



**2017 Conference Program**

**April 23 – 26, 2017**

**Murfreesboro, Tennessee**

## **2016-2017 Executive Board**

President	Karen Hauser, Vanderbilt University
President-Elect	Charles Harper, Belmont University
Past President / Nominations / TSAC Advisory	Dick Smelser, Pellissippi State Community College
Secretary	Joe Myers, Motlow Community College
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## **2016-2017 Sector Representatives**

Representative at Large	April Cross, Lee University
Private Sector Rep	Danette Seale, Carson Newman
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Public 2-Year Rep	Kacee Hardy, Dyersburg State Community College
Public 4-Year Rep	Stephen White, Middle Tennessee State University
TCAT Rep	Jo Wallace, TCAT McKenzie

## **2016-2017 Committee Chairs**

Association Governance	Jeff Gerkin, University of Tennessee Knoxville
Awards	Stacey Duncan, Rhodes College
Budget/Finance	Terri Parchment, TSAC
Conference	Charles Harper, Belmont University
Diversity	Portia Cook, Cleveland State Community College
Electronic Services	Jeff Norrod, Tennessee Technological University
Governmental Relations	Ron Gambill, Edsouth
Historical	Cynthia Piana, Aquinas College
Membership	Melissa Smith, Vanderbilt University
Mentoring	Joanna Hayes Dickens, John A. Gupton College
Public Relations / Blog	Celena Tulloss, University of Tennessee Knoxville
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Site Selection	Sonja McMullen, Sallie Mae
Sponsorship	Lester McKenzie, Tennessee Technological University
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Training	Tiffany Summers, Lipscomb University

# 2017 TASFAA Conference Committee

Charles Harper, Chair, Belmont University

Karen Hauser, Vanderbilt University

Leah Louallen, TSAC

April Cross, Lee University

Tiffany Summers, Lipscomb University

Portia Cook, Cleveland State Community College

Jeff Norrod, Tennessee Technological University

Melissa Smith, Vanderbilt University

Joanna Hayes-Dickens, John A Gupton College

Celena Tulloss, University of Tennessee Knoxville

Kacee Hardy, Dyersburg State Community College

Jo Wallace, TCAT McKenzie

Stephen White, Middle Tennessee State University

Lester McKenzie, Tennessee Technological University

Maggie Kersten, Lipscomb University

LeChelle Davenport, Southwest Tennessee Community College

Blake Hopson, East Tennessee State University

Kevin Jacobs, Tennessee State University

Danette Seale, Carson Newman University

## Conference Logo by Jacob Lambert

Student at Memphis College of Art

**ARTIST STATEMENT:** Throughout my entire life, I have wanted to tell my own fictional stories. Movies,

specifically animation films, and comics have inspired me to strive and create different ideas. To tell my stories, I wanted to use animation because of the different possibilities with the technology available. While I prefer 2D animation, I am also fond of 3D animation, and I would like to be able to master both. I have always been amazed by the different and unique styles of animation used in animated movies and television shows. I want to create stories not only for others to enjoy, but for myself as well. Over the years, I have so many ideas in my head that I would like to share. Not only do I create digital artwork and animation for fun, but also for me, it is a great way to take away stress. I now attend Memphis College of Art, where I am currently majoring in animation. When I finish school, I would like to do internships and have more experiences,



so that one day I could work for either Disney or DreamWorks. I would also love to do freelance work as well and possibly start a business. It takes time and patience to do animation, but it is worth it in the end when it is finished.



Dear TASFAA Friends,

Welcome to the 2017 annual TASFAA conference. Our conference theme, *Education is Key*, resonates with each of us personally and in the profession we have chosen. Members of our association serve students by providing a vital key to unlock their potential. Our common goals are to assist our students with the means to obtain an education; seek and earn academic credentials that document their educational achievements; and enjoy a higher quality of life than would be possible without higher education. We provide ways for each student to have a life that has been enriched and deepened by the learning that takes place at the institutions across our state.

Your conference committee has worked diligently to bring together a jam-packed four days. Under the leadership of Charles Harper the committee has put together an agenda that includes an ambitious collection of general and concurrent sessions which will provide numerous and meaningful learning opportunities for you. Our keynote speaker, Jonathan Bowman, will share how education was key in redirecting his life. FBI Special Agent Scott Augenbaum will deliver key information on protecting our campus's and our personal cyber space. Of course our favorite Feds, David Bartnicki and Wood Mason, will join us to deliver current and relevant regulation updates. Designated time will be set aside so you can meet new friends, share ideas, swap stories and expand your professional network.

I want to give a huge thanks to our sponsor friends. Please visit the exhibit area often during the conference to learn about key products and services they can provide to your institutions and your students. TASFAA remains fiscally strong, in part, as a result of their financial contributions to our conference and the relationships they build with each of you.

In closing, I want to thank you from the bottom of my heart for allowing me to serve as your President during 2016-17. TASFAA has been a key to my professional and personal growth, and I am truly humbled to have been afforded the honor of serving our association.

*"Education is the most powerful weapon which you can use to change the world."*

**Nelson Mandela**

Sincerely,

*Karen Hauser*

Karen Hauser  
TASFAA President



Dear TASFAA Family,

On behalf of the 2017 Conference Committee, I am excited to welcome you to our Annual TASFAA Conference!

This year's theme, "*Education is Key*", provides an opportunity for us as financial aid professionals to continue to engage, learn, and put into practice the ever changing processes while we strive to manage federal, state, and institutional regulations. We put such an emphasis on educating our students on loan debt/smart borrowing, personal finances, and even serving as mentors that we often forget that our continuing education is just as important as we work to help provide assistance to the next generation of leaders and possibly financial aid professionals. As financial aid administrators, the TASFAA conference allows us to collaborate with our colleagues and friends, to de-stress, laugh, and to find answers to the always changing questions. I personally want to give a heartfelt thank you for taking time away from your office to spend it with us at the conference and hopefully return to your institution more knowledgeable as leaders and educators in our profession.

I am pleased to open our conference with a focus on "People Power" by our Keynote Speaker, Jonathan Bowman. Jonathan is the CEO of Clear Picture Leadership. We will also be joined by several special guests throughout the conference including David Bartnicki, Wood Mason, U.S. Department of Education; Marian Dill, SASFAA President; Heather Boutell, NASFAA; Kevin Perry, South Carolina State President; John Konerman, Office of Inspector General; Scott Augenbaum, Federal Bureau of Investigation and other distinguished guests. I hope you will join me in welcoming them to Tennessee and TASFAA.

Please take time to review our program and note the Sponsor Exhibit Hall hours. Stop by often during the conference to thank our sponsors for their support of our training efforts. Their financial support is critical to the mission of TASFAA and our conference.

On Monday afternoon, plan to stay after a day of sessions to honor Karen Hauser at the President's Reception. The TASFAA Suite will be open Monday and Tuesday evening, and we encourage everyone to stop by for networking and fellowship with old friends and new ones! Don't forget BINGO is back on Sunday night immediately following our networking dinner.

On behalf of the Conference Committee, we hope you experience excellent training opportunities, networking, and financial aid fun!

Thank you,

Charles Harper  
Conference Chair

# **Welcome to the 2017 TASFAA Annual Conference**

## **Information for Conference Participants**

### **Cell Phones/Electronic Devices**

As a courtesy to presenters and attendees, please silence your cell phones and/or electronic devices during the General and Concurrent Sessions.

### **Conference Attire**

Business casual attire is appropriate for the entire conference

### **Hospitality Suite**

The TASFAA Hospitality Suite is on the 2nd floor in Suite 228 and welcomes all members. Hours are posted in the program. Join new friends for a pit-stop during the conference.

### **Meals**

If you are a commuter and if you indicated on your registration that you would be eating breakfast then you should have breakfast meal tickets in your registration packet. If you did not indicate that you would be eating breakfast but you now need a meal ticket then you may stop by the registration area.

For conference lunches, individuals who requested vegetarian meals on your registration will have a vegetarian meal ticket in your registration packet. Please present the ticket to the wait staff at the luncheon and they will accommodate your request.

For members staying at the hotel, the Embassy offers a free cocktail hour from 5:30 to 7:30 pm each evening. They offer free drinks and light snacks at this event.

### **Name Badges**

Please wear your name badge at all times as it is necessary for admission to all conference sessions and meals. If you misplace your badge, please go to the registration desk.

### **Embassy Suites**

A floor plan/layout of the hotel is located on the last page of this program.

# TASFAA 2017 Conference Sponsorship

## *Special Thanks*

*As always, the members of TASFAA express their gratitude for the continued support from generous sponsors. The Grand Patrons, Patrons, Sponsors, and Vendors have allowed us to offer this annual conference for a reasonable fee. Thank you to each and every one of our 2017 conference sponsors. Please visit each of them in the Sponsor Exhibit Hall.*

## **Grand Patron Level**

**minimum \$5,500**



**Tennessee Student Assistance  
Corporation**

## **Sponsor Level**

**\$3,000 - \$3999**



**campuslogic**

**Vendor Level**

**\$2,000-\$2,999**





## Pre-Conference Activities on Saturday, April 22, 2017

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3:00 – 6:00 pm	TASFAA Hospitality Suite Open	Suite 228
6:00 pm	Dinner: Executive Board and Conference Committee	Macaroni Grill

## Conference Activities on Sunday, April 23, 2017

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7:00 – 8:15 am	New Aid Officers Breakfast Executive Board Breakfast	Hotel Lounge
7:45 – 9:00 am	Registration: New Aid Officers Workshop	Registration Area
8:30 – 10:15 am	<b>New Aid Officers Workshop – Session 1</b>	Broadlands A
9:00 – 10:15am	Executive Board Meeting	Cambridge B
11:00 am – 2:00 pm	Sponsor Set-Up in Exhibit Hall	Oakleigh A
10:15 - 10:30 am	Break: New Aid Officers Workshop Executive Board Meeting	
10:30 am – 12:00 pm	<b>New Aid Officers Workshop – Session 2</b> Executive Board Meeting	Broadlands A Cambridge B
12:00 – 1:00 pm	Luncheon: New Aid Officers, Executive Board, and Conference Committee	Broadlands B
1:00 – 2:00 pm	Executive Board Meeting Continues	Cambridge B
1:00 – 2:30 pm	<b>New Aid Officers Workshop – Session 3</b>	Broadlands A
2:00 – 4:45 pm	TASFAA Hospitality Suite Open Vendor Area Open Conference Registration Open	Suite228 Oakleigh A
2:30 – 2:45 pm	Break: New Aid Officers Workshop	
3:00 – 4:30 pm	<b>New Aid Officers Workshop – Session 4</b>	Broadlands A
3:00 – 4:30 pm	Governmental Relations Meeting	Cambridge B

3:00 – 4:15pm

## **Beyond the Regulations – An Open Forum**

**Oakleigh C**

### **Presenters**

**Heather Boutell**, Bellarmine University

**Brent Tener**, Vanderbilt University

**Dick Smelser**, Pellissippi State Community College

**Stephen White**, Middle Tennessee State University

Join a panel to dive deeper into topics and themes impacting your offices. This session is NOT about regulations, R2T4, 399, or PPY. This session will guide you to think outside of the box in responding to the balancing act of enrollment management, student behaviors, office management challenges, need for data, future trends in higher education, making your case for budget increases, and more. These type of discussions challenge us to think beyond the walls of Title IV and move into mission focused thinking for the greater good of your students and your institutions.

3:00 – 4:15 pm

## **NASFAA Credentialing: Student Eligibility**

**Oakleigh B**

This session provides an overview of Student Eligibility and guides the financial aid administrator through the eligibility criteria checked via the FAFSA process and criteria checked by the school. Not only will you learn about Student Eligibility, if you complete this training you are allowed to take the NASFAA Credential test for Verification at no cost to you! This is a savings of \$99.00.

**Presenter:** April Cross, Lee University

5:00 – 6:30 pm

## **TASFAA Opening Session**

**Mirabella E**

### **Welcome and Opening Remarks**

**Karen Hauser, TASFAA President**  
Vanderbilt University

### **Keynote Speaker: Jonathan Bowman**

*The Fine Art of People Power*

Jonathan grew up enveloped in poverty and homelessness. Though faced with circumstances and challenges he persevered to practice law as well as serve as Deputy Attorney General and Section Chief in Ohio. His presentation will prove *Education is Key!* Jonathan is a avid photographer using his inspiration photos to empower leaders. He will be available following his presentation to autograph posters received by our first 120 conference registrants.

6:30 – 8:00 pm

## **Networking Dinner: “Birds of a Feather”**

**Mirabella F**

Sector signs will be on tables! Look for your sector sign and sit with colleagues. Discussion will be led on sector issues.

8:00 – 10:00 pm

## **BINGO!**

**Mirabella A/B**

Bring your White Elephant “prize” to get a card to play Bingo with your TASFAA friends. Want to play two cards? Donate to *End Slavery TN* and receive a second card for a greater opportunity to win! Not into Bingo – hang out and visit with your colleagues while enjoying a soft drink, beer, or sangria. We have lots of extra White Elephant prizes so don’t let that stop you from enjoying the fun!

## Monday, April 24, 2017

6:00 – 8:15 am	Hotel Breakfast	Hotel Lounge
7:45 – 8:15am	Vendor Area Open	Oakleigh A
7:45 – 11:30 am	Conference Registration	Registration Area

### General Session

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8:30 – 9:30 am	<b>Cyber Security on Campus and at Home</b> <b>Presenter: Scott Augenbaum</b> , FBI Special Agent <b>Moderator: Karen Hauser</b> , Vanderbilt University	<b>Mirabella E</b>
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Our campuses must be on guard to protect our student data. Even our personal data is at risk. Special Agent Augenbaum and the FBI team received notice of the alleged DRT breach. Learn keys to protecting cyber data, preventing identity theft and refund fraud, ransomware prevention and response guidance. This session is sure to help you, your family, your schools and your students stay alert to cyber security.

9:30 -11:00 am	Vendor Area Open	<b>Oakleigh A</b>
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### Concurrent Sessions

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9:45 – 10:45 am	<b>Session 1: Get Involved!</b> <b>Presenter: Kevin Perry</b> , SCASFAA President <b>Moderator: Shannon Cross</b> , Inceptia	<b>Oakleigh B</b>
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In the session we will discuss the importance of volunteerism and the opportunities that exist at the State, Regional and National level. We will take a look at the key factors to helping you grow personally and professionally in your career.

<b>Session 2: E*GRandS</b> <b>Presenters: Josh Moran, Leah Louallen, &amp; Robert Biggers</b> , TSAC <b>Moderator: Kimberly Harness</b> , Milligan College	<b>Mirabella A</b>
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Come see the latest enhancements to TSAC's e\*GRandS database and take the opportunity to make suggestions for future upgrades.

<b>Session 3: Monitoring Satisfactory Academic Progress</b> <b>Presenters: Amy Wood</b> , Tennessee State University <b>John Lewis</b> , Christian Brothers University <b>Robin Townson</b> , Roane State Community College	<b>Mirabella B</b>
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**Moderator: Jamie Hamby**, Cleveland State Community College

The United States Department of Education requires every postsecondary institution receiving federal funds (Title IV) to have an academic progress policy that is used to determine eligibility for and continued receipt of federal funds. Progress is measured by two standards, the qualitative standard (grade point average) and the quantitative standard (pace).

## Concurrent Sessions (cont.)

It is important to note that the standards of the **Satisfactory Academic Progress Policy** for financial aid purposes may differ at each individual school. This session consists of a panel discussion on how SAP is administered at various institutions.

### Session 4: **Satisfactory Academic Progress for TCATs**

**Mirabella C**

**Presenter: Amanda Heath**, TCAT Covington

**Moderator: Carrie Gilbert**, TCAT Pulaski

At the end of each payment period TCAT institutions must assess whether students are making SAP. This session will offer instruction on how to evaluate SAP for all TCAT institutions in accordance with the federal policies and regulations. It will also include an explanation of key concepts such as qualitative and quantitative assessments, pace of completion and maximum time frame. In addition, the session will cover the elements that a school is required to include in its SAP policy.

### Session 5: **R2T4 Credit Hr. & Modules from Identifying to Notifying**

**Mirabella D**

**Presenters: Leann Eaton & Isaac Jones**, Middle Tennessee State University

**Moderator: Tiffany Summers**, Lipscomb University

This session will walk through the Return of Title IV Aid process from identifying the student, the process of calculating the return and then finally notifying the student who has withdrawn either from a full credit hour semester or a program offered in modules. Best practices will be shared as well as policies and procedures that are used to efficiently work through the R2T4 process.

11:00 am-12:30 pm

Luncheon  
TASF AA Business Meeting  
NASFAA Update, Heather Boutell  
Awards – Service years

**Mirabella F**

## General Session

12:45-1:45 pm

### **Administering Adds, Drops, & Withdrawals**

**Mirabella E**

**Presenter: Dave Bartnicki**, Department of Education

**Moderator: Charles Harper**, Belmont University

This session will address the activities a financial aid administrator must perform when a student adds or drops courses as well as when a student withdraws (excluding R2T4 calculation). Discussion and case scenarios will be provided concerning recalculation rules and census dates in various situations as students add and drop courses. This session will also provide an in-depth explanation concerning student withdrawals on such topics as school attendance, official and unofficial withdrawals, determining the date of withdrawal, and reporting deadlines.

1:00 – 4:30 pm

Conference Registration

**Registration Area**

1:45 – 5:00 pm

Vendor Area Open

**Oakleigh A**

## **Concurrent Sessions**

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1:45-2:45 pm

**Session 1: Straight Facts**

**Oakleigh B**

**Presenter: Roberta Robison**, Vanderbilt University

**Moderator: Portia Cook**, Cleveland State Community College

This session will offer information regarding the LGBTQ community. Including gender ID, statistics, and issue facing the community and how it may impact student life on campus.

**Session 2: NSLDS Enrollment Reporting**

**Mirabella A**

**Presenter: Dave Bartnicki**, Department of Education

**Moderator: Donna Price**, Austin Peay State University

This session will review the campus- and program-level reporting required by NSLDS, including situational examples and guidance about how to prevent common errors. The session will highlight changes and discuss enhancements that will focus on improving the data that schools report to NSLDS.

**Session 3: TN Promise/Reconnect TCAT**

**Mirabella B**

**Presenter: James Snider**, TSAC

**Moderator: Jo Wallace**, TCAT McKenzie

Attend this session and get the latest information for TCAT schools regarding TN Promise and Reconnect. This session will offer time for discussion.

**Session 4: Clery Act**

**Mirabella C**

**Presenters: Jason Morton & Grace Langeland**,

Middle Tennessee State University

**Moderator: Sandra Rockett**, TSAC

This session will introduce the Clery Act, the spirit of the law, and the importance of continued compliance with this federal law. A general description of Clery Act requirements, along with the requirements of companion acts: Higher Education Opportunity Act (HEOA) and the Violence Against Women Act (VAWA) will also be discussed. The Annual Security Report will be examined as a valuable information resource for students and staff.

**Session 5: COD Reconciliation**

**Mirabella D**

**Presenter: Wood Mason**, Department of Education

**Moderator: Erika Adams**, TSAC

In the world of Financial Aid, money matters. Make sure you are reconciling your Direct Loan Program and Pell Grant Program accurately and in a timely fashion. We'll also talk about some enhancements coming to COD in the 2017-2018 award year.

2:45 – 3:15 pm

**Break: SNACKS!**

**Oakleigh A**

## Concurrent Sessions

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3:15-4:05 pm

**Session 1: TN Promise Reconnect for 2 & 4 yr. schools**

**Oakleigh B**

**Presenter: James Snider, TSAC**

**Moderator: Joanna Hayes Dickens, John A Gupton College**

Attend this session and get the latest information for 2 and 4 year schools regarding TN Promise and Reconnect. This session will offer time for discussion.

**Session 2: R2T4 Clock Hours**

**Mirabella A**

**Presenter: Dave Bartnicki, Department of Education**

**Moderator: Jo Wallace, TCAT McKenzie**

Return of Title IV (R2T4) funds is an important process on your campus. This session will focus on R2T4 provisions for students enrolled in clock-hour programs.

**Session 3: Datatel Users Session**

**Mirabella B**

**Presenter: Kevin Perry, SCASFAA President**

**Moderator: John Windham, Union University**

This session is for all Datatel schools to discuss best practices and to ask "How did you do that?" when it comes to all things related to financial aid and the Datatel system.

**Session 4: Direct Loans 101**

**Mirabella C**

**Presenter: Wood Mason, Department of Education**

**Moderator: Emily Earwood, Cleveland State Community College**

From the types of Direct Loans available to how to calculate a Direct Loan to reporting a Direct Loan to COD to how it gets to a Servicer will all be covered in this session. New to processing Direct Loans? Been around a while but have some questions? Come on in and get the goods.

**Session 5: Climate in Washington DC**

**Mirabella D**

**Presenters: Ron Gambill, EdSouth**

**Heather Boutell, Bellarmine University**

**Moderator: Darolyn Porter, TSAC**

Join us as we discuss the current climate in DC in regards to Title IV Legislation, what Lawmakers are thinking about, NASFAA's position and how our voice in DC is more important than ever.

## **Vendor Concurrent Sessions**

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4:15-5:15 pm

**Vendor Session: Roadmap to Financial Success**  
**Presenters: Irma Molinares, Solutions at ECMC**  
**Todd Woodlee, iGrad**

**Oakleigh B**

Join us to learn how we can help meet your institutional goals. Our state of the art tools provide a holistic approach to financial education. By combining a range of user-friendly web based sites and dedicated counselors, we make sure your students and borrowers have a successful lifetime experience with your institution.

**Vendor Session: KHEAA: At Your Service**  
**Presenter: Clark Aldridge & Ron Sweeney, KHEAA**

**Mirabella B**

Join us for an overview of the school services and outsourcing opportunities available through KHEAA. These services can help you, your staff, and your students save time and money. Join your peers in this session to learn the advantages of working with KHEAA and see how to get started today.

**Vendor Session: 5 Must haves for Modern Financial Aid**  
**Presenter: Jordan Nischan, CampusLogic**

**Mirabella C**

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/imaging can change your institution's entire approach to financial aid.

**Vendor Session: TSAC: Student & School Services Update**  
**Presenters: Jane Pennington, Terri Parchment, Bill Heath,**  
**David Hutton, Sheila Sanchez, Lori Mitchum, and**  
**Sandra Rockett, TSAC**

**Mirabella D**

This session will give an overview of the School and Student Services Division @ TSAC. We will cover how they assist with interim staffing, default Management, compliance, and financial aid awareness.

5:30 – 7:00 pm

**President's Reception**

**Oakleigh C**

This is a time to gather and just kick back! We've worked hard this year with all the new challenges of PPY, 399, requests for PJs, and SAP appeals! Leave it at the door and join us for horsd'ouvers, a beer or soda, or a glass of sangria!

7:00 pm

**Dinner on Your Own**

8:00 – 10:00 pm

**TASF AA Suite Open**

**Suite 228**

## Tuesday, April 25, 2017

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6:00 – 8:15 am	Hotel Breakfast	Hotel Lounge
7:45 – 8:30 am	Vendor Area Open	Oakleigh A
7:45 – 11:30 am	Conference Registration	Registration Area

### General Sessions

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8:30 – 9:30 am	<b>Session 1: TSAC Update</b> <b>Presenters: Mike Krause, Tim Phelps, Jane Pennington, &amp; Diane LeJeune, TSAC</b> <b>Moderator: Portia Cook, Cleveland State</b>	<b>Mirabella E</b>
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TSAC will provide information on the State of Tennessee financial aid programs as well as proposed legislation.

8:30 – 9:30 am	<b>Session 2: Graduate/Professional Forum</b> <b>Presenter: Kristie Smith, Vanderbilt University</b>	<b>Cambridge B</b>
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Bring your Graduate / Professional School topics with you to share in an open forum setting with your colleagues. Special guest, David Bartnicki, will be in attendance.

9:30 – 9:45 am	Break	
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9:30 – 11:00 am	Vendor Area Open	Oakleigh A
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### Concurrent Sessions

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9:45 – 10:45 am	<b>Session 1: TN Reconnect for 2 &amp; 4 yr. schools</b> <b>Presenters: Tim Phelps &amp; James Snider, TSAC</b> <b>Moderator: Haley Hendrix, Cleveland State Community College</b>	<b>Cambridge B</b>
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This session will discuss the pending legislation for TN Reconnect for 2 and 4 year schools. Attendees will receive the latest legislative updates and have the opportunity to join in the discussion for this new program.

	<b>Session 2: Academic Calendars, Program Structure, &amp; Awarding Title IV.</b> <b>Presenter: Dave Bartnicki, Department of Education</b> <b>Moderator: Amy Wood, Tennessee State University</b>	<b>Mirabella A</b>
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This session will explain how different types of academic calendars, programs, and eligible coursework affect the administration of Title IV aid. Guidance will be provided on how to determine whether a program is structured as standard term, non-standard term, or non-term and how each calendar structure determines what Pell formula is required and how academic years are defined for Direct Loans.





1:30 – 4:30 pm	Registration Open	<b>Registration Area</b>
1:45 – 3:30 pm	Vendor Area Open	<b>Oakleigh A</b>

## **Concurrent Sessions**

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1:45-2:45 pm	<b>Session 1: PLUS Loans A-Z</b> <b>Presenter: Wood Mason</b> , Department of Education <b>Moderator: John Windham</b> , Union University	<b>Mirabella A</b>
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Want to be a Direct PLUS Loan "Ace"? This session will present to you the "ins and outs" of the Direct PLUS Loan Program and highlight some of the recent enhancements to processing Direct PLUS Loan data via COD.

	<b>Session 2: How to Overcome 5 Major Areas in the Development of Teams (Part 1).</b> <b>Presenters: Heather Boutell</b> , Bellarmine University <b>Brent Tener</b> , Vanderbilt University <b>Moderator: Jana McCall</b> , TSAC	<b>Mirabella B</b>
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Individuals who are currently in leadership positions or who are aspiring to leadership opportunities often struggle with creating and maintaining a team. How do you build trust, deal with conflict, establish commitment, embrace accountability, and attend to results? Patrick Lencioni's book, "The Five Dysfunctions of a Team," approaches these topics and offers solutions to assist individuals in leadership roles. This interactive workshop will provide you skills to take your leadership to the next level.

	<b>Session 3: Resolution of the "399" ISIR Comment Code</b> <b>Presenter: Stephen White</b> , Middle Tennessee State University <b>Moderator: Lori Mitchum</b> , TSAC	<b>Mirabella C</b>
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This session will provide a brief overview of the "399" ISIR Comment Code resulting from conflicting 2015 income / tax information reported on the 2016-17 and 2017-18 FAFSA Applications. Stephen White will provide information regarding the start to finish process used by MTSU. Ample time will be given to entertain questions / "best practices" from the audience related to resolution of conflicting information. As time allows, questions will also be entertained regarding increased use of PJ resulting from PPY income.

	<b>Concurrent Session 4: Consumer Information, Don't Be Caught Off Guard.</b> <b>Presenter: Tiffany Summers</b> , Lipscomb University <b>Moderator: Felicia Orr</b> , TSAC	<b>Mirabella D</b>
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Consumer Information mistakes and missing information are commonly listed in the "Top Ten Compliance Findings" in a Department of Education Program Review. This session will walk through the Financial Aid requirements for Consumer Information using the Department of Education's Consumer Information "At a Glance" worksheet. Best practices and website examples will be discussed.

2:45 – 3:15 pm	<b>Break: SNACKS!</b>	<b>Oakleigh A</b>
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## **Concurrent Sessions**

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3:15-4:15 pm

**Session 1: TCAT Wrap-up**  
**Presenter: Jo Wallace**, TCAT McKenzie  
**Moderator: Carrie Gilbert**, TCAT Pulaski

**Mirabella A**

All TCAT Financial Aid staff attendance is requested. We will discuss Banner and how it will affect financial aid in 2018. We will discuss key TASFAA sessions and answer any questions that you still may have.

**Session 2: How to Overcome 5 Major Areas  
in the Development of Teams (Part 2).**  
**Presenter: Heather Boutell**, Bellarmine University  
**Brent Tener**, Vanderbilt University  
**Moderator: Jana McCall**, TSAC

**Mirabella B**

**Session 3: Fraud Detection**  
**Presenter: John Konerman**, Office of Inspector General  
**Moderator: Dave Bowman**, Great Lakes

**Mirabella C**

This session will cover how schools are able to detect fraud in relation to Title IV and to report suspected fraud to the OIG.

**Session 4: Banner: How did you do that?**  
**Presenters: Suzanne Beller**, Middle Tennessee State University  
**Randi Major**, Austin Peay State University  
**Moderator: Nadia Keyes**, Pellissippi State Community College

**Mirabella D**

A panel composed of two TBR university representatives will be available to address technical questions you might have regarding Banner functionality related to the processing of financial aid.

**Concurrent Session 5: COD Update**  
**Presenter: Wood Mason**, Department of Education  
**Moderator: Shannon Cross**, Inceptia

**Cambridge B**

We'll look at what's planned for the COD Release 16.0 next March which will be for the 2017-2018 academic year. The New Award Year Setup, new Schema, and a few enhancements to help you work efficiently in the programs that COD processes will be discussed.

5:15 – 7:45 pm

Dinner on Your Own

7:00 – 10:00 pm

TASFAA Suite Open – *“Suite/Sweet Mixer”*  
Sponsored by the Diversity Committee

**Suite 228**

## Wednesday, April 26, 2017

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6:00 – 8:45 am	Hotel Breakfast	Hotel Lounge
7:45 – 9:00 am	Registration Open	Registration Area

### **General Session**

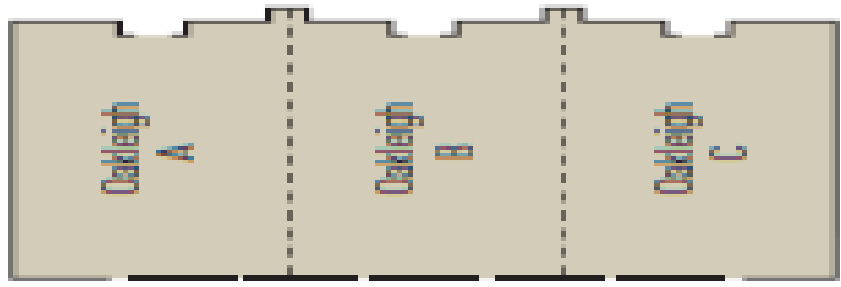
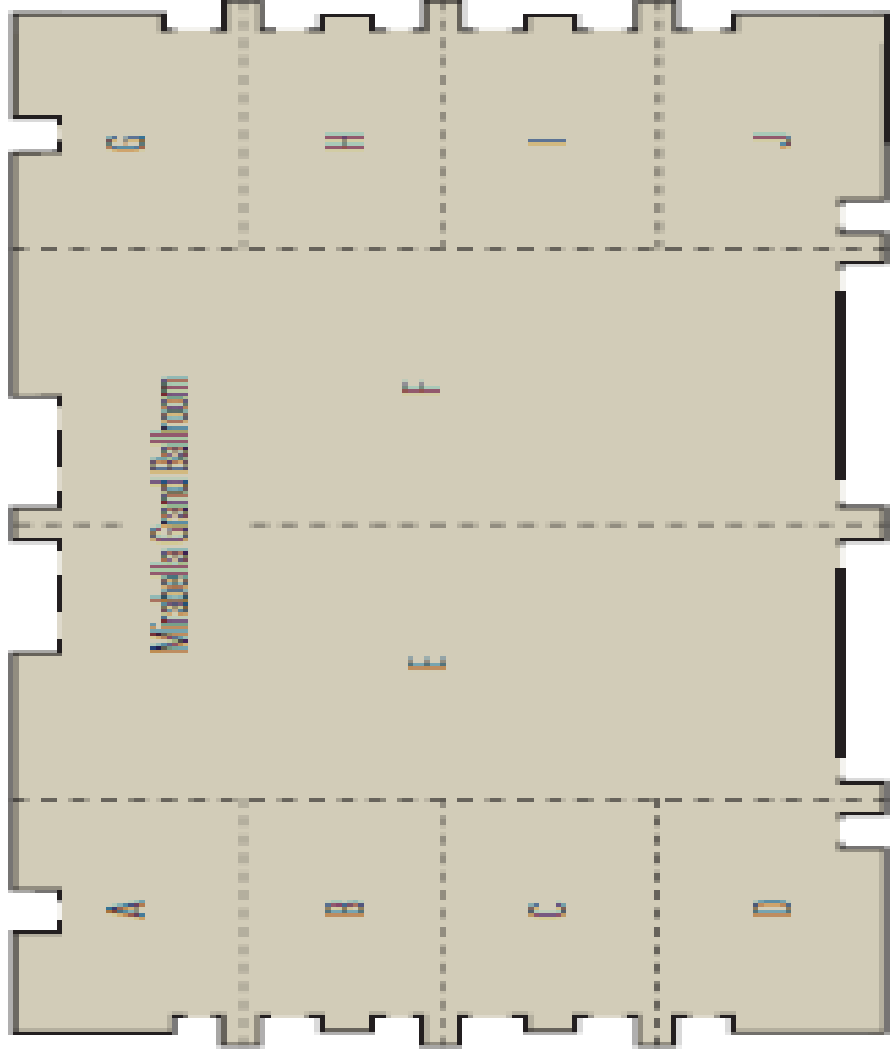
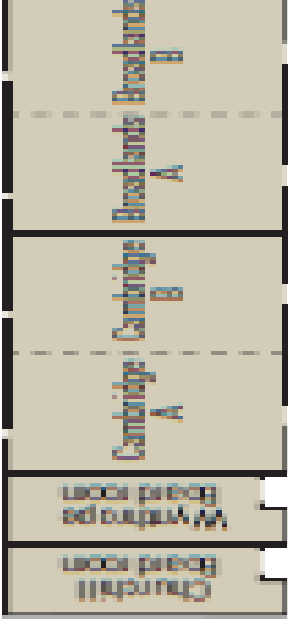
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9:00 - 11:30 am	<b>Federal Update &amp; Closing Remarks</b> <b>Presenter: David Bartnicki</b> , Department of Education <b>Moderator: Charles Harper</b> , Belmont University	<b>Mirabella E</b>
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The Department of Education will present information about current issues for the Title IV student aid programs. The session will include updates about the Department's Title IV activities and initiatives, including information about regulatory efforts.

## Celebration Scheduled for Next Year!





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