NASFAA Tools

Tools 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: NASFAA University

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 (starting spring 2013)
- Eligible to take the examinations and earn nationally-recognized credentials

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
Using NASFAA Tools

Paths to Credential: Facilitated Online Course

- Designed to bring minds and ideas together despite distances
- Provides an opportunity to learn from peers
- Program objectives
  - Proficiency
  - Knowledge
  - Value

Paths to Credential: Facilitated Online Course

- Three-to-six 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: On-site Training

- NASFAA staff on your campus to provide training for your entire staff
- Focuses on regulations and provides best options for implementation of regulations on your campus
- Goal to provide guidance and resources to ensure compliance and best practices
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 Paths to Credential: Boot Camps

• In-person workshops offered by state and regional financial aid associations using NASFAA CORE curriculum
• Immersive in nature and usually span multiple days
• Successfully completing specific topic areas through a boot camp qualifies an individual for the credentialed test (starting 2013-14)

 NASFAA University Testing Center

• Completion of an approved NASFAA University learning activity qualifies you to take an examination on one or more topics
• Testing topics for 2012-13 include:
  – Return of Title IV
  – Student Eligibility
  – Verification and Professional Judgment
  – Cost of Attendance and Packaging
  – Application Process and Federal Methodology

 Online: Webinars

NASFAA brings continuing education to you via live streamed Webinars and recorded sessions that you can view on demand. You can invite an unlimited number of people from your organization to participate with just one webcast login from your desk, with everyone around a computer, or with a large group in a conference room.

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Online: Webinars

Upcoming Webinars:
• December 19, 2012 – Moving Toward Customization: Verification for 2013–14
• January 30, 2013 – Working with Students Without a High School Diplomas
• February 27, 2013 – Strategic Packaging: Who Gets What
• June 26, 2013 – Hot Topics!

On My Campus: CORE

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

CORE

MODULE 2 THE APPLICATION PROCESS

TIME: 2 hours
PURPOSE: Participants will be able to:
- Explain the Title IV financial aid application process for the 2012–13 school year.
- Identify and describe the methods students may use to apply for Title IV aid.
- Identify and explain data elements collected by the FAFSA on the Web worksheet.
- Explain how the FAFSA data are processed.
- Identify and describe the application processing output and
- State application data changes and override a student’s dependency status.

OBJECTIVES:
Participants will learn how to complete the online version of the FAFSA, understand the macrosteps of application output (data changes to applicant data, and override a student’s dependency status).

References for the Application Process

The following is a list of resources you can utilize to develop these materials that you may find helpful if you need additional information or clarification on topics covered in this training module:

2. Part F – Need Analysis

Dear Colleague Letters

GEN 11-03 – Enhancements to the FAFSA RIS Data Retrieval Process

Electronic Announcements


In My Area: State & Regional Workshops

State & Regional Workshop Kit

State & Regional Workshop Kit

Direct Loans: The Rest of the Story
- Features real-life situations
- Provides guidance on common issues
- Contains an instructor’s guide, PowerPoint presentation and trainee handouts

2011 Topic: Satisfactory Academic Progress

In our view in compliance with the new Satisfactory Academic Progress regulations that were in effect on July 1, 2011, although these have been a number of training opportunities on SAP list has not been updated for the implementation.
Using NASFAA Tools

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.
AskRegs Knowledgebase

Subscribe to receive automatic updates if article guidance changes.

AskRegs Knowledgebase

Submit a Ticket and NASFAA staff will research and provide an answer to your question.

AskRegs Knowledgebase

Immediately check the status of any Tickets you have submitted.
Self-Evaluation Guide

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
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

Compiled Title IV Legislation includes a searchable PDF for each of the major subchapters of the U.S. Code that relates to the student financial assistance programs for higher education. These files reflect the codified law under Title 20 (Education), Chapter 28 (Higher Education Resources and Student Assistance) and under Title 42 (The Public Health, and Welfare), Chapters 14 (Research Opportunities Programs), and for the most part derive from the Higher Education Act (HEA) of 1965, as amended. The HEA is reauthorized approximately every five or six years, although recent legislation has also added the authorizing language that details congressional intent with regard to student financial aid. We construe those compiled files by incorporating amendments to the law. We note effective dates if those dates will occur after posting.

For official version of the law, visit Thomas at http://thomas.loc.gov/home/thomas.php

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
§ 1074. Statement of purpose: program authorization; [745-7] etc.

For Example

- Example

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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

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

Policies and Procedures Tools

- Example:
  - Policies and Procedures Tools
    - Procedures
      - Describe how the financial aid office ensures its packaging policies are based on federal and institutional guidelines. You may want to cross-reference the packaging guidelines and award package notification sections of the manual.
      - Example:
        - Step 1: The assistant director generates a preliminary report of all students for whom verification is complete and are ready for packaging
        - Step 2: The assistant director gives the packaging report to the packaging counselor
        - Step 3: The packaging counselor reviews the report to ensure the students named were initially set up appropriate packages
  - Policies and Procedures Tools
    - Step 4: After reviewing the report, the packaging counselor marks a flag in the computer system to run the final automated packaging program during its next scheduled run
    - Step 5: The packaging counselor reviews the resulting Fund Balance Report to ensure the amounts of funds awarded to each student category follow policy guidelines
    - Step 6: After reviewing the Fund Balance Report, the director reviews the packaging parameters to adjust the amounts of funds awarded from each financial aid program to prevent over- or under-award
    - Step 7: The packaging flag is re-set and automated packaging is run
    - Step 8: After reviewing the second Fund Balance Report, the director authorizes the awards to be finalized
    - Step 8: Student award notifications are sent

How-to Guides

- Example:
  - How-to Guides
    - Award Letter Self-Assessment Guide
      - Offers a framework in which to provide what families want to know in a language understandable to all. This guide helps you ensure clear, concise, and complete award letters that adhere to best practices.
    - Net Price Calculator Buyer's Guide
      - Guides for: Award Letter Self-Assessment and Net Price Calculator Selection
      - Reference tool on how to use federal income tax returns, forms and schedules for verification and need analysis
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Using Tax Returns in Need Analysis

- Example -

How-to Guides: Using Tax Returns in Need Analysis

- Example -

How-to Guides: Using Tax Returns in Need Analysis

- Example -

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Standards of Excellence

Through review of school’s financial aid operations, administration of Title IV programs, and compliance with Title IV requirements by team of practicing financial aid administrators.

Quick Reference Guides

- Deadlines: Direct Loan Program Year Closeout vs. Reconciliation Q & A
- 2012–13 Student Aid Reference Sheet
- 2011–12 Graduate & Professional Reference Sheet
- 2011–12 Health Professions Loans & Scholarships Reference Sheet
- Cash For College
- And more...

Monographs

- Competent review of literature on financial aid related topics
- Publications offering historical, research driven information that summarizes statistics
The Journal of Student Financial Aid is the official journal of NASFAA, featuring in-depth articles by NASFAA members, policy experts, and colleagues in related industries.

Graduate & Professional Listserv
- Free service for student aid professionals at graduate and professional institutions
- Serves as a communications forum for issues specifically related to the administration of financial aid at Grad/Prof schools

Resource Listserv
- Free service for institutions that have limited resources to administer student aid
- Serves as a communications forum for issues specifically related to the administration of financial aid and maintaining compliance on a tight budget