



DC-DE-MD ASFAA Conference Agenda

Sunday, October 29, 2023

8:00 AM – 9:00 AM Executive Board Breakfast

8:00 AM - 12:00 PM Executive Board Meeting

Chesapeake Boardroom

8:00 AM – 12:00 PM

Exhibitor Set-Up

Cirrus Ballroom

10:00 AM – 1:00 PM

NASFAA Credential: Satisfactory Academic Progress (SAP)

Cirrus Ballroom

Presenter: Catherine Boscher-Murphy, Associate Director of Financial Aid/Compliance Officer, Montclair State University

This session will help you understand the foundational concepts of Satisfactory Academic Progress and learn about SAP consumer information requirements.

The key concepts you will learn in this training:

- Satisfactory Academic Progress
- Same as or stricter than
- Quantitative component
- Maximum timeframe
- Qualitative component
- Consumer information requirements

12:00 PM – 5:00 PM

Registration Open

Cirrus Foyer

12:00 PM – 2:00 PM

Exhibitor Area Open

Cirrus Ballroom

2:00 PM – 3:30 PM

Overview of Changes for the 2024-2025 Financial Aid Cycle

Cirrus Ballroom

Presenter: Robert Weinerman, Director of Training, Iron Bridge Resources

We've been hearing about, studying, Zooming, and worrying about the impact of the FUTURE Act and the FAFSA Simplification Act for months now – and now it's actually happening. Let's take a broad overview of the two acts and how they are changing the way we will process federal applications going forward. We'll review the key changes made by the two acts, including the move from the Expected Family Contribution (EFC) to the Student Aid Index (SAI), changes to Pell Grant eligibility, and the impact of the transition from the IRS DRT to the FUTURE Act Direct Data Exchange (FADDX). We'll look at how the FADDX will impact V1 verification. And we'll review changes in the tax code and the use of tax returns as we move to tax year 2022 as the base year for 2024-2025.

3:30 PM – 3:45 PM

Snack and Beverage Break

Cirrus Ballroom

3:30 PM – 5:00 PM

Exhibitor Area Open

Cirrus Ballroom

3:45 PM – 4:45 PM

Concurrent Sessions

1. **Understanding Today's Multi-Generational Workplace** (3:45 PM – 4:30 PM)

Layton

Presenter: Beth McSweeney, AVP/Campus Relations Manager, PNC

Tips for working in and managing the different generational differences and similarities.

2. **Not Just Another Hand Calc Session** (3:45 PM – 4:45 PM)

Rockbridge

Presenter: Robert Weinerman, Director of Training, Iron Bridge Resources

We will use the SAI Guide to hand calculate a SAI or two – but our purpose is to see how changes in some of the data elements impact the SAI. Your institutions will be inviting students to submit appeals, and you'll have more of them to do. A solid understanding of how the data elements into the FAFSA are used in the SAI formula, and how changes to a data element (AGI, income earned from work, parent or student assets, etc.) will change the SAI and student's aid eligibility. You'll learn how to predict whether an adjustment to a FAFSA data element will make enough of a change in the SAI to make a difference in the aid a student might receive.

5:30 PM – 8:00 PM

Cash Bar

5:45 PM – 8:00 PM

Dinner and Music Trivia with Prizes!

Cirrus Ballroom

Join us for "Decades Trivia" where we will have prizes for the winner of the table/team that wins a round!

Monday, October 30, 2023

7:30 AM – 5:00 PM

Registration Open

Cirrus Foyer

7:30 AM – 8:30 AM

Breakfast Buffet

Cirrus Ballroom

7:30 AM – 11:45 AM

Exhibitor Area Open

Cirrus Ballroom

8:30 AM – 11:30 AM

NASFAA Credential: Professional Judgement (PJ)

Cirrus Ballroom

Presenter: Catherine Boscher-Murphy, Associate Director of Financial Aid/Compliance Officer, Montclair State University

This session will provide you with the meaning, purpose, and underlying principles of professional judgement (PJ); areas of financial aid administration to which PJ is applied; and general documentation requirements applicable when exercising PJ.

The key concepts you will learn in this lesson include:

- Statutory authority
- Definition of PJ
- Unusual circumstances
- Special circumstances
- Purpose and principles of PJ
- PJ policies and procedures
- PJ triggers
- Areas of PJ; areas where PJ does not apply
- Role of PJ documentation; types of PJ documentation
- PJ during a disaster, emergency, or economic downturn

8:30 AM – 9:30 AM

Concurrent Sessions

1. Financial Aid Jeopardy

Layton

Presenter: Julie Lawton, Manager, Business Development, Cognition

A fun interactive way to test your financial aid knowledge and learn something new! This information will directly assist you in the 2023-2024 academic year and beyond. Categories include; FAFSA, Potpourri, Verification, Student Loans, and more. Join us in a game of Financial Aid Jeopardy where you will be split up in teams to see who takes home the win.

2. Connecting Dots Between Financial Behaviors and Well-being

Rockbridge

Presenter: Becky Davis, Region Director, Ascendium Education

Many students may not understand how financial behaviors impact their mental and physical well-being. All three are interconnected, so if one part is distressed, it's likely to affect the others. A recent study found that 54% of student loan borrowers say their mental health issues are directly related to their debt. During this session, we'll identify common financial behaviors, their impact on students' well-being, and ways to encourage healthier habits.

9:30 AM – 9:45 AM

Beverage Break

Cirrus Ballroom

9:45 AM – 10:30 AM

Concurrent Sessions

1. Helping Clients: Finding and Leasing an Apartment

Layton

Presenter: Meredith Schor, Director of Financial Aid, George Washington University School of Medicine & Health Sciences

This presentation will offer insights into how to advise a student client on issues of finding appropriate housing from searching, to signing a lease, to moving in and dealing with issues that may arise at the property.

2. Averting Danger: Combatting Fraud in Higher Education, Financial aid, and Student Credit

Rockbridge

Presenters: Katrina Delgrosso & Eric Chas from College Avenue Student Loans, Charles Scheetz from Hagerstown Community College and Detra Hooper from Howard Community College

We are witnessing a disturbing surge in fraudulent activities in higher education and financial aid, and financial aid administrators have a fiduciary responsibility to report suspected fraud. The objectives of this session are to raise awareness of the startling sophistication of fraud, discuss credit industry mitigants, and review campuswide best practices for deterrence. Just as Title IV administration is a campuswide initiative, so is the detection and reporting of fraud. The session will highlight an integrated strategy for fraud prevention that includes multiple campus offices as well as external partners, such as the Office of Inspector General (OIG), credit agencies, and lenders.

10:30 AM – 10:45 AM

Beverage Break

Cirrus Ballroom

10:45 AM – 11:30 AM

Concurrent Sessions

1. Proper Protection and Use of Personal Tax Information (PTI)

Layton

Presenter: Robert Weinerman, Director of Training, Iron Bridge Resources

Starting with the 2024-2025 academic year and the implementation of the FUTURE Act Direct Data Exchange (FADDX) between the IRS and the FAFSA, most of the tax information you'll be handling will be considered "Controlled, Unclassified Information" (CUI) and "Personal Tax Information" (PTI). Information classified as CUI (Controlled Unclassified Information) and PTI (Personal Tax Information) must be treated in specific, and more

strict ways that differ from the treatment of other information in the student's application. In this session, we will review the proper use and protection of PTI, the proper use and protection of other FAFSA data, and the difference between tax information provided via the FADDX and manually by the application or other FAFSA contributor.

2. How to Use Social Media and Other Tactics to Engage Gen Z

Rockbridge

Presenter: Tim Young, Director of Campus Partnerships, Earnest

With calls, email, texts, letters, and tweets, you might wonder how students still miss your messages. Students are overstimulated and if you want your message to be heard, you have to think like a social media company. Here, you will find the tools you need to engage your students on their terms and make your message heard.

11:45 AM – 1:00 PM

Lunch, Business Meeting, EASFAA Update and Awards

Cirrus Ballroom

1:15 PM – 2:30 PM

General Session: What We Do Matters: How Financial Aid Fits into the Larger Picture of the Institutional Goals

Cirrus Ballroom

Presenters: Keia Brown from University from MD – College Park, Robert Muhammad from Howard University, Tamika Bybee from Howard Community College and Tom McDermott from Johns Hopkins University

We know our work helps students to obtain their dreams of a degree. But our work has even more meaning. Join our panel of experts to discuss how the work we do in our office helps our institutions meet their strategic goals.

2:30 PM – 2:45 PM

Snack and Beverage Break

Cirrus Ballroom

2:30 PM – 5:00 PM

Exhibitor Area Open

Cirrus Ballroom

2:45 PM – 3:30 PM

Concurrent Sessions

1. Student Engagement with Financial Aid: What They Need and How FAOs Can Help; A Review of Earnest Survey Data

Luray B

Presenter: Patrick Ziegler, Senior Account Executive for Campus Partnerships, Earnest

We all want to provide exceptional service to our students but we don't always know how they feel about their engagement with us and what we could do to serve them better. This session will review the results of Earnest's second annual survey on student engagement which seeks to understand how undergraduate students are financing their education and the role that Financial Aid Offices play in helping them understand the process and financing options. We will pay particular attention to linguistic/communication challenges and incorporate relevant scholarly research on the subject.

2. The Way of the Shepherd: Seven Secrets to Managing Productive People

Rockbridge

Presenter: Eddie Hill, Vice President of Student Lending/School Relations Manager, Citizens

Discover seven principles used by effective leaders and put them into practice with your own team to build a highly productive team. Learn how to teach the people around you to view their work as a calling rather than merely a job, a place to work rather than a place to get a paycheck. Challenge yourself to become a great leader and bring out the best in your team.

3. Director Series - Who, What, When, Why and How: Updating the E-App

Layton

Presenter: Chris Zimmermann, Associate Dean, Financial Assistance and Retention, College of Southern Maryland

So, you have a new president, you've opened a new location or you're offering new certificate programs. Congratulations, now what? How quickly must you notify the Department of Education of these changes? Uh oh, you've just received notification that your institution's PPA will expire in six months. What do you do? This session will focus on the "Application for Approval to Participate in Federal Student Financial Aid Programs", also known as E-App, process. We will discuss some of the common updates that must be communicated as well an overview of the Title IV recertification process.

3:30 PM – 3:45 PM

Break

Cirrus Ballroom

3:45 PM – 4:30 PM

Concurrent Sessions

1. MD State Update / MHEC Meeting

Layton

Presenter: Al Dorsett, Director of the Office of Student Financial Assistance, Maryland Higher Education Commission

Please join this breakout session for your state update!

2. DE State Update / DHEO Meeting

Rockbridge

Presenter: Sharon Wilson, Director of Financial Aid Operations, University of Delaware

Please join this breakout session for your state update!

3. DC State Update / DCTAG, DC OSSE Meeting

Luray B

Presenter: Ken Howard, Director, Operations, DCTAG Program, DC Office of the State Superintendent of Education

Please join this breakout session for your state update!

4:30 PM – 4:45 PM

Break/Transition to Next Session

4:45 PM – 5:30 PM

Concurrent Sessions

4. 7 Disruptors to Financial Aid and Student Success

Luray B

Presenter: Leroy Doubleday, Account Executive, Ellucian

Gen Z is the most cost-conscious and debt-averse generation ever. This makes the financial aid office one of the most critical functions of today's modern campus. However, the student financial experience has been disrupted. And financial aid teams are buried in new administrative tasks. Staying on pace with Gen Z and all students requires tools that will increase enrollment, retention and staff satisfaction, putting student financial success at the forefront of your institution. In this session, you'll learn about the top disruptors to student success. And you'll learn exactly what you need to do to change the score for your students and your financial aid team.

5. ROUNDTABLE: Implementing FAFSA Simplification and Cost of Attendance on YOUR Campus

Rockbridge

Presenter: Andrew Harvey, Director of Financial Aid, Garrett College

A roundtable discussion for best practices from Cost of Attendance to FAFSA Simplification to making people aware of the change and presenting the NEW FAFSA

6. Director Series – Lion Taming: Managing Your School's Recertification

Layton

Presenter: Jennifer Martin, Director of University Financial Aid Compliance, Johns Hopkins University

Managing recertification shouldn't feel like you are taming a lion. With planning, you can manage this important process the same way as your cat's or dog's feeding schedule. During the session, we will discuss how the E-App, Program Participation Agreement (PPA), and Eligibility and Certification Approval Report (ECAR) work together, managing recertification using an institution-wide committee, reviewing and updating the E-App, and other tips for a less-stressful recertification process.

5:30 PM – 10:00 PM

Cash Bar

Cirrus Ballroom

6:00 PM – 10:00 PM

Dinner & Entertainment

Cirrus Ballroom

Dinner, DJ, Dancing, 360° Photo Booth, and Pumpkin Decorating with Prizes!

Tuesday, October 31, 2023

7:30 AM – 9:30 AM

Registration

Cirrus Foyer

7:30 AM – 9:30 AM

Exhibitor Area Open

Cirrus Ballroom

7:30 AM – 8:30 AM

Breakfast Buffet

Cirrus Ballroom

8:30 AM – 9:15 AM

Concurrent Sessions

1. Question, Persuade, Refer (QPR): Suicide Prevention and Mental Wellness

Cirrus Ballroom

Presenter: Diane Hallila, M.A., LCPC, GCDF Coordinator, Personal Counseling, Anne Arundel Community College

QPR is a nationally certified workshop that teaches attendees about the signs and symptoms of someone who may be considering suicide. It teaches participants what to say and how to get them connected to someone who can help save their life.

2. Keys to Loan Repayment: A Toolkit for Keeping Up with Unprecedented Changes

Layton

Presenter: Dr. Tisa Silver Canady, Founder and Executive Director, Maryland Center for Collegiate Financial Wellness (MCCFW)

After a three-year pause, student loan repayment is back. From on-ramps and one-time adjustments to fresh starts and fewer servicers, it can be hard to keep up with the changes. This session will provide a breakdown of:

- post-pandemic repayment options, including SAVE,
- time-sensitive benefits included in the IDR Adjustment and Public Service Loan Forgiveness, and
- resources for financial aid administrators to use for managing their own loans and assisting students.

9:15 AM – 9:30 AM

Beverage Break

Cirrus Ballroom

9:30 AM – 10:30 AM

NASFAA: Inside the Beltway Update

Cirrus Ballroom

Presenter: Justin Draeger, President & CEO, NASFAA

This NASFAA Federal Update will provide an overview of the latest happenings in Washington, including a high-level landscape of the current political climate in D.C. with a focus on federal financial aid policy and how it has impacted students and institutions in recent years. Overall trends in student aid will be discussed including recent legislative and regulatory activity, reauthorization proposals and predictions for how student aid funding will fare in future budget negotiations. Movement within the Department of Education concerning negotiated rulemaking and updates from Federal Student Aid (FSA) will also be discussed. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts.

10:45 AM – 11:45 AM

NASFAA: Top FAFSA Simplification Questions

Cirrus Ballroom

Presenter: Jackie Cottom, Compliance Generalist and Webinar Producer, NASFAA

The biggest changes to the FAFSA in history will be implemented in the 2024-25 application cycle - are you ready? Explore the upcoming changes to the FAFSA, including direct data sharing with the IRS and a streamlined Federal

Methodology, and learn more about the latest updates on implementation and NASFAA's Student Aid Index Modeling Tool. Discover what questions your colleagues are asking as we all prepare for the 2024-25 award year.

11:45 AM – 1:00 PM

Exhibitor Area Breakdown

Cirrus Ballroom

Safe travels home and thank you for attending the 2023 Tri-State Conference!

