

*SWASFAA 2017 Annual Conference
November 8-10
Grapevine, TX
Session Schedule Detail*

Wednesday, November 8, 2017

| Time | 1:00 pm – 2:30 pm |
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| Opening Ceremonies | Opening Ceremonies – Dr. Harold Whitis and D. Ingram |
| White Pine I-II | |
| National Anthem | Mrs. Julie Lantiere |
| SWASFAA Welcome | Mrs. Denise Welch, SWASFAA President |
| TASFAA Welcome | Mr. Alan Ahmad – TASFAA President |
| Keynote Speaker | Dr. Staussa Ervin - Tarrant County College Associate Professor of Psychology and owner of MindPeace Integrated Psychotherapy |

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| Break with Exhibitors | 2:30 pm – 3:00 pm |
| White Pine III | |

| Time | 3:00 pm – 3:45 pm |
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| Auditors are Coming! Oh My! Help Me Prepare! | Shannon Crossland – Texas Tech Univ. and Delisa Falks – Texas A&M Univ. Learn how to prepare for an audit on your campus. Setting up entrance counseling sessions – who needs to be involved. Identifying a point of contact in your office, what areas could be reviewed, and how to answer an auditor’s questions. Other preparations that are critical to the audit – PPA, consumer information, data collection, policies and procedures, etc. – will also be discussed. This session will provide key tips to assist in the audit process. |
| White Pine I | |
| PSLF, What Do We Now Know? | Janell Valdez – University of New Mexico Session will be from a financial aid administrator's perspective; experiences with communication to/from PSLF servicer, in's & outs of filing the ECF, best practices in communicating and advising borrowers. At the ten year mark, October 2017, the conversation at the Federal level about the continuation of the program will |

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| <p>Northwest Territory</p> | <p>also be addressed.</p> |
| <p>Work – Life Balance and Spiritual Awareness – Stress Relief 101</p> <p>White Pine II</p> | <p>Linda Ballard – Texas Southern University</p> <p>Financial aid professionals are a dedicated group of people. Operating with a servant's heart can be tasking. Everyone that contacts you generally needs something from you; whether it is administration or the students. When gratitude is slow to come and the demands remain constant, we need to effectively use our spiritual tools. Spiritual wellness is an important part of maintaining work-life balance. Learn how we can support one another as we complete the call to serve our fellow man. Review critical strategies to keep and remain spiritually healthy, avoid burn-out, and maintain your inner peace.</p> |
| <p>How to Advocate for Student Aid Programs</p> <p>Fallen Timbers - B</p> | <p>Mendy Schmerer – University of Oklahoma Health Sciences Center</p> <p>Have you ever contacted your legislators? Your state lawmakers or federal representatives? Does the idea intimidate you? It shouldn't! Advocating for our student aid programs at the state and federal levels is extremely important, so come hear a few tips to do it, in person and otherwise.</p> |
| <p>NCAA Compliance and Financial Aid</p> <p>Fallen Timbers - A</p> | <p>Ben Montecillo – Texas Tech University</p> <p>This session will review NCAA rules as it relates to Bylaw 15 - Financial Aid. Best Practices for certification and monitoring team limits will be reviewed.</p> |

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| <p>Time</p> | <p>4:00 pm – 4:45 pm</p> |
| <p>Mobile Financial Aid: What Your Students Really, REALLY Want</p> <p>Fallen Timbers - B</p> | <p>Niki Harris – Campus Logic and Ashley Tatum - NCTC</p> <p>Students today are used to mobile, online communications—they aren't used to waiting for information. Too often, complicated, manual, generic financial aid processes create barriers to student success. Don't believe us? Believe the 730 students we surveyed nation-wide. Hear about the improvements they want to see made to the FinAid process. Walk the student finance journey and identify points of friction at your institution—and brainstorm solutions.</p> |
| <p>Satisfactory Academic Progress Best Practices - Connecting SAP to Retention</p> | <p>Dan Dreves – Financial Aid TV, Cynthia Butler – DCCCD, Emily Patterson, U of A, JoEllen Soucier – HCCD, Niki Schwartz – ATU, Jennifer Williams - SAUT</p> <p>We all want to ensure students are successful and graduate, but we know some will struggle along the way. This <u>interactive, school panel</u> session will discuss</p> |

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| <p>Fallen Timbers - A</p> | <p>how Satisfactory Academic Progress (SAP) relates to retention. Learn the importance of a proactive communication strategy about SAP to ensure retention as you review SAP principles.</p> <p>Session will include a campus discussion on how schools are actively communicating with students about SAP and will share best practices.</p> |
| <p>Multigenerational Workplace</p> <p>White Pine II</p> | <p>Karen Krause – University of Texas at Arlington</p> <p>By the year 2020, there will be five generations present in the workplace. Each generation approaches life and work in varying ways, and each brings a unique set of strengths. This session will discuss ways to maximize the best skills of each generation to create a more productive and positive workplace.</p> |
| | <p>4:00 pm – 5:15 pm</p> |
| <p>R2T4 in Modules (75 Minutes)</p> <p>White Pine I</p> | <p>Kevin Campbell and Rick Renshaw - Department of Education</p> <p>Any course in a program that does not span the entire length of a payment period or a period of enrollment is considered to be a module. This session will explain how to calculate a Return of Title IV (R2T4) transaction when your standard term academic calendar contains modules. Modules may be included exclusively or in conjunction with full-term courses, year-round, or only during a summer term.</p> |

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| <p>Time</p> | <p>6:00 pm to Whenever</p> |
| <p>Your Time</p> | <p>Night at the Water Park or Local Entertainment. Check out Things To Do on our site for suggestions. https://www.swasfaa.org/docs/conferences/site/todo.html</p> |

Thursday, November 9, 2017

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| <p>Time</p> | <p>7:45 am – 8:45 am</p> |
| <p>White Pine I-II</p> | <p>All American Buffet</p> |

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| | <p>8:00 am – 9:00 am</p> |
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| Invitation Only – NASFAA Session Red Oak | Justin Draeger – NASFAA President |
| | 9:00 am – 10:00 am |
| Federal Update White Pine I-II | Craig Munier, Policy Liaison and Implementation, U.S. Department of Education |

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| Break with Exhibitor Browse White Pine III | 10:00 am – 10:15 am |
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| Time | 10:15 am – 11:00 pm |
| New and Aspiring Aid Directors: Practical Tools for Success White Pine I | Billie Jo Hamilton – NASFAA National Chair – USF This session will provide practical tips for success for new and aspiring aid directors. Being successful takes more than managing aid programs and having a firm grasp of procedures and legislation governing financial aid. It also takes understanding the values of the people around you, having a vision, having the ability to plan well, and positioning your office on campus. Hear what skills a “seasoned” aid director feels have helped her to succeed and how you, too, can develop yourself and become a great leader! |
| Verification and Conflicting Information Fallen Timbers - B | JoEllen Soucier – Houston Community College Identifying, resolving, and documenting conflicting information. This session will discuss the types of conflicting information that results from doing a verification review and how those conflicts can be resolved. This includes Marital Status Conflicts, Tax Filing Conflicts, and reported data that cause conflicts. We will go over the 399 comment code that exists for the 2017-2018 year and determine appropriate action when resolving the conflict when comparing the two award years. |
| Post-Secondary Data Security and Requirements | Tiina Rodrigue, Senior Advisor – Cybersecurity - Department of Education As post-secondary institutions (PSIs) move from the information age to the virtual age, cyber threats are a certainty. It is no longer a question of if; it is now when and how often. This presentation defines data security, requirements and |

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| White Pine II | available tools. Poor knowledge could leave your PSI vulnerable and unfunded. |
| Early FAFSA Panel | Kayla Lopez – Texas A&M University – Corpus Christi It was the hope of the financial aid world that Early FAFSA would make the world a better place. Although there were several solutions, we still have many challenges. One year later, we can now talk about the improvements and accomplishments Early FAFSA brought, as well as the issues we continue to face. |
| Fallen Timbers - A | |
| | 10:15 – 11:45 am |
| Administering Title IV Aid when Standard Terms Contain Modules (1.5 hours) | Kevin Campbell - Department of Education Any course in a program that does not span the entire length of a payment period or a period of enrollment is considered to be a module. This session will explain how to administer Title IV aid when your standard term academic calendar contains modules. Modules may be included exclusively or in conjunction with full-term courses, year-round, or only during a summer term. All of these scenarios will be discussed. NOTE: This session does NOT include a discussion of R2T4 with modules. |
| Northwest Territory | |

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| Time | 11:15 – 12:00 am |
| Office of Inspector General – Combating Title IV Fraud | Neil Sanchez – Office of Inspector General The Office of Inspector General (OIG) at the U.S. Department of Education/(ED) conducts audits, investigations, and inspections of educational programs and operations. The OIG has criminal investigators nationwide who conduct investigations of fraudulent schemes targeting ED funds and/or programs. This presentation will provide each participant information regarding ED/OIG investigations of individuals and organizations that have defrauded the Title IV programs through various schemes. |
| White Pine I | |
| Creating a Financial Dynasty | Linda Ballard – Texas Southern University Making financial literacy fun is the key to attracting students. Combining topics of interest with common sense financial tips is a great way to increase campus awareness. Learn some of the innovative topics used to lure student, faculty and staff to financial literacy sessions. Eating healthy can be combined with shopping on a budget. Clothes fanatics can learn tips on shopping on sale, on-line and in thrift shops. Put the credit report in the student’s hands and help them get it together before graduation. Life is not solely about making a budget. It revolves |

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| <p>Fallen Timbers - B</p> | <p>around strategies to make the budget work. The pay-offs can be huge when you keep the students engaged over a four year period.</p> |
| <p>Call Center Setup and Management</p> <p>Fallen Timbers - A</p> | <p>Emily Patterson – University of Arkansas</p> <p>Many campuses are currently utilizing call centers to manage incoming calls and outgoing phone campaigns. This session will answer questions about how to get buy-in from administration and other offices to start a call center for your office and best practices for staffing, managing, and using it as a resource not only for managing high call volume, but to also reach out to students regarding financial aid and other information.</p> |
| <p>NASFAA’s Annual State and Regional Training – SAR Comment Codes 2017-18</p> <p>White Pine II</p> | <p>Shannon Crossland – Texas Tech University and Debra LaGrone - NASFAA</p> <p>This training will examine common database match SAR comment codes that schools encounter, discuss the basis for the SAR comment code and review options a school must use to resolve a SAR comment code that impacts student eligibility for Title IV aid.</p> |

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| <p>Exhibitor Browse and Silent Auction Drawings</p> <p>White Pine III</p> | <p>12:00 – 12:30 pm</p> |
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| <p>Time</p> | <p>12:30 pm – 2:00 pm</p> |
| <p>Luncheon</p> <p>White Pine I-II</p> | <p>Announcements: Dr. Harold Whitis and D. Ingram</p> |
| <p>NASFAA Update</p> | <p>Justin Draeger, NASFAA President</p> |
| <p>Business Meeting</p> | <p>Denise Welch, SWASFAA President</p> |

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| <p>Time</p> | <p>2:15 pm – 3:00 pm</p> |
| <p>Working in an</p> | <p>Billie Jo Hamilton – NASFAA Chair –</p> |

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| <p>Enrollment Management Environment</p> <p>White Pine I</p> | <p>This session will provide practical tips for success for new and aspiring aid directors. Being successful takes more than managing aid programs and having a firm grasp of procedures and legislation governing financial aid. It also takes understanding the values of the people around you, having a vision, having the ability to plan well, and positioning your office on campus. Hear what skills a “seasoned” aid director feels have helped her to succeed and how you, too, can develop yourself and become a great leader!</p> |
| <p>How to Serve Online Students – Panel Discussion</p> <p>Fallen Timbers - B</p> | <p>Emily Patterson – University of Arkansas, D. Ingram – Tarrant County College, Kandi Molder – Oklahoma Wesleyan University</p> <p>With more and more programs being offered online, it's become apparent to many schools that serving the needs of these students is very different than serving those attending on a college campus. This panel will discuss best practices and what schools are doing to serve these students.</p> |
| <p>Using Technology to Increase Financial Literacy</p> <p>Fallen Timbers - A</p> | <p>Julia Joggerst – Common Bond</p> <p>This session will cover how financial aid officers can use online tools, content, and calculators to help students better understand their student loan options, enabling them to make the most informed decision for how to pay for college or graduate school based on their own personal circumstances. The session will walk through specific examples of unbiased tools and content that financial aid officers can use to help students make these decisions.</p> |
| <p>Privacy and the Use of Financial Aid Information</p> <p>White Pine II</p> | <p>Kathleen Styles – Chief Privacy Officer - Department of Education</p> <p>Institutions often want to share financial assistance information across the campus, and to use it for purposes beyond awarding financial aid. Hear about privacy and data use considerations on campus generally, and review recent guidance from the Department of Education describing limitations on the use of this information.</p> |
| <p>What is the Right Type of Loan? Help your student’s fast break to the best loan for them!</p> <p>Northwest Territory</p> | <p>Raina Chezem – Elm Resources, Michelle Enriquez - Citizens One, Kim Thomas – Cognition Financial</p> <p>This session focuses on how you can help families look at all aspects of choices in financing an education and how the variety of choices impacts the total cost of education. Hear how some schools communicate the choices, what trends they noted and the impact on the financial aid office.</p> |

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| <p>Break and Exhibitor</p> | <p>3:00 pm – 3:30 pm</p> |
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| White Pine III | |

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| Time | 3:30 pm – 4:15 pm |
| What Would You Do? | <p>Melanie Rinehart – SSC, Jason Marrujo – OSU-CHS, Erika Cox - UTSA, Erin Porter - TAMU</p> <p>We all have had those sticky student situations where the details were a little gray or just so crazy you just don't know where to start. Come share that situation and see what our panel of FA Administrators would do or just come and listen for ideas and tips for when you find yourself in these situations.</p> |
| Fallen Timbers - A | |
| Financial Planning Counselor – Office of First Year Success | <p>Robert Raab and Jake Walters - Oklahoma State University</p> <p>The Office of First Year Success Financial planning counselors provide individualized financial strategies and recommendations to freshman students at no cost. They leverage campus resources and opportunities to address student needs. They work in collaboration with Scholarships and Financial Aid to address immediate monetary needs of first year students via intervention activities, education, financial counseling, and other financial strategies to help student succeed their first year. In addition, they advise students regarding:</p> <ul style="list-style-type: none"> • Financial Literacy • Strategies to overcome financial setbacks • Mapping out plans for funding the student’s education |
| Fallen Timbers - B | |
| Working with Income Tax Documents | <p>JoEllen Soucier – Houston Community College System</p> <p>This session will discuss the various verification tax documents that are used to complete verification and address conflicting information. We will review W2 forms, Tax Transcripts, Account Transcript, Amended Returns, TBDRV Record, Foreign Returns, and more.</p> |
| White Pine II | |
| | 3:30 pm – 4:30 pm |
| R2T4 for Credit Hour Schools (60 minutes) | <p>Rick Renshaw – Department of Education</p> <p>Return of Title IV (R2T4) funds is an important process on your campus. This session will focus on R2T4 provisions for students enrolled in credit-hour programs, providing a basic overview of the R2T4 regulations and current</p> |

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| Time | 6:00 pm – 9:00 pm |
| Dinner and Awards Recognitions | Howl at the Moon Dinner and Awards Ceremony - Please come join us for a howling time with delicious bbq, acknowledgement of our deserving colleagues, and come see if you won any raffle prizes and what was in the Mystery Box. |

Friday, November 10, 2017

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| Time | 7:30 am – 8:15 am |
| White Pine I-II | Crafter Buffet |
| | 8:15 am – 9:15 am |
| General Session | Join us for a discussion of the “Five Dysfunctions of a Team” and participate in some fun exercises led by Harold and Debbie Whitis. |
| | 9:15 am – 10:00 am |
| Veteran Recognition | Join us in honoring the “Warriors of our Wolf Pack”. Dr. Hamaria Crockett will be speaking about veteran services, opportunities, and challenges. |
| | 10:00 am – 10:30 am |
| Closing Remarks | Ms. Shannon Crossland – Incoming SWASFAA President |