Conference Sessions

U.S. Department Of Education

Federal Update & Town Hall
Presenter: Jeff Baker, Federal Student Aid
We are delighted to once again have Jeff Baker join us for our closing session on Tuesday Morning. This year the Federal Update will include a Town Hall style question & Answer session – This is your chance to hear the latest updates and breaking news straight from the U.S. Dept. of Education.

Verification 101
Presenter: Virginia Hagins, FSA Training Officer
This session will cover the fundamentals and philosophy of the verification process in addition to an in-depth analysis of the 2012-13 rules and requirements. This will also be a great opportunity to ask a federal trainer questions about the verification process

New Rules for Verification 13-14 and beyond
Presenter: Virginia Hagins, FSA Training Officer
This session will cover the 2013-2014 Verification requirements, IRS Data Retrieval and updates on IRS related issues.

SAP 101 - A Whole New World - Rules & Further guidance on an old topic
Presenter: Robert Vallas, FSA Training Officer
This session will define the components that make up a school's Satisfactory Academic Progress policy, including repeated coursework, maximum timeframe, financial aid warning, financial aid probation, and academic plans. It will also describe a school's options in setting up their SAP, and the mechanisms that will trigger different SAP statuses for students. Checking SAP for clock hour programs will be included.

U.S. Department Of Education

Transitioning into a Clock Hour Program Environment - Part I
Presenter: Bruce Honer, FSA Training Officer
This is part one of a two part series. In addition to basic clock hour concepts, this session will cover payment periods, TIV program calculations, SAP (including the new pace examples), R2T4 highlights and other considerations. This is a great session for those who are new to clock hour programs and would like to ask a federal trainer questions on the issue.

Transitioning into a Clock Hour Program Environment - Part II
Presenter: Bruce Honer, FSA Training Officer
This session is a continuation from session of the series. In addition to basic clock hour concepts, this session will cover payment periods, TIV program calculations, SAP (including the new pace examples), R2T4 highlights and other considerations. This is a great session for those who are new to clock hour programs and would like to ask a federal trainer questions on the issue.

Return of Title IV Funds – Basic Training For FAAs New To R2T4
Presenter: Bruce Honer, FSA Training Officer
This session will cover the fundamentals of the Return to Title IV (R2T4) process. This is a high overview step by step approach to understanding the philosophy and "how to" approach of administering R2T4. This will be a great session for those administrators who are new to the process.

Return of Title IV Funds – Programs of Study Taught in Modules
Presenter: Bruce Honer, FSA Training Officer
This session will cover the unique rules exclusive to modular programs when administering R2T4. Examples will be provided on determining when a student is considered a withdrawal from a modular program and how that affects the R2T4 administration process.

Conference Sessions

U.S. Department Of Education

FAFSA Application & Processing Update
Presenter: Virginia Hagins, FSA Training Officer
The session will provide an overview of the 2013-14 Free Application for Federal Student Aid (FAFSA) and an update of related application processing changes.

Working with the Eligible Non-Citizen - Citizenship Documentation and Beyond
Presenter: Virginia Hagins, FSA Training Officer
This session will cover the citizenship and non-citizen eligibility statuses, confirming eligibility, DHS issues and resolution options.

Pell Grant Program Update
Presenter: Robert Vallas, FSA Training Officer
This session will discuss recent changes to the Pell Grant Program and focuses on the new Pell Grant Lifetime Eligibility limits.

Loan Servicing Update
Presenter: TBD
The servicing landscape has changed dramatically and this session will assist schools in navigating a multiple servicer environment with a focus on understanding the various entities and their roles; our Not for Profit (NFP) servicers; and our strategy going forward as we transition the current federal portfolio

Direct Loans/COD Processing Update – Hot Topics
Presenter: Chuck Hirman, Federal Loan Support Team
Confused about what to do with loans having incorrect rebates? Muddled about how other recent regulatory changes impact your DL processing? Unsure of how to process PLUS loans and credit checks? Mystified about what the COD Newsbox is and what it can do for you? The answers to these questions as well as a sneak preview of upcoming COD/DL processing changes will be covered in this session.

Conference Sessions

Default Prevention & Financial Literacy

3 year CDR - Managing, Understanding & Utilizing the Challenge & Appeal process
Presenter :Tommy Sims, Sr. Default Management Program Advisor, ECMC
Join proven Default Management expert, Tommy Sims as he explores the "new" 3-year Cohort Default Rate (CDR) and the effects of the rates after 3 consecutive years, with emphasis placed on the monitoring of school's student loan portfolios and CDRs. You will be guided through the calculation, challenge, and appeal processes (including a special focus on loan servicing appeals)

Developing Effective Default Management Plans
Presenter: Dennis Zanchi, Sr. Trainer –Outreach & Financial Literacy, ECMC
Ever wonder who the students are that end up defaulting on their student loans? Want to learn more about them so you can improve future borrower success? Need to write up your school's default prevention plan and don't know where to start? This session will review the Department of Educations sample default management plan. This information is used for developing more effective default prevention efforts on campus, both front-end and back-end. Join us for this informative session where you'll learn how to improve student success by creating or enhancing your schools default management plan

Federal Loan Servicer Panel Discussion
Presenters: Jon Potter, NelNet; Bob Leary, SLMA; Brett Lindquist, Great Lakes ; Will Shaffner, MOHELA(representing NFP's); Will Lindsey, Fed Loan Servicing
This Session will be your opportunity to hear from a panel of Federal Loan Servicers. The panel will be asked to answer questions raised frequently from the financial aid community. The panel format will provide you with a comparison of processes, products and services. At the end of the session the audience will be given additional time to ask questions of the servicers

Conference Sessions

Default Prevention & Financial Literacy

Developing & Implementing a Financial Literacy Program
Presenters: Dennis Zanchi, ECMC; Paul Mittlehammer, Inceptia, Colleen MacDonald, Simple Tuition; Lynne Garcia, Corinthian Colleges
The more a campus helps students understand debt and financial responsibility, the better the outcome for all parties involved. Find out about how to make a case for promoting financial literacy and where to look for partners on campus. Learn methods of delivery, student need identification, funding sources, evaluation techniques, and marketing ideas for launching a customized plan on your campus. Hear the details of current best practices of California schools. This session is sponsored by CLFE

Ins and Outs of Student Loan Repayment
Presenter: Joe Braxton, TG
While students receive information during loan counseling, they often have questions about how loan repayment works. This session describes the repayment options available to students. Topics include: taking inventory of your student loans; understanding the available repayment plans with an in-depth look at Income-Based Repayment, the advantages of each; reviewing the details of consolidation; and learning about deferment, forbearance, forgiveness, and cancellation options.

Financial Literacy from A Student Perspective
Presenters: Student Panel representing diverse segments
Developing student financial literacy plans has become more essential on many campuses. How do we know what our students truly need to know? How do they like the information delivered? What would make a program worthwhile from a student perspective? This session will feature a panel of students from all segments discussing this essential topic in order to help you succeed in the development of these initiatives

Conference Sessions

CSAC/State Issues

CSAC General Session & Town Hall
Presenters: Diana Fuentes-Michel, Executive Director, California Student Aid Commission; CSAC Leadership Team
This year has brought about significant changes to the Cal Grant Program. Diana Fuentes-Michel and key members of CSAC staff will conduct a general session on Monday morning discussing these changes and what we see on the horizon. The informative presentation will be followed by a Town Hall question & answer period.

Cal Grants 101a
Presenters: Bryan Dickason,Manager Program Administration; and Tae Kang, Manager Cal Grant Operations
This session is intended to give new Cal Grant program participating schools or staff members a basic overview of the Cal Grant program: application, awarding, notifications, school payments and reconciliation

Special Programs
Presenters: Gloria Falcon,Manager Program & Policy Development; Nati DeGroot, Interim Manager Policy Development
This session is intended to provide an overview of specialized programs administered by the California Student Aid Commission (CSAC) such as the California Chafee Foster Youth Program (Chafee), the California National Guard Education Assistance Award Program (CNG EAAP) and other smaller specialized programs. CSAC staff will also cover recent legislative changed to the Assumption Program of Loans for Education (APLE) and the State Nursing Assumption Program of Loans for Education (SNAPLE). Participants will leave this session with a better understanding of other CSAC financial aid resources available to students.

Conference Sessions

CSAC/State Issues

California Dream Act
Presenters: Bryan Dickason, Manager Program Administration; Catalina Mistler, Chief Program Administration & Services
Assembly Bills 540, 130, and 131, together they are the California Dream Act. A new student population will be receiving state student financial assistance. This session will outline the California Student Aid Commission's efforts in implementing a common Dream Act Application to supply student data to campuses

Program & Regulatory Issues

Program Reviews & Audits
Presenter: Linda Buchanan, Vice President Compliance, Corinthian Colleges
This session will give you an overview of the most common audit and program review findings, including approaches or solutions on how to avoid them at your institution. We will also discuss preparing for an audit at your campus

Tax Transcripts and Verification Requirements
Presenter: Cheryl Foster-Hunt, Regional Training Executive, USAF
Take an in-depth look at the format of a Tax Return Transcript and other related IRS documents used in verifying FAFSA information. You will leave this session with tools to help you train office staff in processing Tax Return Transcripts and completing verification.

Conference Sessions

Program & Regulatory Issues

Advanced PJ
Presenter: Maureen McRae, Director of Financial Aid Occidental College
Financial aid administrators have given the authority through Professional Judgment to make case by case decisions regarding family circumstances. However many aid professionals hesitate to use professional judgment for fear that they may not do the right thing, their decision may not be upheld within the office, or that they're uncertain of the rules. Join this session to talk about the best practices in professional judgment and tackle some more complicated family circumstances such as bankruptcy, students supporting parents, cost of attendance adjustments and blended families. You'll leave this session confident to take on those complicated cases and make yourself a star in the office

Navigating NCAA Division II Regulations in Financial Aid
Mollie Bohrer, Financial Aid Counselor Athletics & NCAA Compliance, Cal Baptist
In this session we will review regulations and best practices for financial aid administrators working with NCAA Division II athletes. Some of the discussion will feature the period of the award, averaging, awarding initial offers, distinguishing between countable and exempt aid, and individual limits. Whether your school is a long standing, established NCAA Division II member or you're just beginning candidacy this is a great opportunity to share and brush up on tips when awarding athletes

Conference Sessions

Program & Regulatory Issues

The Integrated Postsecondary Education Data System (IPEDS): What You Need To Know
Presenter: Vickie Linne-Robinson, Director of Financial Aid – Corinthian Colleges, Inc.
This session will provide an overview of IPEDS and upcoming changes to the data collection. In addition, there will be a discussion of the increasing visibility of IPEDS data and why it is important for institutional administrators to be informed about how IPEDS data are used in the public domain by both governmental and non-governmental entities

Understanding enrollment reporting and useful NSLDS reports
Presenter: Ruby Nieto, Sr. Financial Literacy Director, ECMC; Robert Haushalter, National Student Loan Clearinghouse
Do you know the possible side effects of erroneous or non-reported enrollment changes? All schools are required to follow regulatory guidance that includes reporting timely and accurate enrollment information to the U.S. Department of Education. Enrollment reporting may not be one of your responsibilities on campus, but understanding the process may reduce its impact on your school's cohort default rate. Learn about the role of the Clearinghouse in this process. We will also explore how the various NSLDS reports may assist you in your default prevention efforts. Come join us to learn more about reducing default risk and minimizing technical defaults.

Conference Sessions

Program & Regulatory Issues

Perkins 101-How Does That Money Get Back Into The Revolving Fund?
Presenter: Laurelle Swan, VP Sales West Coast, ECSI
You've awarded the Perkins funds and your students are happy. What happens next? This session will explore at a high level the collections side of a Perkins Loan program, including the perils of moving from in-school to grace, due diligence, and some of those arcane regulations your colleagues struggle with. We will discuss issues such as commonly-used division of duties between Financial Aid and Student Accounts, how to choose a billing servicer, and other related topics

The Dastardly 1098T Form – A Quick Insight from the Bursar Side of the House
Presenter: Laurelle Swan,VP Sales, West Coast, ECSI
The 1098 what? 1098E? 1099? What exactly are "qualified educational expenses" anyway? Oh dear – come to this session to avoid the feeling of being Alice having fallen down the rabbit hole. This session will review the 1098T form and best practices at a high level to enable you to answer those commonly-asked questions you get between January and April of every year..

Conference Sessions

Military Education Benefit Funding

Working with the Military Student
Presenter: TBD *Colleges and universities are seeing an increase in their veteran population, it's important for financial aid administrators to understand benefits to help them achieve their educational goals. In this session you will learn about the primary benefit programs available to your military students. We will also have a discussion about how your school can provide services and support to your military population.*

NASFAA

Standardized Award Letters, Shopping Sheets, & Trends in Consumer Disclosure
Presenter: Justin Draeger, NASFAA President
The Shopping Sheet was released by the Department of Education and the Consumer Financial Protection Bureau in July 2012 for voluntary use by schools for the 2013-2014 academic year. In addition, other federal agencies and Congressional proposals seek to increase transparency in college costs. NASFAA created the Award Notification & Consumer Task Force to make recommendations about the things that should be included when providing information to students about financial aid. NASFAA President Justin Draeger will present on the various consumer disclosure proposals from the Administration and Congress and provide NASFAA's view on these proposals will work (or won't) for student

Conference Sessions

NASFAA

NASFAA Reauthorization Listening Sessions
Presenters: Pat Hurley, Associate Dean Student Services, Glendale CC;Kay Soltis, Director of FA Pacific Lutheran University, Ron Day, NASFAA Chair
Members of the NASFAA's Reauthorization Task Force will conduct a listening session to gather information from the CASFAA Membership about topics that should be addressed in the next reauthorization of the Higher Education Act (HEA) scheduled for 2014. The Task Force will use the feedback from this and similar listening sessions conducted in 2012 to formulate recommendations for HEA reauthorization that will be presented in spring 2013 to NASFAA's Board of Directors for adoption to guide advocacy efforts when Congress takes up reauthorization

Using NASFAA Tools to Assess Your Financial Aid Operations
Presenter: David Tolman, NASFAA Training Specialist
NASFAA's financial aid management tools can help you evaluate and improve your school's administration of Title IV and other student aid programs. The session will highlight best practices and practical ways these user friendly tools can assist you to enhance daily aid office operations, collaborate with others on campus, and stay in compliance with federal regulations. Learn more about these tools and hear how to use them on your campus.

Conference Sessions

NASFAA

Satisfactory Academic Progress: Best Practices
Presenter: David Tolman, NASFAA Training Specialist
Assessment of a student's progression towards the completion of his or her academic program is a fundamental concept of Title IV. The changes made to the satisfactory academic progress regulations provided consistency in the assessment of satisfactory academic progress across the country. How has the blending of regulations, goals, and expectations of federal, state, and institution requirements worked? How can consumer information assist in notifying student populations of academic expectations? This session will provide a brief review of the regulations, discuss the impact of changes, and share best practices at an institutional level

How to Research a Question
Presenter: David Tolman, NASFAA Training Specialist
How do you find answers to questions about the Title IV programs? As a financial aid administrator, you are constantly fielding questions from students, their families, staff, other departments, and senior administration. Although many questions can be satisfied with a simple answer, some are more complex and require research. This session will identify the various statutory, regulatory, and sub regulatory resources available. It also will provide tips for locating and using these types of resources

Conference Sessions

Staff Training & Development

Welcome To CASFAA – A Welcome Session for Newcomers or Old Timers

Presenters: CASFAA Executive Council

Are you new to CASFAA or perhaps you've been around a while but just want to have a better understanding of what we do and meet who has been elected to leadership positions. Have you always wanted to volunteer or run for an executive council office but just don't know where to start? This is the session that will answer all of these questions. Led by your CASFAA President and members of the Executive Council, you can look forward to walking away with a true understanding of what CASFAA can bring to your professional life and how you can get further involved.

Creating a Training Program For Your Office - For Schools of all Different shapes & Sizes

Presenter: Ron Day, NASFAA Chair; Kay Soltis, WASFAA Past President-FA Director, Pacific Lutheran University

Training is crucially important to the Financial Aid Office staff. Staff must follow complex regulations at the federal, state and institutional level. Keeping staff informed of new rules, or even old ones, ensures compliance. Few audit findings, successful operations and excellent customer service. In this session, you will hear from two colleagues at very different types of schools and learn what they do on their campuses to train their staff. Various approaches will be addressed, from staff training retreats to testing your staff on financial aid concepts and terms

Conference Sessions

Staff Training & Development

If Only I Had Known….
Presenters: Diana Minor, Cal Poly Pomona; Sherrie Padilla, Antelope Valley College; Youlanda Copeland-Morgan, Associate Vice Chancellor Enrollment Services, UCLA
As we progress on our journey from financial aid staff to administrators and beyond, there are many things that we learn the hard way; things we wish someone had warned or advised us about much earlier in our career. Today, a panel of colleagues will be sharing their tricks to simplify tedious processes, deal with employee, student and upper management issues, shortcuts in financial aid administration, and other "tricks of the trade" that they have learned along the way in their rise to veteran status. Don't be the one saying, "If Only I Had Known."

Effective Communication: It's Not Always Easy
Presenter: Kris Shear, Santa Rosa Community College
Effective communication can seem easy for those of us that do it all day long-as easy as making a peanut butter and jelly sandwich, but often it is not easy, nor is it simple. With larger workloads, higher stress levels, and regulatory changes coming each year, effective communication is more important than ever, but often we devote even less energy, thought, and purpose toward it. This session will provide a brush up with some pointers and some candid discussion, as well as some humor!

Conference Sessions

Leadership & Student Aid Management

Maximizing Student Awards: A Dialog About Award Displacement
Presenters: Natasha Kobrinsky, Director Student Financial Services, Pepperdine Graduate School; Cynthia Nyra-Simon, Family Foundation; Gregorio Alcantar, Financial Aid Counselor, CSUN; Bob Patterson, Director of Outreach, Zinch
Outside scholarship providers and colleges come together to discuss ways that colleges and scholarship providers can work together to facilitate access, retention and graduation of students. Some of the issues that will be addressed include students getting caught in the gap between institutional methodology (IM) and federal methodology (FM), EFC Calculations, the displacement of scholarship funds by instructional outside scholarship policies, using scholarships as a recruitment told for student access, and the need for clarity concerning out-of-pocket costs, gapping and types of aid in financial aid award letters.

Graduate/Professional Best Practices
Presenters: Jack Edwards, Director of FA – Stanford Graduate; Jaime Shrode, UC Berkeley Haas School of Business; DeWayne Barnes, Associate Director FA Stanford Law
This session will provide an opportunity for graduate and professional financial aid administrators to discuss a variety of topics and issues that affect graduate and professional students. This session will give folks an opportunity to talk about best practices that some institutions are implementing as well as guidance on how to update your current policies and procedures and provide the best resources to graduate and professional students.

Conference Sessions

Leadership & Student Aid Management

Collaborating With The Development Office
Presenters: Jack Edwards, Director of FA Stanford Grad; Kay Soltis, WAFAA Past President -Director of FA Pacific Lutheran University
Come to a panel discussion about coordinating and collaborating with your Development office to maximize the limited endowed and restricted financial aid dollars. Share ideas on how these funds are awarded and coordinate with other forms of financial aid - is it stacked on top or part of other institutional funds. Tell us what has worked at your institution to get the most bang for your buck and to encourage future giving.

College Completion Agenda- Latino Edition
Presenter: The College Board
Last fall, the College Board released its College Completion Agenda: Latino Edition 2011. This compendium that includes a Progress Report, State Policy Guide, A Research and Context Brief and an interactive website aimed at providing the best data and policies for increasing college completion rates among this important demographic. The Latino Edition is based on the 10 recommendations issued in 2008 by the Commission on Access, Admissions and Success in Higher Education. State legislators, policymakers and educators play a large part in advancing each recommendation. Participants will explore the highlights of the 10 recommendations and will review Latino progress for each indicator. The session will also include some best practices and resources when working with undocumented students.

Conference Sessions

Leadership & Student Aid Management

How to Leverage Social Media
Presenter: Jodi L. Miller, NelNet Social Media Strategist
Come learn about the communication preferences of today's college student. We will discuss how to successfully communicate with your students, along with how to do useful searches. We will take a closer look at Facebook, Twitter, and YouTube, with an eye toward how aid offices can use these forums to connect with and counsel students. Learn about ways to reach out to your existing students and also potential students which can help with your enrollment. A case study will be provided as a template to provide more insight.

Student Lending

Private vs. Plus Loan Programs –
Presented by CLFE – Julie Rehder, ELM Resources; Kim Thomas, 1st Marblehead; Sharee Brend, Wells Fargo
This year several changes went into effect within the Federal Direct Loan Program; most notably, parents and graduate students will be responsible for paying the full 4% origination fee on new PLUS loans. Now, more than ever, it is important for students and families to thoroughly review all of their education funding options. Listen in as representatives from national lenders discuss facts versus myths between a private student loan and a PLUS loan. The session will cover an overview of responsible borrowing, a comparison of the two programs, and what you can do to help educate your students and families

Conference Sessions

Student Lending

Loans For International Students
Presenter: Daniel Roddick, Director of FA-UC Berkeley Haas School of Business
As colleges and universities recruit larger numbers of international students, the need for alternative funding has increased at the same time that changes to the loan marketplace has made it increasingly difficult for these students to secure alternative loans without a US Co-signer. Join this panel to discuss how they have addressed the challenges with creative alternatives that included negotiating a risk-share agreement between the school and lender and developing an institutional loan. This session will explore the hurdles in helping international students secure funding for their education with limited access to other resources

The value of Private Lender Lists and Keeping it Simple
Presenters: Heather Garcia, Great Lakes;Kim Thomas, 1st Marblehead;Callie Woods, Discover Student Loans;Daniel Reed, Pt. Loma University;Denise Pena, Dominican University.
Looking for ways to keep your private lender list simple? This session is designed to help you understand the regulatory requirements and steps needed to create a neutral lender list.

Loans 101: A Means To Achieving Post- Secondary Education
Presenter: Gregorio Alcantar, CSU Northridge FA Counselor
This introductory session is intended for new financial aid administrators with little or no prior financial aid knowledge. You will learn the types of Federal Loans available to eligible students seeking a post-secondary education. In addition, the importance of helping students perceive federal loans as an investment rather than a debt burden will be discussed. Although federal loans are the focus of the session, private alternative loans will also be mentioned

Conference Sessions

Business Partner Solutions Seminars

7 Ways to Get Someone Else to Pay Down Student Loans - *Presented by Simple Tuition*
Presenter: Patrick Kandianis, Co-Founder, SimpleTuition
Discover how borrowers can qualify to have all or some of their student loan payments made by someone else. We'll help you understand these opportunities so you can help your students get out of debt faster. This session will discuss the Public Service Loan Forgiveness program, other loan repayment assistance programs, loan cancellation, and more

I Need Tax Transcripts NOW: Tips and Tricks of IRS Tax Transcript Retrieval –Presented by Veri-Tax
Prsenter: Maria Kirgan, Senior Director of Customer Happiness & Product Management
Discover the various methods of tax transcript retrieval and learn how to avoid common mistakes and overcome the challenges your financial aid department may encounter. Learn tips and tricks from Veri-Tax, the company who pioneered electronic IRS tax transcript delivery in 1999.

Building a Successful Default Prevention Plan- Presented by USA Funds
Presenter: Dianne Fulmer, Account Executive
A solid commitment to financial literacy and default prevention across your institution is key to promoting successful student loan repayment. Although default prevention plans will vary according to institutional goals, financial literacy education, regular contact with borrowers and support for at-risk students are among the best practices for successful default prevention. During this session, you'll review the benefits of implementing a financial literacy education

Conference Sessions

Business Partner Solutions Seminars

Plus additional Business Solutions Seminars Presented by:

CardFlex, Inc

CMD Outsourcing Solutions

Discover Student Loans

Student Loans

ECMC

ELM Resources

First Marblehead Corporation

Great Lakes

Inceptia

National Student Loan Clearinghouse

ProEd Solutions

Texas Guaranted Student Loan Corporation

The College Board