

**2009 FSA Conference
December 1-4, 2009
Gaylord Opryland Hotel and Convention Center
Nashville, Tennessee**

Day 1 General Session

GS-1. Conference Opening & Welcome

Target Audience: All conference attendees.

Topics to be Covered: Join us as Education Secretary Arne Duncan and Chief Operating Officer for Federal Student Aid, Bill Taggart, discuss the current and future state of postsecondary education in America.

Day 2 General Session

GS-2. Application Processing System Update

Target Audience: All conference attendees.

Topics to be Covered: Come hear about changes Federal Student Aid is making to simplify FAFSA on the WebSM by employing the increased use of skip logic and by implementing a new IRS data retrieval process where students and parents can elect to have IRS data transferred directly from the IRS into their FAFSA on the Web application. This session will also cover recent and upcoming changes to the paper FAFSASM, the Student Aid Report (SAR), and the Institutional Student Information Record (ISIR).

Day 3 General Session

GS-3. Federal Update

Target Audience: All conference attendees.

Topics to be Covered: The panel will present up to date information on a number of Department of Education activities and initiatives. This will include information on the recently published final regulations and the status of the current negotiated rulemaking process. Also, included will be an overview of the changes made to the Title IV student aid programs by recent legislation.

Day 4 General Session

GS-4. Town Hall

Target Audience: All conference attendees.

Topics to be Covered: Under Secretary Martha Kanter kicks off the Town Hall, which offers conference attendees an opportunity to ask questions of Bill Taggart, FSA's Chief Operating Officer, and Bob Shireman, Deputy Undersecretary, along with their senior staff on issues related to the federal student aid programs.

BREAKOUT SESSIONS

DAY 1 ONLY: So This is Your First Federal Student Aid Conference?

Target Audience: Attendees new to FSA's conference.

Topics to be Covered: New to FSA's conference? This session will help you navigate through the four-day agenda and determine what sessions will best meet your needs. We will explain who is here, what services are available, and answer any conference-related questions you may have.

1. Direct Loan Processing in COD for New Participants

Target Audience: Schools that already process grants using the Common Origination and Disbursement (COD) System and/or the COD Web site, but who are unfamiliar with using COD for processing Direct LoansSM.

Topics to be Covered: This session will focus on how COD handles Direct Loan processing basics related to origination records, credit checks, promissory notes, disbursements, funding, reconciliation, and reports.

2. Direct Loan Programmatic Primer

Target Audience: Schools new to the Direct Loan ProgramSM or individuals who are simply new to Direct Loan processing.

Topics to be Covered: This session will present the Direct Loan Program from a programmatic perspective. We will introduce concepts, terminology, and other information needed to understand how the program works and how to manage and administer the program at a school. We will cover school, financial aid office, and Federal Student Aid roles and responsibilities. We will explain processing responsibilities, options, and management related to origination, promissory notes, disbursement, funding, reconciliation, closeout, and servicing.

3. Direct Loan Servicing

Target Audience: Schools new to the Direct Loan Program or individuals who simply want to understand how Direct Loans are serviced.

Topics to be Covered: This session is an overview of how the Direct Loan Servicing System performs its functions and how the Department's servicer works with schools. You will become familiar with the many tools available to assist you and your students, and get updates on the changes and new activities in Direct Loan Servicing.

4. Direct Loan Systems Primer

Target Audience: Schools new to the Direct Loan Program or individuals who are simply new to Direct Loan processing.

Topics to be Covered: We will provide an overview of the functions, features, and screens of the COD Web site and explain how these are used to process, manage, and administer Direct Loans. In addition, we will cover other electronic Direct Loan processes and systems, including the Direct Loan Electronic Master Promissory Note (eMPN) Web site, Student Aid Internet Gateway (SAIG), Direct Loan Servicing System (DLSS), and G5.

5. Default and Delinquency Management

Target Audience: All schools that participate in any of the Title IV student loan programs.

Topics to be Covered: This session will provide information to assist schools in managing Title IV student loan delinquencies and avoiding defaults.

6. What's New in COD for Direct Loans?

Target Audience: Schools currently processing Direct Loans using COD.

Topics to be Covered: This session will focus on the upcoming Common Origination and Disbursement (COD) System changes specific to Direct Loans for 2010-11. We will cover operational changes and enhancements, such as PLUS process improvements and changes resulting from recent legislation.

7. Direct Loan Funding & Cash Management

Target Audience: Schools that currently participate in the Direct Loan Program and schools that will be new to the Direct Loan Program.

Topics to be Covered: This session will focus on Direct Loan funding and cash management as it relates to your institution. We will cover the processes or procedures you should have in place to manage your Direct Loan funds. We will cover the practical aspects of managing Direct Loan funds, including the Direct Loan funding process, gaining access to and using G5 to request, return, and substantiate funds through the Common Origination and Disbursement (COD) System. We will also discuss some of the web screens, tools, and resources that are available to assist you in managing Direct Loan funds effectively.

8. Direct Loan Reconciliation

Target Audience: Schools that currently participate in the Direct Loan Program and schools that will be new to the Direct Loan Program.

Topics to be Covered: This session will focus on monthly Direct Loan reconciliation, the process by which a school balances their internal systems' data to the data accepted by the Department. We will highlight various reports, tools, and resources available to assist schools in reconciling in a timely manner. In addition, we will review a case study that demonstrates the use of some of these simple techniques and tools by a sample school.

9. Additional Loan Servicers

Target Audience: Schools with students whose FFELSM Loans have been sold to the Department.

Topics to be Covered: This session will describe how FFEL Loans now owned by ED are assigned to a servicer. This session will discuss student and school impacts in an environment in which there are additional servicers and the methodology for measuring customer satisfaction.

10. NSLDSSM Update

Target Audience: All schools.

Topics to be Covered: This session will provide information on the changes and enhancements to NSLDS to support the regulatory and program changes for the upcoming 2010-11 award year and features to accommodate the advent of additional servicers. You will learn how to determine which Federal Student Aid Servicer is servicing your borrowers' loans. The session will also introduce a new exit counseling feature that will be implemented on the NSLDS Student Web site, and exit counseling reports available to schools on the NSLDS Financial Aid Professional Web site.

11. Loan Repayment and Forgiveness Plans

Target Audience: Schools with Direct Loan or FFEL borrowers.

Topics to be Covered: This session will focus on repayment plans for Direct Loan and FFEL borrowers, including the new Income-Based Repayment plan, and loan discharge and forgiveness programs, such as Public Service Loan Forgiveness.

12. Using EExpress for Direct Loan Processing

Target Audience: Schools who are considering using EExpress to process Direct Loans.

Topics to be Covered: Thinking about using EExpress to process your Direct Loans with the Common Origination and Disbursement (COD) System? If you are new to the Direct Loan module of EExpress, join us as we show you how to use data from the Institutional Student Information Record (ISIR) to populate Direct Loan records, how to use shortcuts in EExpress to reduce data entry time, and how to optimize the Multiple Entry function. You will also learn how to originate and disburse Direct Loans (subsidized, unsubsidized, PLUS and Grad PLUS) and how to stay in sync with the COD System. Come see a demonstration of the entire data flow process in EExpress from front to back!

13. Using EExpress for Direct Loan Processing – Hands-On

Target Audience: Schools who are considering using EExpress to process Direct Loans and want to gain hands-on experience.

Topics to be Covered: Thinking about using EExpress to process your Direct Loans with the Common Origination and Disbursement (COD) System? If you are new to the Direct Loan module of EExpress, here is a chance to use your own fingers to work through a series of Direct Loan-related exercises designed to help you gain confidence in the simple process of creating, originating, disbursing, and reconciling Direct Loan records. Staff will be available to assist you with the exercises and answer any questions you have as you move along at your own pace. A great way to learn EExpress!

14. Using Direct Loan Tools to Reconcile your Direct Loan Data with COD

Target Audience: Schools that currently participate in the Direct Loan Program and schools that will be new to the Direct Loan Program.

Topics to be Covered: The Direct Loan Tools software application works with your own mainframe or middle-range application, or hand-in-hand with EExpress, to ensure that your Direct Loan records reconcile with the Common Origination and Disbursement (COD) System. With a few simple keystrokes you can compare the School Account Statement (SAS) file you receive every month from the COD System with your own loan database to identify discrepancies that need to be addressed. This session is designed to show you how simple it is to stay in sync with the COD System.

15. Direct Loan Reports

Target Audience: Schools that currently participate in the Direct Loan Program and schools that will be new to the Direct Loan Program.

Topics to be Covered: This session will focus on the Direct Loan reports and explain how these reports can assist schools in the management and administration of Direct Loans. We will cover how schools receive or retrieve the reports as well as how they can be used to improve Direct Loan processing, reduce errors, resolve issues, and simplify reconciliation and closeout.

16. Processing Direct Loans with the COD Web site - Hands-On

Target Audience: Schools that are new to Direct Loan processing.

Topics to be Covered: This is an in-depth session in which participants become familiar with using the COD Web site for the Direct Loan Program. You will learn about the tools available to resolve processing issues, search for and view electronic master promissory notes (eMPN), and more. This session is particularly helpful after attending Session #1: Direct Loan Processing in COD for New Participants. Bring your active COD User ID and Logon.

17. Processing Direct Loans for Schools That Have Never Processed with COD

Target Audience: Schools new to COD and the Direct Loan Program.

Topics to be Covered: This is an in-depth session in which participants become familiar with using the COD Web site for the Direct Loan Program. You will learn about the tools available to resolve processing issues, search for and view electronic master promissory notes (eMPN), and more. This session is particularly helpful after attending Session #1: Direct Loan Processing in COD for New Participants.

18. Need Analysis: The EFC Formula Beyond 2010-11

Target Audience: All schools.

Topics to Be Covered: This session will cover recent and proposed changes to the federal need analysis formula. Topics will include proposals to simplify the financial aid application process by reducing the number of data items used in the calculation of a student's Expected Family Contribution (EFC) and recent changes to the criteria for determining a student's dependency status.

19. Reporting Student Financial Aid Data to IPEDS

Target Audience: All schools.

Topics to be Covered: Do you assist your institutional research office in completing the financial aid portion of IPEDS? This year, there will be changes to data collection related to a new HEOA requirement to display institutional net price data on the Department of Education's College Navigator Web site. This session will summarize the changes in the reporting requirements and answer questions regarding definitions and instructions for reporting data.

20. The New Institutional Net Price Calculator Requirement in HEOA

Target Audience: All schools.

Topics to be Covered: This session will review the new requirements in the HEOA for institutions to provide a net price calculator on their Web sites. In addition, a demonstration of the Department of Education template that institutions can use to meet the requirement will be provided.

21. Requirements and Suggested Practices for ACG and National SMART Grants

Target Audience: Schools seeking ideas about ways to increase the number of their students participating in the Academic Competitiveness Grant (ACG) and National SMART Grant programs.

Topics to be Covered: This session will provide an overview of recent changes to the ACG and National SMART Grant programs. Representatives from different school types will discuss how they have been able to mobilize campus resources to identify students eligible for these programs based on very different student populations and how they overcame some of the barriers that may prevent schools from maximizing their participation.

22. Overview of the Federal Direct Perkins Loan Program

Target Audience: Schools that plan to participate in the new Federal Direct Perkins Loan Program.

Topics to be Covered: This session covers recent statutory and anticipated regulatory changes to the Perkins Loan Program, funding authority calculations, data requirements, and how ED will originate and collect loans in the new Federal Direct Perkins Loan Program.

23. Perkins Loan Program - Status of Existing Loan Portfolios

Target Audience: Schools that currently participate in the Federal Perkins Loan Program.

Topics to be Covered: This session will cover the status and operational treatment of a school's Federal Perkins Loan portfolio following the implementation of the new Direct Perkins Loan Program. The session will provide information on the policy and operational requirements governing the treatment of FCC and ICC when the school continues to service outstanding loans. It will also provide information on the assignment or referral of outstanding Perkins Loans to the Department for collection.

24. IRS Data Retrieval Process in FAFSA on the Web

Target Audience: All schools.

Topics to be Covered: Come hear more about the new IRS data retrieval process Federal Student Aid will be implementing in FAFSA on the Web, starting with the 2009-10 application processing year pilot project. We will show you how students and parents can use the new data retrieval process to access the IRS Web site from FAFSA on the Web and request to have their IRS income tax information transferred into their FAFSA on the WebSM application. We will also discuss how results of this pilot may inform changes to our current processes.

25. General Provisions and Non-Loan Program Issues (Does not include Pell Grants)

Target Audience: All schools.

Topics to be Covered: A brief discussion of recent changes in Institutional Eligibility, General Provisions, and other areas, including Consumer Information, Peer-to-Peer File Sharing, Aid to Students with Intellectual Disabilities, Federal Work-Study, Campus Safety (fire safety, crime and missing persons), Re-admission of Service members, and Prior Year Charges.

26. Federal Pell Grant Program Update

Target Audience: All schools participating in the Federal Pell Grant Program.

Topics to be Covered: This session will cover recent budget and policy issues affecting the Federal Pell Grant Program. The session will highlight issues related to the payment of "two Pells in an award year," duration of student eligibility, and ineligibility due to civil commitment. It will also include discussions regarding students whose parents have died in Iraq and Afghanistan and these students' eligibility for Federal Pell Grants and for other programs, including the new Afghanistan and Iraq Service Grants.

27. Use of Professional Judgment to Address Families Impacted by the Economy

Target Audience: All schools.

Topics to be Covered: This session will cover the use of professional judgment with an emphasis on assisting families who have been impacted by the economy. Topics will include data element adjustments in the expected family contribution (EFC) calculation, adjustments to the cost of attendance, and dependency overrides.

28. Top Ten Audit and Program Review Findings

Target Audience: All schools.

Topics to be Covered: What are the top findings identified during audits and program reviews? Come and get information on the top 10 and find out how to avoid them.

29. Partnering for Compliance and Consumer Protection

Target Audience: All schools.

Topics to be Covered: As they say - there is strength in numbers. FSA's Program Compliance office is partnering with various agencies (states, accrediting agencies, Federal Bureau of Investigation (FBI), and the Federal Trade Commission (FTC)) to share information to strengthen oversight and consumer protection. Come learn more about how this affects you.

30. IT Security: Threats, Vulnerabilities and Countermeasures

Target Audience: All schools.

Topics to be Covered: This session will present some of the threats and vulnerabilities that schools may need to take action against. It will explore countermeasures that school system developers, administrators, and security professionals can take. This session will highlight vulnerability identification and discuss threats being reported by the Department of Homeland Security that could affect your schools and students.

31. Experimental Sites - A New Beginning

Target Audience: Schools interested in testing new approaches to the Administration of Title IV Student Aid.

Topics to be Covered: This session provides an overview of the Department's new Experimental Sites Initiative. Presenters will detail the two-step process for the initiative and will review some of the tentative ideas already suggested by FAAs. Sufficient time will be reserved for discussing ideas from the audience for experiments.

32. Student Loan Consumerism

Target Audience: All schools.

Topics to be Covered: This session will include a discussion of the new statutory and regulatory school consumerism requirements related to the student loan programs, both federal and private, including a discussion of the role the institution plays in complying with the Truth-in-Lending Act private loan disclosures and in the completion of the private loan self-certification form.

33. Cohort Default Rates for Schools

Target Audience: All schools that participate in one or more of the Title IV loan programs.

Topics to be Covered: In this session we will give you an overview of how cohort default rates have been calculated over the years, and how these rates affect schools. We will share information on the about the upcoming 3-year cohort default rates and especially our Electronic Cohort Default Rate Appeals process (eCDR Appeals).

34. Title IV Systems from the Perspective of IT Professionals

Target Audience: School and other Information Technology Professionals.

Topics to be Covered: This session is geared toward IT Professionals, including campus IT staff, joining with their peers to discuss ideas and concerns related to systems support of the Title IV Programs. In this session, participants will have an opportunity to share issues and innovative solutions.

BIRDS OF A FEATHER

BOF 1-8: Direct Loan School Transitioning by School Type: Each of these “Birds of a Feather” sessions is for similar school types to discuss transitioning from FFEL to Direct Loans. A panel of colleagues from like schools who have transitioned to Direct Loans will facilitate the discussions. Schools will discuss their transition plan; organization changes; coordination and planning with IT; changes to publications and Web sites; and their overall communication plan to students and parents. Q&As will follow the presentations.

Presenters:

- BOF 1 – Community College and other 2 year Schools
- BOF 2 – 4 year Public Schools
- BOF 3 – 4 year Private Schools
- BOF 4 – Proprietary Schools
- BOF 5 – Grad professional, Law, Medical Schools
- BOF 6 – HBCU’s
- BOF 7 – Hispanic Speaking Institutions
- BOF 8 – Tribal Colleges and Universities

BOF 10-17: Direct Loan School Transitioning by Software Type: Each of these “Birds of a Feather” sessions is for schools using similar software solutions. A panel of colleagues from schools using the same solution will facilitate the discussions.

Panelists will discuss the transition to Direct Loans from a system focus. Panelists will describe challenges and helpful hints, as well as what schools need to do from a school perspective to set up Direct Loans with this particular software product. Q&As will follow the presentations.

Presenters:

- BOF 10 – SunGard Higher Education
- BOF 11 – PeopleSoft
- BOF 12 – Datatel
- BOF 13 – Powerfaids & Jensabar
- BOF 14 – Sigma
- BOF 15 – Campus Management
- BOF 16 – Institutionally Developed Software (Home Grown)
- BOF 17 – EDExpress and EDExpress Combo