



*Cruising Into the Future  
by Strengthening our Bond*  
May 29 - June 1, 2018

**Naples Grande  
Beach Resort**  
475 Seagate Drive  
Naples, Florida 34103  
NaplesGrande.com

## 2018 FASFAA Training and Conference

*Cruising into the Future by Strengthening Our Bonds*  
**May 29<sup>th</sup> (Pre-conference) & May 30<sup>th</sup> - June 1<sup>st</sup> 2018**  
[Naples Grande Resort](#), Naples, Florida

### Tuesday, May 29, 2018 (Pre-Conference Workshops)

8:00a – 4:00p	Pre-conference & Registration Open (closed during Lunch)	<i>Acacia 1 Foyer</i>
8:00a – 4:00p	<i>Exhibit Area Set-up</i>	<i>Royal Palm Foyer</i>
8:30a-11:15a	<b>NASFAA Credential Session Begins – Application Process</b> , Kristopher Hatcher, GCSC / Nathan Basford, FSU	Royal Palm 3
9:30a-9:40a	Transition Break	
9:00a-11:30a	<b>FASFAA Leadership Workshop Begins</b> , Past & Present FASFAA Board Members (For Leadership Program Participants)	Banyan 1-2
9:40a-11:30a	<b>NASFAA Credential Session Continues</b> – Application Process, Kristopher Hatcher, GCSC / Nathan Basford, FSU	Royal Palm 3
11:30a-12:30p	<b>Lunch</b> – Included with \$50 <i>Pre-conference</i> Registrations	Royal Palm 1
12:45p-2:45p	<b>NASFAA Credential Session Begins</b> – Eligibility, Sean Johnson, HCC / Stephanie Lawrence, ASU	Royal Palm 3
12:45p-2:45p	<b>FASFAA Leadership Workshop Continues</b> , Past & Present FASFAA Board Members (For Leadership Program Participants)	Banyan 1-2
12:45p-2:45p	<b>Excel for Financial Aid Administrators Begins</b> , Daniel Barkowitz	Royal Palm 2
2:45p-2:50p	Transition Break	
3:00p-4:00p	<b>NASFAA Credential Session Continues – Eligibility</b> , Sean Johnson, HCC / Stephanie Lawrence, ASU	Royal Palm 3
3:00p-4:00p	<b>FASFAA Leadership Workshop Conclusion / Meet the 17-18 Board</b> , Present FASFAA Board Members (For Leadership Program Participants)	Banyan 1-2
3:00p-4:00p	<b>Excel for Financial Aid Administrators Q &amp; A</b> , Daniel Barkowitz, Valencia	Royal Palm 2
4:15p-4:45p	<i>Moderator Orientation Session (for conference Moderators)</i>	Royal Palm 3
5:00 – 6:00p	<b>New Member “Muster”</b> (For new FASFAA members/1 <sup>st</sup> time conference attendees)	Royal Palm 2
6:00p – 8:00p	<b>All Attendees’ Preconference Networking (“Lifeboat Drill”)</b> <i>Meet the President &amp; Board (Meet the “Captain &amp; His Crew”)</i>	Vista Ballroom (All Attendees)

**Region Color Day! Wear your Region colors.**

5:45a-6:45a	“Happy Hoofers” Morning Walk	Meet in Lobby
8:00a-3:30p	Registration Open (closed during Lunch)	Acacia 1 Foyer
8:30a-9:45a	<b>Concurrent Sessions 1</b>	
	<p><b>A – State Programs Update, Brian Underhill</b>                      The session will provide an update on a variety of topics related to state financial aid, including: current 2017-18 academic year numbers, 2018 state legislative changes, Bright Futures summer funding, FSAG funding and allocations, state calendar, state reporting, and an introduction to the new State Student Financial Aid Database (SSFAD).  <i>Moderator – Jamie Myers, State College of Florida-Manatee</i></p> <p><b>B – Problem Students, or Students with Problems, Kevin Moehn, ReliaMax/Connex \$</b>                      Understanding default rates, what they mean, how they affect a school, why each office within the school’s administration ought to be involved and how a school can have a positive impact on repayment success including sharing best practices with schools in attendance.  <i>Moderator – Tiziani Marchante, Florida Southwestern State College</i></p> <p><b>C – Overview of Title IV Programs, Brenda Noblitt/ Andrew Hidalgo/ Amy Smith, UF ☼</b>                      Welcome aboard our vessel as we journey through Navigating the Title IV Waters! This session will provide an overview of the Title IV programs: Pell Grant, Federal Direct Loans, TEACH grant, Work Study and Iraq and Afghanistan Service Grant. <i>Moderator – Trey Harrison, Valencia College</i></p> <p><b>D – Clock Hours Compliance &amp; Hot Topics, Clock Hours Professionals, Open Forum, Stephanie Lawrence, ASU ☺</b>                      Are your clock hour programs in compliance? Are your payment periods R2T4s set up properly? Some aspects of institutional and student eligibility are the same for clock and credit hours, but some critical elements are quite different. Make sure your clock hour programs are in compliance by coming to this session and sharing best practices with colleagues.</p>	<p>A- Royal Palm 4 &amp; 5</p> <p>B- Royal Palm 2</p> <p>C- Royal Palm 3</p> <p>D- Royal Palm 8</p>
8:30a-3:30a	Exhibit Area Open (closed for luncheon from 11:30a-1:45p)	Royal Palm Foyer
9:45a-10:00a	Break	
10:00a-11:15a	<b>Concurrent Sessions 2</b>	
	<p><b>A – Non-College Degree (NCD) Programs and the GI Bill, Kathy Snyder, FL Department of Veterans' Affairs ☺</b>                      This session will focus on certification / preparation, measurement, policies and payment of education benefits for NCD programs approved for the GI Bill ®  <i>Moderator – Lori Auxier, ECMC</i></p> <p><b>B – Comprehensive Transition Programs (CTPs), Dr. Paula Kohler, FL Center for Students with Unique Abilities ♠</b>                      This session provides information on the process schools can complete to qualify for support for students with intellectual disabilities. Specifically, the presenter details how students in CTP programs can receive financial</p>	<p>A- Royal Palm 1</p> <p>B- Royal Palm 2</p>

	<p>aid, including eligibility requirements for schools, programs and students. <i>Moderator – Francisco Valines, Florida International University</i></p> <p><b>C – Time Management for The Overworked and Overwhelmed</b>, Lisa Albers, Cognition Financial-SunTrust Bank ♦ We all have the same amount of hours in the day, but why do some people seem to get so much more done than others? If you are like most of us, you have attended the sessions, heard the tips and know what you're supposed to do, but still have not mastered the ever so important skill of time management. We will take a look at several different strategies as well as mind sets that can improve your ability to be more productive and less stressed both at work and at home. <i>Moderator – Vickie Jackman, Hillsborough Community College</i></p> <p><b>D – You Are The Judge!: Professional Judgment Overview</b>, Wayne Bodiford, Financial Aid Services ☼ Professional judgment is how Congress permits financial aid professionals to address the unique circumstances of our students. Learn what you can do, what you can't, and discuss what you should do. <i>Moderator – Dawnetta Wearing, Polk State College</i></p> <p><b>E – Satisfactory Academic Progress (SAP) for Clock Hours Professionals</b>, Stephanie Lawrence, ASU ☺ This session offers instruction on how to evaluate clock hour SAP in accordance with applicable laws and regulations. In addition, the session will cover the elements that a clock hour school is required to include in its SAP policy. <i>Moderator – Teriann Wright, Orange County Public Schools</i></p> <p><b>F – Exposing Hidden Biases in Professional Judgement</b>, Daniel Barkowitz, Valencia College Professional judgment is a privilege of aid administrators that assists us in providing practical solutions for exceptional situations. This subjective authority produces options and opportunities in an otherwise objective regulatory environment. Our decisions are critical to those affected, but how often do we pause to consider how our minds come up with our answers? Where did our opinions come from? And are we as certain as we think we are? This session will discuss expanding research on hidden biases from leading psychologists in the field. We will explore the implications of some of their findings together as we examine our own decisions as they relate to professional judgment and the lives of folks we encounter every day. <i>Moderator – Anita Brown, University of South Florida</i></p>	<p>C- Royal Palm 3</p> <p>D- Royal Palm 6</p> <p>E- Royal Palm 7</p> <p>F- Royal Palm 8</p>
11:15a-11:30a	Transition Break	
11:30a-1:45p	<b>Opening Luncheon (“Captain’s Gala”) w/ Speaker</b> Business Meeting/ <a href="#">Elections</a> Awards Luncheon	<b>Royal Palm 4 &amp; 5</b>
1:45p-2:00p	Transition Break	
1:45p-3:30p	Exhibit Area Open	<i>Royal Palm Foyer</i>
2:00p-3:15p	<b>Concurrent Sessions 3</b>	
	<p><b>A – State Programs Reporting</b>, Brian Underhill An overview of how to use the State Student Financial Aid Database (SSFAD) to report state financial aid disbursements. Brian will use screens from the new system, which will go live on September, 2018, to walk</p>	A- Royal Palm 1

	<p>through the disbursement process: Master Eligibility List, Disbursement Eligibility Report, Clearing Edits, Reconciliation, and Payment Summary. <i>Moderator – Katrina Bennett, Lake Sumter State College</i></p> <p><b>B – Duties of a VA Certifying Official</b>, Ron Scoggins, Florida Department of Veterans' Affairs ☺ <i>Moderator – Alicia Brandon, Concorde Career College</i></p> <p><b>C – Engaging Students in Financial Wellness</b>, Geoff Stam, Keiser University/Tracy Wiles, University of Tampa / Ilia Cordero and Sedrick Brinson, Valencia College \$ What stimulates a student to take part in a financial wellness class, seminar, or program? Once they show up at the door, what keeps the student engaged in the material or entices them to learn and want more? The first goal of this session is to discuss methods schools in different sectors have found as successful bringing students in to a financial wellness type program, and what hasn't. But getting students in the door is half the battle! Our second goal; once they students have taken a seat at the table, how do we “make them eat” the material? Come share your experiences and ideas for getting students excited for financial wellness! <i>Moderator – Anna Williams, Florida A&amp;M University</i></p> <p><b>D – SAR/C Comment Codes</b>, Markell Saunders/Donna Kolb, UF ☼ This session will provide an explanation of Student Aid Report (SAR) comment codes and assist with understanding specific SAR comment codes are assigned to a student's SAR/ISIR. It will also examine common database match SAR comment codes that schools encounter. The session also reviews options a school must use to resolve a SAR comment code that impact student eligibility for Title IV aid. <i>Moderator – Carol Holmes, Hillsborough Community College</i></p> <p><b>E – Getting Involved: The Importance for You &amp; Your Career</b>, David Alexander, FASFAA &amp; SASFAA / Tiffany Summers, TASFAA &amp; SASFAA ♦ Have you ever been curious about how you can get involved and leave your mark within FASFAA &amp; SASFAA. Well here is your chance! Association presidents will be explaining the purpose and current goals of these associations and how you can serve in the future. Learn more about getting involved in professional financial aid associations at both the state and regional levels. Getting involved can be beneficial to both your personal and professional growth!</p> <p><b>F – 3rd Party Processors: Sharing Best Practices (Open Forum)</b>, Karen Martin-Brown, Dragon Rises College of Oriental Medicine ♠ If your school uses a 3rd Party Processor for verification, processing, awarding or disbursing of Title IV aid, you should attend this session! What works, what doesn't? What are some good or bad experiences you've had? Are you aware of the requirements to list them on your PPA? Are you really saving your institution time and/or money? Join your colleagues and answer these questions together!</p>	<p>B- Royal Palm 2</p> <p>C- Royal Palm 3</p> <p>D- Royal Palm 6</p> <p>E- Royal Palm 7</p> <p>F- Royal Palm 8</p>
3:15p-3:30p	Transition Break	
3:30p-5:00p	Exhibit Area closed for General Session	

3:30p-5:00p	<p><b>General Session 1 – Federal Updates, Craig Rorie, Federal Trainer, US Dept. of Ed.</b></p> <p>This session will feature information and updates about ED’s Title IV activities and initiatives, including information about ED’s regulatory efforts and recent news from ED and FSA.</p> <p><i>Introduction – David Alexander, FASFAA President</i></p>	<b>Royal Palm 4 &amp; 5</b>
6:00p-7:00p	<p><b>Bon Voyage Sunset Karaoke Party</b></p> <p><b>Dinner on Your Own (“Independent Excursion”)</b></p>	Sunset Verandah

**Thursday, May 31, 2018**

**School Spirit Day! Wear clothing that represents your school/company.**

5:45a-6:45a	“Happy Hoofers” Morning Walk	Meet in Lobby
8:00a-11:30 am	Registration	Acacia 1 Foyer
8:30a-10:00a	<p><b>General Session 2</b></p> <p><b>NASFAA Updates, Billie Jo Hamilton, NASFAA National Chair, &amp; USF Associate Vice President for Enrollment Planning &amp; Management</b></p> <p><b>SASFAA Updates, Bryan P. Erslan, SASFAA President Elect &amp; Eastern Kentucky University Director of Student Financial Assistance</b></p> <p><i>Introductions – Joan Bailey, FASFAA Immediate Past President</i></p>	<b>Royal Palm 4 &amp; 5</b>
10:00a-4:00p	Exhibit Area Open (closed for luncheon from 11:45p-1:30p)	Royal Palm Foyer
10:00a-10:15a	Break	
10:15a-11:30a	<b>Concurrent Sessions 4</b>	
	<p><b>A – Consumer Information, Craig Rorie, USDOE</b> An overview of the consumer information requirements for schools participating in the Federal Student Aid programs will be presented. <i>Moderator – Rebecca Davis, Great Lakes</i></p> <p><b>B – State Waivers, Exemptions &amp; Legislative Updates, Jhenai W. Chandler, FL Division of Colleges (FCS)</b> The Florida College System has a history of keeping tuition rates low, ensuring all Floridians have access to affordable, high-quality education and job training. The state of Florida offers a number of state waivers and exemptions to offset the cost of tuition for a number of special populations throughout the state of Florida. This session will cover state tuition and fee waivers related to foster care, homelessness, veterans, undocumented students, and other related special populations. The session will also provide an update on any legislative updates from the 2018 Florida legislative session. <i>Moderator – Daniel Barkowitz, Valencia College</i></p> <p><b>C – Are You Prepared For The Inclusion Of Cybersecurity Requirements In Your Next Audit?, John Knost, Attain LLC ♠</b> 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</p>	<p>A- Royal Palm 1</p> <p>B- Royal Palm 2</p> <p>C- Royal Palm 3</p>

	<p>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 EDA’s recommended cybersecurity audit plan. Finally, we present best practices for preparing for the inclusion of cybersecurity in your yearly audit. <i>Moderator – Nichole Crowley, Keiser University</i></p> <p><b>D – Satisfactory Academic Progress (SAP) Basics</b>, Donna Kolb, UF ☼</p> <p>Institutions must assess, at least once a year, whether students are making SAP. This session will include an explanation of key concepts such as qualitative and quantitative assessments, pace of completion, and maximum time frame, as well as warning and probation periods, appeals, and academic plans. It will also offer instruction on how to evaluate SAP in accordance with applicable laws and regulations. In addition, the session will cover the elements that a school is required to include in its SAP policy. <i>Moderator – Ronnette Barter-Gordon, HCC</i></p>	D- Royal Palm 7
11:30a-11:45a	Transition Break	
11:45a-1:30p	<p><b>Luncheon</b></p> <p><b>Speaker: Minority Academic Advising Matters for Financial Aid, Locksley Knibbs</b>, Florida Gulf Coast</p> <p>Financial aid and academic advising is an important service to individuals, done with the aim of partnering with students to make successful decisions over periods of time. While direct guidance that financial aid administrators provide can increase retention, decrease dropout rates or improve/increase graduation rates, creating and building relationships and forming bonds with students can teach them to make the best educational and financial decisions. This session will provide attendees with tools that can be used to develop advising strategies specifically geared towards minority populations. <i>Introduction – Cindy Lewis, FASFAA Local Arrangements Chair</i></p>	<b>Royal Palm 4 &amp; 5</b>
1:30p-1:45p	Transition Break	
1:45p-3:00p	<b>Concurrent Sessions 5</b>	
	<p><b>A – Academic Calendars, Modules and Title IV, Craig Rorie</b>, USDOE</p> <p>This session will present an overview of standard, nonstandard, and non-term academic calendars, as well as discuss modules and treatment of summer and intercessions and their effect on administering Title IV aid. <i>Moderator – Kathy Johnson, City College</i></p> <p><b>B – Public Service Loan Forgiveness &amp; Repayment Options</b>, Laura Dickerson, Sallie Mae \$</p> <p>This session will cover PSLF and repayment for the financial aid professional. We will take a deep dive on eligibility of PSLF, repayment options and what to consider when advising students on the available their available options. <i>Moderator – Nadine Bailey, Ultimate Medical Academy</i></p> <p><b>C – Work-Life Balance</b>, Sean Johnson &amp; Irma Molinares, HCC &amp; ECMC ♦</p> <p>What is work life balance? One person might think balance is achieved when you leave work early enough to eat dinner with your family. Someone else might view it as having a flexible schedule, so that they can study for a part-time graduate degree. Yet another person might feel</p>	<p>A- Royal Palm 1</p> <p>B- Royal Palm 2</p> <p>C- Royal Palm 3</p>

	<p>fulfilled by spending "free" time in the gym or out on the road cycling. Let's discuss ways to find your balance. <i>Moderator – Jeniffer Molina, Florida Technical College</i></p> <p><b>D – How College Promise Programs Are Changing the Way We Talk About Affordability in Florida</b>, Paul Perrault, Helios Education Foundation / Francisco Valines, FIU/ Iliana Patron, MDC ♠</p> <p>Despite our collective efforts to help students connect to the right resources &amp; navigate the financial aid process, still too many forgo education after high school because of money. A trend that has emerged in recent years to remove this barrier are college promise programs, which aim to take the guess work out of the college affordability and decision-making process. Join us for a panel discussion to learn about two college promise programs launched by FIU and FSCJ, and the future of 'free college' in FL. This panel is part of an on-going effort from Helios Education Foundation, FL Philanthropic Network and FL College Access Network to explore ways philanthropic organizations and communities are partnering with colleges and universities to design and strengthen financial aid programs that improve outcomes for underserved students. <i>Moderator – Katie Schanbeck, Florida Southwestern State College</i></p> <p><b>E – Intro to SQL</b>, Kristopher Hatcher, GCSC ♦</p> <p>Are you a front-end administrator who wonders how the back-end works? Are you a back-end administrator going over reports but you don't know how they were generated? This hands-on session seeks to introduce Structured Query Language (SQL) to those who are curious and brave enough to delve into the technical side of financial aid. <i>Moderator – Laquanda Robinson, University of South Florida</i></p> <p><b>F – Attendance for Clock Hours Schools (Forum)</b>, Lorrie Allen, North Florida Technical College ☹ ⚙</p> <p>The cornerstone of clock hour programs and eligibility is attendance. This forum is an open discussion on how schools process attendance, pros &amp; cons of the software used, etc. We will also address attendance policies and other questions that may arise during the session regarding attendance!</p>	<p>D- Royal Palm 8</p> <p>E- Royal Palm 7</p> <p>F- Royal Palm 6</p>
3:00p-3:15p	Break	
3:15p- 4:30p	<b>Concurrent Session 6– (Meet at Your “Muster Station”)</b>	
	<p><b>A-</b> Clock Hour &amp; Technical – Christine Taylor ☹</p> <p><b>B-</b> Private / Proprietary – Nadine Bailey</p> <p><b>C-</b> State Universities (SUS) &amp; Grad/Professional – Alicia Keaton</p> <p><b>D-</b> State Colleges/FCS – Daniel Barkowitz</p>	<p>A- Royal Palm 1</p> <p>B- Royal Palm 2</p> <p>C- Royal Palm 3</p> <p>D- Royal Palm 8</p>
4:00p-5:00p	Exhibit Area Break-down	<i>Royal Palm Foyer</i>
	<b>Dinner on Your Own (“Independent Excursion”)</b>	

**Friday, June 1, 2018**

5:45a-6:45a	<i>"Happy Hoofers" Morning Walk</i>	<i>Meet in Lobby</i>
8:30a-9:30a	<b>Breakfast Buffet</b>	<b>Royal Palm Foyer East</b>
9:30a-9:45a	Transition Break	
9:45a-11:45a	<p><b>General Session 3 – Year-Round Pell</b>  <b>Craig Rorie, Federal Trainer, US Dept. of Education</b>            An overview of Year-Round Federal Pell Grants to include new statutory provisions, examples of calculations, and related COD system updates will be featured.  <i>Opening- Mia Mwangi, FASFAA VP of Training</i></p>	<b>Royal Palm 4 &amp; 5</b>
11:45a-12:00p	<b>Closing – David Alexander, FASFAA President</b>	<b>Royal Palm 4 &amp; 5</b>

**Legend:** Blue = All Sectors, all levels

⌚ – Clock Hour ⚙ – New Aid ♦ – Professional Development \$ – Financial Literacy ♣ – Mid/Upper-Level Professionals

2018 Charity: [Christopher Misner Firefighter Scholarship Fund](#)

