Does Your Loan Counseling Need a Face Lift?

**Session Description:** This session points to real statistics to address the challenges of loan counseling and the importance of an engaging delivery method in order to change behaviors. Why incorporating relevant reinforcement of loan counseling throughout enrollment is a must will be dissected. Sampling of information to be shared includes Income-Based Repayment enrollment number to date, retention/default correlation, positive effects on student borrowing habits, and synergy of crossing multiple departments/campuses. Common obstacles and challenges faced will be discussed such as organizational challenges, i.e. executive management and administrator support, and more importantly tried and true best practices of how to overcome them.

**Presenter(s):** Donna Miller - Director of Business Development - iGrad

Understanding Credit

**Session Description:** This presentation is a primer on all things credit, leveraging the content in the Understanding Credit Handbook available at salliemae.com/FICO or salliemae.com/understanding credit. It is geared towards borrowers new to credit with a focus on student loans, auto loans and credit cards. It highlights credit basics, FICO Scores and their importance, credit reports, credit monitoring, credit knowledge and financial health tips.

**Presenter(s):** Pam Burns - Director of Business Development - Sallie Mae

Doryann Barnhardt – Associate Director of Financial Aid – Washington College

An Overview of Graduate Aid for the Undergraduate

**Session Description:** The session is intended to give Undergraduate Financial Aid Officers a good working knowledge of the varying expenses that students face in Graduate/Professional School. Discussion will include the difference in financial aid programs at the Graduate vs. Undergraduate level, as well as the expected and unexpected costs that students often face when pursuing graduate level education.

**Presenter(s):** Gisele Joachim - Dean of Enrollment Management, – Seton Hall University School of Law

Karen Sokol - Assistant Dean for Enrollment Services – Seton Hall University School of Law

Connecting SAP to Retention

**Session Description:** We all want to ensure students are successful and graduate, but we know some will struggle along the way. This session will discuss how Satisfactory Academic Progress (SAP) relates to retention. Learn the importance of a proactive communication strategy about SAP to ensure retention as you review SAP principles. Review of case studies showing how schools are actively communicating with students about SAP.

**Presenter(s):** Dan Dreves - Director of School Partnerships – Financial Aid TV
Demystifying R2T4 for Programs Offered in Modules
Session Description: Put your cards on the table, and hit the jackpot with R2T4 for programs offered in modules! Learn how to identify these programs. Review tips and best practices for navigating the complex regulations. Employ a handy visual process that helps to ensure that you will make the right call when reviewing students with enrollment changes in programs offered in modules.

Presenter(s): Laura A. Beer - Assistant Vice President - Federal Program Operations – University of Maryland - University College

Financial Aid Fraud
Session Description: Financial aid fraud schemes have plagued schools for years. They have been growing in complexity and notoriety in recent years. Hear how UMUC identifies and addresses the risks.

Presenter(s): Andrea Cipolla - Assistant Vice President of Financial Aid Systems – University of Maryland - University College

Understanding C Codes
Session Description: Do comment codes and C codes on the ISIR often overwhelm or confuse you as to the proper way to resolve each one? This session will help you sort them out and identify appropriate resolutions to the most common comment codes.

Presenter(s): Judy Schneider - Senior Consultant – Financial Aid Services, Inc.

Ethics - Yikes!
Session Description: Join Janet Dodson as you explore the options of working with your colleagues in Enrollment Management, Admissions, Advancement and the Business Office. This lively exercise will have you thinking AH-HA...

Presenter(s): Janet Dodson - Associate Director of Communications – Tuition Exchange

Would You Read Your Own Website?
Session Description: Your financial aid website provides essential information for students and parents, but content-heavy doesn’t have to be uninteresting and boring. Learn ways to improve the organization and clarity of your website. See examples of schools across the nation using videos, chat, and knowledge based searches to engage students in self-service. Check out how schools use income specific case studies to drive the message of affordability to prospective students. Small adjustments can make a huge impact on the effectiveness of your online presence.

Presenter(s): Dan Dreves - Director of School Partnerships – Financial Aid TV

FERPA and Beyond
Session Description: This session will provide a general overview of FERPA and application of FERPA to financial aid operations and records along with a detailed look at authentication and identity and access management (IAM) issues as part of a broader look at the privacy and data security issues commonly faced by educational institutions.

Presenter(s): Marjorie Arrington - Senior Advisor - Higher Education Services – Cooley, LLP
Matthew Johnson – Associate – Cooley, LLP
Breaking with Tradition: Best Practices for Working with Non-Traditional Students

Session Description: As the definition of a traditional college education has changed, so has the traditional student. This session is designed to assist financial aid administrators in serving non-traditional populations. It will explain who non-traditional students are and their unique challenges, as well as suggest some best practices for helping them through the financial aid process.

Presenter(s): Maria Morelli – Associate Director for Graduate Aid - Northeastern University
Ebony Carter – Director of Financial Aid, CPS; Associate Director of Financial Aid, SFS – Northeastern University

VA Benefits and Collaboration with Financial Aid

Session Description: It takes extra effort on the part of schools to ensure veterans and their dependents, who are receiving transferred VA benefits, are effectively using their earned education benefits in transitioning from the military to higher education.

Presenter(s): David Carlson - Coordinator of Student Veteran Services – The University of Vermont
Laurie Fay, Supervisor – The University of Vermont

How to Stay Trendy When You're Old and Worn Out!

Session Description: When you have been in financial aid for more than a little while and are faced with new processes and regulations on the horizon, reports out the wazoo, and requests for more money on a daily basis, how can you possibly stay motivated? With the continual shifting of priorities on an almost daily basis, how can you manage to stay strong as a leader for your office and play an active role in student success? Hear from two seasoned professionals on feeling good about your career choice while, at the same time, trying to keep your head above water.

Presenter(s): Barbara L. Miller - AVP - Financial Aid – Stevenson University
Odette Franceskino – Director of Financial Aid – Quinnipiac University School of Law

Creating a Professional Development Roadmap

Session Description: This session will provide a comprehensive professional development roadmap (Excel file) for immediate use for your office. The session will also examine the human development traits necessary for a career in financial aid administration.

Presenter(s): Michael J. Bennett - Associate Vice President of Financial Assistance Services – St. Petersburgh College

Who, What, When and Where is the Data? Clearinghouse and the Higher Education Community

Session Description: An overview of Clearinghouse services, processes and resources supporting your regulatory requirements and office efficiencies. These past few years has seen significant changes in data reporting impacting our members of over 3,600 institutions with 96% enrollment data nationwide. This session will outline the past, present and future plans. Participation is encouraged to provide input and thoughts on how
we can best service our community.

**Presenter(s):** Sue Ledwell - Director Higher Ed Development Northeast – National Student Clearinghouse

**The Work of Being an Ally**

**Session Description:** Fostering a supportive environment for all students is essential. We may have had some LGBTQ+ training and consider ourselves allies on our campus, however, there are responsibilities inherent in fully embracing that label. Presenters will help to fully define the term Ally in the LGBTQ+ context. Participants will discuss how to enhance their ally position and strategies for inclusion. Information will be provided on how LGBTQ+ issues may impact applications for, and granting of, aid.

**Susan M. Kolls - Associate Director - Student Account Services – Northeastern University**

**Presenter(s):**
Keith Curtis Dimalanta - Financial Aid Counselor - Student Financial Services Office - Northeastern University
Meredith Kuczik - Associate Director for Scholarships - Northeastern University

**Understanding the New Refund Regulations: The Importance of Student Choice**

**Session Description:** Presentation & Case Study: The new regulations released by the DOE will require most institutions working with a third-party vendor to significantly change their refund disbursement process to achieve compliance. Discover where your current provider falls and learn what requirements your school will face.

**Presenter(s):**
Laure Holbrook - Customer Relationship Manager - Nelnet Business Solutions
Andy Braciano – Technical Product Specialist - Nelnet Business Solutions
Paul Aries – Regional Vice President - Nelnet Business Solutions

**Today’s Aid Office - Challenging Conversations During Challenging Times**

**Session Description:** Many of today’s aid offices have merged Financial Aid and Student Accounts to better assist customers. Our offices work very hard to ensure processes & procedures are streamlined, technology is current, and communications are clear and concise. We do this to provide the highest level of customer service to our students and their families, and to make sure that the student’s experience, while at University, is as stress-free as possible. The conversations between aid counselors and their students during these challenging times have changed significantly over the years, and Aid Counselors are more often than not being used as sounding boards, not only for financial aid or billing questions but for personal issues – relating to family dynamics, personal relationships, major health issues, and death. A very typical question “How do I complete the FAFSA” or “When is my bill due” can escalate into an emotionally engaged conversation, which can be followed by frustration, anger and even sorrow. The purpose of this Presentation/Panel Discussion is to provide Tips on Communicating Bad News Effectively - with Comfort, and to discuss as a group what Aid Counselors are experiencing as well as the types of training and support being offered to help us have these challenging conversations.

**Presenter(s):** Donna Stevens, Supervisor – The University of Vermont
Laurie Fay, Supervisor – The University of Vermont
Alan Shashok, Associate Director of Compliance – The University of Vermont

Consumer Disclosure Requirements
Session Description:
Presenter(s): TBD

Verification
Session Description: This session will cover both policy and operational verification requirements for 2016-17 and verification plans for 2017-18.
Presenter(s): Zachary Goodwin - U.S. Department of Education

R2T4 and Clock-Hour Programs
Session Description: Return of Title IV (R2T4) funds is an important process on your campus. This session will focus on R2T4 provisions for students enrolled in clock-hour programs. Time during the session will be reserved for questions.
Presenter(s): Zachary Goodwin - U.S. Department of Education

Public Service Loan Forgiveness
Session Description: The Public Service Loan Forgiveness Program was enacted in 2007 to encourage individuals to enter and continue to work full-time in public service jobs. This session will include a program overview, eligibility requirements, available resources schools can use to spread awareness about the program, and information about how qualifying payments are tracked.
Presenter(s): Zachary Goodwin - U.S. Department of Education

How Modules Can Affect Title IV Programs
Session Description: Any course in a program that does not span the entire length of a payment period or a period of enrollment is considered to be a module. This session will explain how to administer Title IV aid when your standard term academic calendar contains modules. Modules may be included exclusively or in conjunction with full-term courses, year-round, or only during a summer term. All of these scenarios will be discussed.
NOTE: This session does NOT include a discussion of R2T4 with modules, or adjustments, disbursement options for modules, and differences among Title IV programs.
Presenter(s): Zachary Goodwin - U.S. Department of Education

Open Forum
Session Description: This question-and-answer session will give financial aid administrators an opportunity to ask questions and offer comments and suggestions to Department of Education staff members.
Presenter(s): Zachary Goodwin - U.S. Department of Education

Maintaining your Institutional Eligibility
Session Description: This session will cover what financial aid administrators need to know about maintaining their institution’s eligibility and will include information about recertification and other changes that
could impact an institution’s eligibility for Title IV aid. The session will cover what information an institution needs to prepare to submit different types of eligibility applications and what events trigger the need to submit an application. Presenters will explain when and how schools should report changes to maintain eligibility.

**Presenter(s): Zachary Goodwin - U.S. Department of Education**

**Professional Judgment – Nut and Bolts**

**Session Description:** Are you new to the PJ process? Do you want to build policies and procedures that provide some standardization for your PJ decision? This session will cover the basic concepts of what, when and why the Financial Aid Office should perform PJ calculations. Learn the regulations which guide PJ. Develop a standard process for students. Establish a protocol within your office to treat each PJ fairly and equitably.

**Presenter(s): Catherine Boscher-Murphy – Assistant Director/Compliance Officer - Montclair State University**

**Professional Judgment – Case Studies and an Exploration of Some Really Weird Cases**

**Session Description:** This session will explore some of the more unusual cases that have been presented for PJ review. We will also review some case studies to provide a basis for an interactive discussion about the process, policies and documentation. Bring your strangest case and be willing to have a discussion with your peers.

**Presenter(s): Catherine Boscher-Murphy – Assistant Director/Compliance Officer - Montclair State University**

**PMBOK: Another Acronym (But This One Can Really Help You!)**

**Session Description:** Whether you realize it or not, many financial aid professionals find themselves engulfed in projects on a regular basis. In a traditional sense, managing a project successfully hinges squarely on the ability to manage the “triple constraints” of time, cost, and quality. Sacrifice any of those, and “No Bueno!” While financial aid professionals may not be referred to as project managers, the reality is, much of your time is spent in that role. The Project Management Body of Knowledge (PMBOK) outlines over 47 processes, and ten knowledge areas with which you can strategically manage a project’s life cycle. Come learn tools and techniques to increase your ability to lead projects to a successful completion.

**Presenter(s): Rich Neilson - Education Loan Program Manager - New Hampshire Higher Education Loan Corporation**

**What’s New in the World of Veterans Benefits**

**Session Description:** The presentation discusses the three major pieces of legislation involving Veteran Affairs benefits since 9/11 and their effect on college and university financing which include: *The Post-9/11 Veterans Educational Assistance Act of 2008; The Post-9/11 Veterans Educational Improvements Act of 2010; The Veterans Access, Choice and Accountability Act of 2014.* Additionally, how these programs have been implemented, amended and altered since 2009 and their growing effect on colleges
nationwide. Also, the presentation discusses current legislation being considered in the House and Senate Veterans Affairs committees and concludes with ongoing challenges of the GI Bill and its future outlook.

**Presenter(s):** Dr. Richard Robitaille - Berkeley College

**Easy To REPAYE**

**Session Description:** Are you unsure whether REPAYE or PAYE is the best option? Join us for this interactive session on Income Driven Repayment (IDR) plans. We will discuss eligibility requirements, annual recertification, interest capitalization, and loan forgiveness and how easy it is for borrowers to find the best plan to REPAYE student loans!

Karen Sokol - Assistant Dean for Enrollment Services – Seton Hall

**Presenter(s):** University School of Law

Wynette Zuppardi – Director of Financial Services – Brown University

LinkedIn

**Session Description:** This session will review the site LinkedIn and offer tips and tricks for completing your profile, connecting with other professionals, and how to utilize the resources available.

**Presenter(s):** Dan Wray - Higher Education Access Partner - PHEAA

What Guidance Counselors want YOU to Know (What they need to know from you)

**Session Description:** HS Guidance Counselors are the link between students, families, and postsecondary education. Besides answering questions, scheduling SAT’s, helping students meet deadlines and sending transcripts, among a host of other functions, there’s a whole realm of interpersonal activities dealt with daily at the high school level. On the postsecondary side of the equation, Financial Aid staff have regulations, awards and re-awards, timelines, verification, and families who just want more, to name a few activities. Join us to explore and share ideas on how these two crazy worlds can assist each other in helping students transition with fewer questions and more clarity. Your feedback is welcome!

**Presenter(s):** Dan Wray - Higher Education Access Partner – PHEAA

Andre Maglione – Acting Director Client Services - NJHESAA

Higher Education Today – Is This a Healthy Business Model?

This session will examine the state of higher education in America from a business model approach. Using admissions trends and cost/management analysis, we will observe the direction that higher education is taking. Are we on the right path or headed for disaster? Are Law Schools the canary in the coal mine?

**Presenter(s):**

John Iacovelli –

Gisele Joachim – Dean of Enrollment Management – Seton Hall University School of Law