

2017

PACFAA 

Ala Moana Hotel | Honolulu, HI | March 13-14, 2017

Be Knowledgeable.

Be Empowered.

Be Credentialed.



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Letter from the President



Aloha PacFAA Members and Guests,

On behalf of the PacFAA Executive Board and our conference committee, I want to welcome you to the 2017 PacFAA Conference.

Lets face it, financial aid isn't getting any easier!

With the ever changing regulations and updates that we have become accustomed to its no wonder why we find ourselves in a state of confusion and panic from time to time. This year we were thrown another curve ball with the debut of the "Early FAFSA Release, Prior, Prior, Year, and the creation of comment code 399." With this many waves in the ocean its hard to see how we manage to stay afloat, but we have the choice to either fight against the waves, or go with the flow. As we gain experience and mature in our profession we tend to find that going with the flow and learning to adapt is always the best choice. This ability to adapt is what prepares us for the upcoming changes, whether they be good or bad, we will see in the very near future.

Training is now more than ever so important for all financial aid professionals in order to make sure that you are properly prepared for such changes. Being on the WASFAA Training Committee allowed me to see the value in the training's that are offered and how much it really is beneficial to our membership to have the same services provided to us in the Pacific Islands. The PacFAA Executive council, in partnership with WASFAA & NASFAA

are excited to offer our membership access to the NASFAA U credential modules as a training tool to build upon your existing financial aid knowledge. We hope that all of you find it useful and are able to credential in the respective modules.

The PacFAA Executive Council is looking currently planning for the future and changes that we need to anticipate as an organization. We are looking forward to releasing those exciting changes to the membership in the near future and are looking for new and exciting ways to increase communication and involvement of our membership. We want to make sure that everyone has a voice and that it is heard loud and clear. Our organization serves as a beacon of financial aid literacy in the pacific islands and having a strong membership just makes it that much better. While other states have state offices that facilitate this need, the Pacific Islands have PacFAA to take up this charge. We need to, as a whole organization, make sure we survive, we are strong and that we continue to grow. We must look to the future, while learning from the past and we will come out on the other side stronger and prepared for any challenges that may come our way.

I wish you a good conference, and a successful 2017.

Mahalo,
Shawn Domingo
PacFAA President



Day 1: March 13, 2017

8:00 am — 9:30 am Registration/ Welcome Breakfast WASFAA Update

Mike Johnson
WASFAA President
Garden Lanai

9:30 am — 10:45 am Session 1: Campus Based Aid

Anthony Morrone
Nevada State College
Carnation Room

This reviews the provisions common to all three of the campus-based programs along with detailed information about the individual programs (Federal Supplemental Educational Opportunity Grant, Federal Work-Study, and Federal Perkins Loans).

Session 2: Verification for Beginners

Bruce Honer
U.S. Dept of Education
Plumeria Room

This session is intended for the new financial aid administrator. In this session, we will have a comprehensive discussion about all of the verification components. This will include a basic overview of regulatory requirements, definitions and processes needed to assist in your success as an administrator for the verification provision.

Session 3: Maintaining a School's Title IV Eligibili- ty: Why, When, and How to Change the E-App

Mike Johnson
Portland State University
Pakalana / Anthurium Room

In this session, we will discuss the Program Participation Agreement (PPA) and the Eligibility and Certification Approval Report (ECAR), the federal documents that confer a school's eligibility to participate in the Title IV programs. We will also discuss when, why, and how schools use the Electronic Application (E-App) to update information that affects their eligibility to participate in those programs.

10:45 am — 11:00 am Transition Break

11:00 am — 12:15 pm Session 4: Consumer Infor- mation

Anthony Morrone
Nevada State College
Carnation Room

This brings all of the consumer information requirements together in one place, including required disclosures of institutional information, financial assistance information, campus and fire safety, completion and transfer-out rates, and athletics. Quick quizzes, learning activities, and reflection questions help reinforce

content and help individuals determine if their schools are meeting regulatory requirements. Completion of this qualifies individuals to take the NASFAA University credential exam on consumer information.

Session 5: R2T4 Ashley Munro University of Alaska-Fairbanks *Plumeria Room*

Do you ever have students that disappear before the end of the term? What do you do about them? This session will explore the Return to Title IV Funds regulations and practice, including a look at the calculations, withdrawal dates and the required notification.

Session 6: Advanced Verifi- cation

Bruce Honer
U.S. Dept of Education
Pakalana/Anthurium Room

This session will highlight the changes to the verification process for the 2017-18 award year. Also, this session will include an overview of regulatory changes, documentation requirements, as well as verification reminders to ensure accurate processing.

12:15 pm — 2:00 pm Lunch Buffet: Institutional Improvement Renee Shultz *Garden Lanai*



2:00 pm — 3:15 pm

Session 7: Student Eligibility

Mike Johnson

Portland State University

Carnation Room

This provides an overview of general student eligibility criteria and documentation requirements acquaints participants with the role of the Central Processing System (CPS), the student eligibility database matches, and the National Student Loan Data System (NSLDS), as well as how certain educational programs affect student eligibility.

Session 8: FAFSA Application Process

Ashley Munro

University of Alaska-Fairbanks

Plumeria Room

Review the various sections of the FAFSA and learn why we ask the questions we ask.

Session 9: Developing an Office Calendar

Kay Soltis

Pacific Lutheran University

Pakalana/Anthurium Room

New Director or just trying to get organized, a calendar of office events and processes will help you and your staff be better prepared with resources for those time-consuming events. Where do you start and how to get your staff involved in financial aid events but also University and community tasks.

This will be an interactive session so bring your calendars and ideas. Sample calendars are also welcome!

3:15 pm — 3:30 pm

Transition Break

3:30 pm — 5:00 pm

Session 10: Satisfactory Academic Progress

Laura Hughes

Lewis-Clark State College

Carnation Room

This provides an overview of satisfactory academic process (SAP) concepts and guides the learner through evaluating SAP, appeals, and additional policy considerations. Quick quizzes, learning activities, and reflection questions help reinforce content and help individuals understand SAP. Completion of this qualifies individuals to take the NAS-FAA University credential exam on satisfactory academic progress.

Session 11: How to do a Presentation

Kay Soltis, Ashley Munro,
Shawn Domingo, Frank Green,
Anthony Morrone
Plumeria Room

Does the thought of doing a presentation make you break out in hives, make you sick to your stomach, break out in a cold sweat, feel like fainting, make your voice squeak or make you run away screaming. Come hear a frank panel discussion about some of the techniques for how to do a presenta-

tion; from understanding the topic you are trying to present, knowing your audience, deciding to do a power point and/or handouts. How to outline your presentation - tell your audience what you're going to tell them, tell them the information, quick review of what you told them and then leave them with something. If we three can do a presentation you can do it too!

Session 12: Administering Adds, Drops, & Withdrawals

Bruce Honer

U.S. Dept. of Education

Pakalana/Anthurium Room

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.

5:00 pm

End of Day 1

Enjoy the rest of your day!



Day 2: March 14, 2017

8:00 am — 9:15 am

Registration/ Welcome Breakfast NASFAA Update

Lisa Blazer
NASFAA National Chair
Garden Lanai

9:15 am — 10:30 am

Session 13: Professional Judgement

Kay Soltis
Pacific Lutheran University
Carnation Room

Explore the world of PJ. Definition, what's allowed and what's not. Not all PJ's are the same, why not? Necessary supporting documentation should be a good practice. Notifying the student regardless of the decision and documenting the student's file of the decision. Finally, we'll go over some case studies and we'll talk about the decision and the rationale. You can even come in your PJs to discuss Professional Judgment.

Session 14: Yield and Retention

Lisa Blazer
University of Texas at San Antonio
Plumeria Room

Across our institutions, the role of financial aid has shifted from equity awarding to strategically awarding to have a greater impact on yield and retention. How much financial aid

should we award to students to better impact student success and institution enrollment goals? How can we create need-based and merit-based programs that help create access as well as influence student success? This session will focus on the paradigm shift happening in financial aid and how financial aid administrators can become better equipped to participate in and lead conversations about enrollment management.

Session 15: Gainful Employment

Laura Hughes
Lewis-Clark State College
Pakalana / Anthurium Room

This session will provide an overview of the Gainful Employment regulations, reporting, and required disclosure requirements that schools must comply with including a discussion on the debt-to-earnings rates.

10:30 am — 10:45 am

Transition Break

10:45 am — 12:00 pm

Session 16: Packaging & Notification of Awards

Kay Soltis
Pacific Lutheran University
Carnation Room

Review the different ways to Package financial aid, things to consider when determining your institution's Pack-

aging goals and align them with your institutions admission and retention goals. How to present your Award Notifications and in a timely manner. Is Prior-Prior Year/Early FAFSA changed your timing of Award Notification to new/prospective students' vs returning students. Come we'll talk and discuss these very real concerns.

Session 17: 5 Must-Haves for Modern Financial Aid

Chris Jordan
CampusLogic
Plumeria Room

1-hour interactive presentation. Interactive elements include: audience participation questions, group discussion around shared best practices. PPT presentation. Handouts to be shared. Demonstration of Campus Logic's Student Forms product to be included, dependent on time.

Students are glued to their mobile devices. Fiction: Financial Aid isn't mobile. Rather than waiting for students to look up from their gadgets, Financial Aid Offices need to get in front of them where they live: their phones. Modern Financial Aid is the solution. In this interactive session, you'll experience first-hand how paperless file review, automated student follow-up including SMS/text-messaging and email, and automated file indexing and imaging can change



your institution's entire approach to financial aid. Hear about the dramatic impact personalized mobile-optimized web-form wizards, automated updates, e-signature, and secure document upload from any device will have on your student experience

Session 18: Leading with the Heart, Mind, & Soul

Lisa Blazer

University of Texas at San Antonio

Pakalana/Anthurium Room

Leading with the heart, mind and spirit provides a framework for what it means to be an effective leader. Leadership is not about a title but about whether you CHOOSE to lead. It requires a long-term commitment to transforming yourself and others. It's not about power, but about authority. That authority can come from your previous experience, your knowledge base and your ability to focus on the task at hand as well as the people you are leading. During this session, you will discover what it takes to be an effective leader and answer questions about your motivation to serve and help others, regardless of your role on campus.

12:00 pm — 2:00 pm

Lunch Buffet

PacFAA Business Meeting
Garden Lanai

2:00 pm — 3:30 pm

Federal Update

Bruce Honer

U.S. Dept. of Education

Garden Lanai

This session will provide a comprehensive overview and update on existing Federal regulations in financial aid as well as offering interpretation and guidance on recently enacted regulations.

3:30 pm

End of Conference



*Banner photos: Waimea Canyon panorama by Gerald Prickett, Kaua'i Community College; Hula dancers from Kaua'i Community College Hawaiian Studies Program
Page layout & design: Print Design major, Shaina Nacion, Kaua'i Community College*

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Use AwardLetter as your student engagement engine to communicate across the financial aid lifecycle.

- Boost enrollment yield
- Streamline efficiencies
- Improve retention
- Modernize your award letter
- Reduce borrowing
- Foster financial literacy

Your staff and students will thank you.

