The following is a presentation prepared for:
RMASFAA Conference
Cheyenne, WY
October 20 – 23, 2013

Using NASFAA Tools

David Tolman – Training Specialist
Division of Training & Regulatory Assistance
Art Young – Associate Director of Financial Aid
Brigham Young University
Using NASFAA Tools

NASFAA Tools

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
Using NASFAA Tools

Training and Professional Development

Online: 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.
Online: 2013–14 Webinar Series

- November 20 – Verification for 2014–15
- December 18 – What is Conflicting Information and How do You Resolve It
- February 26 – Nontraditional Program Issues Related to Federal Loans
- March 26 – Return of Title IV Review
- May 21 – Preparing for an Audit
- June 18 – Hot Topic - TBD

Webinars: On-Demand

- Expires November 25, 2013: Hot Topics – ICR and IBR: How You Spell (Student Loan Debt) Relief
Using NASFAA Tools

CORE

• 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

CORE: 2013–14 CORE Modules

1. Overview of the Student Aid Programs
2. Application Process
3. Student Eligibility
4. Verification
5. Cost of Attendance
6. Federal Methodology
7. Campus-based Programs
8. Calculation of Federal Pell Grant and Iraq and Afghanistan Service Grant (IASG) Awards
9. TEACH Grant Program
10. Federal Direct Loans (2 parts)
11. Packaging & Notification of Awards
12. Return of Title IV Funds
13. Professional Judgment (PJ)
14. CORE Toolkit
State & Regional Workshops

State & Regional Workshop Kit

Each year in autumn, our Training and Professional Development Committee publishes a course instructor kit on current aid administration topics. We distribute it to state and regional associations to provide in-person and online training to financial aid professionals in their area.

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!

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

Search on key terms to view most popular Q&A articles on a topic

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.

Immediately check the status of any tickets you have submitted.
The Guide is divided into four major parts:
I. Institutional Responsibilities
II. Administration of Title IV Federal Aid Programs
III. Administration of Title VII and Title VIII Health Professions Programs
IV. Appendices
Using NASFAA Tools

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
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
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

Example -

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 § 1070]

(purpose)
It is the purpose of this part, to assist in making available the benefits of postsecondary education to eligible students enrolled in institutions of higher education by—

(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 such students;
(4) providing for special programs and projects designed
(A) to identify, and encourage, qualified students with financial or academic need in potential for postsecondary education,
(B) to prepare students from low-income families for postsecondary education, and
(C) to provide remedial education (including remedial English and other services) to students, and

(A) assist students, assistance to institutions of higher education
Policies and Procedures Tools

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

Policies and Procedures Tools

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

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
Using NASFAA Tools

Paths to Credential: Self-Study Guides

Choose from **seven 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**

**Paths to Credential: Self-Study Guides**

**Self-Study Guide Topics Coming Soon!**

- **Cost of Attendance**
  – Available October 2013
- **Pell Grant**
  – Available January 2014
- **Consumer Information**
  – Available April 2014
Using NASFAA Tools

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
• Direct loans
• Professional Judgment
• Cost of Attendance
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
Using NASFAA Tools

Other NASFAA Tools and Services

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

Questions?
Please send your questions to:
tolmand@nasfaa.org

© 2013 NASFAA
This page intentionally left blank.
### 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
<table>
<thead>
<tr>
<th>Product</th>
<th>• Standards of Excellence</th>
</tr>
</thead>
</table>
| Services         | • AskRegs Knowledgebase and Assistance  
|                  | • Buyer's Guide           
|                  | • Career Center           
|                  | • Listservs               
|                  | • Online Membership Directory |
| Training         | • Annual Training         
|                  | • Leadership Conference   
|                  | • National Conference     
|                  | • NASFAA University       
|                  | • Training Track          
|                  | • Webinars                |