

A Guide to Best Practices:

Awarding Transfer and Prior Learning Credit

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AACRAO is a non-profit, voluntary, professional association of more than 11,000 higher education professionals who represent approximately 2,600 institutions in more than 40 countries. Its mission is to provide professional development, guidelines, and voluntary standards to be used by higher education officials regarding the best practices in records management, admissions, enrollment management, administrative information technology, and student services. AACRAO represents institutions in every part of the higher education community, from large public institutions to small, private liberal arts colleges.

The association promotes the well-being and advancement of professionals in the higher education community by engaging members in the collaborative pursuit of excellence in admissions, registration, and enrollment services. The association provides relevant programs, professional development tools, and information resources necessary to chart the course for professional success.

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Preamble

Students are on the move.

In the 21st century, students will attend a variety of colleges and universities throughout their professional lives. Fueled by a worldwide rush for credentials and a knowledge economy that demands postsecondary skills, these students look to traditional and nontraditional postsecondary providers to prepare them for the academic challenges and opportunities of the future.

This pursuit of lifelong learning puts pressure on colleges and universities to devise principles, policies, and practices that fairly, but rigorously, address the transfer of the multiple kinds of credit that prospective students bring with them.

The word "transfer" itself has become complicated; it now identifies a broad range of opportunities to provide credit for learning external to the student's current institution.

This new environment includes high school students who challenge themselves by completing college-level work, such as Advanced Placement (AP), International Baccalaureate (IB), and Cambridge A-Level courses; students attending community colleges who seek to transfer and earn a bachelor's degree from a four-year institution; students who return to community colleges after attempting a four-year institution; students who participate in the rapidly expanding marketplace of online courses and certifications; and, finally, older students who return to college to advance professionally or to seek an entirely new career. Add to these populations the increasing numbers of students who are active-duty military or veterans, with credit recommendations offered by the American Council of Education, and you have a diverse, multi-faceted group of students with only a

single common theme – they want credit for what they have already learned.

Transfer and the transfer of credit will become more complicated and idiosyncratic in the coming decades, as students attend multiple institutions throughout their lives, and as institutions further align their outreach, admission, and enrollment to meet the needs of these students. As a result, the transfer of credit will become more ubiquitous and complex, challenging educational leaders to develop policies and practices for the evaluation of credit from diverse sources in ways that serve the educational goals of prospective students and the academic missions of their institutions.

Purpose

This document describes expectations and best practices for post-secondary institutions' work with transfer credits. These guidelines are intended to assist and advise--not prescribe--member colleges and universities in this work

The impetus for these guidelines is the need for a clear, accessible and accommodating transfer credit policy. While most accrediting bodies--and participation in Title IV funding--require such a policy to exist, there have been no comprehensive recommendations about policy content, leading to a complex, inconsistent array of policies and procedures that lack in content and breadth, or which benefit the institution more than the student.

The growing complexity of transfer policies and practices have been brought about, in part, by the changing nature of postsecondary education. With increasing frequency, students are pursuing their education in a variety of institutional and extra institutional settings. Fairness, accountability, and the intelligent use of resources require that validated college-level learning be recognized wherever it takes place. These guidelines are thus intended to serve as a reference and starting point for institutions developing or reviewing policies dealing with transfer, acceptance, and award of credit.

"Transfer" as used here refers both to the movement of students from one college, university, or other education provider to another and to the process by which credits representing those educational experiences, courses, degrees, or credentials are accepted or not accepted by a receiving institution. When necessary, this definition can expand to include transfer within a single institution, such as when students change majors, attend a different campus, switch modality, or pursue accelerated degree programs which require a re-evaluation

of previous coursework, experience, and knowledge. Similarly, the definition is not limited to transfer from a two-year institution to a four-year; rather, the document is intentionally non-specific about the type and academic level of sending and receiving institutions.

The paper does not purposely discuss international or graduate-level transfer credit. This was a conscious decision by the authors based on other available resources or guidance. The authors are always open to hearing feedback on additional areas missed or poorly--covered.

Guiding Principles

To guide policy development, two documents are available for reference. The first is the Joint Statement of the Awarding of Transfer Credit, which was authored by AACRAO, American Council on Education (ACE), and the Council on Higher Education Accreditation (CHEA). This statement addresses some of the basic principles of transferring credit, and served as a starting point for this guide. The second is the Transfer Student Bill of Rights, available in Appendix I, which was developed in conjunction with this guide and identifies the basic rights of all transfer students.

Additionally, research conducted by AACRAO, the Community College Research Center, the National Student Clearinghouse, the Lumina Foundation, the Western Interstate Commission for Higher Education, and others, have influenced recommendations and content for a successful transfer credit policy. Each of these organizations have examined issues related to transfer students and the ways in which they earn and transfer credit: who transfer students are, how credits transfer and how they are lost, how transferability of coursework affects recruitment and enrollment, and the various ways credit can be earned. From this research, four major themes can be identified as the guiding principles of a successful and comprehensive transfer credit policy:

Students have the right to clearly know how credits transfer. It is important for students to understand how and why the policy applies to them. Often, colleges and universities use jargon and other professional language that students do not understand. Is the policy communicated fully and well? Transfer credit policies need to be displayed in the open light of day. Advantages for the institution are clear: Students who apply will understand how their prior work and learning will or will not transfer. Clearly stated

and publicized policies will also prevent prospective students from completing inappropriate courses in the hope of transferring to your institution.

Institutions should develop policies that help prepare students for the transition. In what ways does the policy ensure that the credit transfer process effectively prepares students for the academic demands of your institution? And, does your policy support the integrity of your institution's curriculum and degrees? An illconsidered policy does your institution no favors by granting credit that does not properly prepare students for what's to come. Worse, a weak or indiscriminate credit transfer policy might be seen by prospective students as accommodating—and therefore fair—yet students unprepared for the demands of the institution damage not only themselves, but also the institution's reputation.

Both institutions and students have responsibilities in the transfer process. Transfer credit policies should be fair and reasonable to the institution and the student. For the institution, the policy should provide clear rules to govern, and protect, what credit is accepted, how it is applied, and how those decisions were reached. The institution also has the right to give the student every possible opportunity to earn credit through multiple means. For the student, responsibilities include appropriate disclosure of information, understanding degree and curriculum requirements, meeting deadlines and following procedures, to name a few. The key is developing a policy that both gives students and institutions flexibility while placing appropriate and measurable accountability.

Transfer credit policies should reflect the mission and goals of the institution. Does the transfer credit policy support the institution's mission and, by extension, the institution's accreditors or governing body? The degree to

which any given college or university, especially public institutions, accepts courses from another institution is always a focus of attention by prospective students and, ultimately, lawmakers. Public officials, with the purse strings at hand, are rightly concerned about students' ability to seamlessly move through a curriculum among public institutions. Again, an ill-considered policy—too stringent, lacking rationale, or self-serving—will not be looked on well by anyone interested in an accountable public postsecondary system.

Each of these four principles influences content in its own way. Together, they provide a foundation for a policy that will be fair, informative, and flexible. Most importantly, they can inspire policy authors to include content that makes the student feel welcomed, provides an institution with any legal safeguards required, and engages the entire community in the process of determining student success. In addition, a well-written credit transfer policy can be an effective recruitment and retention tool.

Developing a Policy

An institutional policy regarding the review and acceptance of transfer credit should consider the institution's? history and current campus and national climate. Developing or changing a transfer policy is an organic process; it should happen because a need is identified and a result is required. When entering into the process, institutions should clearly identify why there is a need for a policy and how the policy should work. Policy development should engage the entire campus community, both internal and external stakeholders, and will probably go through multiple revisions before being finalized. A periodic review of current policies is just as important; changing technologies, laws, student demographics and trends, and curriculum pedagogy necessitate changes to maximize student success.

A policy may have both internal and studentfacing components. Internally, institutions may build policy and procedures that reflect how they articulate, evaluate, and post credit and prior learning. These are the nuts and bolts of the policy. The external presentation of policy may need only high level information or specific information related to the audience's questions and concerns, and may include definitions, bullet points, charts or other mechanisms to clearly and efficiently present the information. The complexity and content of any transfer policy depends on the institution which it serves. A two-year institution may need a very different policy then a four-year institution. Likewise, an institution with few transfer students may not need a policy as comprehensive as an institution with thousands of transfer students.

The following section identifies various topics to include in your policy; and content for each topic. When reviewing each section, evaluate if your institution needs the content, if it can be implemented and sustained at the institution, and how it influences current policies and procedures.

Certain content is identified as follows:

- (1) Best Practices when polled, these recommendations were identified by a majority of institutions when asked about the topic,
- (2) Recommended Practice a common practice, but not identified as a best practice in poll questions,
- (3) Reminders, or items to be aware of when developing the policy, and
- (4) All other content, which are general suggestions for developing the policy

None of the content is required, and none should be interpreted as AACRAO or federal mandates.

Definitions

Policy Topic	Policy Content
Who is a transfer student at the receiving institution?	Possible definition: A transfer student is someone who has previously earned more than some specified number of credits at post-secondary institution or via credit for prior learning opportunities. Most institutions and/or states already have a definition
What is an official vs. unofficial transcript?	An official transcript typically is marked as such and carries security enhancements. It is sent directly from an institution to another institution and must be delivered to the receiving institution electronically or in a sealed envelope. An unofficial transcript is often printed from a student portal, or delivered opened, has little security, may be marked as 'unofficial' and is commonly issued directly to a student.
What is Prior Learning Assessment (PLA)?	Credit is awarded for <identify avenues="" credit,="" dual="" enrollment="" exam="" include="" may="" military,="" nationally-recognized="" non-traditional="" options,="" or="" other="" portfolio,="" which="">. Use institutional or state definitions as appropriate.</identify>
What constitutes "college-level" coursework at your institution?	College-Level coursework is credit earned post-high school, or earned via enrollment at a post-secondary education while attending high school. It will contain certain academic content and rigor, as identified by the institution. Use institutional or state definitions as appropriate.
What is dual enrollment and dual admission?	Use institutional or state definitions as appropriate.

Course Equivalencies

Policy Topic	Policy Content
Credit Conversion: How do you convert credits been different semester formats? Quarter to semester? 5- week to 10-week to 16- week, etc.?	 Develop a standard conversion for all types of semester/quarter/week hours; apply universally to all institutions and formats. Recommended Practice: Multiple 4 quarter hours by .67% to convert from quarter to semester; and Consider using 2.68 semester hours (converted from 4 quarter hours) as satisfying 3 semester hours, unless otherwise noted in policy.
Grades: What grades are needed to transfer coursework, and what grades are needed to apply the coursework to different degree requirements, if applicable? Which types of credit are included in the GPA, and which are not?	 Include minimum grade required for transferring credit into the institution, into a major, or as general education. Best Practice: Most institutions require a grade of C or better for transfer; however some states have regulated D or C- grades. Clarify minimum grade requirements for general education, major, or graduation requirements should be met by transfer credit (e.g. if English Composition requires a C to pass, transfer students should have a C in their transfer class. Or, if a B or better is required in a major course, a B is required for the transfer course to count). Have a statement on how remedial education, developmental education, or other non-academic level coursework transfers. Best Practice: Most institutions do not transfer this type of coursework. Have a statement on transferring Pass/Fail credit. Include Prior Learning, if applicable, in this policy, as most PLA credit is documented as such. Recommended Practice: Consider identifying a minimum grade for "pass," like a C or better, which may facilitate the transfer of the credit. Identify this grade on a transcript key.
Credit Limits: How many credits are accepted from both two-year and four-year institutions?	 Publish the number of credits awarded from institution type, at credit level, or from particular sources. Recommended Practice: Accept, at a minimum, an entire associate degree (60 semester credits or more), and, at a maximum, credits up to institutional residency requirements. Include Prior Learning in this section of the policy. Reminder: Institutional and programmatic accreditation and any applicable governing or state laws supersede these recommendations.
Credit Levels: Will 100- or 200-level coursework be accepted into the upper division? Can 300- or 400-level coursework satisfy lower-level requirements?	 Establish a method for articulating across credit levels, driven by course content and not course nomenclature. Best Practice: Transfer 100- and 200-level coursework at the same level, articulate 200- to 300-level coursework when academic content and rigor is the same, and transfer 300- and 400-level when possible. Identify, if applicable, the conversion of academic level between institutions if you do not use the common 100-, 200-, 300-, 400-level nomenclature.

Non-Transferability of credit: What credit will not be accepted, and why?	 Inform students of which types of credit are not accepted for transfer. This may include credit earned at specific institutions, via delivery method, prior learning credit, or remedial education. Identify alternative ways for students to earn credit for knowledge learned, if applicable.
Specific Discipline Transfer: What rules govern specific course content or disciplines, such as religion courses, technical/computer courses, internships, study abroad, English as a Second Language (ESOL), developmental education, etc.?	 Refrain from using course delivery modality (online, in person, hybrid, asynchronous) as a means to accept or deny credit. Clearly state how internal and externally earned PLA credit will transfer and apply towards the degree.
International Transfer Credit: What different rules and regulations apply to international transfer credit? What evaluation companies are accepted? How does international credit apply to degree requirements? What grades or levels are required?	 Articulate any additional or different rules or requirements for evaluating, transcripting and applying credit earned from an institutions outside of your country. This may include the need for a third-party evaluation of credit, specific TOEFEL scores, waiver of requirements based on prior coursework in your country, or other specifics. Identify which evaluation agencies the institution will accept a transcript, keeping in mind where students may be transferring from, or to, and which agencies they accept.
Credit Life and Expiration: How long will credit be valid for? How does this number change for different disciplines?	 Place time limits on specific disciplines where content changes on a routine basis, such as computer science, biological or physical sciences, international policy, law, and other technologies. Reminder: Students should be evaluated on the catalog year they are following, including meeting all program and degree requirements. However, credit should be awarded based on content of the course at the time it was taken.
Accreditation Parameters: How will credits from both nationally and	 Disclose how credits will come in as transfer based on the accreditation of the sending institution, keeping in mind: The US Department of Education recognizes both national and regional accreditors.

The Joint Statement on the Awarding of Transfer Credit

regionally accredited

institutions be accepted? What about for programmaticaccreditation (e.g. AACSB)?	 suggests not using regional vs. national accreditation as a basis for determining transfer credit. Most regional accreditors do not require transfer credit to be from another regional accreditor. Some specialized accreditations do require regional accreditation. Post-baccalaureate work may depend on completion of a degree from a regionally-accredited institution. Coursework from nationally-accredited institutions may meet many academic rigor and same content requirements as regional institutions.
Applicability and Awarding Credit: What is the difference between credit applicability and transfer credit?	 Based on policy, courses may transfer to an institution in a multitude of ways, but if and how they apply towards degree and graduation requirements is determined by the degree a student chooses, grades received in the class, number of credits received, and content of the course, among others.

Evaluating and Transcripting Credit

Policy Topic	Policy Content
Transcripting Credit: How is coursework from other institutions, or via prior learning, posted to the transcript?	 Identify a procedure for posting credit, making sure to discuss with financial aid and military-related services the pros and cons of the procedure. Document how external credit is posted to the transcript: Is all credit posted or only credit needed for the chosen degree at the time of evaluation? Will transfer credit be removed from a transcript? Are grades posted, or how is the credit annotated? Explain the procedure to students when providing a transcript evaluation. Link this process to both the change-of-major process and the student's re-evaluation-of-creditappeal process. Reminder: This procedure may be dependent on your institution's student information system (SIS) or how your financial aid system is set up.
Internal process for evaluating coursework: Who is responsible, and what is the procedure, for evaluating transfer coursework?	 Best Practice: Course equivalencies should be made by discipline faculty or designee. Establish a minimum percentage to be used when matching content. Best Practice: Recommend using 70% matching of content to determine equivalency, unless otherwise needed for specific accreditation, discipline content, or other written requirement. Identify which materials are used to determine equivalencies (e.g. syllabus to include learning outcomes, schedule of topics, textbooks, etc.) Students should be responsible for providing materials when requested, unless otherwise noted. Review course equivalencies on a routine basis, depending on resources. Best Practice: Review coursework every five years, unless discipline requires a more frequent review (e.g. computer science). Post equivalencies online or via a database for easy access and transparency. All equivalency reviews should be documented, and retained, for a period of time consistent with an institution's document retention schedule. If not transferable, maintain documentation indicating the reason. Validate accuracy of equivalencies by assessing student completion after transfer. Develop a training plan for new faculty or new-to-the-process faculty so that the process is consistent and respected.

Partnerships and Non-Traditional Transfer Credit

Policy Topic	Policy Content
Recognition of Other	Clearly explain what credit will be considered as PLA, and what credit
Forms of Prior	is considered transfer. Articulate sources of Prior Learning:
Learning: What methods does the institution offer for the evaluation of a student's prior learning from extra-institutional learning (e.g., learning from work, life, or military experiences)?	 Military Credit – ACE recommendations or internal review, to award credit for both military experience and occupation. Nationally-Recognized Exams – CLEP, AP, IB, DSST, Cambridge A-Levels, etc. Employment Based Training – Certifications, Apprentices, ACE CREDIT recommendations. Individualized Assessment – Portfolio, experiential learning. Or, communicate which types of prior learning will not apply. Identify how each type of credit (transfer, PLA, institutional) can be
What are the institution's specific policies regarding the awarding of credit for prior learning and how that credit may be applied to the student's degree plan? How will credit awarded from a sending institution for Prior Learning transfer to a receiving institution?	 applied to degree or graduation requirements, as necessary. Institutions are encouraged to use prior evaluations, with content and rigor validation, to transfer credit earned from prior experience opportunities. Credit should, when possible, be awarded for the same course. Or communicate that the credits awarded for prior learning from a sending institution will not transfer.
High School Credit: Does credit earned while in high school count as transfer credit? How does that credit transfer?	 Articulate the difference, if applicable, between credit earned in high school, and credit earned as a high school student enrolled at the institution. Establish parameters, with local schools, in which credit earned while in high school is posted to a transcript as transfer credit or institutional credit. Communicate how these credits will transfer, and, if applicable, develop articulation agreements to verify transfer. Develop a policy which allows HS credit earned and transferred to be awarded for coursework, limiting applicability if necessary. Limitations might be based on length of time since graduation, grades in course, or into specific majors or courses. Or communicate that these credits will not transfer.
Homeschooled Credit: Does credit earned while homeschooled	 Endorse specific methods of evaluating homeschooled credit (e.g. GED, locally approved curriculums and exams, etc.) Communicate how these credits will transfer, and, if applicable,

count as transfer develop articulation agreements to verify transfer. credit? Develop a policy which allows homeschooled credit earned and transferred to be awarded for coursework, limiting applicability if necessary. Limitations might be based on length of time since graduation, grades in course, or into specific majors or courses. Or, communicate that these credits will not transfer. Articulation Clearly identify any institutions for which official Articulation Agreements exist, and for what programs, majors and/or courses. Best **Agreements:** What are Practice: Effective articulation agreements indicate how many credits articulation agreements, and why will transfer, how those credits will satisfy major or institutional requirements, and the process by which those credits will be applied. do they exist? Best Practice: Make agreements easily accessible by posting to websites and building agreements into degree audit systems. Link articulation agreements to a catalog year, when possible, since major requirements change. Validate content of agreements on a regular basis. Identify success measures and assessment opportunities for students following agreements. Explain any statewide or agency agreements. Include information on getting additional information about agreements. Develop multiple types of agreements, including course-to-course, program-to-program, degree-to-degree, outcome based, statewide agreements, etc.

Institutional and Student Rights and Responsibilities

Policy Topic	Policy Content
State or Federal Requirements/Regulat ions: What state and federal rules and laws dictate transfer policies and practices? Where can a student find this information?	 Provide a link to any state or accreditor rules and regulations regarding transfer credit; include specialized accreditation when appropriate. Summarize regulations within the policy. Reference regulations when appropriate within the policy. Explain how sharing transfer credit evaluations, GPA, or sending/receiving transcripts is covered, or not covered, by FERPA.
Student Appeal Processes: Institutions should establish a clearly-understood transfer-credit appeal process for students.	 Implement an appeal process for student appeals. Students should have the right to appeal a transfer equivalency to the appropriate person at an institution. A clear, direct, and specific appeal process outlined in the college catalog is most beneficial to the student and the institution. The best policy will contain a point of contact for the appeal, the documents needed for the appeal, and the timeline for a response. For example: Students are welcome to appeal transfer credit equivalencies to the Registrar's Office within 60 days from the date of evaluation. Students must appeal in writing and provide a course description and syllabi to support the nature of the appeal. The college will respond with a decision within 15 days. Provide flexibility, when appropriate, to encourage degree completion while maintaining institutional integrity.
Residency requirement for transfer: What are the institutional residency requirements, and how does transfer credit and prior learning apply to the policy? Is applicability different for different types of credit?	 Present a statement on how transfer credit applies towards residency, perhaps using the following recommended best practices: Transfer and Prior Learning Credit should not count towards residency requirements at the receiving institution, unless coursework is from courses cross-listed among institutions. Coursework transferred from within an institution, with the same Office of Postsecondary Education Identification (OPEID) number, should count towards residency. This includes both non-credit and credit coursework.
Transfer Post- Matriculation/Reverse Transfer: How many credits can be transferred once a student is taking	 Identify the number of credits (when not dictated by state law or articulation agreements) that a student can take post-matriculation and/or transfer back to the degree. Design a clear procedure for completing a request to enroll at another institution. Maintain a list of eligible transfer courses for students to take post-

classes? What factors are relevant when choosing where to take these credits? What is the process to obtain permission? What role does Reverse Transfer play in this process? How does Reverse Transfer work?	 Create guidelines that identify any limitations on types of credit, disciplines, or locations from which post-matriculated or reverse transfer can be earned.
Course Transferability: How do you plan to ensure that your courses will transfer?	 Explore ways to make your coursework transferable, using the same process by which you evaluate courses, including some of these recommendations: Encourage institutional syllabi to contain the same information you require for evaluation: course outcomes, textbooks, assignments, assessments, schedule of topics, hours, etc. Use transferability as the basis for approving new courses; determine if the course will transfer to primary recipients prior to inclusion in the catalog. Place courses at the appropriate academic level, based on content and rigor. Work with partner institutions to align course content when appropriate to ensure academic preparedness. Consider posting grades to a transcript for prior learning or transfer credit.
Expectations of Students: What should students know regarding what is expected of them during the transfer process?	 Disclose student responsibilities in the process, including, but not limited to: Sending transcripts. Providing course descriptions or syllabi as needed. Completing proper paperwork and meeting deadlines. Listing all previously-attended institutions on application. Adhering to rules and regulations. Meeting graduation requirements. Understanding that each institution handles articulation and transfer differently.

Conclusion

Transfer is complex. Students can easily be overloaded with information, which can lead to a lack of planning, frustration with the process, loss of credit, or not transferring at all. Institutions are under increasing pressure to ease the transfer process, to be accountable for their policies and practices, and to be more open and flexible with transfer credit while maintaining academic integrity..

It is unlikely that any institution will be able to implement or address all of the recommendations identified in this paper. The intent is not to have identical policies at every institution in the country; rather, it is to provide a working framework for a more comprehensive, inclusive policy that can be implemented at an individual institution.

In the end, the most important thing is that institutions and students work together to ensure student success. Our goal is seamless transfer to degree completion by removing barriers and empowering student completion.

Appendix A - Transfer Student Bill of Rights

As members of the Higher Education Community, representatives of institutional administration, and advocates for the equitable and ethical treatment of all students, the American Association of Collegiate Registrars and Admissions Officers (AACRAO) hereby recommends and supports that all transfer students:

- Have the right to clear, complete and accessible information about how previously-earned academic credit will be accepted and applied to degree requirements in their select program of study.
- Enjoy the maximization of available credit in transfer by their institution in support of reduced cost to students as well as the most efficient time to degree completion.
- Are entitled to educational costs that do not differ based upon their transfer status.
- Be considered for available financial aid and scholarships.
- Have access to orientation, student life activities, and, when possible, campus housing.
- Retain credits previously earned through experiential learning, nationally-recognized exams, and military training and from international educational programs as applicable to their degree requirements and in accordance with institutional policies, accreditation requirements and/or legal statue.
- Be eligible for sport and athletic programs as outlined by the NCAA, NAIA or other governing organizations.
- Are direct beneficiaries of specific academic advising, academic success programs, tutoring programs, career services, and, when possible, pre-transfer advising.
- Enter into a culture of acceptance and understanding, where institutional faculty and staff are familiar with a variety of subpopulations of transfer students and their needs and challenges.
- Be admissible to all academic program when possible; non-admissible programs should be clearly identified. Likewise, pre-requisite and additional admission requirements should be documented and made available.
- Have access to the same class schedule and register for classes at the same time as the native student body, including enrollment in in internships and study abroad options.
- Are ensured equal access to disability support, health and mental health services, and other such programs with the main objective to assure a safe and healthy college experience.

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