Using NASFAA Tools

The following is a presentation prepared for:
EASFAA Conference
Fajardo, Puerto Rico
May 18 – May 21, 2014

Using NASFAA Tools

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Division of Training & Regulatory Assistance – NASFAA
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Brown University
Tools developed to help you improve administration and compliance include:

- Analysis of new laws, regulations and guidance
- Text of laws, regulations and ED guidance
- NASFAA-developed tools and resources
- Online live and on-demand training and analysis
- Centers with resources to help you comply with new regulations
Online: Webinars

Live Webinars

Register for a upcoming webinar and get access to the live event, plus continued access to an On-Demand version of the session and all course materials, for up to five months following the original broadcast. Webinars cover a variety of topics, and last from 90 to 120 minutes.

Please register by the published deadline to participate in a live event (even if you’ve already purchased a Webinar Package). Missed the deadline? Just watch it on demand.

Working with Unaccompanied Homeless Youth: Access and Compliance

Offered in collaboration with the National Association for the Education of Homeless Children and Youth (NAECHY), this webinar will discuss best practices for working with special populations including unaccompanied homeless youth.

2013-2014 Webinar Series

The following topics are scheduled for the 2013-2014 Webinar Series – Registration now open! Please note that they are subject to change, and more information will be posted as it becomes available.
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Online: 2013–14 Webinar Series

- September 25, 2013 – Working with Unaccompanied Homeless Youth: Access and Compliance
- November 20 – Verification for 2014–15
- December 18 – What is Conflicting Information and How do You Resolve It
- February 26 – Nontraditional Program Issues – Do You Know if Your Offer Nontraditional Programs?
- March 26 – Return of Title IV Funds Review
- May 21 – Preparing for an Audit
- June 18 – Hot Topic: 150% Direct Subsidized Loan Eligibility Limitation

Online: 2014–15 Webinar Series

- September 24, 2014 – Consortium
- October 29, 2014 – Reporting Untaxed Income on the FAFSA
- November 19, 2014 – Verification 2015–16
- February 25, 2015 – Consumer Information
- March 25, 2015 – Student Eligibility – Enrollment Issues
- May 20, 2015 – Cohort Default Rate Issues
- June 18, 2015 – Hot Topic: To be Determined
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Webinars: On-Demand

Webinar Series On-Demand

- Expires July 26, 2014: Nontraditional Program Issues – Do You Know if You Offer Nontraditional Programs?
- Expires August 25, 2014: Return of Title IV Funds Review

CORE

2014-15 CORE Modules

- Comprehensive instructional materials for teaching financial aid fundamentals
- 14 modules cover almost all topics relevant to financial aid administration
- Contains an instructor’s guide, PowerPoint presentation and trainee handouts
# Using NASFAA Tools

## CORE: 2014–15 CORE Modules

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<td>Campus-based Programs</td>
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<td>8.</td>
<td>Calculation of Federal Pell Grant and Iraq and Afghanistan Service Grant (IASG) Awards</td>
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## State & Regional Workshops

### 2013–14 — Compliance & Campus Collaboration – R2T4
- Features real-life situations
- Provides guidance on common issues
- Contains an instructor’s guide, PowerPoint presentation and trainee handouts

**Coming for 2014–15 — Need Analysis!**
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Professional Practice Tools

AskRegs: Q & A Service

AskRegs provides a searchable Knowledgebase of answers to financial aid administrators’ questions. Search or browse our Knowledgebase for answers to regulatory and compliance questions submitted by your peers.

If you can’t find the answer to your specific question, submit a ticket and our experts will thoroughly research your question and provide you a comprehensive answer, including any applicable regulatory citations. That question and answer will then be added to the Knowledgebase to assist other student aid professionals with the same question.

- Download the AskRegs Knowledgebase Guide >>
- Watch the AskRegs Knowledgebase Video Tutorials >>
AskRegs: Knowledgebase

AskRegs Knowledgebase allows members to browse and search for answers to regulatory and compliance questions.

Search on key terms to view most popular Q&A articles on a topic.
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AskRegs: Knowledgebase

Subscribe to receive automatic updates if article guidance changes

AskRegs: Submitting a ticket

Submit a Ticket and NASFAA staff will research and provide an answer to your question
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AskRegs: Submitting a ticket

My Tickets

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<td>Closed</td>
<td>5/8/2013 3:36 PM EDT</td>
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Status Legend

- **Open**: Your ticket has been received.
- **Work In Progress**: Ticket has been assigned to a Customer Service Representative and is in process.
- **Need More Info**: We require additional information in order to answer your question.
- **Respond**: The ticket has been reopened and requires a revision for the solution posted.
- **Solution Suggested**: A solution has been suggested for your issue.
- **Closed**: This ticket has been closed.

Immediately check the status of any tickets you have submitted.

Self-Evaluation Guide

The Guide is divided into three major parts:

I. Institutional Responsibilities
II. Administration of Title IV Federal Aid Programs
III. Appendices
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Self-Evaluation Guide

- Example -

Self-Evaluation Guide

- Example -
Compiled Title IV Regulations

• Searchable PDF document
• Linked table of contents in each document
• New regulations incorporated each award year
• Current edition is as of July 1, 2012, effective 2012–13 award year

Compiled Title IV Regulations

• Revisions that became effective July 1, 2012, are shown in: red (added text) or strikeout (like this) for deleted text
• Keys applicable to individual sections of regulation are noted in the footer
• Gray shading used to denote early implementation at institution’s option
• Bookmarks added to permit navigation in document
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Compiled Title IV Regulations

PART 600—INSTITUTIONAL ELIGIBILITY UNDER THE HIGHER EDUCATION ACT OF 1965, AS AMENDED

Since published as a compilation through December 1994, the following amendments have been incorporated into part 600:

- Technical corrections of 6/03/06
- Technical corrections of 6/06/06
- Improved oversight amendments of 1/29/04
- Technical corrections of 7/05/05
- Reauthorization amendments of 10/27/03
- Streamlining revisions of 11/15/03
- Bush-era reduction revisions of 11/02/01
- Technical corrections and PL 108-483 amendments of 3/15/04
- NERD amendments of 5/03/09
- NERD amendments of 10/27/09
- Program integrity revisions of 10/09/10
- Program integrity: Quarterly Program Integrity Report revisions of 10/09/10
- Changes institutional ineligibility student aid program revisions of 1/04/05

Subpart A—General

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Compiled Title IV Legislation

- Searchable PDF for each major subchapter of U.S. Code
- For official version of the law, visit Thomas at http://thomas.loc.gov/home/thomas.php

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Compiled Title IV Legislation

U.S. Code, Title 20—Education
Chapter 28—Higher Education Resources and Student Assistance
Subchapter IV—Student Assistance > Part A—Grants to Students in Attendance at Institutions of Higher Education

§ 1070. Statement of purpose; program authorization [HEA § 400]

(a) Purpose
It is the purpose of this part, to assist in making available the benefits of postsecondary education to eligible students defined in accordance with section 1091 of this title in institutions of higher education to—

(1) providing Federal Pell Grants to all eligible students;
(2) providing supplemental educational opportunity grants to those students who demonstrate financial need;
(3) providing for payments to the States to assist them in making financial aid available to their students;
(4) providing for special programs and projects designed
   (A) to identify and encourage quality youths with financial or cultural need with a potential for postsecondary education;
   (B) to prepare students from low-income families for postsecondary education, and
   (C) to provide remedial (including remedial language study) and other services to students;

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Policies and Procedures Tools

NASFAA’s Policies & Procedures Tools are a set of integrated resources that assist you in improving your regulatory compliance, administrative consistency, and staff training. This essential management toolkit provides expert guidance and an organized approach to developing and maintaining policies and procedures. Unless otherwise noted, all files were last updated in September 2012.

- Tools for formatting, implementing, and evaluating policies and procedures
- Regulatory Resources Guide containing:
  - Explicit and implied regulatory requirements
  - Areas where schools have implementation options

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Policies and Procedures Tools

NASFAA's Policies & Procedures Tools are a set of integrated resources that assist you in improving your regulatory compliance, administrative consistency, and staff training. This essential management toolkit provides expert guidance and an organized approach to developing and maintaining policies and procedures. Unless otherwise noted, all files were last updated in September 2012.

- Customizable P&P manual
- Page format samples, style decisions, and master template document
- Guidance for reading and interpreting statutes and regulations

Student Aid Index
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Student Aid Index

![Student Aid Index](image)

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Student Aid Index

![Student Aid Index](image)

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Student Aid Index

Search by Term

- To make post-withdrawal disbursement of grant funds (found in Return of Title IV funds)
- To make post-withdrawal disbursement of loan funds (found in Return of Title IV funds)
- To request borrower confirm post-withdrawal disbursement of loans funds (found in Return of Title IV funds)
- To confirm use of loan funds as post-withdrawal disbursement (found in Return of Title IV funds)
- Disbursement during LOA (found in Return of Title IV funds)
- In post-withdrawal disbursement of earned funds (found in Return of Title IV funds)
- Adjustment of loan period and disbursements
- Interim disbursement
NASFAA University

CREDENTIALED TEST ADMINISTERED THROUGH NASFAA TESTING CENTER

KNOWLEDGE DEMONSTRATED BY EXPERIENCE
COMPLETION OF NASFAA SELF-STUDY GUIDE
COMPLETION OF NASFAA FACILITATED ONLINE COURSE
COMPLETION OF ON-SITE TRAINING CONDUCTED BY NASFAA
PARTICIPATION IN A BOOT CAMP UTILIZING NASFAA MATERIALS

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NASFAA University

What does a NASFAA University credential mean?
• Expands your student financial aid knowledge
• Improves your job performance and service to students
• Provides tangible evidence of your knowledge for employers
• Differentiates between you and less qualified personnel

Paths to Credential: Demonstrated Experience

• Five year minimum experience
• Understanding of regulations and office management can qualify to take examination
• Submit your résumé for evaluation
• Eligible to take the examinations and earn nationally-recognized credentials
## Paths to Credential: Credentials Offered

- Application Process
- Cost of Attendance
- Federal Direct Student Loan
- Federal Methodology
- Packaging and Notification of Awards
- Professional Judgment
- Return of Title IV
- Student Eligibility
- Verification
- COMING SOON:
  - Campus-Based Programs
  - Federal Pell Grant
  - TEACH Grant

## Paths to Credential: Self-Study Guides

- Written for the independent learner
- Structure consists of multiple lessons with exercises to reinforce the lesson contents
- Quizzes are in paper format, but it can qualify you for professional credential testing
Self-Study Guides

OVERVIEW OF THE FINANCIAL AID PROGRAMS

Updated for 2013–14

Introduces the federal student aid programs, providing information on the Title IV programs, state aid, the Health and Human Services (HHS) programs, and other sources of financial assistance

Paths to Credential: Self-Study Guides

Choose from nine topics now available:

- Overview Of The Financial Aid Programs
- Student Eligibility
- Return Of Title IV Funds
- Need Analysis
- Direct Loans: Eligibility & Frequency
- Direct Loans & FFEL: Repayment & Counseling Requirements
- The Application Process
- Cost of Attendance
- Campus-Based Programs
- Pell Grant and IASG
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Paths to Credential: Self-Study Guides

Self-Study Guide Topics
Coming Soon!
- Consumer Information
  — Available June 2014

Paths to Credential: Facilitated Online Course

- Three-to-eight week length courses
- Offers video-enhanced lectures
- Includes quizzes and homework assignments
- Live facilitator(s)
- Online discussions
- Resource library
- Qualifies for credential testing
### Paths to Credential: Facilitated Online Course

#### 2013–14 Online Course Topics

- Student Eligibility
- Return of Title IV
- Verification
- Overview of the Financial Aid Programs
- Packaging and Notification of Awards
- Direct loans
- Professional Judgment
- Cost of Attendance

#### 2014–15 Online Course Topics

- Overview of the Financial Aid Programs
- Application Processing
- Campus-Based Programs
- Cost of Attendance
- Federal Direct Student Loan
- Federal Methodology
- Federal Pell Grant
- Packaging and Notification of Awards
- Professional Judgment
- Return of Title IV
- Student Eligibility
- TEACH Grant
- Verification
Paths to Credential: Boot Camps

• In-person workshops offered by state & regional financial aid associations
• Immersive in nature and usually span multiple days
• Must be using NASFAA CORE curriculum
• Successfully completing specific topic areas through a boot camp qualifies an individual for the credentialed test

Paths to Credential: Boot Camps

2013–14

• Credential testing available at no additional charge
• Contact:
  ➢ Connie McCormick
  Chief Training Officer
  mccormickc@nasfaa.org
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Other NASFAA Tools and Services

- How-To-Guides
- Staffing Resources
- Today’s News
- Standards of Excellence
- Using Tax Returns in Need Analysis & Verification

Questions?
Please send your questions to: sharpa@nasfaa.org
**Advocacy**

We are regularly engaged in advocacy, public policy and research to support our mission: promoting programs that remove financial barriers and ensure student access to postsecondary education. Together, the tools of advocacy, policy, and research allow us to respond effectively to pending legislation, provide ideas for new legislative and policy proposals, and to promote policy objectives in a methodologically sound manner.

Our advocacy efforts center around these major policy areas:
- Increasing access to higher education, including early awareness and outreach
- Simplifying student aid systems
- Encouraging college persistence & completion
- College savings and financial education
- Minimizing student indebtedness and emphasizing grant and work aid
- Supporting the primacy of need-based aid

**Publications**

- Today's News
- Cash for College
- Eligibility Checklist
- Monographs
- NASFAA’s Book: *You’re the Director: A Guide to Leadership in Student Financial Aid*
- Quick Reference Sheets

**Professional Practice Tools**

- Compiled Title IV Legislation
- Compiled Title IV Regulations
- CORE
- How To Guides:
  - Award Letter,
  - NPC,
  - NPRM Need Analysis
- Policies and Procedures Tools
- Self-Evaluation Guide
- Salary Model
- Staffing Model
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