

*United Toward Access*  
2018 CASFAA Conference  
JW Marriott Desert Springs Resort & Spa  
Palm Desert, CA  
October 28-30, 2018

Program Draft  
(Sessions are subject to change)

**Pre-Conference**

**Saturday, October 27, 2018 – 9:00 AM – 5:00 PM**

Proprietary School Training – Desert Salons 9/10

**Saturday, October 27, 2018 – 1:00 PM – 5:00 PM**

WASFAA NASFAA U Training – Desert Salon 11  
Topics: Effective Communication Training & SAP Certification

Speakers: Ashley Munro, WASFAA President  
Anthony Marrone, WASFAA Training Committee Chair

**Sunday, October 28, 2018 – 8:00 AM – 11:45 AM (Times may vary)**

Community College Breakfast – Desert Salons 1-3

CSU Segmental Breakfast – Desert Salons 12/13

UC Segmental Breakfast – Desert Salon 14

Independent Schools Segmental Breakfast – Desert Salon 4

**Sunday, October 28, 2018 – 9:00 AM – 11:30**

Proprietary School Breakfast/Training – Desert Salons 9/10

**Sunday, October 28, 2018 – 11:00 AM - Noon**

Exhibit Hall Open – The Desert Ballroom Salon 7

**Sunday, October 28, 2018 – 11:45 AM – 12:45 PM**

Newcomers Welcome – JW Pavillion

## **Main Conference**

### **Sunday, October 28, 2018 – 1:00 PM – 2:15 PM**

**Opening Session/Keynote Welcome to *United Toward Access*, CASFAA Conference 2018 – Desert Salon 8**

**Keynote – Jeff Butler, Author, Millennial Expert**

### **Sunday, October 28, 2018 – 2:00 – 6:45 PM**

**Exhibit Hall Open – The Desert Ballroom, Salon 7**

### **Sunday, October 28, 2018 – 2:15 – 2:45 PM**

**Visit With Vendors – The Desert Ballroom, Salon 7**

### **Sunday, October 28, 2018 – 2:45 – 4:00 PM**

#### **Session A1 – Desert Salon 9/10 Overawards and Overpayments**

This session will focus on Title IV Overawards and Overpayments - the differences between the two, how they occur, how they can be avoided, and what administrative actions must take place. Additionally, this session will discuss related issues such as Interim Disbursements, Potential Overaward Process (POP), Overborrowing as an Overpayment, and much more.

Moderator: TBD

Speaker: Virginia Hagins, US Department of Education

#### **Session A2 – Desert Salon 5/6 Cal Grant Overview (for Beginners)**

This session will provide an overview of the Cal Grant program to include: general eligibility requirements, Cal Grant cycles (Entitlement vs. Competitive), Cal Grant types (A, B, C) and the Cal Grant award sequence (from application submission to awarding). Ideal for those just starting out with Cal Grants and those needing a refresher!

Moderator: TBD

Speakers: Adrian Slade, California Student Aid Commission  
Nai Saeteurn, California Student Aid Commission  
Yvonne Hollingsworth, California Student Aid Commission

#### **Session A3 – Desert Salon 4**

##### **Access Then and Now: Where We've Been and Where We're Going**

Whether you're a financial aid veteran or just entering the field, industry goals and philosophies can evolve over time. As such, it's just as important to know where you come from as it is to know where you're going. What sparked financial aid programs? What were our country's needs back then? Who pays and who benefits? How has our world changed and what are our current needs? What will our future needs be and what can you do to help get us there?.

Moderator: TBD  
Speakers: Patrick Register, University of California, Santa Cruz  
Ron Radney, University of California, Merced

### **Session A4 – Desert Salon 3**

#### **How Your School Can Benefit from a Peer Review**

You know that complying with federal financial aid regulations is an institution-wide responsibility, but it often falls solely on the shoulders of the financial aid office. Palo Alto University, California State University, East Bay and University of California, Davis, decided to address compliance head-on with a peer reviewer from the National Association of Student Financial Aid Administrators (NASFAA). A team of currently practicing financial aid administrators that brought extensive experience to the review that not only assisted with identifying compliance issues that result in reducing the risk for audit and program review findings, but also made recommendations increased operational efficiency, improve customer service, and provided support for change. Learn how the school prepared for the review and used the resulting report to make effective changes.

Moderator: TBD  
Speakers: Mandy Sponholtz, NASFAA  
Jessica Ayres, Palo Alto University  
Isabelle Mora, California State University, East Bay  
Bronwyn Garrison, University of California, Davis

### **Session A5 – Desert Salon 2**

#### **The Impact of the New Tax Code – Updated**

If you participated in or reviewed the recorded version of the March 15 CASFAA webinar on the new tax code, you received an early and speculative look at how the tax code may impact the financial aid landscape. This session will take another look at this critically important topic, with a specific look at guidance that the IRS and Department of Education have provided since that initial session. Feel free to participate in this session even if you missed the March 15 webinar – this session will not assume any prior knowledge of the tax code changes.

Moderator: TBD  
Speaker: Robert Weirnerman, Iron Bridge Resources

### **Session A6 – Desert Salon 1**

#### **R2T4**

Administering Return to Title IV (R2T4) rules, like public speaking, is among the most feared functions for a financial aid administrator. Lucky for us, Ashley Munro not only has it down, but she explains it in as plain English as it can get (for financial aid, that is). How awesome is that? We'll cover a review of the R2T4 regulations, determine the last day of attendance, define what constitutes a withdrawal for programs taught in modules, calculate earned and unearned aid, figure out how to assign returned aid to the appropriate program, review deadlines (often an audit finding), and discuss best practices for contacting students. If R2T4 tends to challenge and confound you, this session just might be the ticket!

Moderator: TBD  
Speaker: Ashley Munro, University of Alaska - Fairbanks

### **Session A7 – Desert Salon 11**

#### **Developing an Equity Mindset in a Regulated World**

Everyday we have an opportunity to make an impact on student success. Join this session to gain a basic understanding of equity in higher education and how it applies to student services. Discuss and learn ways to use equity in the financial aid office to help students navigate the process and obtain their aid. Learn how to develop an equity mindset to help students through the regulated world of financial aid.

Moderator: TBD

Speaker: Karen Hunter, De Anza College

### **Session A8 – Desert Salon 12**

#### **Back to the Future: Managing (Change) in the Financial Aid Office**

Financial Aid Offices are confronted with continual change - policies, regulations, requirements, technology, etc. Much of the time, the challenge is not the implementation of the policy or requirement or technology, but 'change' itself. This session will focus on an understanding of the effects of change in the workplace and tools that managers can use to minimize the challenges and maximize team morale while bringing about effective change.

Moderator: TBD

Speaker: Robin Bailey-Chen, Ed.D., California Institute of the Arts

### **Session A9 – Desert Salon 13**

#### **A Model for Understanding Student Need and Motivation in Offering Financial Education Programs on Campus**

College and university leaders largely agree that supporting the financial well-being of their students is important. Many begin by providing some financial education to their student population but industry wide there is no clear standard. Often, student turnout is low for these events. To be effective, administrators must identify whom they serve and understand that population before it can be determined what and how to deliver solutions. The purpose of this session is to provide administrators with an easy to digest model for understanding how students' needs and motivation may impact financial education offerings on campus.

Moderator: TBD

Speaker: Jacquie Carroll, Accesslex Institute

### **Session A10 – Desert Salon 14**

#### **Creating Outstanding Customer Care**

It's been said that you get what you give. If you want to get outstanding customers, you should give outstanding customer care. In this session, we'll talk about what quality service is and why it's important, define who your customers actually are and explore how to recognize when and where customer service opportunities take place. Join Mark to learn how to make quality customer service work for you!

Moderator: TBD

Speaker: Mark Gotsch, Professional Connect

### **Session A11 – Director's Suite II**

#### **Innovations in Financial Aid Management Solutions**

Innovating the way financial aid processes are presented is a challenge. How do you make gathering information easy and intuitive? How do you deliver the experience students expect? We'll look at new innovations including: universal sign in student portal, award letters and electronic forms as well as enhancements to current solutions that will help you boost enrollment, promote your school, enhance the student experience and save you time. Deliver the experience your students expect and gain the time you need to help them. This Business Solutions Session is sponsored by Inceptia.

Moderator: TBD  
Speaker: Pat Robles-Friebert, Inceptia

**Session A12 – Director's Suite IV  
Funding Generation Z and Millenials**

We will explore the expectations and mindset of your Generation Z and Millennial students and how their unique perspective impacts their buying choices. The session will also introduce you to CommonBond; how we align with the expectations and mindset of these two distinct generations, while offering an open forum for discussion on what factors are most important to them, and finally, if your preferred lender list is aligned with their expectations and mindset. This Business Solutions Session is sponsored by CommonBond.

Moderator: TBD  
Speaker: Jeff Recker, CommonBond

**Sunday, October 28, 2018 – 4:00 – 4:30 PM**

**Visit With Vendors – The Desert Ballroom, Salon 7**

**Sunday, October 28, 2018 – 4:30 – 5:30 PM**

**Session B1 – Desert Salon 9/10  
R2T4 - Programs Taught in Modules**

This session will focus on the Return of Title IV (R2T4) funds when a student withdraws from a program that is either taught within modules or has modules in the program.

Moderator: TBD  
Speaker: Virginia Hagins, US Department of Education

**Session B2 – Desert Salon 5/6  
Web Grants Nuts and Bolts**

This session will provide an overview of the WebGrants system and will cover topics ranging from how to create a WebGrants account to customizing a roster and everything in between. Attendees are encouraged to bring a laptop to this session. Various hands-on exercises will allow attendees to begin applying concepts into practice.

Moderator: TBD  
Speakers: Adrian Slade, California Student Aid Commission  
Nai Saeteurn, California Student Aid Commission  
Yvonne Hollingsworth, California Student Aid Commission

### **Session B3 – Desert Salon 4**

#### **Cybersecurity and Audits: Are You Ready?**

Did you know that the U.S. Department of Education (ED) has directed that compliance with cyber security requirements be included in FY18 audits? This session details your institution's cybersecurity responsibilities under the Gramm-Leach-Bliley Act, the Program Participation Agreement, and Student Aid Internet Gateway (SAIG) Enrollment Agreement. In addition, it examines the requirements of ED's recommended cybersecurity audit plan. Finally, we present best practices for preparing for the inclusion of cybersecurity in your yearly audit.

Moderator: TBD

Speaker: John Knost, Attain, LLC

### **Session B4 – Desert Salon 3**

#### **Tax Transcript Decoder**

FAFSA instructions direct applicants to obtain information from certain lines on IRS income tax returns, which differ based on whether the tax filer completed a Form 1040, 1040A or 1040EZ. For the most part, the instructions identify the relevant lines on the tax return by line number. These line item numbers do not appear on IRS tax transcripts. Join this session for a lively review of a very useful tool to help navigate your way through tax returns and transcripts.

Moderator: TBD

Speaker: Cheryl Hunt, NASFAA

### **Session B5 – Desert Salon 2**

#### **Mystified by the 1098-T? Focus on the Tax Credits Instead**

What do students do when they receive their IRS Form 1098-T at the end of January? They visit the financial aid office. This session will help financial aid officers understand the purpose of the 1098-T, and includes an overview of the student facing education related tax issues – taxable scholarships, the American Opportunity Tax Credit. Participants will leave with an understanding of why this form is so confusing for students, and how they can explain some of the basics of the form without being tax experts.

Moderator: TBD

Speaker: Robert Weirnerman, Iron Bridge Resources

### **Session B6 – Desert Salon 1**

#### **One Stop Student Service Centers: Providing Transactional and Transformative Experiences**

One Stop Centers are often developed with the focus on improving the experience for students as they conduct their business with the institution – a transactional focus. Over time, and with continued collaboration across the campus, they can have a significant impact on student success, providing a much more transformative experience for students. In this session, you'll learn how one institution has been evolving from the transactional to the transformative and the successes and challenges they met along the way.

Moderator: Mary Jane Towne-Denton, University of San Diego

Speakers: Sybilla Robison, University of San Diego  
Kellie Nehring, University of San Diego

**Session B7 – Desert Salon 11**  
**Trends in Higher Education**

This has been a volatile year for higher education. Sliding enrollments, an increasingly diverse student population, concerns about cost and access, and an emphasis on value and job placement have become increasingly important factors for colleges and universities. Come hear the latest statistical trends on these and other topics impacting higher education. You will be armed with information you can take back to your campus as you plan for future initiatives to attract, retain and fund students.

Moderator: TBD  
Speaker: Ciel Senechal, College Ave Student Loans

**Session B8 – Desert Salon 12**  
**Gap Financing Options**

Many students and families will be considering financing a portion of their college education with either a federal PLUS Loan or a private student loan, when scholarships and financial aid are not enough. This session highlights the differences between the PLUS and private student loan programs. The focus will be on encouraging responsible borrowing and what you can do to help educate your students and families on finding the right solution for their borrowing needs. By attending this session, you will gain a deeper understanding of the gap financing tools that students and families use and will be better equipped to counsel them on choosing the right financing solution for them.

Moderator: TBD  
Speakers: Thalassa Naylor, Sallie Mae

**Session B9 – Desert Salon 13**  
**Understanding Consumer Credit Reports and Scores**

Thinking about buying a new home or car? Unless you're independently wealthy, it's likely you'll need to finance those big-ticket items. We'll talk about why it's important to understand consumer credit reports and scores and how best to responsibly manage your credit.

Moderator: TBD  
Speakers: Rosemary Martinez-Kepford, ECMC  
Tom Bailey, ECMC

**Session B10 – Santa Rosa**  
**Direct Loan Update**

What's a CASFAA Conference without a Direct Loan Update? This session will include reconciliation and some upcoming COD changes. You won't want to miss this one!

Moderator: TBD  
Speaker: Chuck Hirman, US Department of Education

**Session B11 – Director's Suite II**  
**Using an Artificial Intelligent (AI) Chatbot to Efficiently Answer Student Questions** Come learn about how FATV's Chatbot "Penny" is helping California College & University students get financial aid answers. Powered by IBM's Watson Technology, Penny the Chatbot enables students to converse online with a customized artificial intelligent Chatbot at each school. Penny is always working to save staff time, reduce wait times, and improve student awareness and

comprehension of financial aid. Whether your staff answers student questions currently, uses LiveChat, or directs students to a call center, this session is a must-attend if you are looking to improve customer service and make it available 24/7/365. This Business Solutions Session is sponsored by Financial Aid TV.

Moderator: TBD  
Speakers: Dianne Fulmer, Financial Aid TV  
Nick Burrell, Financial Aid TV

### **Session B12 – Director’s Suite IV**

#### **Let ProVerify Do the Work!**

ProVerify uses custom Smart Rules to automatically perform verification, including electronically retrieving tax data directly from the IRS, thereby greatly reducing processing time and virtually eliminating errors. ProVerify is the perfect verification solution for large and small schools alike. The system does all the heavy lifting. Join us to hear how it works, how it can save you time and increase your accuracy. We'll also discuss additional services that ProEducation Solutions offers that can help improve your office's efficiency. This Business Solutions Session is sponsored by ProEducation Solutions.

Moderator: TBD  
Speaker: Teala Smith, ProEducation Solutions

### **Session B13 – Desert Salon 14**

#### **FWS, Student Employment & Technology**

This informative session will discuss University of Tennessee, Knoxville’s lessons learned following their FWS DOE Program Review Audit Findings – specifically, how you can avoid costly FWS and State/Federal Labor Law violations, penalties & fines; be more efficient managing your entire employment lifecycle; survive severe budget cuts; and bring considerable cost savings to your institutional bottom-line. This Business Solutions Session is sponsored by Next Gen Web Solutions.

Moderator: TBD  
Speaker: Taige Haines, Next Gen Web Solutions

### **Sunday, October 28, 2018 – 5:30 PM – 6:45 PM**

**Vendor Reception – The Desert Ballroom, Salon 7**  
**Dinner on your own**

### **Monday, October 29, 2018 – 8:00 AM – 10:00 AM**

#### **Breakfast and Morning General Session – – The Desert Ballroom, Salon 8**

Speakers: Ashley Coleman, 2018 WASFAA President, University of Alaska, Fairbanks  
Lupita Cortez Alcalá, Executive Director, California Student Aid Commission  
TBD

### **Monday, October 29, 2018 – 10:00 AM – Noon**

**Exhibit Hall Open – The Desert Ballroom, Salon 7**



## **Monday, October 29, 2018 – 10:15 – 11:30 AM**

### **Session C1 – Santa Rosa**

#### **Administering Adds, Drops and Withdrawal**

This session will address the administration of Title IV funds when a student adds or drops courses as well as student withdrawals (excluding R2T4 calculation). Discussion and case scenarios will be provided concerning Recalculation Rules and Census Dates in various situations. Also, this session will provide an in-depth explanation concerning student withdrawals on such topics as Schools Required to Take Attendance vs. Schools Not Required to Take Attendance, Official and Unofficial Withdrawals, Dates of Determination and Deadlines, and an overview of Enrollment Reporting Requirements.

Moderator: TBD

Speaker: Virginia Hagins, US Department of Education

### **Session C2 – Desert Salon 5/6**

#### **California Dream Act Application**

Which financial aid application should your students complete? The answer to this question and many more, can be obtained by attending this session. Attendees will receive an overview of the various components that make-up the California Dream Act application – AB 540, AB 2000 and SB 68. Other topics will include a review of common mistakes and a summary of the changes to the 2019-20 application.

Moderator: TBD

Speakers: Adrian Slade, California Student Aid Commission  
Nai Saeteurn, California Student Aid Commission  
Yvonne Hollingsworth, California Student Aid Commission

### **Session C3 – Desert Salon 4**

#### **Legs, Regs and You**

Wondering about the different between legislation and regulation? How are each made, governed, and enforced? How do they impact the day-to-day work you do as a financial aid administrator? This session will provide a “101” on development and implementation of legislation and regulation, and how it pertains to you and your role!

Moderator: TBD

Speaker: Megan McClean Coval, NASFAA

### **Session C4 – Desert Salon 3**

#### **EFC 101**

Understanding the Expected Family Contribution (EFC) not only is essential in determining a student's eligibility for need-based aid, but is critical in assisting students with professional judgment requests and helping you decide on what documentation to collect for verification. In this hands-on session, we'll go through a high-level overview of the EFC and Federal Methodology formulas and spend the greater part of the session doing an EFC hand calculation using case study information. You'll walk away with an understanding of when to use a 9-month vs. an alternate EFC and come to know the differences among the three federal methodology formulas.

Moderator: TBD  
Speaker: Cheryl Hunt, NASFAA

### **Session C5 – Desert Salon 2**

#### **Best Practices in the Administration of Scholarships**

This session will cover best practices in the administration of campus scholarship programs. Presenters will discuss federal and state regulations that impact scholarship management at public institutions in California and review ways to reduce institutional liability.

Recommendations for working with single scholarship selection committees and tips on processing a shared application form will be covered. Additional highlights include scholarships publicity, coordinating scholarships by nomination, and making recommendations on scholarship eligibility criteria.

Moderator: TBD  
Speakers: Desiree Marquez, Mt. San Antonio College  
Teresa Pham, Mt. San Antonio College

### **Session C6 – Desert Salon 1**

#### **Accessing Your Financial Aid Career Path**

Ready to take the next step in your career? Not sure what your next step is? Feel like you're wandering around looking for that golden piece of advice that'll open the next door? What are your future bosses and employers looking for in their leadership teams? Join in this interactive panel session with experienced colleagues who have worked in a diverse set of institutions—two-year, four-year, graduate, public and private—who can provide guidance on building your Financial Aid career path. You'll come away with a game plan about what you want to do next!

Moderator: TBD  
Speakers: Scott Cline, California College of the Arts  
Pat Hurley, Glendale Community College, Retired  
Helen Faith, Lane Community College  
Ashley Munro, University of Alaska - Fairbanks

### **Session C7 – Director's Suite I**

#### **Diversity, Equity and Inclusion on the American Campus**

Diversity, Equity and Inclusion - perhaps you've heard of it; perhaps not. Regardless, it's a concept that is growing on college campuses nationwide. What is it? Why is it important? What issues does it address and in what areas of campus life? Who does it target and what do the efforts look like? How can your college and community benefit? Join this session to find out what the University of California is doing to make for a welcoming campus culture.

Moderator: Craig Kusunoki, University of California, Los Angeles, School of Nursing  
Speaker: Mariam Lam, University of California, Riverside

### **Session C8 – Director's Suite III**

#### **Washington Update for Graduate and Professional Schools**

Graduate and Professional Schools face many of their own unique challenges. With the relatively recent changes in the administration and the new Secretary of Education, what does

the future hold for GP schools? Join this industry veteran as she shares her observations, analysis and views. This session is sponsored by the CASFAA Grad/Professional Committee.

Moderator: TBD

Speaker: Vicki Shipley, National Council of Higher Education Resources

### **Session C9 – Director’s Suite VI**

#### **Admissions and Financial Aid - Creating a Strong Marriage**

We all know that the college admissions and financial aid process is complicated. Imagine what it’s like for students and parents who are unfamiliar with the process and find themselves getting bounced around from one department to another. Having an integrated office with cross-trained staff creates a strong partnership that increases efficiency and saves students time. Join this discussion to hear how this complicated couple can build a strong marriage.

Moderator: TBD

Speakers: Jon Horinek, College of Marin  
Emy Bagtas-Carmona, College of Marin

### **Session C10 – Director’s Suite VII**

#### **SULA Update**

Now that SULA has been around for a while, some students may be tagged for loss of subsidized eligibility, further complicating their lives (think transfer students). Can you explain it to them? How do you assist them if they think there's an error? What are the ED procedures for getting corrections made? Join this session for a detailed discussion on this and other SULA-related issues. Fortunately for us, we have Chuck Hirman to help us keep it all straight!

Moderator: TBD

Speaker: Chuck Hirman, US Department of Education

### **Session C11 – Director’s Suite II**

#### **Ten Things You Might Not Know About NASFAA**

So, you’ve joined NASFAA, but are you really maximizing your membership? Attend this session for an interactive look at 10 things you might not know are included with your NASFAA membership, including ways to get involved with NASFAA, keeping your operations in compliance with Title IV rules, and furthering your professional goals. This Business Solutions Session is sponsored by NASFAA.

Moderator: TBD

Speaker: Mandy Sponholtz, NASFAA

### **Session C12 – Director’s Suite IV**

#### **Solutions to Help Your “Credit Invisible” Students Get Funding Without a Co-Signer**

Today’s \$12 billion private student loan market is focused on co-signers, rather than students. Students continue to rely on private loans to help cover gap-financing, but in many cases are having a difficult time finding a qualified co-signer. In this session, you will learn about programs/products developed by Goal Structured Solutions, Inc. (GS2) and MPower Financing that domestic and international students can apply for without a co-signer. This Business Solutions Session is sponsored by Goal Structured Solutions.

Moderator: TBD  
Speakers: Dennis Wentworth, Goal Structured Solutions, Inc. (GS2)  
Carmen Kienow, MPower Financing

**Monday, October 29, 2018 – 11:30 – 12:00**

**Visit With Vendors – The Desert Ballroom, Salon 7**

**Monday, October 29, 2018 – 12:00 – 1:15 PM**

**Lunch – The Desert Ballroom**

Speaker: Megan McClean Coval, Vice President, Public Policy & Federal Relations  
NASFAA

**Monday, October 29, 2018 – 1:15 – 4:00 PM**

**Exhibit Hall Open – The Desert Ballroom, Salon 7**

**Monday, October 29, 2018 – 1:30 – 2:30 PM**

**Session D1 – Santa Rosa  
2019-20 Verification**

This session will highlight the changes to the verification process for the 2019-20 award year. This session will include an overview of regulatory changes, documentation requirements, as well as verification reminders to ensure accurate processing.

Moderator: TBD  
Speaker: Virginia Hagins, US Department of Education

**Session D2 – Desert Salon 5/6  
Cal Grant Consolidation**

The CSAC team will provide an overview of the report Expanding Opportunity, Reducing Debt: Reforming California Student Aid by The Century Foundation and will present the Commission's plans towards consolidating the Cal Grant program.

Moderator: TBD  
Speaker: Lupita Cortez Alcala, California Student Aid Commission

**Session D3 – Desert Salon 4  
Performing a Self-Review of Your Consumer Information**

You've been putting it off for ages, but you know you need to do it. Come get some great ideas on how to assess your current level of compliance around Consumer Information.

Moderator: TBD  
Speaker: Lissa Wayne, New York Film Academy

**Session D4 – Desert Salon 3  
Supporting Undocumented Students as a Financial Aid Counselor**

This presentation will provide financial aid counselors with information, resources and best practices to support undocumented students achieve their academic goals. Participants will increase their awareness of how to remove roadblocks to successful financial aid distribution through the California Dream Act and promote an increase in the disbursement of CA Dream Act aid for students at your school. Additionally, promising institutional practices for financial aid counselors from local schools will be elevated.

Moderator: TBD

Speaker: Nancy Jodaitis, Immigrants Rising

### **Session D5 – Desert Salon 2**

#### **The UC and CSU Financial Aid Models: A Look at Access in Action**

Ever wondered how these nationally recognized university systems package financial aid? Whether you work or have worked for either segment, or are merely curious how these two public universities achieve access, this session will give you a window into each system's aid structure and how they are addressing current state higher education goals. Come hear from the systemwide directors of financial aid from the Cal State University and University of California, on how their aid models serve students, including increasing diversity and transfer transitions.

Moderator: TBD

Speaker: Chris Carter, University of California Office of the President  
Anita Kermes, California State University, Sacramento

### **Session D6 – Desert Salon 1**

#### **Onboarding: Preparing Your New Employee for Success**

Filling a vacant position in the financial aid office is not an end point- it's just the beginning. It can take a full cycle for a new employee to feel comfortable in the position. This session will explore tips for managers to make new employees feel welcome and prepared to tackle their responsibilities. We'll discuss our experiences as new financial aid employees and review some thoughts of new staff in offices across the university to find out what keeps a new employee engaged and what gets them ready to flee.

Moderator: TBD

Speaker: Ashley Munro, University of Alaska - Fairbanks

### **Session D7 – Director's Suite I**

#### **The ABC's of Gen Z: Adapting Financial Aid Practices for Effective Outcomes**

Gen Z, the next generation of students, is more tech savvy and digitally driven than its predecessors – an area in which many campus departments are still getting up to speed. Learning their language and finding the right balance of electronic and interpersonal interaction will present challenges as FAOs adapt to these bright young minds; this session will help you prepare for that. Through research, and best practices from the University of Illinois, this session covers: understanding the Gen Z mindset, communication and engagement strategies, and tips from the University of Illinois to easily meet Gen Z where they are.

Moderator: TBD

Speaker: Pat Robles-Friebert, Inceptia

### **Session D8 – Director's Suite III**

#### **The Nitty-Gritty on Loan Repayment Counseling**

Ever find yourself dancing around a tricky repayment question and then realize you better find out too because you know you'll get that question again? When is an unsubsidized loan subsidized? When can a borrower forego the grace period? How can the initial payment be \$0 and count towards PSLF? Come learn (and share) easy strategies to help your student borrowers. This session is sponsored by the CASFAA Grad/Professional Committee.

Moderator: TBD

Speaker: Daniel Roddick, University of California, San Francisco

### **Session D9 – Director's Suite VI**

#### **Engaging Partnerships to Connect with High Schoolers**

Sallie Mae and Dee-1, a motivational speaker and national rap recording artist, partnered with high schools, colleges, and community organizations across the country to inspire students not only to go to college, but to finish and earn their degree. In this session, we'll share the formula for connecting with Generation Z and how expanding messaging across campus is essential to connecting with today's youth and in reaching your institution's enrollment and retention goals. We'll discuss how a rap song, championing the pride in graduating college and paying back student loans, went viral and encouraged Sallie Mae's Social Media team to launch a nation-wide campaign. Join us to learn about the unique and engaging outreach strategies you can use on your campus to connect with Gen Z. #Dee1Knowledge [Salliemae.com/Dee1knowledge](http://Salliemae.com/Dee1knowledge).

Moderator: TBD

Speaker: Thalassa Naylor, Sallie Mae

### **Session D10 – Director's Suite VII**

#### **How to Detect and Deter Federal Financial Aid Fraud**

Special agents from the Office of Inspector General (OIG) will discuss the OIG's mission to combat fraud and abuse in federal student aid programs and what you can do to help safeguard those programs for your neediest students. The special agent will illustrate complex and common fraud schemes, brief you on indicators that can help you detect internal and external fraud, discuss the criminal and civil remedies sought by the OIG, and how you can report potential fraud to the OIG. The special agents will clarify what actions are taken by OIG as it pertains to fraud. Join this conversation with the Office of the Inspector General for a discussion on how to address fraud in federal student aid.

Moderator: TBD

Speakers: Adam Shanedling, US Department of Education  
Chris Hodge, US Department of Education

### **Session D11 – Director's Suite II**

#### **Automating Verification to Improve Student Service**

Verification is universally challenging and time consuming for aid administrators in overworked financial aid offices. Join Global Financial Aid Services to discuss a better way to approach Verification. In this session, we will discuss some of the common verification challenges including compliance, student service, and managing paper documents. We will highlight real colleges' implementations of our GLOBALCore Verification solution to mitigate these challenges, reduce stress in the FA office, and improve student service. This Business Solutions Session is sponsored by Global Financial Aid Services.

Moderator: TBD  
Speaker: Chris Campbell, Global Financial Aid Services

**Session D12 – Director's Suite IV  
Student Debt Letters**

More and more states are enacting student debt letter legislation. This session provides a brief history of where and why student debt letter communications started; the methods, timings, and lessons learned when implementing debt letters. This Business Solutions Session is sponsored by GetWi\$Edu..

Moderator: TBD  
Speaker: Ruben Reyes, GetWi\$Edu Program NMSLGC

**Monday, October 29, 2018 – 2:30 – 3:00 PM**

**Visit With Vendors – The Desert Ballroom, Salon 7**

**Monday, October 29, 2018 – 3:00 – 4:00 PM**

**Session E1 – Santa Rosa  
Administering Disbursements**

In this session we will discuss various aspects of properly disbursing Title IV funds including Title IV credit balances, early and late disbursements, post-withdrawal disbursements, and retroactive disbursements. In addition, we will review G5 drawdowns, G5 and COD interactions, and timely and accurate system reporting. We will also provide information regarding how to disburse or return funds if improper payments occur or if a student regains eligibility.

Moderator: TBD  
Speaker: Virginia Hagins, US Department of Education

**Session E2 – Desert Salon 5/6  
Reauthorization Update**

This session will provide updates on progress toward reauthorization of the Higher Education Act, including recent bills introduced by the House and Senate. An overview will also be provided on NASFAA's reauthorization recommendations stemming from the work of various task forces.

Moderator: TBD  
Speaker: Megan McClean Coval, NASFAA

**Session E3 – Desert Salon 4  
Middle Class Scholarship Basics (and Not-So-Basics)**

This session will cover the information and procedures schools need to administer the Middle Class Scholarship program. We will cover student eligibility, payment and correction guidelines as well as a detailed explanation of the Middle Class Scholarship roster.

Moderator: TBD  
Speakers: Adrian Slade, California Student Aid Commission  
Nai Saeteurn, California Student Aid Commission

Yvonne Hollingsworth, California Student Aid Commission

### **Session E4 – Desert Salon 3**

#### **Nine Common Questions Schools Have About Federal Program Reviews**

The U.S. Department of Education (ED) performs program reviews to identify whether a school is abiding by the provisions governing Title IV aid programs, and if not, ED can impose hefty financial fines and liabilities against the school. This danger of financial ramifications may lead schools to fear program reviews, but you don't have to. Learn about the types of reviews, potential triggers for being selected for a review, the financial ramifications, and more.

Moderator: TBD

Speaker: Mandy Sponholtz, NASFAA

### **Session E5 – Desert Salon 2**

#### **Assets in the Need Analysis: Getting it Right**

Have you read the Application and Verification Guide's description of the value of a trust? Do you understand it? Do you know when a 529 plan should be reported on the FAFSA, and when it should be left off? What about the value of rental property that is worth less than its mortgage? In this session, participants will get a refresher on the asset reporting rules, with an emphasis on those that are most confusing to aid officers, and hints about how to identify and resolve conflicting information related to the asset side of the need analysis.

Moderator: TBD

Speaker: Robert Weirnerman, Iron Bridge Resources

### **Session E6 – Desert Salon 1**

#### **Financial Aid in an Enrollment Management World**

Enrollment Management—is it a buzz word, a fad, or here to stay? Surprise! We have all been working in enrollment management for a long while - it might just not have been called that. This session, by seasoned financial aid professionals who made the jump to enrollment management, will bring you up to speed on what enrollment management means, how it actually has been there all along, and how you, as a financial aid professional, can be a key voice in shaping the future of enrollment management at your institution.

Moderator: TBD

Speakers: Scott Cline, California College of the Arts  
Helen Faith, Lane Community College

### **Session E7 – Director's Suite I**

#### **How to Make Student Communications Stick**

How savvy are you when it comes to understanding student loan repayment, much less explaining it to your students? In this session we'll discuss grace periods, debt tracking, repayment plan options, what to do when you can't afford to pay, deferments, forbearances, forgiveness, default and rehabilitation. Plus, we will have candy!

Moderator: TBD

Speakers: Chris Jordan, CampusLogic  
TBD



### **Session E8 – Director's Suite III**

#### **A Research-Based Approach to Building a Personal Finance Program**

While most of the emphasis about student loan indebtedness and financial literacy programs are on undergraduate students, the significant debt levels of graduate students suggest that research in this area should be explored. This field study wanted to confirm whether a particular group of graduate students perceived a need, and/or a desire, for a personal finance program, and if so, what – in an ideal world – would that education look like. From a needs assessment perspective, it is apparent these particular graduate students overwhelming saw the need and the benefit from a personal financial capability program built to meet their unique needs. This session is sponsored by the CASFAA Grad/Professional Committee.

Moderator: TBD

Speaker: Jacquie Carroll, Accesslex Institute

### **Session E9 – Director's Suite VI**

#### **It takes a Village – Integrating Financial Wellness into Campus Wide Programming, Adulting 101 Series**

Learn how Orange Coast College created an Adulting 101 program, and how you can implement it at your campus. We'll discuss creative ways to integrate your financial wellness program into existing and new campus wide programming, including ways to bridge the departmental silos, lessons learned and resources available.

Moderator: TBD

Speaker: Laura Reese, Orange Coast College

### **Session E10 – Director's Suite VII**

#### **Federal Laws on Sharing Student Data – A Navigational Guide for Financial Aid Officers**

In this session, we will discuss key federal laws that govern the release of various types of student data commonly held by financial aid offices, along with real-world examples and best practices for developing effective institutional protocols to ensure consistent and compliant data release processes.

Moderator: TBD

Speaker: Rebecca Flake, Cooley, LLP

### **Session E11 – Director's Suite II**

#### **Students and Credit: Consumer Credit Management**

Did you know that 83 percent of students with only student loans on their credit file are in deferment? Or that late payments and collection accounts can remain on a credit report for up to 7 years? In this session, attendees will learn what the average student's credit profile looks like, what students need to know about credit, and how to help students build their credit history. We will also discuss hot topics including fraud, data breaches, and credit protection, and will provide attendees with valuable tips, tools, and resources to help students and families. This Business Solutions Session is sponsored by College Ave Student Loans.

Moderator: TBD

Speaker: Ciel Senechal, College Ave Student Loans

### **Session E12 – Director's Suite IV**

#### **KHEAA Verify: Improving Both Compliance & Customer Service**

Come see how KHEAA Verify can work in your office, saving time and allowing your staff to focus on other pressing issues. Presented by not only part of KHEAA's marketing team, but a former user as well: Sean McGivney. This Business Solutions Session is sponsored by Kentucky Higher Education Assistance Authority.

Moderator: TBD

Speaker: Sean McGivney, Kentucky Higher Education Assistance Authority

### **Monday, October 29, 2018 – 4:30 – 5:30 PM**

#### **Session F1 – Santa Rosa Year Round Pell**

Come and hear an overview of the new provisions governing year-round Pell Grants. This session will include new statutory provisions, examples of calculations, and answers to frequently answered questions.

Moderator: TBD

Speaker: Virginia Hagins, US Department of Education

#### **Session F2 – Desert Salon 5/6 Professional Judgment**

Nothing in this program shall be interpreted as limiting the authority of the financial aid administrator, on the basis of adequate documentation, to make adjustments on a case-by-case basis to the sessions of attendance or the values of the data items required to calculate the expected or intended attendance (or both) to allow for treatment of an individual attendee with special circumstances. That's what the statute says, now what do we do with it?

Moderator: TBD

Speakers: Lissa Wayne, New York Film Academy  
Jessica Moore, University of California, Santa Cruz

#### **Session F3 – Desert Salon 4 Web Grants Nuts and Bolts (repeat)**

This session will provide an overview of the WebGrants system and will cover topics ranging from how to create a WebGrants account to customizing a roster and everything in between. Attendees are encouraged to bring a laptop to this session. Various hands-on exercises will allow attendees to begin applying concepts into practice. This is a repeat of session B2.

Moderator: TBD

Speakers: Adrian Slade, California Student Aid Commission  
Nai Saeteurn, California Student Aid Commission  
Yvonne Hollingsworth, California Student Aid Commission

#### **Session F4 – Desert Salon 3 How Effective is Your Website?**

Every business needs customers to succeed, new and old alike. For schools, this means having proactive outreach measures to secure a reliable stream of new students. Arguably, your website is the most effective tool to advertise your school to the world and can be one of the most significant factors in generating interest and securing new applicants. How effective is your website? Join this session to see how UC Irvine went about a major overhaul. What were the

strategies? How was it executed? What were the results and how did it affect workload? See how the Anteaters tackled one aspect of their enrollment management efforts.

Moderator: TBD

Speakers: Joseph Hornig, University of California, Irvine  
Lindsay Crowell, University of California, Irvine

### **Session F5 – Desert Salon 2**

#### **Asset-Related Conflicting Information**

In its definition of “good practices” for identifying conflicting information, the Department of Education asks financial aid officers to compare an applicant’s answers to the asset questions on the FAFSA to information that the school may have received on a tax return transcript. This session will cover the asset related information that can be derived from the tax return transcript, including a look at interest, dividends, business income, rental income, and retirement income, and how these may be used to identify conflicting information on the FAFSA.

Moderator: TBD

Speaker: Robert Weirnerman, Iron Bridge Resources

### **Session F6 – Desert Salon 1**

#### **Becoming Efficient and More Effective**

Do you wish there were more hours in the workday? Or that you had more staff? The Financial Aid Office takes on many new processes each year, but we aren’t always given the resources we need. This session will explore how you can become a more efficient worker and how you can streamline processes within your office.

Moderator: TBD

Speaker: Ashley Munro, University of Alaska - Fairbanks

### **Session F7 – Director’s Suite I**

#### **Middle Eastern Immigrant and Refugee Students in College**

Middle Eastern immigrant students, including Iranian students, do not have minority status and therefore become invisible, under-served students in higher education in the United States. What are some of the barriers and challenges this ethnic group face in college? What can we do to help? Join this discussion to experience through the different social, political, cultural and academic lenses, that which impact typical Iranian immigrant students.

Moderator: TBD

Speaker: Dr. Nilofar Ghasami, Santa Monica College

### **Session F8 – Director’s Suite III**

#### **Coping with Challenging Customers**

Is the customer really always right? Maybe not, but the customer is still always the customer. What do customers really want? How can you win over the really challenging ones? When should you apologize and when should you stand your ground? What is a "Customer Bill of Rights" and what should be in it? Will a discussion of these questions help you with your sanity?

Moderator: TBD

Speaker: Mark Gotsch, Professional Connect

### **Session F9 – Director's Suite VI**

#### **Developing a Financial Literacy and Debt Management Program**

Starting a Financial Literacy and Debt Management Program can be daunting, but you can do it!. This session will discuss steps to start a successful and engaging program, including some of the possible challenges and available resources. What has worked and what hasn't? Bring your ideas and add to the conversation!

Moderator: TBD

Speakers: Landy Gonzalez-Hernandez, California State University, Stanislaus  
Ashlie McCallon, California State University, Monterey Bay

### **Session F10 – Director's Suite VII**

#### **Creating a Debt-Free College Pathway in California**

The Institute for College Access and Success (TICAS) recently partnered with higher education experts, which culminated in issue papers presented at an October convening, to take a deeper dive into the growing interest in creating a debt-free pathway through college for Californians. Join us to learn more about the authors' findings, including costs and political tradeoffs, and what you can do to support reforms to our state aid programs that best enable student success.

Moderator: TBD

Speakers: Laura Szabo-Kubitz, The Institute for College Access and Success  
Amy Rose, California Budget & Policy Center

### **Session F11 – Director's Suite II**

#### **Business Solutions Session - ECMC**

This Business Solutions Session is sponsored by ECMC.

Moderator: TBD

Speakers: TBD, ECMC

### **Session F12 – Director's Suite IV**

#### **Reserved for Business Solutions Session**

This Business Solutions Session is sponsored by TBD

Moderator: TBD

Speakers: TBD, TBD

### **Monday, October 29, 2018 – 6:30 – 10:30 PM**

Dinner, Dancing, Cocktails, Awards – **JW Pavillion**

### **Tuesday, October 30, 2018 – 8:00 – 9:00 AM**

Breakfast and Business Meeting – **The Desert Ballroom, Salon 8**

### **Tuesday, October 30, 2018 – 9:00 – 10:00 AM**

NASFAA Chair's Update – **The Desert Ballroom, Salon 8**

Speaker: Lori Vedder, NASFAA National Chair, University of Michigan, Flint

**Tuesday, October 30, 2018 – 10:15 – 11:30 AM**

Federal Update – **The Desert Ballroom, Salon 8**

Speaker: Craig Munier, US Department of Education

**Tuesday, October 30, 2018 – 11:30 AM**

Final Comments & Adjourn – **The Desert Ballroom, Salon 8**

*See You Next Year!!  
November 3-5, 2019  
Riverside Convention Center*