



## Monday, May 17

Time	Event/Session	Presenter	Moderator	Description
9:30am - 11:00am	Conference Kick-off	Andrew Quinn & Sherika Charity		● Intro to REMO: Tips & Tricks ● Opening Session ● Sponsors ● Business Meeting ● Charity Speaker
<b>General Session</b>				
11:00am -12:00pm	<i>Data Security Best Practices</i>	Mike Tassey	Cecelia Dwyer College Ave	This session will provide training on current data security best practices for education data systems, including user privacy and security awareness, privacy and security program development. It will address ways in which schools are vulnerable and common security failures seen in districts. This session is appropriate for anyone who has access to student data.
<b>LUNCH BREAK</b>				
<b>Breakout Sessions (2 choices)</b>				
2:00pm - 3:00pm	<i>Income Earned from Work-Deep Dive</i>	Robert Weinerman	Rick Gallagher Ascent	We are required to verify the income earned from work questions only for nonfilers, but need to understand them so we can identify, and resolve, conflicting information for filers as well. Do you know how to properly address business losses or foreign earned income? What about when Form 1040, line 1 and the reported income earned from work figure on the FAFSA are different? This session will look at the guidance provided about Income Earned from Work and give you strategies for addressing discrepancies you might find as you review cases.
	<i>FERPA 201</i>	Brittani Fairchild	Jim Crichton Campus Logic	Work with Student data for a while? You got this privacy stuff down? Delve into some advanced interactive scenarios based on recent guidance and real cases received by PTAC. Or bring your own questions. You know how much we love saying 'It Depends.'
3:00pm - 4:00pm	Networking Event & Visit your sponsors			Join us for a chance to catch up with friends and colleagues as well as visit with our conference sponsors.



**Our Charity:** Safe Harbor provides the support that survivors of sexual and domestic violence and human trafficking need to overcome their crisis and to transform their lives.

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## Tuesday, May 18

Time	Event/Session	Presenter	Moderator	
9:30am - 10:00am	Warm-up Event	Mayra Vazquez		Icebreaker Fun
<b>General Session</b>				
10:00am - 11:00am	<i>NASFAA: Inside the Beltway Update</i>	Megan Coval	Dianne Fulmer Ocelot	NASFAA: Inside the Beltway Update
<b>Breakout Sessions (3 choices)</b>				
11:00am - 12:00pm	<i>Business Etiquette (virtual edition)</i>	Bill Ayers	Biz Daniel Great Lakes	<p>The pandemic has changed how we socially interact, but one thing remains the same - "You never get a second chance to make a first impression." This session will guide VASFAA members through mannerly ways to engage with students, families (including your own), colleagues, and fellow conference attendees, both virtual and live. Topics will include but will not be limited to:</p> <ul style="list-style-type: none"> <li>● Appropriate greetings: Handshake vs. elbow bumps? Hugs vs. waves?</li> <li>● Proper introductions – How would I introduce Queen Elizabeth II to my sister-in-law...in-person and on Zoom?</li> <li>● Dining etiquette</li> <li>● Writing thank-you notes</li> <li>● Rules for effective business/email/phone correspondence</li> <li>● Polite conversation</li> </ul>
	<i>IRS-- FAFSA Marital Status Mismatches</i>	Robert Weinerman	Patty Peterson Citizens Bank	The IRS and Department of Education define marriage differently and use a different moment in time to define marital relationships. Financial aid officers may need to combine incomes from individual tax returns – or extract a single person's information from a joint tax return, as a result. This webinar will look at the guidance that the Department of Education has provided related to marital status mismatches, including how to combine incomes, how to separate incomes, and what information schools need to have on file to complete these processes correctly.
	<i>Encouraging Better Borrowing Behavior</i>	Sarah Collins	Scott Oris Elm	Are you dealing with a back log of loan applications before the start of the spring term? Learn how Virginia Tech addressed this problem and share your thoughts and ideas with colleagues dealing with this similar issue.
12:00pm - 1:30 pm	<b>LUNCH BREAK</b>			
1:30 pm - 2:00pm	<b>Visit Your Sponsor</b>			
<b>Breakout Sessions (3 choices)</b>				
	<i>Resilience</i>	Patty Peterson	Kelly Savoie Sallie Mae	Strengthen your inner resolve and ability to bounce back better than ever regardless of the circumstances.
2:00pm - 3:00pm	<i>How To Engage Your Students Better Than TikTok</i>	Tim Young	Chansone Durden Earnest	With calls, emails, texts, letters, and tweets, you might wonder how students still miss your messages. Students are overstimulated and if you want your message to be heard, you have to think like a social media company. Here, you will find the tools you need to engage your students on their terms and make your message heard.
	<i>Return to Repayment: The Precautions and the Preparation</i>	Matt Nettleton	Chester Priest KHEAA	The pandemic continues and the CARES Act that has afforded some relief to all student loan borrowers by bringing them current and eliminating the need for payments has been extended to September 30, 2021. As the resume repayment date draws closer, borrowers and schools will be dealing with a much different landscape of repayment than has been seen in past trends. Understanding the ramifications of a mass resume date on student loan repayment can help you understand the impact it may have on your student borrowers and your school. In this session we will talk about the challenges this presents for students and schools along with recommendations on steps to take to ease the strain.



## Wednesday, May 19

Time	Event/Session	Presenter	Description
10:30 am - 11:00 am	Virtual Coffee Break with Sponsors		
	<b>Break out Sessions (3 choices)</b>		
	<i>Asset Related Conflicting Information</i>	Robert Weinerman	Matt Nettleton Inceptia
			In its definition of “good practices” for identifying conflicting information, the Department of Education asks financial aid officers to compare an applicant’s answers to the asset questions on the FAFSA to information that the school may have received on a tax return or tax return transcript. This session will cover the asset related information that can be derived from the tax return transcript, including a look at interest, dividends, business income, rental income, and retirement income, and how these may be used to identify conflicting information on the FAFSA.
11:00am -12:00pm	<i>Verification 2021/22 &amp; COVID Flexibility</i>	Andrew Quinn & Dominique Maddux-Jackson	Anne Traverso Sofi
			Join us as we go over everyone's favorite financial aid topic: Verification! We will discuss the 21-22 Verification requirements, COVID flexibilities with verification, and discuss ways to engage with students and encourage them to complete the Verification process timely.
	<i>Student Loan Advocacy in Virginia</i>	Scott Kemp	Joe Jovell Nelnet U-Fi
			In August, SCHEV will launch an online education loan course designed for future, current and former students interested in learning more about financing higher education through student loans. In addition, there is a new legislative mandate to share information about private loans with students before they commit. These topics, as well as the lessons learned after 2.5 years of student advocacy will be shared with financial aid professionals.
12:00pm - 1:00pm	<b>LUNCH BREAK</b>		
	<b>General Session</b>		
1:00pm - 2:30pm	<i>1:00- 2:00pm Open Forum on Taxes and Need Analysis</i>	Robert Weinerman	Becky Davis Ascendium
			<a href="#">Bring your financial aid related tax questions – or just listen to your colleagues’ questions. This session will have an open forum format and is your opportunity to ask any question you have about taxes and financial aid. Any tax question is on the table – as long as it’s related to verification, conflicting information, the difference between taxable income and cash flow, and/or need analysis. Click here to submit your questions.</a>
	<i>2:00- 2:30pm SASFAA Update</i>	Celena Tulloss	SASFAA Update
3:00pm - 4:00pm	Sector Meetings	Public-Beth Armstrong Private-Scott Morrison Two year-Laurie Owens	<a href="#">We will discuss current topics impacting the private school sector. Click here to submit your questions.</a>

## Thursday, May 20

9:00am - 11:30am	<b>General Session</b>		
	<i>SCHEV Update Awards &amp; Recognition Closing Business</i>	Lee Andes Brad Scaggs Sherika Charity Beth Armstrong	Will Shaffner MOHELA
			SCHEV Update