

# hot TOPICS



IPD Financial Aid News  
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## 2003 IPD Financial Aid Conference

The Annual IPD Financial Aid Conference was held in Phoenix, AZ on April 6–7, 2003. Weary travelers were greeted Sunday evening at the hotel with a wonderful southwest meal. After a couple of hours of “roundtabling it” during dinner all retired to prepare for a very full two days.

The conference officially kicked off on Monday, and in keeping with its theme, “Ding–Dong the 12–Hour Rule is gone,” it began with a regulatory update. After completing the presentation, all conference attendees formulated an action item matrix to address the required changes. Additional sessions were facilitated on a variety of current topics, including default management and communication with student services. The day ended with a “yummy” visit to Rustler’s Rooste™ and yes, some folks even tried the rattlesnake... and liked it!

The Tuesday morning sessions began with the annual Financial Aid Commission meeting (see related article below). Congratulations to our new officers! A full day of information sharing followed with sessions on emerging legal issues, reauthorization update, veteran benefits, National Student Loan Data System (NSLDS) and transfer monitoring, and electronic signature. Members within the Consortium for the Advancement of Adult Higher Education (CAAHE<sup>SM</sup>) shared their best practices throughout the conference. Participants who shared their institution’s sample forms and practices were greatly appreciated. You are what makes this conference so valuable for all who attend!

Conference materials were been mailed to all who were unable to attend. If you have not received these materials, please contact Kristen Vedder, as soon as possible.



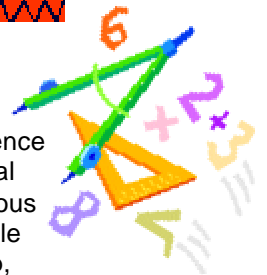
Mark your calendars. The 2004 IPD Financial Aid Conference will be hosted by Hope International University in sunny Southern California on March 8–9, 2004. We hope to see all of you there!

## Financial Aid Commission Update

On Tuesday April 8, 2003, the Financial Aid Commission held its annual meeting in Phoenix, AZ during the IPD Financial Aid Conference. With a quorum present, the meeting began with the election of the 2003–2004 officers. The new officers are Holly Ulland from Cardinal Stritch University, Chair; Pam Harris from Averett University, Vice Chair; and Pat Forquer from Olivet Nazarene University, Secretary. Lois Kelly from Indiana Wesleyan University moves to the past chair position. Congratulations to the newly elected officers. A warm thank you goes out to those who served us the previous year!

In the business meeting following the election of officers, new subcommittees were established for determining training opportunities and next years conference. A proposition to begin a mentoring program was also shared, thanks to Carol Carpenter. Complete minutes of the meeting will be sent out on the listserv, once approved by those present.

## CAAHE Conference



The focus of the 2003 Annual CAAHE Conference is *Leading Through Change*. The conference will include keynote speakers, roundtable discussions, presentations, networking, and general fun. Workshop sessions will focus on various aspects of leading change throughout the various functional areas of the institution. In addition, keynote speakers will discuss the expanded role that change is playing in our society. Dr. Jay Barbuto, Department of Agricultural Leadership, Education, and Communication at the University of Nebraska–Lincoln and founder of Future Leadership Consulting, will discuss the levels of change and link them to compatible styles of leadership. Bob Furnad, past president of CNN Headline News and the current Professional in Residence at the Henry W. Grady College of Journalism and Mass Communication at the University of Georgia, will address the need to make a change in our priorities and in our sense of values as leaders in business and government.

Conference attendees may also attend specialized sessions related to faculty services, curriculum, financial aid, and student services; participate in roundtable discussions; network throughout the conference with peers; participate in a variety of special committees and task forces; and enjoy the beautiful city of Atlanta and plenty of southern hospitality!

Conference attendees must make their own hotel reservations at the JW Marriott Hotel Lenox in Atlanta, GA. The hotel is located in the heart of Buckhead and is connected by an enclosed promenade to the shopping and dining of Lenox Square. Please indicate to the hotel that this is a CAAHE conference reservation in order to receive the special rate. **Reservations can be made by calling the hotel direct at 404–262–3344, calling the national reservation number: 800–228–9290, or via the Internet at [www.marriott.com](http://www.marriott.com).** In order to get the group rate, the code **SCSSCSA** must be entered into the group code box.

**JW Marriott Hotel Lenox  
3300 Lenox Road, N. E.  
Atlanta, GA 30326  
\$159.00 plus tax per night**

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## Welcome to Saint Gregory's University

CAAHE has a new member: Saint Gregory's University in Shawnee, OK! The venture will begin with operations in Tulsa, OK, with plans to expand into Oklahoma City. The adult program will initially offer associate's and bachelor's degrees in Business and Management Information Systems. Planning is underway to add master's level programs in the near future.

IPD thanks all those who worked hard to bring this partnership to fruition, including Butch Jones, IPD Corporate Vice President for Contract and Business Development; Sue Salter, IPD Corporate Vice President for Academic and Institutional Services; Kristen Vedder, IPD Director of Student Financial Services; Rebecca Henriksen, IPD National Vice President of Enrollment; Angella Oliver, IPD Executive Vice President; Rod Bernat, IPD Chief Financial Officer; Jerry Dervin, IPD Director of Corporate Reporting; Deanna Boe, IPD Director of Student Services; and Col. Jim Nichols, IPD Director of Military Programs. IPD also thanks Jeff Driskill, IPD Contract Manager, who assisted in coordinating a site visit for the Saint Gregory's administrators to the School for Graduate and Professional Studies at Baker University in Overland Park, KS.



This partnership was made possible through the wonderful leadership of Keith Hackett, Provost; as well as Dr. Mayda Shorney, Business Chair; Pamela Hannay, Vice President for Fiscal Affairs; Father Charles Buckley, Vice President for Academic Affairs; and Father Lawrence Stasyszen, President. Saint Gregory's is praised as "The Catholic University of the 21st Century," which Father Lawrence explains to mean "Building upon our 125-year tradition as Oklahoma's oldest institution of higher education, Saint Gregory's has built a new university for the difficult world of change and complexity that students enter upon graduation."

IPD wishes Saint Gregory's every success and extends its offer to help in any way!

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## 2003–2004 Federal Student Aid (FSA) Handbook Available

Sections of the 2003–2004 FSA Handbook are posted to the federal Web site at <http://ifap.ed.gov/sfahandbooks/attachments/0304Vol8Ch3Loanperiodamounts.pdf>. Of particular interest is the language included in the loan section. A teleconference will be scheduled to discuss the new content. Look for related announcements on the listserv.

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## Student Transfer Monitoring Process

Effective July 1, 2001 (34 CFR 668.19), schools were no longer required to obtain a paper Financial Aid Transcript (FAT), or respond to another schools request for a FAT for any transfer student, including midyear transfers. Dear Colleague Letter GEN–01–09 describes how schools can use the NSLDS data to provide financial aid history information for midyear transfer students. Institutions are required to set up their profile in NSLDS and go through an "Inform, Monitor, and Alert" process for ALL midyear transfer students. NSLDS will monitor midyear transfer students for changes in their financial aid and if any changes occur, NSLDS will alert the school. Alerts are triggered if any of the following occur: 1) a new loan or Federal Pell Grant (Pell) is being awarded; 2) a new disbursement of a loan or Pell; 3) a loan or Pell is cancelled; 4) an adjustment is made to a previously reported loan, Pell, or Federal Perkins Loan (Perkins); 5) the student has overlapping loan periods; or 6) the loan period from a prior school is less than 30 weeks before the enrollment begin date at the new school. See <http://www.ifap.ed.gov/dpccletters/GEN0109.html> for more information on this process.



### **Examples:**

1. A disbursement or adjustment of a Pell or Perkins is reported to the NSLDS. A student started at school A on August 15, 2002 and school B on March 3, 2003. NSLDS is reporting a Pell disbursement of \$2000 from school A. Since the disbursement made by school A was in the 2002–2003 award year, it is a relevant disbursement, and NSLDS will inform school B of the change.
2. Overlapping Loan Periods. A student's loan period for school A is August 15, 2002 to May 10, 2003 and the enrollment begin date for school B is January 8, 2003. School B would need to be informed of the loan (or change in loan) being reported from school A, since the loan period overlaps with the new loan from school B.
3. Loan period is less than 30 weeks prior to the enrollment begin date. A student received a loan at school A for the period of August 5, 2002 to January 31, 2003, and the enrollment begin date at school B is March 3, 2003. Even though the loan period does not overlap, school B needs to know that the student received a loan for a period that is less than a full academic year (30 weeks) prior to the loan period for a loan at school B (GEN-01-09).

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## **Electronic Cohort Default Rate Enrollment Deadline**

The June 1, 2003 deadline is fast approaching for all Title IV schools in the US to enroll in the electronic cohort default rate (eCDR) notification process. Enrollment for this process is mandatory. More information about eCDR, including a link to the Federal Register notice, Dear Colleague Letter, and step-by-step enrollment instructions, are available online at <http://www.ed.gov/offices/OSFAP/defaultmanagement/ecdr.html>. This announcement also explains how to see if your institution is already signed up for eCDR and, if not, what steps it should take to do so.

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## **Military Relief**

The Department of Education (ED) has published a series of letters that provide relief to military students. The letters (GEN-03-06 and GEN-01-13) can be found at <http://www.ifap.ed.gov/dpcletters/GEN0306.html>.



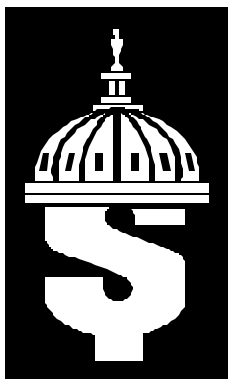
In addition, the National Association of Student Financial Aid Administrators (NASFAA) has published resource pages at <http://www.nasfaa.org/linklists/reservistguidance.asp>.

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## **Implementation of PLUS Master Promissory Note (MPN)**

The new Federal Family Educational Loan Program (FFEL) PLUS MPN is now available for the 2003–2004 academic year. It may be used for loan periods beginning on or after July 1, 2003, and after a one-year transition period; it must be used for loan periods beginning on or after July 1, 2004. A parent may use the PLUS MPN for one dependent student. The parent will sign the PLUS MPN once (at the time of the first borrow), and may obtain additional loans for the same dependent student for up to ten years after the first signed PLUS MPN. If the parent chooses to borrow from a different lender, a new PLUS MPN must be signed with the new lender. Also, if a different parent decides to borrow a PLUS MPN for the same dependent student, that parent must sign a new PLUS MPN. Finally, if a parent chooses to take out PLUS loans for more than one dependent, that parent must sign separate PLUS MPNs. As with the Stafford Loan MPN, the borrower, school, or lender may request that a new PLUS MPN be signed for each new loan period.

## Payment Period Rules for Changes in Programs



According to the Final Rule posted on November 1, 2002 (34 CFR 668.4), non-term students who change programs (not to be confused with a change in cohorts) will have their academic years (AYRs), loan periods (LPs), and payment periods restarted. This is similar to the new payment period rule for students who reenter into the same program of study after 180 days of being withdrawn. Once the AYRs, LPs, and payment periods are restarted, overlapping loan periods and overlapping AYRs need to be reviewed. For Federal Family Education Loan Program (FFELP), if there are overlapping loan periods or overlapping AYRs, prior funds must be considered for frequency of annual loan limits. For a Pell, since the AYRs, LPs, and payment periods are starting over, we are assuming that the Pell prior credit rules no longer apply. We are still seeking guidance on these regulations from the ED.

These regulations may be applied early but must be implemented by July 1, 2003.

## IPD Financial Aid Training

The training session originally scheduled for February 24–25 has been postponed. Please contact Kristen Vedder if you are interested in registering for the training. A date for training will be set once five or more registrations are received.

## Other Financial Aid Opportunities

NAME OF ASSOCIATION	TENTATIVE DATES FOR WORKSHOP/CONFERENCE	LOCATION
<b>NASFAA</b>		
Spring Training	May 8	Brainerd, MN
	May 9	San Antonio, TX
	May 19–20	Saratoga, WY
Best Practices Symposium	May 21–22	Las Vegas, NV
Annual Conference	July 9–12	Salt Lake City, UT
<b>Department of ED</b>		
Electronic Access Conference	December 2–5	New Orleans, LA



## Other News

Shorter College welcomes Nancy Wilson as its Financial Aid Coordinator for the School of Professional Programs in Atlanta, GA. Nancy has recently retired from the Army where she worked in Educational Services, including Financial Aid and Evaluation of Military Experiences for Academic Credit. We are excited about Nancy's arrival to the Shorter College staff.

Philip Hawkins, Director of Financial Aid for Shorter College, has also been given more direct oversight of the entire financial aid program; both for its traditional program as well as its nontraditional program in Atlanta, GA. Congratulations also go to Philip for completing all dissertation requirements for his PhD degree from Georgia State University in Atlanta, GA.

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## Financial Aid Global Distribution List

The Financial Aid Global Distribution List (including only CAAHE members) is available to allow you to consult with one another about the common problems you face and solutions you have found that have provided positive results. To use the list, open a regular e-mail and type [ipdfinaid@apollogrp.edu](mailto:ipdfinaid@apollogrp.edu) in the "To" section of the message. When the e-mail is sent, it will go to all the members of the list. Clicking "Reply To All" in response to the e-mail will send the response to all members of the list. Thanks to all who have been using this list, and to those providing timely responses to requests.



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## Goings On

Do you have information about job openings or upcoming events at your institution that you would like to share with the other IPD Partner Institutions? Just e-mail the information (including the name of the event or job opening; any relevant dates; and a name, telephone number, or e-mail address of a contact person) by June 15, 2002, to Kristen Vedder at [kristen.vedder@apollogrp.edu](mailto:kristen.vedder@apollogrp.edu) so that your information will be included in the next newsletter.

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