

## **2019 CASFAA Conference Session Offerings**

### **Draft**

(Session titles and descriptions subject to change)

Trying to decide whether the upcoming CASFAA Conference is in the cards for you? Will it be worth it to attend? Will you get your training dollars' worth? Well, to help you decide, consider these sessions that are in the works.

#### **From the US Department of Education –**

- Administering Adds, Drops and Withdrawals
- 2020-21 Verification
- R2T4
- Administering Disbursements
- Year Round Pell
- SULA
- Internal and External Threats Facing Title IV Institutions

#### **From the California Student Aid Commission**

- CSAC Update and Cal Grant Consolidation (General Session)
- Cal Grant Payments, Audits and Reconciliation
- California Dream Act Application and California Nonresident Tuition Exemption (Commonly Known as AB 540)
- Middle Class Scholarship Basics
- Navigating CSAC WebGrants System
- Chafee Grant for Foster Youth
- Cal Grant Delivery System Modernization Project

#### **Customer Service and Professional Development**

- Assessing Your Financial Aid Career Path
- Success, Equity, and You - Making Connections Through Financial Aid
- Navigating Change
- StrengthFinder Workshop
- Service Sanity
- Managing Time – 24 Hours and Counting

- The Care and Feeding of Your Career
- Reaching Students Where They Are - GenZ and Beyond

### **Management, Leadership or Global Thinking**

- Cybersecurity and Audits: Are You Ready?
- Disaster Strikes- How an Institution Prepares for and Responds to a Natural Disaster
- Enrollment Management and Discounting
- Financial Aid & Enrollment Services - The Force Is Real
- Pay No Attention to the Regulation Behind the Curtain: R2T4 and Student Time to Degree
- Begin with the End: Managing Change in the Financial Aid Office
- Borrower Defense
- Accreditation and Innovation
- CalVet/VA Update
- How Riverside County Builds Bridges for Access

### **Financial Aid Best Practices**

- Tax Transcript Decoder
- Calculating the EFC
- Increasing California Dream Act Awards for Undocumented Students
- California State Compliance ... Are You Ready?
- Financial Aid RoadMap: Advocacy & Best Practices for STEM and Undocumented Students
- Scholarships, Regulations and Best Practices
- 10 Common Questions Schools Have About Federal Program Reviews
- Mistakes You're Making with Your P&Ps
- How the New Tax Code is Impacting Financial Aid
- Introduction to the 2018 Tax Forms
- IRS – FAFSA Marital Status Mismatches
- What is the Correct Filing Status for a Taxpayer?

### **Student Loans and Financial Literacy**

- Understanding Credit
- Financial Literacy –Not Just Checking the Box
- Developing a Financial Literacy and Debt Management Program
- Public Service Loan Forgiveness Updates

## **Advocacy**

- Diversity, Equity and Inclusion on the American Campus (General Session and Interest Session)
- State Issues, State Legislature: How it Works and How to Work it
- Financial Aid Liaisons for Underrepresented Students
- Scholar Retention Program: Supporting Students Through Their Re-entry Journey

## **Trending Issues**

- Preventing Data Breaches and Identity Theft
- Basic Needs and Student Success
- Trends in Higher Education

## **With Descriptions**

### **From the US Department of Education –**

#### 2020-21 Verification

- This session will highlight the changes to the verification process for the 2020-21 award year. This session will include an overview of regulatory changes, documentation requirements, as well as verification reminders to ensure accurate processing.

#### R2T4

- TBD.

#### 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.

#### 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.

#### Administering Adds, Drops and Withdrawals

- 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.

#### 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

#### Internal and External Threats Facing Title IV Institutions

- Special agents from the Office of Inspector General (OIG) will discuss internal and external financial aid fraud and cyber security threats currently facing institutions of higher education. The presenters will discuss real case examples of these threats, and how OIG's investigative mission to combat fraud and abuse in federal student aid programs can help your organization safeguard those programs by identifying and detecting fraud. The presenters 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 inform you concerning how to report potential fraud to the OIG. A question and answer period is planned as part of this presentation.

#### **From the California Student Aid Commission**

##### CSAC Update and Cal Grant Consolidation (General Session)

- The CSAC team will provide updates on the Commission's programs, the SEARS Survey, and the Grant Delivery Modernization Project. We will also 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.

##### Cal Grant Payments, Audits and Reconciliation

- This session discusses proper use of WebGrants payment and adjustment codes; school policies on payment timelines with respect to census/freeze dates; and provides payment scenarios designed to test your knowledge. We will also provide an overview of the audit process as well as proper reconciliation procedures - including how to utilize reports to identify accounting discrepancies- and how the disbursements reported in WebGrants are audited during a compliance review.

##### California Dream Act Application and California Nonresident Tuition Exemption (Commonly Known as AB 540)

- Which financial aid application should your students complete? Are U.S. Visa holders eligible to complete the Dream Act Application (CADAA)? What is the Selective Service registration process for CADAA applicants? What if a Dreamer completes FAFSA in error? The answer to these questions and many more will be explained during this session. Attendees will receive an overview of the various eligibility components for the California Dream Act application, including AB 540, AB 2000 and SB 68, as well as a summary of the changes to the 2020-21 application.

#### Middle Class Scholarship Basics

- This session is applicable to CSUs, UCs, and CCCs that participate in the Baccalaureate pilot program, and 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.

#### Navigating CSAC WebGrants System

- 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.

#### Chafee Grant for Foster Youth

- This session will provide an overview of the Chafee Grant and will cover topics ranging from the features of the Chafee grant and new parameters that have been added for the 2019-2020 academic year. Additionally we will be discussing the expanded eligibility for foster youth offered with some of our programs.

#### Cal Grant Delivery System Modernization Project

- This session will provide an overview of the Grant Delivery System Project and will cover topics ranging from the features and compatibility of the system, how the fully integrated system will work, and how it will interact in real time for institutions and students.

### **Customer Service and Professional Development**

#### 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!

#### Success, Equity, and You - Making Connections Through Financial Aid

- The Financial Aid Office plays an important role in student success. We can be the bridges over the valleys for our students as they navigate the higher education experience. Learn how making connections can lead to student success.

#### Navigating Change

- Change Navigator is a change process model that has been designed to help individuals accept and support change initiatives faster. This tool is a way of approaching organizational change that focuses on the emotions of the individuals whose buy-in and support are critical to a project's success.

#### StrengthFinder Workshop

- Based on Gallup's StrengthFinder's research, this interactive workshop will help you identify and understand your own unique combination of talents to maximize personal effectiveness and performance and address strategies and challenges associated with developing in your role, as well as understanding the unique dynamics of your team's collective talents.

#### Service Sanity

- Need to discover how to manage stress? Do you understand why problem solving is important? Want to find out how to say "no" in a positive way? How about how to make the physical setting more suitable for quality service? Join this session to explore ideas to improve service and see your office thrive?

#### Managing Time – 24 Hours and Counting

- Who's responsible for managing your time? Yes, it's you, but can you use some help? Explore four key steps to help manage time. Learn how to prioritize projects and tasks. Find out how to deal with external distractions and identify steps to help with crisis time management. You'll like the new you!

#### The Care and Feeding of Your Career

- Who is responsible for your career? Where do you begin to assess what you want and need? What should you do now? Is it time to make a move? How do you go about moving on? Do you need to network? Join us for this informative session to help you take stock of your career and make a plan to take it to the next level.

#### Reaching Students Where They Are - GenZ and Beyond

- What comes after GenZ? Many of us are still reacting or preparing for GenZ, and they are already on your campus. How about the next generation? What about staying in tune with older generations? Come find out what changes you should be making to best interact with this group, and how we may be able to prepare for the group coming up behind them. This interactive session requires your participation, so bring your smart phone and be ready to share best practices with your colleagues. There is also a break-out by generation mid-way through the session, so don't plant yourself in one seat and expect to stay there.

### **Management, Leadership or Global Thinking**

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.

#### Disaster Strikes - How an Institution Prepares for and Responds to a Natural Disaster

- Are you prepared for a disaster in your community? Disaster preparedness and response should be a continuous process that includes planning for action throughout the phases of disaster: Readiness, Response, Relief, Recovery and Review. These phases can move quickly or they can span several months or even years. Learn from the experiences of Butte College and Santa Rosa Jr. College as they worked through and continue to respond to the aftermath of the Camp Fire and Tubbs Fire.

#### Enrollment Management and Discounting

- Session Description TBD

#### Financial Aid & Enrollment Services - The Force Is Real

- Enrollment down? Students being dropped for non-payment? Need a solution? Join this session to hear how Golden West College evaluated the causes and effects, and what steps we took to join forces between Enrollment Services and Financial Aid to address the issues. We'll share how we were able to decrease student drops and increase financial aid completion.

#### Pay No Attention to the Regulation Behind the Curtain: R2T4 and Student Time to Degree

- As aid administrators we are tasked with managing numerous regulations as stewards of federal funds. However, some of you may be curious to understand how these policies affect our students. Come join a talk on research done with UC Santa Cruz students and the Return to Title IV Policy. Just how does R2T4 policy affect withdrawals and time to degree?

#### Begin with the End: Managing Change in the Financial Aid Office

- As financial aid professionals we are faced with change all the time, be it staffing, information systems, regulations, or policies. Change is inevitable. "Transition" is the process of adapting to the change. In this workshop we will examine the phases of transition, different approaches for dealing with it, and creative ways to manage it both personally and with colleagues. We will have plenty of time for sharing our experiences and ideas too!

#### Borrower Defense

- Although we haven't seen many earth-shattering changes coming from ED lately, it doesn't mean they haven't been busy. This fall, ED is expected to release new regulations regarding the "Borrower Defense" rule that could have significant impact on schools' reporting requirements. What are these new rules? How will they affect you?

## Accreditation and Innovation

- Although we haven't seen many earth-shattering changes coming from ED lately, it doesn't mean they haven't been busy. This fall, ED is expected to release new regulations regarding the "Accreditation and Innovation" rule that could have significant impact on schools. What are these new rules? How will they affect you?

## CalVet/VA Update

- Session Description TBD

## How Riverside County Builds Bridges for Access

- Riverside County has been highlighted in various state and national publications for their effectiveness for closing the access gap among our various underrepresented student groups. How are these efforts at the K-12 level determined and implemented? Come hear from leadership on how they collaborate in setting and implementing access priorities, such as the Race to Submit (financial aid application competition), how these efforts have made them a model for increasing access, and what we can do as financial aid administrators to strengthen our partnership.

## **Financial Aid Best Practices**

### Increasing California Dream Act Awards for Undocumented Students

- 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.

### California State Compliance ... Are You Ready?

- Financial Aid compliance with California State laws is challenging but CASFAA is here to help! The CASFAA Training Committee and State Issues Committee have teamed up to bring you an informational session on California laws that impact financial aid. We will discuss several recently passed bills that effect schools across the state, when they went into effect, their regulatory requirements and ways that campuses are working to become compliant. Included will be information on the Shopping Sheet/Award Notification, Cal Grant Notifications, Tuition and Fee Waivers, Foster Youth, the California College Promise and Annual Loan Notification, and more. The Information is relevant for all school segments from public and private 4-year colleges to community colleges to the private for-profit institutions.

### 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.

#### 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.

#### Financial Aid RoadMap: Advocacy & Best Practices for STEM and Undocumented Students

- FAFSA, Dream Act, Pell Grant, Cal Grant, California Promise Grant and Student Success Completion Grant - all financial aid terms that can be overwhelming for students but are crucial to student success and for community college students, timely transfer. In this session, we will discuss how to develop embedded financial aid advising via partnerships with academic programs such as STEM. We'll also discuss how to use technology and WebGrants to better assist students plan their SSCG and Cal Grant for transfer purposes.

#### Scholarships, Regulations and Best Practices

- 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.

#### 10 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.

#### Mistakes You're Making with Your P&Ps

- Let's be real: no one's Policies and Procedures are perfect. But you might have some key mistakes in your P&Ps and not even realize it. These errors can mean big problems for your students and staff, especially if discovered during an audit

or federal program review. Learn about these key mistakes and discuss ways to fix them quickly.

#### How the New Tax Code is Impacting Financial Aid

- Most of the changes to the tax code enacted in December, 2017, were implemented in the 2018 tax year. And financial aid officers will begin to see these changes as they review income-adjustment based professional judgments. This session will take a look at the changes that will most impact financial aid eligible families, and any guidance the Department of Education has issued related to these changes. Topics covered will include the new Form 1040, the elimination of Forms 1040A and 1040EZ and its impact on a student's eligibility for the simplified EFC or Auto Zero EFC formula, and how changes in the tax code may change students' EFCs, ability to finance their education, and meet their financial obligations to their schools.

#### Introduction to the 2018 Tax Forms

- Have you begun to collect 2018 tax returns as documentation for your income-adjustment professional judgments? Are you baffled by what you are seeing? The IRS introduced a radically redesigned Form 1040 and six new numbered schedules in 2018 – and financial aid may never be the same. In this session, participants will learn about the changes implemented in the tax forms in 2018 – including where to find all the figures required on the FAFSA, on and off-form calculations that have been introduced, and the forms you just don't need to worry about.

#### IRS – FAFSA Marital Status Mismatches

- The IRS and Department of Education define marriage differently, and use a different moment in time to define marital relationships. Financial aid officers may need to combine incomes from individual tax returns – or extract a single person's information from a joint tax return, as a result. This webinar will look at the guidance that the Department of Education has provided related to marital status mismatches, including how to combine incomes, how to separate incomes, and what information schools need to have on file to complete these processes correctly.

#### What is the Correct Filing Status for a Taxpayer?

- Financial aid officers are not required to be tax experts, but they are expected to understand the Head of Household filing status – to a degree that exceeds the abilities of many tax preparers! This session will start with a model for determining the filing status that a taxpayer may use, with a focus on the head of household filing status. Confusing terms like “temporary absense” will be explained, as with a discussion of why this topic is so difficult for families.

### **Student Loans and Financial Literacy**

#### Public Service Loan Forgiveness Updates

- The PSLF Program has been on the books for about 10 years now, long enough for some borrowers to start to qualify for actual loan forgiveness. And while there

is much discussion about it, with the new administration, ED hasn't (can't) share much. Will there be changes? Come to this session to learn updates (if any) regarding the program and how they may impact your students.

#### Understanding Credit

- This presentation is focused on all things credit, and 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. The session will also help you understand the components of a credit report and how to read it and tips on what to do to correct errors on the report. It will help you counsel students on the importance of establishing and maintaining a strong credit score.

#### Financial Literacy –Not Just Checking the Box

- The goal of providing financial education should be to educate and inform and to help those you are counseling lead more financially successful lives. Sometimes, providing this information is simply to “check the box” to show you’re making the information available. If you lack time and resources but want to make your efforts count, we will share some ways to engage and inform those you’re trying to reach and to maximize your investment.

#### 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!

### **Advocacy**

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

- Diversity, Equity and Inclusion - perhaps you've heard of it; perhaps it's a new term. But 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.

#### State Issues, State Legislature: How it Works and How to Work it

- As VP of State Issues, Bronwyn Garrison has a story to share. Advocacy in Sacramento is a combination of relationships, committees, well-crafted emails, and back-up plans. In this session, he talks about how to build successful advocacy campaigns, what may be lacking, and what can be done to assert you/our voice in the capitol. Come share your experiences too. Collectively, we'll learn more about the legislative process, ways to influence proposed bills, and do the best work when it comes to helping students finish school in the strongest financial position.

#### Financial Aid Liaisons for Underrepresented Students

- The session will cover the importance of close collaboration and involvement of Financial Aid Officers with student services programs for underrepresented student populations such as PUENTE, UMOJA, DREAMERS. We'll discuss the role of a Financial Aid Liaison, how to incorporate financial literacy as part of the activities of the programs, and the benefits of having Financial Aid Liaisons for student retention strategies.

#### Scholar Retention Program: Supporting Students Through Their Re-entry Journey

- Students who have been academically dismissed from their university face unique challenges as they navigate their pursuit to reinstatement. The Scholar Retention Program provides holistic financial, advising and personal support for students who are committed to pursuing their educational goals. This session will discuss the implementation of the program along with retention and re-entry results.

### **Trending Issues**

#### Preventing Data Breaches and Identity Theft

- Colleges and Universities continue to be prime targets for data breaches. With the nature of higher education institution's open data environment and budget restrictions, it can be difficult to identify and protect against data breach threats. Join us to learn what colleges and universities can do to address cyber threats and review data breach risk assessment.

#### Basic Needs and Student Success

- Come learn about basic needs support programs. This session will highlight the work of UC Santa Barbara's Financial Crisis Response Team, Meal Voucher Program, Housing Voucher Program and more!

#### Trends in Higher Education

- Join this session to discuss the latest findings of higher education trends, including recession and post-recession enrollment, college pricing, and financial aid trends. This session provides a foundation of evidence to strengthen policy discussions and decisions about higher education, as well as illustrate how the payoff of higher education is high.