



# UASFAA

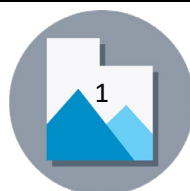
Utah Association of Student Financial Aid Administrators

2021 Virtual Spring Conference | May 12-13, 2021



## Conference Agenda

Wednesday, May 12		
Time	Session	Presenter(s)
10-10:50 AM	Welcome and Introduction	UASFAA Conference Committee
11-11:50 AM	NASFAA Session – Inside the Beltway	Megan Coval (NASFAA)
12-12:50 PM	Networking: Meet our Sponsors & Birds of a Feather (Institutions)	N/A
Breakout Sessions		
1-1:50 PM	Invest in Yourself: Building Wealth in the Digital Age	Tom Manganello (SEC Officer of Investor Education & Advocacy)
1-1:50 PM	Policies and Procedures Manual	Panelists: Amanda Burton (UVU), Jaclyn Nebeker (WGU), Anthony Jones (UU)
Breakout Sessions		
2-2:50 PM	Effective Communication with Difficult Conversations	Josh Forkner (WGU)
2-2:50 PM	Consumer Information	Jared Hallows (SUU)
Breakout Sessions		
3-3:50 PM	Professional Judgment	Panelists: Caroline Bitter (SLCC), Amanda Burton (UVU), Jennifer McGaughey (USU)
3-3:50 PM	State Financial Aid Programs	Ashely Reyes (UHEAA), Cassidy Stortz (USHE)



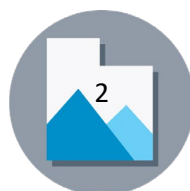
Thursday, May 13		
Time	Session	Presenter(s)
<b>Breakout Sessions</b>		
10-10:50 AM	Working Remotely in FA	Patti Kohler (WGU), Crystal DeLong (Citizens)
10-10:50 AM	Lessons Learned from COVID-19	Panelists: Cristi Millard (SLCC), John Curl (UVU), Kylee Chalk (Neumont College), Joshua Montavon (Westminster College)
<b>General Sessions</b>		
11-11:50 AM	Verification 2020-21 and 2021-22	David Bartlett (U.S. Dept of Education)
12-12:50 PM	Networking: Meet our Sponsors & Birds of a Feather (Experience)	N/A
1-1:50 PM	R2T4 Essentials	David Bartlett (U.S. Dept of Education)
2-2:50 PM	Federal Update	David Bartlett (U.S. Dept of Education)
3-3:50 PM	UASFAA Awards & Recognition	UASFAA Conference Committee

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## Session Details

### Wednesday

**NASFAA Session – Inside the Beltway (Wednesday, 11 AM)** - Join NASFAA’s Vice President of Policy and Federal Relations, Megan Coval, as she discusses the latest happenings in Washington, D.C. Topics covered will include recent legislative and regulatory activity and a preview of what schools can expect in the months ahead.

**Meet our Sponsors/Birds of a Feather—Institutions (Wednesday, 12 PM)** - Join us for an informal lunchtime chat! In this session you can meet with our sponsors and see what services they can provide to assist you and your institution. You will also be able to join breakout rooms that represent your institution type (public four year, private/non-profit, proprietary, community college, tech college) to chat with others. No preparation is needed; just arrive curious and willing to engage as much as you'd like!

**Invest in Yourself: Building Wealth in the Digital Age (Wednesday, 1 PM)** - A “train the trainer” presentation on saving, investing, and avoiding scams from the U.S. Securities and Exchange Commission. Topics include smart use of credit and debt, saving vs. investing, emergency funds, how investments grow through compounding, the importance of starting early, asset allocation and diversification, fees, retirement investing, and how to spot and avoid scams.

**Policies & Procedures Manual Panel (Wednesday, 1 PM)** - The panelists in this session will discuss policies, processes, and best practices in creating and maintaining a Policies and Procedures Manual and other financial aid documentation.

**Effective Communication with Difficult Conversations (Wednesday, 2 PM)** - This session will be on how to build trust and connection when having difficult conversations through the 3 Cs (clear, collaborative, and controlled). We will learn how having difficult conversations strengthen our relationships and leads to deeper trust.

**Consumer Information (Wednesday, 2 PM)** - In order to award and disburse federal aid, institutions must disclose certain consumer information to a variety of audiences. Understanding these notification and disclosure requirements can be a daunting task, so we invite you to join Jared Hallows in exploring the world of consumer information. (Note: This is not a NASFAA U course, but should be a good starting point for those who wish to engage in self-study to prepare for this credential.)

**Professional Judgment (Wednesday, 3 PM)** - This session will feature a panel of representatives from different institutions discussing Professional Judgement policies, procedures, and best practices at their respective institutions, as well as an opportunity for attendees to ask questions.



**State Financial Aid Programs (Wednesday, 3 PM)** – This session will provide an overview of the various state-funded financial aid programs, including a summary of funding, student eligibility, and any known updates about each program.

## Thursday

**Working Remotely in Financial Aid (Thursday, 10 AM)** – Join Crystal DeLong (Citizens Bank) and Patti Kohler (Western Governors University) for this session to learn best practices for working remotely in financial aid. They will share practical advice for remaining productive and effective as a financial aid administrator while working from home, as well as resources and ideas for staying connected to team members and students.

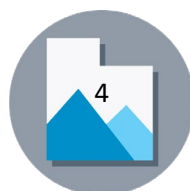
**Lessons Learned from COVID-19 (Thursday, 10 AM)** – Panelists will speak about the impact the pandemic had on their offices and reflect on the lessons learned during this time of change and uncertainty. The panel will address topics ranging from specific actions taken to respond to the pandemic to guidance for dealing with change more generally. Participants will be invited to ask questions.

**Verification 2020-21 and 2021-22 (Thursday, 11 AM)** – This session will include a discussion of the verification requirements for the 2021–22 Free Application for Federal Student Aid (FAFSA®) cycle and review verification issues related to the 2020–21 FAFSA cycle. We will discuss acceptable documentation for the various verification groups as well as guidance on items such as Verification of Non-Filing and amended returns.

**Networking/Birds of a Feather—Experience (Thursday, 12 PM)** – Join us for an informal lunchtime chat! In this session you can meet with our sponsors and see what services they can provide to assist you and your institution. You will also be able to join breakout rooms that represent the amount of time you've spent working in Financial Aid (0-2 years; 2-5 years; 5+ years). No preparation is needed; just arrive curious and willing to engage as much as you'd like!

**R2T4 Essentials (Thursday, 1 PM)** – Whether you are new to R2T4 or have performed calculations for years, if you are interested in the R2T4 process, this session is for you. This presentation will discuss key definitions, provide a high-level overview of the actual R2T4 steps, and address important concepts and time frames that take place throughout the R2T4 calculation. Topics will include withdrawal dates, dates of determination, post-withdrawal disbursements, and grant overpayments. This session will also address modules, institutional charges, aid that could have been disbursed, and more!

**Federal Update (Thursday, 2 PM)** – The Federal Update presentation will describe the most recently approved guidance from the U.S. Department of Education and the office of Federal Student Aid as it relates to the Title IV programs. Statutory and regulatory updates will be provided as well as operational updates and reminders.



## Presenter Biographies

### David Bartlett (Training Officer, U.S. Department of Education)

David Bartlett is a Training Officer with the U.S. Department of Education in Kansas City. David has had the privilege to work in the student aid industry for over 26 years at the U.S. Department of Education. He has been involved in delivering and developing training at Federal Student Aid (FSA) for 23 years, holding the post of Training Officer for 17 years.

### Megan Coval (Vice President of Policy & Federal Relations, NASFAA)

Megan is the Vice President for Policy and Federal Relations at the National Association of Student Financial Aid Administrators (NASFAA) where she oversees the Association's policy and advocacy efforts. Prior to joining NASFAA in the fall of 2010, she served as the Director of Government Relations for the federal Advisory Committee on Student Financial Assistance, where she contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate- income students. Megan began her career in higher education as an admissions counselor at Penn State University. She received a master's in higher education at Penn State and BA in political science from Allegheny College.

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**Kylee Chalk (Associate Director of Financial Aid,  
Neumont College of Computer Science)**

Kylee Chalk has been working in higher education since 2013. She has spent five and a half of those years at Neumont. She is currently the Associate Director of Financial Aid at Neumont and has been in that role for two years.

When she's not at work, Kylee spends time with her two children.

**John Curl (Director of Financial Aid and Scholarships, Utah Valley University)**

John Curl was born and raised in the Black Hills of South Dakota. He first moved to Utah in 1987 to attend college.

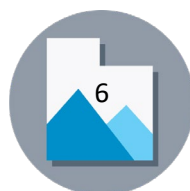
After receiving his degree in Business Management, he worked for General Motors in Michigan. John and his family moved back, where he worked for a community bank in central Utah for a few years.

After deciding to pursue an MBA from the University of Utah, John began working in the U's financial aid office in 1997. John has been the Director of Financial Aid and Scholarships at UVU since 2016.

**Crystal DeLong (Vice President – Relationship Manager, Citizens)**

Crystal DeLong is a Vice President, Relationship Manager at Citizens. She has been working in financial aid offices in KS and MO since the age of 19 and in early 2019 switched over to the lender side to continue serving her passion in Higher Ed. Crystal has served in a variety of roles in both state and regional financial aid associations during her 19 years in the industry and doesn't plan on stopping!

Crystal is a sports fan, a self-proclaimed spreadsheet geek and a social butterfly! She is always on the go and up for the next adventure (except during a pandemic). Speaking of adventures, Crystal and her husband Jim welcomed their first son, Tate Michael, into this crazy world in January and have been enjoying his smiles and giggles every day since!



**Josh Forkner (Financial Services Quality Assurance and Training Supervisor, Western Governors University)**

Josh Forkner is the supervisor over the Quality Assurance and Training Team for Financial Services at Western Governors University. His expertise is in how to effectively communicate with the people around you. One of his proudest accomplishments was being invited to speak in China on how to communicate effectively across culture and Language. Josh recently completed the University of Pennsylvania's positive psychology instructor program and uses much of their research in teaching how to have difficult conversations. When he isn't working Josh loves wood working and binge watching whatever tv show he is working through.

**Jared Hallows (Associate Director of Financial Aid & Scholarships, Southern Utah University)**

Jared Hallows, Associate Director of Financial Aid & Scholarships at Southern Utah University, graduated from Southern Utah University in 2004 with a degree in Computer Information Systems and began working as the Information Specialist for the SUU Financial Aid Office later that year. Knowing nothing about financial aid at the time, he was thrown into the deep end and helped oversee the transition from PLUS to Banner Financial Aid.

Jared recently completed his master's degree in Cybersecurity & Information Assurance. He also works part time as an IT specialist for Wayne School District in central Utah. Jared has been married to his wife Breann for 21 years and together they have four kids.





**Patti Kohler (Director of Financial Aid, Western Governors University)**

Patti Kohler is from Western Governors University, a 4-year private, non-profit school, based out of Salt Lake City, Utah. She joined WGU as the Director of Financial Aid in 2017, and her prior experience was with Utah State University, working in financial aid and scholarships for 15+ years. Among others, she currently sits on a Federal Student Aid Partner Experience Council, working directly with the US Department of Education to provide a better experience for students and schools to deliver financial aid.

**Tom Manganello (Senior Counsel, Securities and Exchange Commission's Office of Investor Education and Advocacy)**

Tom Manganello is a senior counsel in the Securities and Exchange Commission's Office of Investor Education and Advocacy (OIEA). In that role, Tom researches and drafts investor alerts and bulletins, helps manage investor education content on the SEC's website, [www.investor.gov](http://www.investor.gov), and conducts presentations on investor education to millennials, military, seniors, students, and other audiences, and he regularly contributes to OIEA's social media outreach on Twitter and Facebook.

Prior to joining OIEA, Tom spent ten years in the SEC's Division of Enforcement, where he investigated violations of the federal securities laws, including insider trading, Ponzi and pyramid schemes, accounting and broker fraud, and unregistered offerings. He graduated from the University of Pittsburgh School of Law and earned a BS in journalism from Ohio University.



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**Joshua Montavon (Director of Financial Aid, Westminster College)**

Joshua Montavon has worked in financial aid for over 15 years and held different director roles since 2010. He has served as the Director of Financial Aid at Westminster College since 2017 where he is continually looking for ways to improve the student experience and improve team efficiency.

**Jennifer McGaughey (Assistant Director of Counseling, Utah State University)**

I have worked in the Financial Aid Office at Utah State University full-time for 24 years. The first 10 years were spent in Student Employment overseeing the Work-study program and part-time employment for our campus. In March 2007, I accepted a Financial Aid Counselor Position and in October 2019, I was promoted to be the Director of Counseling, overseeing the Counseling Team for the office and serving as the chair of the Professional Judgment Committee. I absolutely love being a Financial Aid Administrator because life never seems dull with its never-ending changes and complexities. I have earned two bachelor's degrees at Utah State in Psychology and Sociology and also have a Master's degree in Psychology with an Emphasis in School Counseling. In my spare time, I love the any

outdoor activities, movies, concerts, traveling (especially to Hawaii), and spending time with family and friends.

**Ashley Reyes (Manager of Student Aid, Research, & Policy, UHEAA)**

Ashley Reyes is the Manager of Student Aid, Research, & Policy at UHEAA, where she has been since 2005. Her work at UHEAA has focused primarily on college outreach, state financial aid, and school relations.

She received a bachelor's degree in Economics followed by a Master of Business Administration degree from the University of Utah. In her free time, she enjoys spending time with her two children and husband watching movies or camping and spending time outdoors.



**Cassidy Stortz (State Aid and Access Manager, Utah System of Higher Education)**

Cassidy Stortz is the State Aid and Access Manager at the Utah System of Higher Education (USHE). She works with the state scholarship and student affairs team striving to increase college readiness and access to higher education for all Utah students. Prior to joining USHE, she worked in special education in New York. Cassidy earned a bachelor’s degree in psychology and sociology from DePauw University in Indiana. Outside of work, Cassidy spends her time hiking and camping.



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