

VASFAA VOICE

FALL ISSUE

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Virginia Association of Student
Financial Aid Administrators



VASFAA Voice

“From The President”

Greetings from Norfolk! I am grateful for the cooling temperatures as well as the slowing of foot traffic and phone calls in the Office of Financial Aid. Time for FISAP, SCHEV and other alphabet soup reports! I hope you are having a chance to catch your breath.

Much is changing in the world of financial aid. Don't miss out on a great opportunity for fall training. Tarik Boyd, Kathleen Garlow and the Non-Conference Training Committee have been working to present a great one day training event. The cost is \$0 for those with paid membership to VASFAA for 2012-2013 (due July 1). Our fall training will be on the campus of Liberty University in Lynchburg, Virginia on October 11, 2012. See the training committee's article in this newsletter for details.

With those changes comes an even greater responsibility for outreach to the students we serve. Our Awareness Committee is working on our FAFSA filing event for February 2013. This four-hour event includes financial aid presentations and hands-on assistance with filing a FAFSA electronically. How can YOU help? Volunteer now to be a regional coordinator. Contact Paula Craw (pcraw@ecmc.org) to get the scoop on responsibilities and resources. Paula will also need sites and site coordinators for the event itself. Volunteer! Our students depend on us for guidance.

Pam Rambo is already hard at work coordinating guidance counselor workshops this fall. If you can help her with this project, please contact her now: Pam Rambo, Ed.D. at pamrambo@ramboresearchandconsulting.com.

Volunteers are still needed. If you had contacted someone about volunteering and not yet received an assignment, please contact me or one of the Board today. Our next Board meeting will be October 11 in Lynchburg.

If you have questions, concerns or anything you wish to share with the Board, please contact me or one of your Board members today:

Melissa Barnes, Ashley Reich, Lisa Tumer, Biz Daniel, Etta Feinauer, Lisa Branson, Tarik Boyd, Paul Farrar, Brian DeYoung



VASFAA Voice

Upcoming Training Opportunities

VASFAA Fall Training Workshop

The VASFAA Non-Conference Training Committee is inviting you to the VASFAA Fall Training Workshop! The Fall Workshop is FREE to all active VASFAA members and lunch will be provided.

Scheduled Events include:

- Federal update from Greg Martin with the Department of Education
 - State update from Lee Andes with the State Council of Higher Education for Virginia
 - Pell LEU presentation from Debra Harber (University of Mary Washington) and Donna Taylor (Virginia Tech)
 - Financial literacy presentation from Pamela Craw with ECMC
 - There will also be a drawing for door prizes including two free classes from Liberty University
- We can't wait to see you there!

Please click [here](#) to register!

VASFAA Annual Conference

Be sure to mark your calendars now to attend The Annual VASFAA Conference May 12-15, 2013! The conference will be held at the Embassy Suites Hampton Roads Hotel-Spa & Convention Center in Hampton, VA.

Your VASFAA Conference Committee has gotten a head start on planning this event! Plan to attend this annual training conference where you can renew your energy, obtain training on hot topics, find out the latest on Federal Issues as well as what's happening in Washington, and network with the finest financial aid professionals around. This conference promises to be one that you will not want to miss as it will have something for everyone!

Be on the lookout for updates about the conference and registration information via the VASFAA List serve!

We look forward to seeing you there!



VASFAA Voice

“Pell Grant Lifetime Eligibility Used: Importance of Timely Reporting”

Author: David Bergeron

In Dear Colleague Letter GEN-12-01 issued on January 18, 2012, we informed you of changes made to the Title IV student aid programs by the Consolidated Appropriations Act of 2012 (Public Law 112-74). Among other changes, Public Law 112-74 included a provision that limits a student’s eligibility for Federal Pell Grant funds to a maximum of 12 semesters (or its equivalent) effective with the 2012-2013 Award Year. This electronic announcement reminds institutions of the importance of timely reporting of Pell Grant disbursements (and adjustments) to mitigate the possibility of Pell Grant overpayments, particularly when students transfer from one institution to another.

Submission of Pell Grant Disbursement Information – Under the Federal Pell Grant Program regulations at 34 CFR 690.83, institutions must, by the reporting deadlines the Department publishes in the Federal Register, submit Pell Grant disbursement information to the Department’s Common Origination and Disbursement (COD) System after the institution makes a Pell Grant disbursement or becomes aware of the need to make an adjustment to previously reported Pell Grant disbursement data. On June 29, 2012, we published a Federal Register notice that provides, in general, that an institution is required to submit Pell Grant disbursement information to COD no later than 30 calendar days after the institution makes a disbursement or adjustment. Under the regulations, failure by an institution to meet these reporting requirements could result in the Department disallowing the disbursement.

While it has always been important for institutions to comply with the Pell Grant disbursement reporting requirements, the possibility that a student may exceed the new limitation on Pell Grant eligibility makes it even more critical that reporting be done timely. To ensure that your institution and your colleagues at other institutions have the most accurate information about each Pell Grant recipient’s Lifetime Eligibility Used (Pell LEU), we urge you to report Pell Grant disbursement (and adjustment) information to COD as early as possible in the required 30 day timeframe. Doing so will allow our systems to provide other institutions with more timely LEU data and prevent the possibility of an overaward.

Example--The following example demonstrates why we strongly urge schools to report Pell Grant disbursement (and adjustment) information to COD much sooner than at the end of the required 30 day timeframe: Assume that a student attends School A only for the Spring 2012 semester and, as of the end of the Spring 2012 term, has a Pell LEU of 550%.

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The student continues attendance at School A for the Summer 2012 term. Because the student has only received 50% of her 2011-2012 Pell Grant Scheduled Award, she receives the remaining 50% for the summer. School A disburses her Pell Grant on August 10 and reports that disbursement to COD on September 4, 2012, well within the 30 day reporting deadline.

The student is admitted to and plans to attend School B for the Fall 2012 term. On July 1, 2012, School B, based on information available to it (e.g., COD, ISIR, rosters) awards the student a Pell Grant for the Fall term only, since the student had remaining eligibility of only 50%. School B re-checks the student’s Pell LEU percentage prior to disbursing her award, and, finding no change, disburses all of the student’s Fall term Pell Grant on September 4.

After School B reports its summer disbursement to COD on September 4, the student’s Pell LEU increases to 650% (initial Pell LEU of 550% + 50% from School B + 50% from School A), which exceeds the new eligibility limitation. Because both schools complied with all requirements – School A reported within 30 days and School B checked the LEU before disbursing - the student would be liable for the excess funds. There are no exceptions in the law to allow a student to receive more than the equivalent of six years of Pell Grant. However, if School A had reported its summer disbursement earlier in the 30 day required timeframe, for instance, August 20, School B would have been informed of the higher Pell LEU percentage before it disbursed the Fall term Pell Grant.

This article was originally posted as a COD electronic announcement on 8/13/2012. Retrieved from <http://ifap.ed.gov/eannouncements/081312PellGrantLifetimeEligibilityUsed.html>



VASFAA Voice

“Getting Your Hands DRT-Y: Reflections on Year Two of the FAFSA and the IRS Data Retrieval Tool”

Author: Linda Peckham

When Norman Caito first learned of the requirement that aid applicants pull their IRS data into their 2012-13 FAFSA data online, he was encouraged. “I was thrilled with the concept that I’d be able to review accurate application data early in the awarding cycle,” said Caito, Director of Financial Aid Operations and Services at the University of San Francisco, “At USF, verification of application data is critical to our mission of getting the right funds to the right students.”

The process is enabled by the Data Retrieval Tool (DRT), which was designed to pull actual tax return data into the FAFSA to make it easier on families to complete the application—and to ease the verification process for aid administrators. Although the DRT was available in the 2011-12 application cycle, it was not mandatory. Effective with the 2012-13 processing cycle, the Department of Education adjusted the verification requirements to include that certain elements from the FAFSA could only be verified with DRT data, or through the use of an official IRS tax transcript submitted by the applicant.

Caito and other aid executives have learned the hard way that the regulation may have had the best of intentions—to simplify verification processes and reduce potential financial aid fraud—but its implementation has been challenging. Successful adoption of the process has required patience and out-of-the-box thinking, as well as some labor-intensive work-arounds when families are unable to successfully transfer their IRS data to the FAFSA.

Leslie Limper, Director of Financial Aid at Reed College, shares Caito’s observations. “Verification is very important here at Reed, so we communicated the new information about the DRT to families early and encouraged them to use it.”

Limper discovered that most families in her applicant pool followed their instructions faithfully and were happy to comply with the new process. However, continued snags between the IRS, the Central Processing System, and sometimes even the U.S. Postal Service resulted in process failures and lag times that have impacted aid offices’ ability to review and verify information in a timely manner. Limper adds: “The things we found out about how to really make this process work, we learned on our own. As a result, we’ve been adjusting our processes and dates all year long to accommodate families and the processing challenges we’ve encountered.” Susan Fischer, Director of Student Financial Aid at the University of Wisconsin-Madison, says the new process has presented a new “balancing act between administrative burden and good customer service to families.” Her team spent many hours revising processing and verification requirements at the beginning of the year to ensure that their office could meet processing deadlines and help families with the new approach. “We are dancing as fast as we can,” says Fischer, who cautions fellow aid administrators to find the most efficient way to verify data and disburse aid prior to the academic year.

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VASFAA Voice

“Getting Your Hands DRT-Y: Reflections on Year Two of the FAFSA and the IRS Data Retrieval Tool”

According to Caito, Limper, and Fischer, some of the most common problems that families encounter with the DRT include:

- IRS data not being available for transfer within the 2-3 calendar days that had been promised (thus FAFSA processing was delayed).
- Delays in receiving IRS transcripts when requested because of address match issues.
- DRT or transcripts not being available to those who owed money to the IRS for 2011.
- Delays in the availability of either the DRT or the transcript request for taxpayers who filed towards the end of the cycle in April.

To reduce some of the administrative burden caused by processing delays, the Department of Education recently adjusted its guidance to allow schools to use paper tax returns to verify data for filers “who have unsuccessfully attempted to use the DRT or obtain a transcript” until July 15th. But many schools are continuing to ask families to use the tool or the transcript anyway. “The process is here to stay and we’d rather have families stay on this path whenever possible,” says Heather McDonnell, Associate Dean of Financial Aid and Admissions at Sarah Lawrence College.

Thinking ahead to next year, aid colleagues suggest the following tips to help better prepare your applicants for the DRT or transcript request process:

- Clearly explain the DRT process to parents on your initial verification document or institutional application and ask them to “check off” which process they intend to use (DRT, transcript request, or non-tax filer status). Use this data to help track application results in your FAMS system and send targeted follow-up messages to families as needed.
- Remind parents that the DRT or transcript request process works faster if they file their tax returns electronically, rather than by paper.
- Inform joint tax filers that the IRS will only recognize data transfer requests from the filer whose name is first on the tax return and/or whose IRS PIN is being used to identify the IRS record. As an example, if the mother is helping the student file the FAFSA, but is not listed first on the parental joint tax return, and attempts to access and complete the IRS data transfer site, the IRS will neither recognize nor approve the data transfer.
- Remind families that although FAFSA guidance indicates that the DRT or the transcript should be available around three weeks after they have filed, this timeframe is extended towards the end of the federal tax deadline in April. If FAFSA filers wait until April to file their returns, they can expect that the DRT or transcript request will take up to six weeks to process.
- Explain that when requesting a paper transcript, the filer’s mail address must exactly match what the IRS system has on file. In cases where the postal service has abbreviated addresses or the filer has moved, the IRS may delay sending out a transcript until the issue is resolved.



VASFAA Voice

“If You Build it, Will They Come? The Benefits of Using Social Media in the Financial Aid Office”

Author: Linda Peckham

Higher education at large has responded to the social media boon by strategically utilizing Facebook and other platforms to improve admissions, yield, community relations and even alumni giving. Why then, has the financial aid community been slower to respond? Concerns about office resources and how and when to post content are the most common reasons offered by aid leaders when asked about their lack of a social media presence. Ironically, schools with a successful financial aid social media presence have reaped substantial returns on investment with minimal use of staff time when they have deployed a strategic approach to a social media plan.

“Start with your mission,” advises Amanda B. Carter, associate director of financial aid at the University of Rochester. “We made the decision to enter the space based on who we are as an aid office and our desire to communicate more regularly with students.” The University of Rochester successfully launched a Twitter account for financial aid in January and currently uses it to push out critical information about deadlines and policies. Strategically, they made the decision to only adopt Twitter and to continue to share a Facebook presence with the admissions office. Carter reports that one staff person is responsible for posting tweets and monitoring responses and generally spends about 30 minutes a day on this effort.

Northeastern University took a broader approach to using social media tools. “Financial aid offices often have a difficult time building trust and good communications with students so we saw social media as an important strategy for us,” explains Jim Slattery, Senior Director of Financial Aid. Anya Morozkina, assistant director of communications and administration for the office, and the staff person responsible for the social media presence, concurs, “We wanted to change the perception among the students about the aid office. We are not the grinches on campus. We want students to know that they can reach out to us and we are ready to help them.” Morozkina notes that Northeastern’s strategy is focused on gaining a larger student audience and improving perceptions about the office. As a result, they have implemented a long term plan for posting content and update their Facebook page every other day. Content updates might include information about broader financial aid topics including articles reposted from NASFAA and other financial aid sources. Morozkina also recommends seeking topical ideas from student employees. “They know what their peers want.”

Liz Gross, director of university marketing and communications at the University of Wisconsin-Waukesha, also encourages aid offices to embrace social media as part of their mission to serve students. “Social media can allow you to inform, connect and make a positive impression. Most aid offices are still thinking about it as only a one-way communication platform.” She notes that aid professionals need to think about “the social media space as a community where you can publicly help students solve problems. It’s really a way to turn your complainers into your champions.”

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Fullerton College has successfully embraced Facebook as an opportunity to improve customer service and student impressions about the financial aid office. Greg Ryan, director of financial aid, notes that their Facebook presence allows them to respond to student concerns within minutes and has resulted in dramatic decreases in phone calls to the office and shorter lines during peak periods. He also reports that over the three years since Fullerton implemented a Facebook page for the office, the amount of time he spends responding has diminished. “The student community now does most of the work. Students respond to each other and answer financial aid questions through the community page. And also publicly thank the office when we’ve been responsive to their concerns.”

Gross says that Fullerton’s experience is exactly what the goal should be for the financial aid office in the social media world: “You need to think about cultivating a community over time so that students begin to answer the questions for their peers. That’s what you want in the long run. Students want to hear from other students about how to resolve processing or deadline issues.”

Financial aid offices that have developed a social media presence based on strategy have successfully improved student service and campus perceptions about their office. As Gross sums up, “A social media presence provides public proof that your office is there to help.”

Suggestions for starting your financial aid office social media effort:

- Start with your mission and build your communication plan from there.
- Build a semester-long communication calendar so you can plan content in advance.
- Refresh your content as often as you can--every other day if possible.
- Use student employees to help write content and respond to posts.
- Develop a social media policy in advance, including guidelines for how you will handle derogatory comments.

Linda Peckham, M.Ed.

Senior Training Strategist

Linda brings over 20 years of higher education experience to her role as senior training strategist. Having focused her career in the development of effective learning programs for education professionals, she is skilled in designing outcomes-based training programs. She is an experienced facilitator and speaker and has delivered presentations at NASFAA, NACAC, and the College Board.

VASFAA VOICE

Thank you to our contributors!

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