

Welcome!

**Thank you for joining us for today's
Student Records and Student Financial Assistance
Community Call.**

The program will begin shortly.

You will not hear the audio until we begin.

**If you have technical questions, please email Christin
Probst at chprobst@aamc.org.**

Wednesday, June 9, 2021



Tomorrow's Doctors, Tomorrow's Cures®

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Association of
American Medical Colleges

Housekeeping Reminders

- Your line will be **muted upon entry**
- We encourage you to **turn on your video!**
- Feel free to post questions and comments in the chat throughout the call
- For **technical assistance**, please directly **message Christin Probst** via the chat function
- ***Please note that today's session is being recorded and will be posted on the AAMC website within 7 business days***



AAMC GSA Community Call

Student Records and Student Financial Assistance



Tomorrow's Doctors, Tomorrow's Cures®

Learn

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June 9, 2021
12:00 to 1:15 p.m. EST



Association of
American Medical Colleges

Welcome from the Chairs



Damien Jackson, MEd
COSFA Chair
Asst. Dean, Office of Student
Finance
Albert Einstein College of Medicine

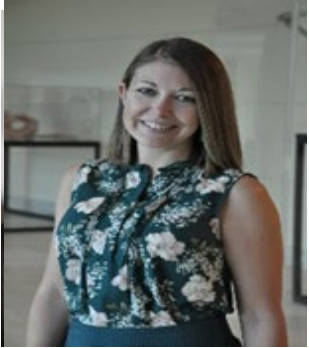


Alisha Corsi, MEd
COSR Chair
Registrar
UCF College of Medicine
Health Sciences Campus at
Lake Nona

Community Call Agenda

- **COSR and COSFA Chairs Welcome**
- **Committees Introductions**
- **COSR-COSFA Liaisons Report**
- **Legislative and Regulatory Updates**
- **Community Discussion**

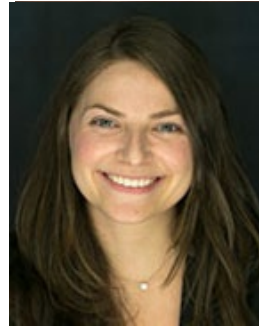
Committee on Student Records (COSR)



Alisha Corsi, MEd
(Nov 2020 -Nov 2023)
Chair
University of Central
Florida COM



Matthew Edwards, MEd
(Nov 2020 – Nov 2023)
CGSA Rep.
University of Iowa COM



Annalise Ellis, MHA
(Nov 2018-Nov 2021)
NEGSA Rep.
SOM at Hofstra/Northwell



Carol Jacqueline Archaga,
MEd
(Nov 2020 - Nov 2023)
SGSA Rep.
University of Miami SOM



Celeste Fowles Nguyen,
EdD
(Nov 2020 -Nov 2023)
WGSA
Stanford SOM



Anita Pokorny, MEd
(Nov 2020 – Nov 2021)
GSA SC Immediate Past
Chair
Northeast Ohio Medical
University



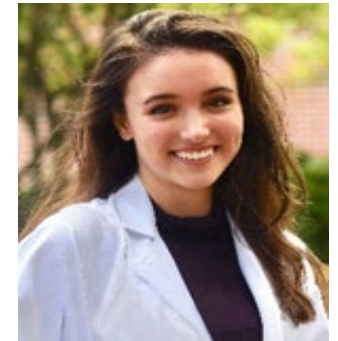
Sandra Mingo
(May 2018 - Nov. 2021)
COSDA Liaison
State University of New York
Downstate Medical Center
SOM



Wendy Clark
(Nov. 2020-Nov. 2021)
COSFA Liaison to COSR
University of Utah SOM



Kris Slaney, MBA
(Nov. 2019-Nov. 2021)
COSR Liaison to COSFA
University of Arizona COM



Lior Levy (May 2020 -
May 2023)
OSR Rep. MD Candidate
New York Medical College

Committee on Student Financial Assistance (COSFA)



Damien Jackson, MEd
(Nov. 2018-Nov. 2021)
COSFA Chair
Albert Einstein COM



Cynthia Gonzalez
(Nov. 2018-Nov. 2021)
CGSA Rep.
*Northwestern University
Feinberg SOM*



Casey Michael Wiley, MEd
(Nov. 2019-Nov. 2022)
SGSA Rep.
*Univ. of South Carolina
COM*



Charles A. Pohl, MD
(Nov. 2020-Nov. 2021)
GSA Chair
*Sidney Kimmel Medical
College at Thomas Jefferson
University*



Meredith Schor, MA, MBA
(Nov. 2018-Nov. 2021)
NEGSA Rep.
*George Washington U.
SOM*



Richard Ronnestad, MS,
CFP
(Nov. 2020-Nov. 2023)
WGSA Rep.
*Washington State
University COM*



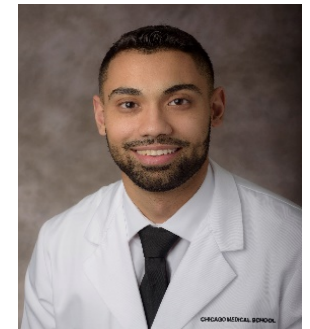
Donna H. Jackson, Ed.D.
(Nov. 2019-Nov. 2022)
COSDA Liaison
*Virginia Commonwealth
University SOM*



Wendy Clark
(Nov. 2020-Nov. 2021)
COSFA Liaison to COSR
University of Utah SOM



Kris Slaney, MBA
(Nov. 2019-Nov. 2021)
COSR Liaison to COSFA
University of Arizona COM



Kumail Hussain, MS
(June 2020 - June 2021)
OSR Rep.- MD Student
*The Chicago Medical
School*

Financial Aid Offices Staffing Survey Reminder

- The survey was distributed to GSA Financial Aid Institutional Representatives
- ~45% of schools completed the survey
- The goal is at least 60% completion rate
- **If you are the GSA Financial Aid Institutional Representative, please look for the reminder email from Irena Tartakovsky this afternoon**
- If you are not sure who is the GSA Financial Aid Institutional Representative from your school, please contact cosfa@aamc.org to confirm



GSA Listservs

GSA Listserv: Open to all GSA representatives

Email gsa@aamc.org to subscribe or for more information

Subscription to the GSA listserv(s) is, by default, based on your primary role. You may request access to any of the following lists based on additional areas of expertise

- GSA-Admissions Listserv
- GSA-Student Affairs Listserv
- GSA-Student Diversity Affairs Listserv
- **GSA-Student Financial Aid Listserve**
- **GSA-Student Records Listserv**
- GSA Regional Listservs (CGSA, NEGSA, SGSA, WGSA)

Before sending any messages to the listserv, please review GSA listserv policies

<https://www.aamc.org/professional-development/affinity-groups/gsa/listserv>

slido

What would be the first place you plan to travel post-COVID?

 Start presenting to display the poll results on this slide.

COSR-COSFA Liaisons



Kris Slaney, MBA

Director of Student Records/Registrar
University of Arizona College of
Medicine, Tucson, Arizona



Wendy Clark

Financial Aid Administrator
University of Utah
School of Medicine



COSR/COFSA Community Call

6/9/2021



Agenda

Intro to the
COSR/COFSA Liaison
role & previous project.

Gain understanding of
how departments
currently work together
at your campus.

Examine student
lifecycle and identify
when and how are roles
intersect.


Cost of attendance,
how is this determined
at your campus and
what does it cover?

COSR/COFSA Liaisons

- Introductions –
 - Wendy Clark, Financial Aid Administrator, University of Utah School of Medicine
 - Kris Slaney, Director of Student Records, University of Arizona College of Medicine Tucson
- Position created a year ago
- Purpose – increase engagement between the roles and identify topics that intersect throughout financial aid and student records. Create collaboration that leads to a positive student experience.

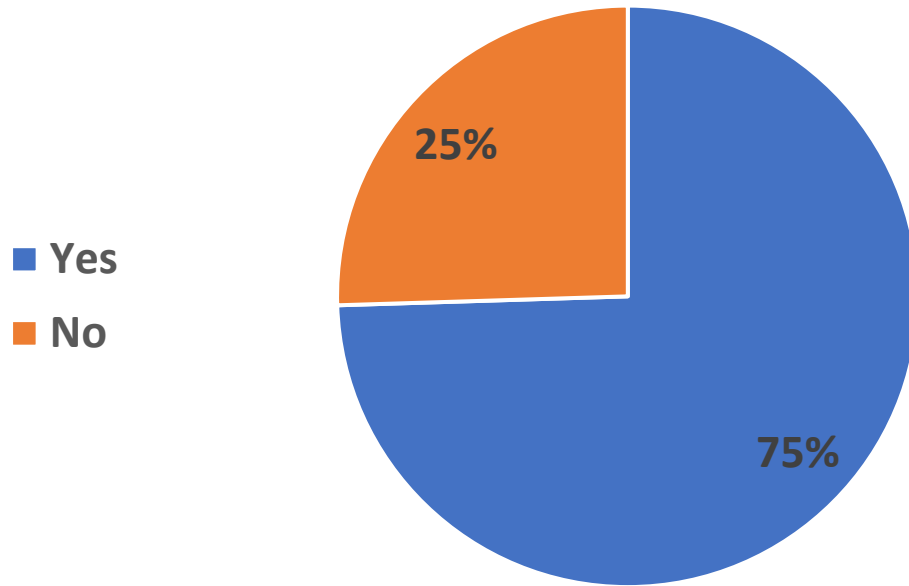


Conversation Question

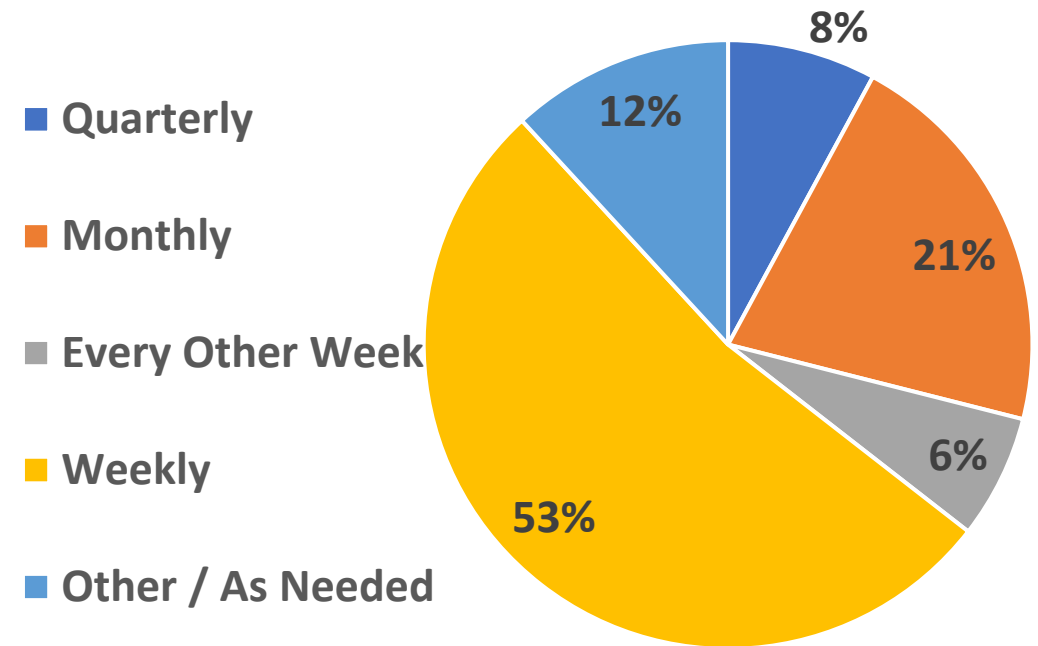
- Do you meet regularly with your Financial Aid/Student Records counterpart?
 - If so, how often? Weekly, monthly
 - Are you currently in a dual finance/records role?
 - Have you worked in this type of position in the past?
- 

Summary Results

Do you meet regularly with your financial aid/student records counterpart? N=102



How often do you meet with your financial aid/student records counterpart? N=76



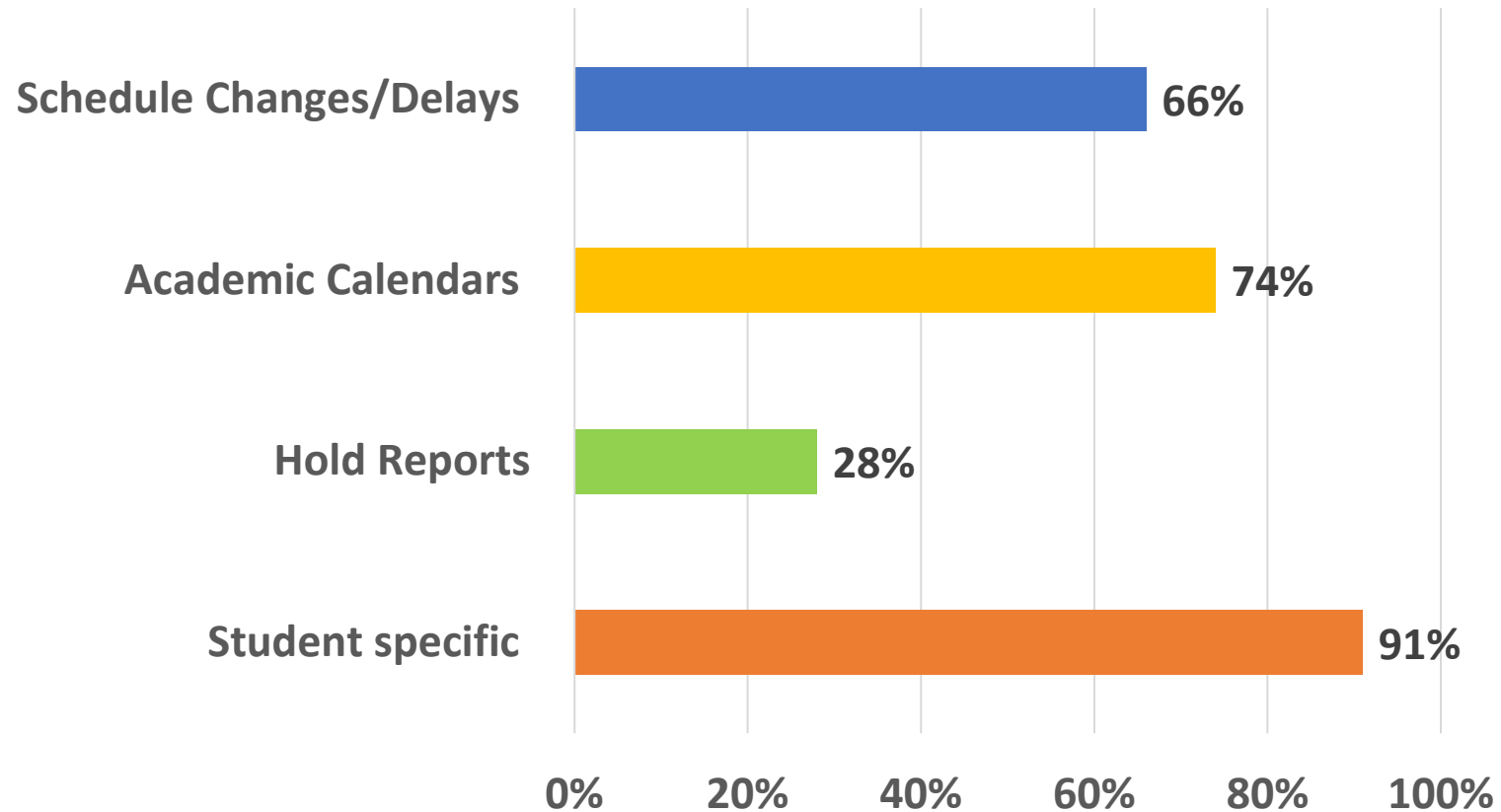
- If you are meeting with your Financial Aid/Records counterpart, what topics are regularly discussed?



Conversation
Question

Summary Results

What topics are regularly discussed at your meetings? Select all that apply. N=85



Conversation Question

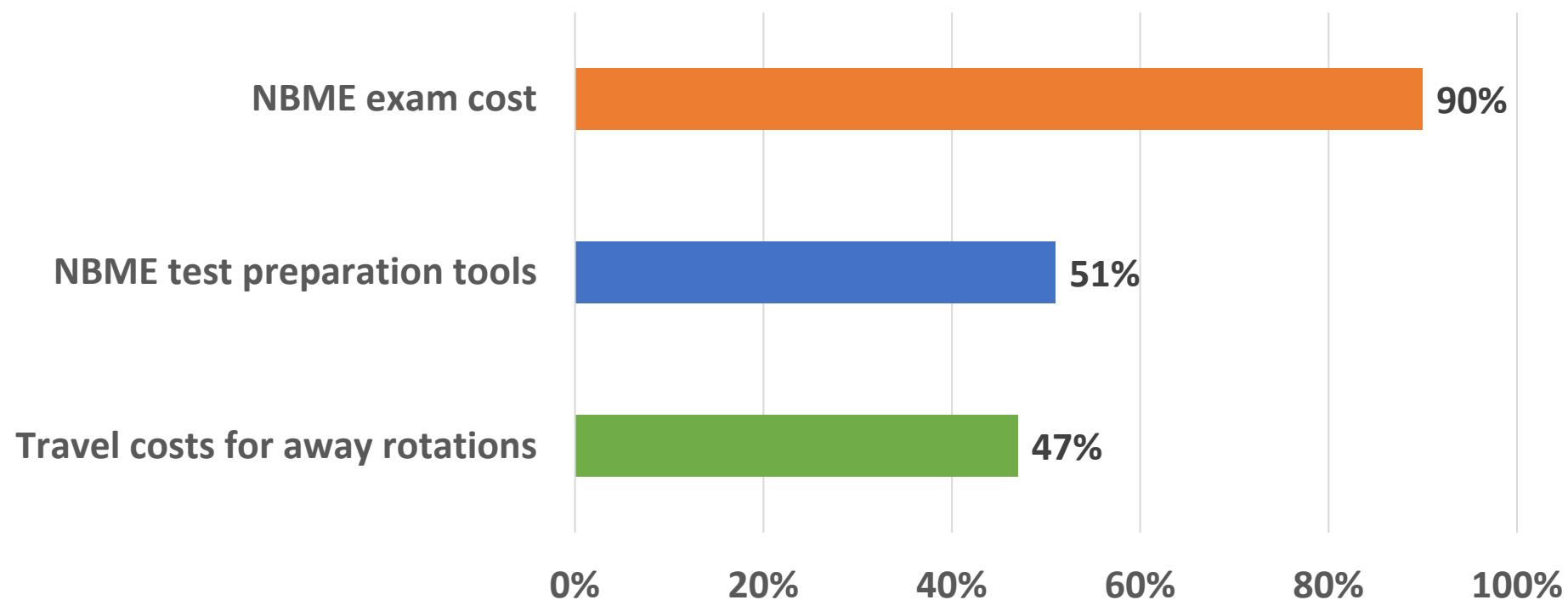
How is the cost of attendance determined at your institution?

Does it include:

- Travel costs for away rotations
- NBME preparation materials
- NBME exam costs

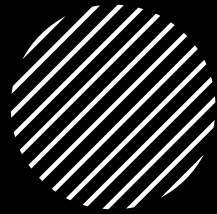
Summary Results

What items are included in your cost of attendance? Select all that apply. N=68





Initial Project – Visiting Student Toolkit



- Included:
 - Sample meeting agenda to increase cohesive approach to scheduling and the 4th year plan.
 - Timeline graphics
 - VSLO/VSAS example slides & resources
 - Student training video – NEW!
 - Funding for away rotations
 - URiM scholarship opportunities
 - Budget planning

Planning the 4th Year – A Collaborative Approach:

Encourage a planning meeting with all involved parties Student Affairs, Student Records, Financial Aid etc.

Sample Agenda:

- Timeline Transitions from 3rd to 4th year
- 4th Year Scheduling, lotteries, deadlines for Financial Aid
- VSLO opening, away elective scheduling

Away Electives: How to plan, apply, & schedule

VSAS vs Non VSAS

Pre-Application Checklist

Types of host institutions (medical schools, teaching hospitals, & clinics)

Affiliation Agreements

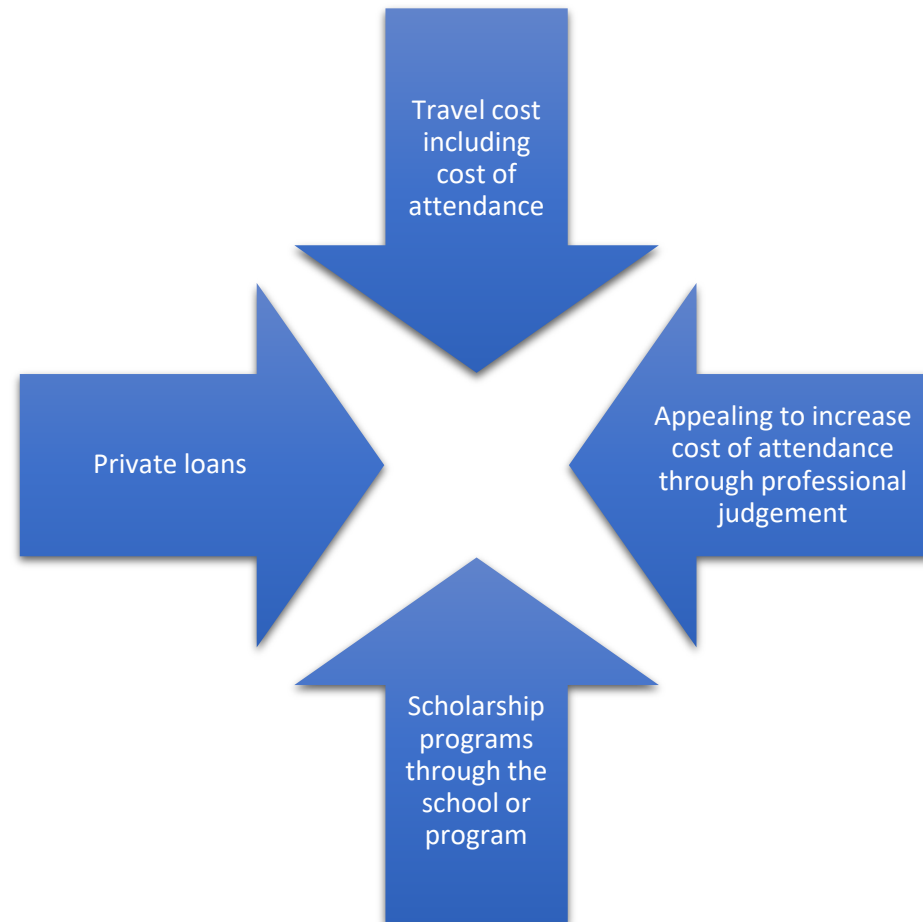
Institution away elective policies/procedures



Resources

- VSLO Resources:
 - <https://students-residents.aamc.org/attending-medical-school/vslo-application-student-training>
- Share resources early with students so they can prepare and understand the process of applying for away electives.

Funding Away Rotations





Question for the group:

Does your institution use professional
judgement to help with the cost of away
rotations?

Poll #1

Appealing to Increase Cost of Attendance through Professional Judgement

Some travel cost may be included in cost of attendance; Utah example, average away rotations 1.5.

Appeal Process – Submit appeal from, indicate which policy you seek an exception.

Attach a letter from yourself, describing your unique circumstances and the reasons you are requesting an exception to the policy.

Attach documentation to support all unusual circumstances detailed in your letter.

Scholarship Programs

- Internships, Fellowships, Scholarships and and away rotation programs- Temple University

<https://medicine.temple.edu/about/administrative-offices/office-health-equity-diversity-inclusion/internships-fellowships>

- Diversity Oriented Away Scholarship Programs

<https://www.emra.org/students/advising-resources/apply-for-away-rotations/diversity-oriented-scholarship-programs>

VSLO Resource

<https://students-residents.aamc.org/students/explore-urim-opportunities-visiting-students>

Budget Planning

Budgeting Tools

Don't wait until after you arrive at your Away Rotation to figure out where your money is going.

It's easier to start now – begin with a simple budget so you'll be ready!



AAMC's Budgeting Basics



Toolbox Expansion

VSLO/VSAS is now complete

Examine how this toolbox concept can be expanded and serve as a resource to both the records and finance communities.

Student Lifecycle

- Identify times during the academic year when our roles naturally intersect.
 - Matriculating Class
 - Approval of Academic Calendar
 - Schedule Changes
 - Academic Delays
 - 4th Year Scheduling and Preparation
 - VSLO Opening, planning for aways
 - Hold Reports
 - Graduation
 - POLL # 2



Academic Delays/Schedule Changes

- Have the number of delays increased at your institution?
- If so, how does your team communicate these changes effectively and provide scheduling/financial aid advisement in a timely manner?
- COM-T Example
 - Weekly Student Success Meetings
 - Zoom appointments with students
 - Setting expectations early – reviewing academic calendar together to advise students when their delay will impact graduation



Academic Calendars

- Is their representation from all involved departments before academic calendars are approved?
 - Ex: Curricular Affairs, Student Records, Financial Aid, Student Affairs
- Dedicated study time (periods of non-enrollment) & financial aid
- Longitudinal Curriculum

Graduation Checklist

Working with Student Records to make sure all grades are posted in internal system.

Check for main campus holds that will prevent distribution of diplomas

Review Exit Counseling hold report.

Sample verification from acknowledgement signed and returned.

Institutional Status Holds

- Review student file
 - Work in conjunction with Student Records to determine the action needed to remove the hold on record.
 - Financial holds need to be reviewed with a financial aid administrator.
 - Partner to notify students in a timely manner of the hold and the action they need to take to clear it.

AAMC Partners



Brett Roude
Legislative Analyst,
Government Relations &
Regulatory Affairs
AAMC



Kristen Earle
Lead Specialist
Office of Student Financial
Services
AAMC

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Legislative and Regulatory Updates

American Rescue Plan: Higher Education Emergency Relief Fund (HEERF III)

Negotiated Rulemaking

Expanded SNAP Benefit Eligibility



Association of
American Medical Colleges

CORONAVIRUS FEDERAL STUDENT LOAN ACTIONS

Since March 2020

Secretary of Education directs
Office of Federal Student Aid to:

- Suspend loan payments.
- Stop collections on defaulted loans,
- Set interest rates to 0% for a period of 60 days.

20 Mar. 2020

27 Mar. 2020

Congress passes, and the
President signs into law, the
CARES Act providing for
previous relief measures through
Sept. 30, 2020.

President Trump directs the
Secretary of Education to
continue to suspend loan
payments, stop collections, and
waive interest on federally-held
student loans until Dec. 31,
2020.

8 Aug. 2020

Secretary of Education extends
student loan moratorium until
January 31, 2021.

4 Dec. 2020

President Biden directs
Secretary of Education to extend
pause on interest and principal
payments for federally-held
student loans until at least
September 30, 2021.

20 Jan. 2021

New Department of Education Higher Ed Leadership



Miguel Cardona
Secretary



James Kvaal
Under Secretary of
Education
(awaiting confirmation)



Michelle Asha Cooper
Acting Assistant
Secretary for
Postsecondary
Education



Richard Cordray
Chief Operating
Officer
FSA

Advocacy Partnerships



- AAMC Action campaigns
 - Loan forgiveness for frontline health professionals
 - Preserving cost of attendance borrowing
- Academic Year Working Group
 - Worked with Dept. of Ed on guidance changes
- Legislative Updates
 - What's happening in Congress?

American Rescue Plan: Higher Education Emergency Relief Fund (HEERF III)

- \$36 billion in emergency grants for students & institutions
- Funds to support vulnerable students, monitor and suppress the coronavirus, and reengage students whose education was disrupted by the pandemic.

Student Emergency Grants

- Eligibility definition now allows for undocumented students, those with DACA status, and international students to access these emergency grants.
 - Defined as “any individual who is or was enrolled at an eligible institution on or after March 13, 2020, the date of declaration of the national emergency due to the coronavirus.”
- Guidance clarifies that institutions can consider a variety of factors when assessing need: eligibility for other federal or state need-based aid, significant unexpected expenses, loss of employment, reduced income, or food or housing insecurity. Institutions can also consider the needs of students who did not complete a Free Application for Federal Student Aid (FAFSA).

American Rescue Plan: Higher Education Emergency Relief Fund (HEERF III)

Institutional Emergency Grants

- Can retain students by providing academic or mental health support systems for students. Additionally, by discharging student debts at their institution accrued during the pandemic so students can re-enroll, continue their education, or obtain their official transcript to continue their education, etc.
- Institutions must allocate a portion of their institutional HEERF award to implement evidence-based practices to monitor and suppress coronavirus in accordance with the public health guidelines.
 - i.e. transmission detection, purchasing tests, site set-up, test administration & reduce barriers to vaccination, among others.
- New requirement that institutions must spend a portion of their institutional HEERF III share to conduct direct outreach to financial aid applicants and current aid recipients about the opportunity to receive a financial aid adjustment by requesting professional judgment.
 - Must be direct one-to-one communication, not just posted to the web (email, webinar and other direct means will suffice)
- For institutions accepting HEERF III funds, annual and quarterly reporting requirements will remain.

Regulatory Updates

Negotiated Rulemaking

- Department of Education's (ED) Office of Postsecondary Education announced that it will hold virtual public hearings on June 21, 23, and 24, 2021 to receive stakeholder feedback on potential topics for action by a negotiated rulemaking committee.
- Interested in comments on regulations that would address gaps in postsecondary outcomes, such as retention, completion, student loan repayment, and loan default.
- Specific consideration given to proposals that address disparate impacts by income, race/ethnicity, gender, and other demographic characteristics.
- Suggested topics: public service loan forgiveness; income-contingent loan repayment plans; certification procedures for participation in federal financial aid programs; among others.

Federal Resources

- <https://www2.ed.gov/about/offices/list/ohe/heerfreporting.html>
- [ED.gov/coronavirus](https://ed.gov/coronavirus)
- [StudentAid.gov/coronavirus](https://studentaid.gov/coronavirus)
- COVID-19 Handbook Volume 3: Strategies for Safe Operation and Addressing the Impact of COVID-19 on Higher Education Students, Faculty, and Staff
- FSA Knowledge Center & Partner Connect:
<https://fsapartners.ed.gov/knowledge-center>

Presenter Contact Information

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Community Discussion

