***Region II Meeting (Zoom)***

***March 20, 2023***

18 attendees: David Rocca (UR), Hali Conrad (UR), Margaret Christian (URM), Chris Vernam (Alfred State), Lisa Papke (GCC), Laura Formella (Fisher), Sylvia Mendez (MCC), Katie Brown (GCC), Kris Ohman (RIT), Nora Bell (Brockport), Jane Gilliland (Alfred University), Mike Turner (HESC), Renee Swift (Fisher), Corinne Franklin (RIT), Jerome St. Croix (MCC). Deidre Strutz (Brockport), Joe Bailey (GCC), Laura George (Alfred State)

***HESC Update – Mike Turner***

Done with spring 2023 processing in anticipation of opening new Excelsior application for 2023-24; budget delay could further delay Excelsior application being available

Providing more tutorials for students/parents on-line as they are developed

Code changes, missing info requests for example

Posted recent bulletins for APTS, issues with system capability when students are eligible for Part-time TAP and APTS; manual spreadsheet option and then student will appear on consolidated roster

Updated SSL with 44 program code for APTS; SICAS is working on incorporating that code into SSL process

[Apts.administration@hesc.ny.gov](mailto:Apts.administration@hesc.ny.gov) with questions

Bulletins are cataloged on financial aid administrators page on HESC website

Guidance about loan default denial; if a student is approved via Fresh Start (bulletin in fall); form that is needed from school that confirms we are processing Title IV aid so they can be eligible for NYS aid; send to DocTrac address. Do not sent Fresh Start letter. Use NYS form.

TAP for incarcerated students is moving forward; enter on website; paper application only for students; manual process currently. Bulletin coming for electronic process. Site is being worked on currently.

College Data Survey is open for 2023-24. TAP certifying officers should be updating costs and term start and end dates. Deadline is May 31. After deadline, electronic submission will be turned off. Can still send information to [collegeupdates@hesc.ny.gov](mailto:collegeupdates@hesc.ny.gov). Want to make sure initial awards are based off of current tuition rates.

Processing current year TAP. Deadline is June 30, 2023. Processing missing information; up to date with residency and citizenship. IVP is still outstanding for students. IVP is run every Friday. Guidance sent to students to explain and how to resolve or make an appointment with HESC to resolve. At this stage, non-IVP success is due to unusual circumstances within the family (audit, taxes never officially filed, etc.). Some can be fixed due to minor errors in SSN or name.

Please make sure student ID numbers are up-to-date. This will prevent student from being put on a roster. However this is submitted, please make sure it is updated to ensure smooth payment of students’ funds.

2021-22 closeout by June. Decertified students on rosters 1 through 16. Running these rosters still. Keep an eye on these rosters and transactions and certify accordingly. Can still do application edits. After June, no more certifications or application changes. No new payments after June for this year. HESC is checking in with schools with big backlog of processing.

Reach out to Priority Services team as a one-stop shop for questions. Email is [priorityservices@hesc.ny.gov](mailto:priorityservices@hesc.ny.gov).

Question re: sibling verification; in March these awards were adjusted when HESC could not confirm sibling enrollment; another way to confirm is through the Clearinghouse. Need permission to access this information (VIAC form which is customized for each student) to confirm the sibling. In late September/early October the outreach from HESC begins. If no response, the award is adjusted and that is communicated to schools. Students can still resolve this if they complete and return the form that HESC sent or submit some other proof of their sibling’s enrollment (unofficial transcript, enrollment verification from the college/university).

Question re: NYS aid denial; no update on communicating this information to schools. State is consistent with message that that information will not be sent to schools. Lisa has been advocating that this be included for schools.

Question re: Fresh Start submission; DocTrac exchange of sensitive information ([doctrac@hesc.ny.gov](mailto:doctrac@hesc.ny.gov)); processed same day; if restrictions in sending this way, contact Priority Services for alternate submission options

Question re: recent training not showing on website; reconfiguring training area of website, wants to create a link to all trainings by subject; will need to check with Lisa to see where this process is

***Secretary Report, Renee Swift***

Minutes sent out after last meeting. Any questions let me know.

***Treasury Report, Jon Heininger***

Not in attendance

***Executive Council Report, Jane Gilliland***

Not too much; Novice is first week of June at Mercy; $555 registration fee; advocacy days in February, membership as of February 13 – 1,039 compared to 1,134 last year. Looking for folks to serve on the awards committee; voted to allow training for third-party servicers webinar to be open to non-members – this training is worth taking a look at, link on NYSFAAA website, lots of updates potentially on ECAR involved. Encouraging comments on suggested changes until March 31. Waiting to determine FAFSA/TAP training event since their could be delay in releasing new cycle.

***Vendor Updates***

None in attendance

***Region Chair Updates, David and Hali***

No specific agenda items submitted. Ideas for future trainings or future speakers? Patti Donahue is next on the list.

Jane said that Patti was vocal during Advocacy Day for independent students and how their awards are calculated.

Suggested trainings by David Mammano [www.davidmammano.com](http://www.davidmammano.com)

Presented to RIT recently; Corinne felt his presentation was dry.

Keep thinking of topics; we have treasury to support a speaker for a meeting over the next couple of months.

How are schools planning on setting up budgets if residency question not on the FAFSA? - Jane

Using Reslife software until we know for sure they are not going to be on campus

Enhancing communication that awards may be changed if they live off campus

When do you process refunds? Want to prevent refunds for students that are not eligible for the refund if their award changes based on their residency status.

***Third-Party Servicer webinar***

Hali concurred that it is worth the watch on the NYSFAAA website

***Fresh Start***

***Loan Forgiveness***

***Simplified FAFSA***

***New business***

***Next meeting: TBD***

*Submitted,*

*Renee Swift*