



Southwest Association of Student Financial Aid Administrators
news FOR and ABOUT the SWASFAA membership

THE SCAN

Fall 2010 Issue



President's Message

President's Message

by Lee Carrillo, SWASFAA President

Greetings SWASFAA Members,

Fall is in the air, football has begun, and the thought of relaxing in the cool autumn after a hard day at the office is always welcome! As we begin this new term let us remember that students come first and all questions are important and have meaning. We are in a strategic position to help our students succeed helping them reach their goal of receiving that degree!

As you begin planning for the future, let's remember to add the Annual SWASFAA Conference in New Orleans the week of December 15th through the 17th. The theme for the Annual conference is "Street Car Named SWASFAA." If you would like to avoid the throngs of people at the FSA conference, join us. There will be expert training beginning with Boot Camp, December 13, 14 and 15. The theme this year is, "Financial Aid Film Feast New Orleans Style." The Boot Camp Committee and Rita Toland, chair, are excited and eager, and hope the classes will be full of new and old Financial Aid Staff. These sessions are a great learning experience and attendees get to hear best practices and simple "how to" solutions you weren't sure of, not to mention interacting with other institutions in our region. The actual conference will begin at noon on the 15th and end at noon on the 17th. This will be a wonderful time to visit New Orleans during the Christmas season. I have heard that the town goes "all out" with lights and decorations, and the mood is very festive. The meat of this conference will focus on how we do business now and in the future. As I had mentioned at our last conference a year ago, we are in the midst of change and we must be able to move at the speed of light to keep up with the ever changing seasons.

I would like to thank the New Mexico and Oklahoma associations for welcoming me to their state conferences last spring. I had a great time seeing familiar faces and meeting new people during my time visiting each state. The main themes during these conferences were "Two PELLs in an Award year and the ever popular Stafford Direct Lending transition." I'm sure that all of you have solved how this is going to work at your shops, and my hope is that the transitions were smooth with little effect on the student body.

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Beginning this fall I will start traveling again to the three remaining states conferences Arkansas, Louisiana and Texas. I am excited, and although I don't like traveling all that much, I really do enjoy experiencing new places and meeting new members. Training on Cost of Attendance and understanding the requirements of the Net Price Calculator will be a valuable part of the fall conferences.

In closing, I would like to extend my congratulations to all of you who have worked so hard to get students into school this coming academic year. Because of our success in processing and completing students FAFSA applications, we in turn help our students succeed as they enter a new world with many challenges and first time experiences. Don't ever think that without you this could happen; you are the "alpha" for many students. Have a great semester and we will see you in New Orleans for Christmas!

AASFAA - News from Arkansas

by Julia Robinson, Arkansas State President

I'm pleased to report the success of our one day spring conference held at the Lake Point Conference Center in Russellville, Arkansas where we had over 130 in attendance, including two DOE representatives. Mike Novak presented on Year Round Pell and Wood Mason enlightened us on more Direct Loan issues. Conference chair Bronwyn Sneed and her committee did a great job promoting Earth Day.

Not only are Arkansas Administrators dealing with Year Round Pell and Direct Loans but our state began using the lottery money to award many more students the Arkansas Academic Challenge Scholarship. With the requirement of the FAFSA you can just imagine how ISIR applications have increased across the state. Thank goodness for the good rapport we have with Arkansas Higher Ed Department.

Mark LeBahn and his committee are busy planning the fall conference to be held on October 21 & 22 in Little Rock at the Airport Holiday Inn where we'll enjoy a visit from President Lee Carrillo.

Decentralized training is scheduled for November 9th with Carlia Smith presenting. We're working to keep College Goal Sunday alive in the state and like everyone else we've lost several members and are facing many strategic planning challenges.

Update from OASFAA

by Nancy Moats, Oklahoma Past President

As of July 1, 2010, a new fiscal year began for OASFAA resulting in a change of officers and board members. David Barron, Director of Financial Aid at Rogers State University in Claremore, OK, assumed the Presidency. Other officers are: Mendy Schmerer, President Elect; Nancy Moats, Past President; Lori Boyd, Secretary; Teri Cochran, Treasurer; Carol Stanfield, Treasurer Elect; Mary Lou Bledsoe, Delegate at Large; and Dustin Davidson, Delegate at Large.

A transitional board meeting was held on June 24, with both the 2009-10 and 2010-11 boards meeting, to exchange ideas and materials. The contract for the 2011 Spring Conference site has been signed and plans are proceeding for the conference to be held at the Hard Rock Hotel & Casino Tulsa on April 14, 15 and 16th.

Three long-time members of the financial aid community have announced their retirements recently. Sherry Foster Hudson and RoseAnn Arnold are both retiring from Southeastern Oklahoma State University. The Dean of Enrollment Management, Liz McCraw, says that Sherry and RoseAnn have been with the Financial Aid Office for over 30 years and have made an enormous contribution to thousands of students in reaching their educational goals. Many of you will remember Sherry, as she has served in leadership positions on the local, regional and national levels.

Also, after many years, David Horn has retired from OSLA. David has served the financial aid community as a university administrator, a lender representative and long-term as OASFAA's Historian and Photographer. He was the man behind the camera saying "smile" and we have greatly enjoyed his slide shows where he has captured the OASFAA history in pictures.

OASFAA continues to plan for an exciting and productive year in 2011.

SCAN is produced by the Southwest Association of Student Financial Aid Administrators. SWASFAA is a professional organization with a diverse membership and SCAN works toward providing a forum for communicating to the membership news and issues affecting the student aid profession in the Southwest region. The ideas and opinions expressed in this forum do not necessarily reflect the viewpoints of SWASFAA, its board of directors, or its members.

Article Submission

Submit your articles, staff updates, photos or other items of interest for the SCAN to **Sara Elliott at selliott15@cnm.edu**. Questions can also be sent to the same address.

DEADLINES

Deadline for articles to be received for inclusion in the Winter 2011 edition of SCAN will be January 7, 2011.

SWASFAA CALENDAR

Check the calendar on the SWASFAA website for events happening in your state and region. If you have events you'd like to add to the SWASFAA calendar, please notify **Sara Elliott at selliott15@cnm.edu**.

TASFAA Update

by Carolyn Jones, Texas State President

The TASFAA Fall Conference was held October 6-8, 2010 in Galveston TX. An ABCs workshop was held on October 5 & 6. This workshop is for new financial aid professionals to help them learn a lot about financial aid and regulations in a short amount of time. Our charity this year is the TASFAA Mack Adams Scholarship. A silent auction is held at the fall conference to raise funds for our scholarship program.

If you are interested in volunteering for TASFAA please go to <http://tasfaa.org/docs/forms/memVolunteer.html>. We need volunteers to fill all of our committees for the 2010-2011 year.

At the NASFAA Conference in Denver the "Lifetime Membership" was presented to **Clair "Micki" Roemer** for over 30 years of distinguished leadership in the financial aid profession. As a former president of both the Texas Association of Student Financial Aid Administrators and the Southwest Association of Student Financial Aid Administrators, and as National Chair of NASFAA for 1993-94, she is known as a financial aid expert, administrator, facilitator, trainer/presenter, mentor and friend to all. TASFAA is proud to have Micki as a member and we would like to congratulate her and thank her for all of her hard work over the years!

Financial Aid Film Fest - New Orleans Style

by Rita Toland, Boot Camp Committee Chair

Set your calendars for December 13-15, 2010 and your vehicle on auto pilot! Come and enjoy the sights and sounds of the Financial Aid Film Fest - New Orleans style. Regardless of your favorite type of movie...we have it all!

Suspense - Why does my school have to return most of the tuition but the student get to keep all of his financial aid???????

Mystery - Why is that married couple filing "head of household" on their taxes????

Adventure - Has the student accelerated in order to receive a 2nd Scheduled Award of Pell Grant?

Drama - Should you override a dependency status for a student????

Comedy - Why does only one Boot Camp instructor have a beard????

For 2 fun-filled, jam-packed days, you will laugh; you will cry; you will moan; you will face an array of emotions as you experience this Financial Aid Film Fest. If some of these movies appeal to you, sign up for Boot Camp at swasfaa.org! We hope to see you there.

Application and Student Eligibility

Federal Methodology

Professional Judgment

Customer Service

Verification

Federal Pell Grant

Campus-Based aid

Electronic Initiatives

Loans

Customer Service

Teach Grant

R2T4

Jeopardy



SWASFAA Conference Fund Raiser!!!

by Geraldine Martinez, Conference Committee Chair

This year's conference which will be held in New Orleans, December 10-17, 2010 will be helping the youth of Louisiana through the George Rodrigue Foundation of the Arts (GRFA). George Rodrigue is most famous for his paintings of the blue dog.

The mission of his foundation advocates the importance of the visual arts in the development of youth. GRFA encourages the use of art within all curriculums and supports a variety of art education programs.

When getting yourself ready to come to New Orleans for the conference don't forget to pack some art supplies

and if you don't want to carry the extra in your luggage monetary donations will be accepted. Keep an eye out on the SWASFAA website for a list of art supplies and more information on the George Rodrigue Foundation of the Arts.

See you all in December!!!



Continuing Education Committee Announces Fall Training Opportunities

by Mary Sue Rix, Continuing Education Committee Chair

SWASFAA's Continuing Education Committee announces training opportunities for the fall. As you may remember, the committee has offered training for the past two years in conjunction with the annual fall conference held in December. This was presented as a pre-conference workshop.

In addition, the association did not offer Decentralized Training last year as NASFAA elected to go a different route with that training and chose to offer a set of webinars for any NASFAA member that elected to participate at a cost to the institution.

This year, NASFAA is offering to the state and regional associations a module dealing with Cost of Attendance (COA). Anyone who chooses to take advantage of the module can use the material in any way they see fit.

SWASFAA is offering the COA module, and the presenter, to each state to use as the state desires. In addition, SWASFAA is offering to each state the opportunity to use a presentation on the Net Price Calculator, if they so choose, presented by Matt Orem, who has done extensive work with this project.

All five states will be offering the COA module, two as breakout sessions at their fall conferences and three as training on a separate date similar to that done in the past with Decentralized Training. The COA module will be part of the program at the fall conferences in Texas and Louisiana. Arkansas and Oklahoma will have a separate date set aside in which training on COA and the Net Price Calculator will be presented. New Mexico will have a separate date set aside for COA training. All of this training will be provided by SWASFAA.

We hope that many of you are able to participate in the fall training offerings. Please contact the committee member in your state if you have questions.

The SWASFAA Continuing Education Committee:
Mary Sue Rix, Chair, Louisiana, msrix@centenary.edu
Carlia Smith, Arkansas, csmith@uasys.edu
Arlene Odenwald, New Mexico, aodenwald@cnm.edu
Lynell Armstrong, Oklahoma, lynella@gctech.org
Karen Krause, Texas, kkrause@uta.edu

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Membership Committee Update

by Nora Cargo, Membership Committee Chair

SWASFAA membership renewal for 2010 has slowly continued to increase over the past few months. As of August, we have 137 member institutions, up from 119 in May. We are coming closer to the number of member institutions that we had at the close of 2009 (151).

Our total number of members is currently at 1219, which actually surpasses the number of members we had in 2009 (1216):

Institutional	719
Associate	149
Individual	344
Not Specified	7

Please assist us by making certain that your membership information is accurate and complete. Individual members may update their own information at http://www.swasfaa.org/docs/toc_memberservices.html by selecting "Update Your Member Profile."

Additionally, Institution Primary Contacts may edit, add, or delete members by selecting "Primary Contacts: Add or Delete Members from your Institution/Agency" at http://www.swasfaa.org/docs/toc_memberservices.html.

If you need assistance with your membership, please contact Nora Cargo at ncargo@tamu.edu or (979) 458-5310.

Thank you for renewing your membership and please encourage your colleagues to do so as well.

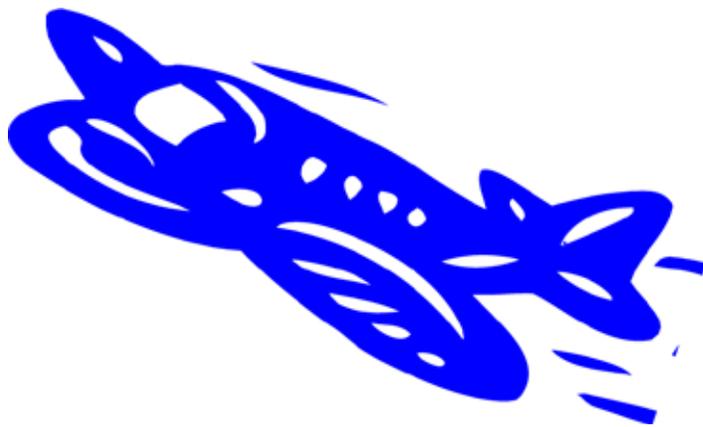
Additional Plug:

Have you ever felt like pulling a Steven Slater - calling out a customer, grabbing a drink, and popping an emergency exit chute?

If you survived financial aid disbursement, you likely have!

You are not alone. SWASFAA is here for you. One of the many benefits of membership is a duty free network of colleagues that spans across five states. Additionally, members receive boarding passes for professional development and can stop over to learn tried and true best practices from other travelers at our annual conferences.

To book your first-class reservation (become a member), visit <http://www.swasfaa.org>.



New on swasfaa.org

by Sara Elliott, Electronic Initiatives Committee Chair

2010 Annual Conference

- Register at http://swasfaa.org/docs/conferences/toc_conferences.html
 - o \$200 Boot Camp Fee
 - o \$250 Annual Conference Fee
- Reservations available through the New Orleans Sheraton, \$99 a night, free wireless, and 50% off parking, book your room at: http://swasfaa.org/docs/conferences/toc_conferences.html
- Exhibit Space available at <http://swasfaa.org/docs/sponsors/sponsorInfo.html>

Past Minutes

SWASFAA Board Minutes can be found online at http://swasfaa.org/docs/committees/BoardDirectors/minutes_index.html.

Movers and Shakers

New Mexico State University Office of Financial Aid announces these changes in staff:

- Carlos Clark - Director
- Marlene Melendez - Assistant Director of Scholarship Services
- Rosa Lee Ramirez - Records Technician II
- Lisa Maynez - Financial Aid Advisor II
- Jamie Lopez - Financial Aid Advisor III

Central New Mexico Community College Financial Aid and Scholarship Services is happy to have Paula Pruitt and Susan Chavez as new additions to the office.

If your office has had changes in staff or other exciting news to share, please email selliott15@cnm.edu to have it included in the next SCAN.



Policy Frequently Asked Question: Entrance Counseling Completion Records

by Debra Bradford, USA Funds

USA Funds Ask PolicySM addresses the issue of whether to retain entrance counseling completion records for students receiving Stafford and Grad PLUS loans through the Federal Direct Loan Program.

Q: We are a new Direct Loan school, and we have a question about entrance counseling records that we need to retain for audit purposes. I know that a student's Direct Loan funds won't disburse if the student hasn't signed a Master Promissory Note through the Direct Loan program and also completed entrance counseling. Should we print each student's entrance counseling records from the Common Origination and Disbursement System to keep in the student's files, or does the fact that a student's Direct Loan funds won't disburse unless the student meets those requirements mean we don't need to keep copies of those specific COD records?

A: Regulations in the Federal Direct Loan Program require that a school retain a record of each Stafford and Grad PLUS loan borrower's completion of entrance counseling. The school is not required to maintain that documentation in each specific student's file. The documentation must be readily accessible to the U.S. Department of Education and program reviewers for review and audit purposes, however.

You may maintain entrance counseling records in hard copy or electronic format.

The Challenge of Supporting Borrowers With Split Loan Portfolios: Understanding the Challenge, Offering Solutions

by Kevin Struckhoff, TG Assistant Vice President, Relationship Management and Consulting

In today's environment, with schools transitioning to the Federal Direct Loan Program (FDLP) and lenders putting Federal Family Education Loan Program (FFELP) loans to the Department of Education (ED), many borrowers, including both students and parents, are likely to have federal education loans under multiple programs, serviced by multiple servicers. This phenomenon, known as split-loan servicing, has the potential to create confusion for some borrowers. Unfortunately, this confusion may impact their ability to repay their federal education loans successfully.

A short-term solution: Build greater awareness of NSLDS

One key to helping borrowers manage split-loan servicing of their federal education loans is to educate them about the importance of the National Student Loan Data System, better known as NSLDS. NSLDS is ED's database for federal student aid, including student loans. Through NSLDS, a borrower can view pertinent information about grant and loan aid received over the course of his or her educational career, including who holds and services the borrower's federal education loans.

Specific to loans, NSLDS allows a borrower to obtain detailed, current information about his or her federal loans, including outstanding balances, loan statuses, disbursements, and loan holder name and contact information. The NSLDS website, www.nsls.ed.gov, is available 24 hours a day, 7 days a week. To access NSLDS, a borrower will need to provide his or her Social Security Number (SSN), the first two letters of the borrower's last name, his or her date of birth, and his or her Personal Identification Number (PIN).

A long-term solution: Encourage borrower connection with loan holders

Another habit to instill in borrowers over the course of repayment is ongoing communication with their loan holders. Under the borrower rights and responsibilities section of the Stafford and PLUS master promissory notes, a borrower must promptly notify his or her loan holders if any of the following events occur before the borrower's loans are repaid:

- The borrower's address, telephone number, or e-mail address changes.
- The borrower changes his or her name (for example, from maiden name to married name).

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Policy Frequently Asked Question...*(continued from page 7)*

- The borrower (or student, in the case of a parent PLUS loan) transfers from one school to another.
- The borrower (or the student, in the case of a parent PLUS loan) withdraws from school, begins attending less than half time, or fails to enroll at least half time for the period of enrollment.
- The borrower (or the student, in the case of a parent PLUS loan) graduates, or the expected graduation date changes.
- The borrower changes his or her employer, or the employer's address or telephone number changes.
- The borrower has any other change in status that would affect his or her loan (for example, the loss of eligibility for an unemployment deferment by obtaining a job).

Establishing connections with loan holders works to the borrower's advantage. If a borrower experiences difficulty in repayment, the loan holder may be able to provide the borrower with several repayment options and help him or her through that financial rough spot.

More help and information

For questions about NSLDS, borrowers can call the Federal Student Aid Information Center at (800) 433-3243, or send an e-mail message to studentaid@ed.gov. If borrowers have questions about managing loan repayment, they can call TG's customer assistance call center. TG customer assistance is available by calling (800) 845-6267 or by sending an e-mail message to cust.assist@tgslc.org.

Kevin Struckhoff is TG assistant vice president for relationship management and consulting, serving schools in SWASFAA. You can reach Kevin at (800) 252-9743, ext. 6701, or by e-mail at kevin.struckhoff@tgslc.org. Additional information about TG can be found online at www.tgslc.org.

