. IPEDS data collection is managed by the U.S. Department of Education through the [National Center for Education Statistics](https://nces.ed.gov) (NCES) and reporting is required of all institutions of higher education that offer federal financial aid in the U.S. states and territories. NCES has been requiring institutions to report distance education data since the IPEDS Fall Enrollment (EF) reporting in 2012. These data are the basis of institutional distance education enrollment reporting to NC-SARA.

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Appendix B: Classification of Instructional Programs (CIP)

Classification of Instructional Programs (CIP) codes were developed by the U.S. Department of Education’s National Center for Education Statistics (NCES) in 1980, with revisions in 1985, 1990, 2000, 2010, and 2020. Virtually every campus, state, and accrediting body in the nation uses them in some fashion. They are used to maintain and categorize academic program inventories and report completions, and, in some states, they affect funding for public institutions. In health-related fields, they can affect the pricing of delivered services, insurance reimbursement to providers, and limits of coverage and practice.

The codes provide a taxonomy (a hierarchical organizational scheme) of fields of study, with greater or lesser subdivision within broad subject areas. For example, CIP Code 51 (Health Professions and Related Programs, with more than 200 sub-categories) contains far more narrowly specified programs than does CIP Code 54 (History, with nine specified sub areas).

The highest order of the taxonomy has 47 two-digit CIP codes and subdivides each of them according to the scheme, using either two digits (xx), four digits (xx.xx), or six digits (xx.xxxx). The online appendix allows the user to click on a two-digit field, be taken to an online definition of that code, and then further click on any of the indicated sub-fields. Definitions are provided for each sub-field. The table is directly available at: https://nces.ed.gov/ipeds/cipcode/default.aspx?y=56.

Institutions have already assigned CIP codes to their academic programs, and NC-SARA does not expect or desire institutions to revisit those decisions for the purpose of SARA reporting. Rather, SARA institutions are to report learning placements categorized by the codes already assigned to the related programs.

Beginning with 2020 data collection, the 2020 CIP Codes will be used. The 2020 CIP codes can be found at https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=56.
Appendix B: CIP - Continued


01) AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES.
03) NATURAL RESOURCES AND CONSERVATION.
04) ARCHITECTURE AND RELATED SERVICES.
05) AREA, ETHNIC, CULTURAL, AND GENDER STUDIES.
09) COMMUNICATION, JOURNALISM, AND RELATED PROGRAMS.
10) COMMUNICATIONS TECHNOLOGIES/TECHNICIANS AND SUPPORT SERVICES.
11) COMPUTER AND INFORMATION SCIENCES AND SUPPORT SERVICES.
12) CULINARY, ENTERTAINMENT, AND PERSONAL SERVICES.
13) EDUCATION.
14) ENGINEERING.
15) ENGINEERING/ENGINEERING-RELATED TECHNOLOGIES/TECHNICIANS.
16) FOREIGN LANGUAGES, LITERATURES, AND LINGUISTICS.
19) FAMILY AND CONSUMER SCIENCES/HUMAN SCIENCES.
22) LEGAL PROFESSIONS AND STUDIES.
23) ENGLISH LANGUAGE AND LITERATURE/LETTERS.
24) LIBERAL ARTS AND SCIENCES, GENERAL STUDIES AND HUMANITIES.
25) LIBRARY SCIENCE.
26) BIOLOGICAL AND BIOMEDICAL SCIENCES.
27) MATHEMATICS AND STATISTICS.
28) RESERVE OFFICER TRAINING CORPS (JROTC, ROTC).
29) MILITARY TECHNOLOGIES.
30) MULTI/INTERDISCIPLINARY STUDIES.
31) PARKS, RECREATION, LEISURE, FITNESS, AND KINESIOLOGY.
32) BASIC SKILLS.
33) CITIZENSHIP ACTIVITIES.
34) HEALTH-RELATED KNOWLEDGE AND SKILLS.
35) INTERPERSONAL AND SOCIAL SKILLS.
36) LEISURE AND RECREATIONAL ACTIVITIES.

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