



**NASFAA**

NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS



# Campus Partners: Addressing Financial Aid Questions with the Business Office

April 8, 2025



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**TRAINING**  
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April 2025



# NASFAA's Webinar

## Campus Partners: Addressing Financial Aid Questions with the Business Office

Presented April 8, 2025

**WEBINARS**

### Welcome to NASFAA's Campus Partners: Addressing Financial Aid Questions with the Business Office Webinar

April 8, 2025

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### Webinar Housekeeping – Welcome!

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# NASFAA's Webinar

## Campus Partners: Addressing Financial Aid Questions with the Business Office

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### Introductions



**Justin Chase Brown**  
Director of Scholarships  
and Financial Aid  
University of Nebraska



**Chris Cook**  
Executive Director, Office  
of Student Accounts  
Vanderbilt University



**Megan Casey**  
Interim VP/CFO Director,  
Bursar Operations  
Johnson County  
Community College



**Chris Foster**  
Associate Vice President  
University of North Texas

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## Johnson County Community College

- Community College located in Overland Park, Kansas
- Bursar's Office reports to Vice President and CFO.
- Financial Aid Office reports to Vice President of Student Success and Engagement.
- Bursar's Office is responsible for student account services, collections, refunding, and third-party billing



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### University of North Texas

- Public, 4-year, R1 research university located in Denton, TX
- Associate Vice President, Enrollment and Student Financial Services; oversees the UNT One Stop Student Services Center
  - Holistic customer support for Financial Aid and Scholarships
- Student Accounting, University Cashiering, Veterans and Educational Benefits, and the UNT One Stop Student Services Center



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### Vanderbilt University



- Private, 4-year, R1 research university in Nashville, TN
- The Office of Student Accounts and the Office of Financial Aid and Scholarships are both members of the University Enrollment Affairs team (UEA). Located together in the same physical location on campus, our teams work closely and collaboratively to ensure our student populations are provided the best care and service possible.
- Student Accounts is responsible for Tuition and Fee Calculation, Billing, Cashiering, Accounts Receivable, Bad Debt and Collections, Third-Party Processes, Installment Plans, Refunding, 1098-T Reporting, Loan Servicing, etc.

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### Moderated Agenda

- 1 Cooperation, Coordination, and Collaboration
- 2 Account Balances & Fund Disbursement
- 3 Scholarships & External Funds Management
- 4 Compliance, Audits and Operational Best Practices
- 5 Future Improvements & Takeaways

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## Cooperation, Coordination, and Collaboration

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### Cooperation, Coordination and Collaboration

#### Cooperation

The least formal of the three, where offices share information and resources as needed but operate largely independently. This is the starting point of interoffice relationships.

#### Coordination

Involves more structured efforts, aligning processes, timelines, and goals. Offices work together to avoid duplication and inefficiencies.

#### Collaboration

The highest level of partnership, requiring mutual trust, shared decision-making, and a commitment to long-term, systemic improvements. This ensures student-centered service and policy consistency.

Mattessich, P. W., & Johnson, K. M. (2018). Collaboration: What makes it work.

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### Cooperation, Coordination, and Collaboration



- ✓ How would you describe the coordinated efforts that exist between your office and the financial aid office?
- ✓ Can you highlight a specific project or initiative that demonstrates successful collaboration?
- ✓ What challenges have you and the financial aid office encountered, and how have you worked through them?
- ✓ What are some common issues that you now address together as a standard practice?
- ✓ Why is strong coordination between financial aid and business offices critical for student success?

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Poll Question

How would you describe the cooperation, coordination, and collaboration between your business office and the financial aid office?

- Excellent - seamless integration and collaboration
- Good - mostly smooth with occasional challenges
- Fair - some struggles but we manage
- Poor - major gaps and lack of communication

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Poll Question

What area of collaboration between financial aid and the business office would you be most interested in enhancing?

- Communication and coordination of processes
- Timeliness of fund disbursement and student refunds
- Clarity on compliance and audit requirements
- Handling of external funding sources (scholarships, third-party billing, etc.)

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### Account Balances & Fund Disbursement


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### Account Balances & Fund Disbursement



What are some of your biggest accomplishments in coordinating with the financial aid office in helping students resolve or pay their student account balances?



How do your teams coordinate timing for fund disbursements, and what strategies have been effective in avoiding funding or financial aid refund delays to students?



What steps do you take independently or in collaboration with the financial aid office to ensure students understand their account balances and avoid surprises?

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### Scholarship & External Funds Management

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### Scholarship & External Funds Management

How does your office handle returned, expired, or uncashed checks or funds, and what policies or practices are in place at your school for processing refunds to donors or lenders?

How do you handle situations where there is confusion over whether an incoming check is a scholarship or a student account payment?

How does your institution coordinate the processing of external scholarship checks?

What strategies have you found effective for managing external scholarships, such as handling the volume of paper checks or electronic deposits from donor organizations?

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### Poll Question

How are overpayments of student accounts and refunds typically handled at your institution?

- Automatically refunded to the student via direct deposit, if applicable
- Automatically refunded to the student via paper check
- Held in student accounts for future terms
- Returned to donors or lenders based on specific policies
- Case-by-case basis depending on funding source

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### Compliance, Audits and Operational Best Practices

- How do you coordinate or collaborate with the financial aid office on your campus to navigate compliance and audit requirements effectively?



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### Future Improvements & Takeaways



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### Future Improvements & Takeaways

- Are there any innovative practices or technology solutions your office has adopted to streamline coordination and collaboration with financial aid?
- What advice would you give to institutions looking to strengthen collaboration between student accounts and financial aid?

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14. This webinar provided me with meaningful insight into the work I perform or assist in performing.

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# What's next?

## Please join us for the 2024-25 NASFAA Webinar Series

NASFAA's live webinars bring you the latest information, hot off the press, and allow you to actively engage with NASFAA staff and featured presenters from government, partner organizations, and fellow aid administrators.

All webinars begin at 2:00 pm ET, unless otherwise noted, and last 60 to 90 minutes. Archives are usually available after the webinar for purchase; these archives are also free to webinar package purchasers.



### Webinar Schedule for 2024-25

Topic	Air Date
FAFSA Data & Federal Tax Information (FTI)	August 28, 2024
Other Financial Assistance (OFA) & Changes in Emergency Aid	September 4, 2024
Developing Diverse Leaders: A Dive into NASFAA's Diversity Leadership Program	September 11, 2024
Student Eligibility Spotlight	September 18, 2024
FAFSA Update: 2025-26	October 30, 2024
Blue Icon Advisors, NASFAA Consulting: Top 10 Standards of Excellence Review Program Findings	November 6, 2024
Professional Development Panel: Financial Aid Pathways, Pipelines and Partnerships	November 13, 2024
How a Bill Becomes a Law (with regulatory guidance)	December 11, 2024
Policy Update Webinar*	December 18, 2024
Verification	January 22, 2025
Unaccompanied Homeless Youth	February 19, 2025
Graduate and Professional Community Update*	March 12, 2025
Changes in Administrative Capability	March 19, 2025
Blue Icon Advisors, NASFAA Consulting	April 2, 2025
Academic Calendars	April 9, 2025
Federal Work Study	May 7, 2025
Annual Business Meeting & Policy Update*	May 21, 2025
NASFAA Quiz Show: Test Your Financial Aid Knowledge	June 4, 2025

\*Free to members, does not require purchase of the webinar package.

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