



# NYSOBBA

## Quarterly

Issue X

Summer 1999

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### *A Word from Our Outgoing President*

I am pleased to take the opportunity of our quarterly newsletter to once again extend my thanks to all the members of NYSOBBA for the guidance, support and friendship that has been extended to me over these past two years as president. I believe the organization is just beginning to recognize its place of influence within the higher education community and I know it will continue to flourish and grow under Shirley Walker's presidency.

As I conclude my duties as president, I want to commend you all for the difficult work I know each of you does at your respective institutions. The hours can be long, the work is challenging, but I know NYSOBBA is filled with people who do their jobs energetically, willingly and with a spirit in their hearts that often times allows students to achieve dreams that they would otherwise not have been able to reach. You should all be very proud of the work you do; you make a difference in education in New York State and in a very real way the lives of the students we serve.

Thank you again, for the privilege you have extended to me by allowing me to serve as your President over these past two years.

Sincerely,

*Jim Sunser*

James M. Sunser  
Past President

## *From the Desk of our Incoming President*

Dear NYSOBBA Members,

I look forward to serving the next two years as the President of NYSOBBA. It is a privilege to serve with such an experienced and affable group of individuals. I am thankful for having had the opportunity to serve the past two years as vice president where I have had the pleasure to work with the Board and come into this position with some experience and familiarity.

In the past six years that I have been a member of this group, I have come to look forward to our annual conferences where I have learned so much. I remember being the new kid on the block and made to feel welcome. Each year, in that same spirit, I try to reach out to the new faces to encourage them.

Many thanks to those who have extended words of encouragement and support. Our working together can only serve to strengthen this organization. Your thoughts, suggestions, and comments are always welcome.

I encourage you to be an active participant in your region; network with each other using our directory; take advantage of the listserv (both sending and responding to inquiries); provide articles of interest for the newsletter; and, support our vendors.

Until the next time,

*Shirley*

Shirley J. Walker  
NYSOBBA President

## *Meet Our New Secretary*

Kanzellar (Kim) Sprague, Bursar in the Office of Student Accounts, University at Albany (SUNY) has served the University with commitment and dedication for ten years, exhibiting an admirable level of performance in her particular finance area. She has earned well-deserved respect for her skills, initiative, and leadership from her supervisors and co-workers.

Sprague began her career with the University in 1989 as staff assistant to the bursar and was promoted to the position of bursar in 1991. In this capacity, she manages a high volume financial operation within the student accounts office, including the supervision of the receipts, banking, and disbursement of the University's revenue. Additionally, she manages security and accountability funds, prepares reports and correspondence, credits students and other receivable accounts, and supervises cashiers and other staff in facilitating the collection operation.

Her ability to respond creatively to existing organizational procedures and operations is one of her greatest strengths. She has reformed the entire bursar operation so that it is now much more student-friendly. She has carried out many process improvements and innovations, such as implementing a lockbox operation with the University's bank to facilitate payment processing and accountability of student revenues.

Sprague serves on a variety of University committees and organizations such as the University Auxiliary Service Board of Directors, Initiatives For Women Scholarship Award Committee, Women's Concerns Committee, EOP mentorship, and the Sexual Harassment Committee. She is also involved in several community groups that are concerned with the improvement of her community and the self-improvement of individuals.

Sprague approaches her assignments with a clear sense of conscience, ethics, respect and good will. She also approaches life with unsurpassed zeal, proving a wonderful role model for all those around her.

***Open Letter from HESC President,  
Robert J. Maurer***

After 35 years of public service and private sector business, I am pleased to announce that effective August 1, I will be taking leave of Higher Education Services Corporation to pursue my seventh career. I have been a teacher, journalist, legislative staffer, educational administrator, business owner and President of HESC. My next step is an unexpected journey - joining the civic debate, sharing my experience with the community.

In a dramatic turnaround for an agency that was threatened with extinction, Governor Pataki, our HESC employees, and I have been able to create the nation's most comprehensive state student financial aid agency. We have modernized processing systems, created new Internet communications, improved customer service, lowered costs and created new grant, savings and counseling programs for students, parents and colleges.

Today, HESC has a \$24 million annual balance after expenditures, up from \$4 million only four years ago. HESC will be able to apply over \$7 million of operational surpluses annually to improving student financial aid services.

The agency has record loan volumes, greater market share of student loan origination in New York, and new Tuition Assistance Program maximum award levels. HESC's long term business and financial plans offer a road map to a bright future of service to students and families.

I am particularly pleased that under Governor Pataki's leadership HESC has been able to accomplish the following:

- \* Secured the future of state student financial aid agencies and the bank-based student loan program through last year's reauthorization of the Higher Education Act

- \* Created, with State Comptroller McCall, the nation's foremost College Savings Program that in nine months exceeded \$200 million in contributions, 55,000 accounts and has account holders from every state in the nation
- \* Added merit, scholarship and achievement to the co-equal goal of access in New York's state grant programs - introducing merit scholarships, career education InVEST grants and increasing the TAP maximum award to \$4,125
- \* Improved loan origination and default prevention to match and overtake any competitor system, expand loan market share and cut student insurance fee costs by \$13 million this school year
- \* Established new Internet-based counseling services, NYMentor, for students beginning in eighth grade - providing E-mail, Regents course planning, tutorials, virtual visits to New York colleges, electronic application for admissions and federal, state financial aid

I wish to thank NYSOBBA and its members for helping to make my four years at HESC the happiest of my professional career.

I am grateful to Governor Pataki for permitting me to be a contributor to an administration that has wrought a new bright future for New York State. You can count on the Governor to give HESC a vibrant new leader for our next century of helping students attend college and to graduate into a lifetime of economic and personal fulfillment.

With my very best wishes for our continued friendship and professional work together.

***Governor Pataki Nominates Peter J. Keitel to Lead HESC***

Governor George E. Pataki nominated Peter J. Keitel of Delmar as President of the New York State High

Education Services Corporation. Pending Senate confirmation, Mr. Keitel would succeed Robert J. Maurer who resigned as President of HESC effective August 1.

"I'm confident that Peter Keitel will build on Robert Maurer's successful tenure at HESC," Governor Pataki said. "As manager of the Tuition Assistance Program, HESC runs by far the largest and most generous state-funded tuition assistance program in the nation.

"Peter Keitel's long career in higher education and financial aid will be invaluable as we continue to provide the necessary financial support that allows so many New Yorkers to fulfill their dreams of higher education and a better life," the Governor said.

Mr. Keitel has been special assistant to the executive director of the Office of Real Property Services since January 1998, where he manages the School Tax Relief (STAR) program, state aid, educational services, sales and equalization support services.

Prior to joining ORPS, Mr. Keitel was executive vice president of HESC from 1984-98, where he was responsible for the management and coordination of the corporation's five divisions: Guaranteed Loans, Grants and Scholarships, Electronic Data Processing, Policy Analysis and Information Services and Administrative Services. He was Vice President of the division of Guaranteed Loans at HESC from 1976-84.

Mr. Keitel served as bureau chief of Postsecondary Planning at the State Education Department from 1975-76 where he prepared the Regents Statewide Plan for Postsecondary Education and was an associate in higher education from 1970-75 where he was responsible for the evaluation and development of special programs for the disadvantaged.

Before joining the State Education Department in 1970, Mr. Keitel was assistant director of the Office of Student Financial Aid at the State University of New York at Albany from 1967-69 and was an

assistant student financial aid officer at SUNY Central Administration from 1965-67.

Mr. Keitel holds a master of Public Administration degree from SUNY Albany's Graduate School of Public Affairs (1968) and a Bachelor of Business Administration from the Bernard Baruch School of Business and Public Administration at the City College of New York (1965).

### ***HESC Introduces New Hold and Release Features***

In one key area -- Hold and Release -- federal requirements have changed. Fortunately, HESC Electronic Processing has changed with them.

HESC's new Hold and Release features come in response to the revised regulations, which cover school application of student loan funds received electronically. As of July 1, schools have three business days to apply these funds to student accounts; after that time, they have 10 business days to refund non-applied proceeds to the lender.

The challenge comes when schools need additional time to verify eligibility before delivering loan proceeds. To address that issue, the Hold and Release process will allow schools to postpone receipt of funds until they are sure the funds can be applied to the student account.

Among the other features of HESC's Hold and Release implementation:

- The standard processing status will be "Release," which results in the transfer of electronic funds on the anticipated disbursement dates. If schools require a "Hold" standard for all Stafford or FPLUS borrowers, they must notify HESC in writing. Schools must send a transaction to change the Hold or Release status for each individual borrower disbursement.
- In changing a Hold or Release indicator for a particular disbursement, schools using CL3 or

CL4 layouts may send Change Transaction files after guarantee but before disbursement. WinPATH 4 reflects CL4 standards, including Change Transaction files (ASM412), to assist in the Hold and Release process.

As a result of Hold and Release procedures, three new reports will be generated:

1. **ASM968: Pre-Disbursement Roster Report.**  
This advises schools of pending disbursements by anticipated disbursement date (as determined by the school). Schools may use this as a turnaround document allowing change of the Hold and Release indicators.
2. **ASM970: Released Not Disbursed.**  
This report lists disbursements designated as Release by the school but not reported as disbursed by the lender.
3. **ASM972: Hold Status Aging Report.**  
A list of disbursements that, due to a Hold status, have not been made on the scheduled disbursement dates.

Schools may contact the HESC Solutions Team at (518) 473-0480 to discuss the Hold and Release procedures and report options.

### ***Anticipating State Budget, TAP Processing Continues***

When the state budget is complete, it will find HESC poised to finalize the 1999-2000 TAP awards.

The agency's Division of Grants and Scholarships has completed its TAP system conversion to a new IBM computer, and processing of 1999-2000 applications began May 3. To date, HESC has processed more than 208,000 completed Express TAP Applications (ETAs), over 99% of which have proceeded to (but not through) the award/denial stage. Under this initial phase of processing, only letters that request additional information or corrections are issued to

students; HESC cannot send award certificates or denials until the 1999-2000 state budget is complete.

Schools with PATH software or Web access can view student records at HESC to determine application status. These records include data for students who have received an application but have not yet returned it. (Such records are denoted with a "701-ETA Sent" or "702-CUNY APP Sent.") Until HESC can determine awards for students, the student records will show the award reduction amount based on current 1998-99 TAP schedules. In the fields where the TAP term awards are usually shown, you will find a series of ones (1111.11) or twos (2222.22); these fields will display the student's actual TAP award after the award schedules for 1999-2000 are finalized in the state budget.

Schools can also use the Web to print 1999-2000 ETAs. HESC has added an on-screen option that allows the printing of multiple ETAs.

When the state budget is enacted, HESC will determine the TAP schedules for 1999-2000 awards and make changes, if any, to the processing systems. As soon as this is complete, the agency will determine the eligibility of students and mail award certificates and denials for the 1999-2000 award year.

If you have questions or require information about TAP processing for 1999-2000, please contact the Office of Field Services at (518) 474-3552.

### ***G&S Payment Redesign***

G&S Payment Redesign is a HESC priority that has now moved to the forefront. A group of bursars have volunteered to work with HESC to ensure the redesign represents your needs and incorporates bursar input. The group has met twice to gather business requirements for term payments and term reconciliation, and for conversion from roster-based payments to term-based payments. We are confident that these sessions will result in expeditious development of a redesigned payment process. We will keep you informed of the group's progress.

## *HESC Helps Colleges Comply With New Tax Reporting Requirements*

The Federal Taxpayer Relief Act (TRA) of 1997 created several tax benefits for postsecondary education students and their families, including Hope Scholarship and Lifetime Learning tax credits.

For most students who are potential recipients of Hope Scholarship or Lifetime Learning tax credits, a postsecondary education institution is required to file, within specific deadlines and using prescribed formats, an information return with the IRS. In addition, a corresponding statement must be provided to the individuals named on the information returns showing that the information has been reported to the IRS. The information provided to the IRS will be used to confirm that requested tax credits are justified. IRS regulations provide that schools may perform the reporting themselves or contract with a vendor to perform these tasks for them.

In response to requests from many postsecondary institutions, the New York State Higher Education Services Corporation (HESC) offered a new service to produce the necessary student and IRS reports on a pilot basis for selected New York State institutions for the 1998 tax year. For 210,300 students, HESC worked with their schools and the National Student Loan Clearinghouse to:

1. Collect data, print and mail a "1098-T" tax form (with school identification and 1998 student attendance and financial information) to each student before February 1, 1999;
2. Send a cumulative electronic file of all 1098-T forms to each school for follow-up and audit purposes; and
3. Electronically transmit a cumulative file of 1098-T forms for all schools to the Internal Revenue Service before March 1, 1999.

These activities fulfilled each school's IRS requirements for the 1998 tax year. HESC last year charged schools 50 cents for each student record provided directly to HESC (no start-up fee), and an

additional 25 cents per record if the school elected to have HESC obtain student data from the Clearinghouse. These fees covered HESC's direct costs for the service.

A Spring 1999 survey of colleges revealed high interest in HESC's continuing the tax reporting service for 1999 and beyond. HESC has begun planning for 1999 tax reporting on a national basis, and plans to enhance the service for schools nationwide without any major increase in fees charged.

Those enhancements include:

1. Use of a double-windowed mailing envelope for the 1098-T form so that incorrect student addresses can be updated by the school, instead of being "dead lettered";
2. Multiple processing runs, so schools can provide student files to HESC as early as November 15, 1999 and as late as January 21, 2000 to meet the January 31 student mailing deadline.
3. Ongoing corrections processing whereby schools may submit updated student information, to correct original information submitted to HESC. Schools would then have HESC (for a fee) mail the corrected 1098-T form to the student and forward it electronically to the IRS;
4. File transfer capabilities through HESC Web to facilitate school transmission and receipt of student tax reporting information;
5. On-demand printing and mailing of duplicate 1098-T forms, by HESC (for the normal processing fee); and
6. Detailed guidance to students on how to apply for the tax credits, thus reducing student and family calls to schools.

HESC will also be offering schools access to data entry software, via our Web site, to facilitate student tax reporting record creation for smaller schools with limited electronic capabilities. And, as in 1998, schools will be given the option (no extra cost) of including "Net Qualified Expenses" data on the 1098-T form.

If your institution is interested in working with HESC, please complete the Survey found on the HESC Web site ([www.HESC.com](http://www.HESC.com)) by July 27, 1999. For additional information, call HESC at 518-402-3371. The tax reporting project falls within HESC's "Full Service" agency program and is consonant with its statutory mission to enhance student opportunity through coordination with other levels of government.

### ***New York to Unveil New Internet College Planning System***

Starting this fall, students in New York State will find it easier than ever to plan for and apply to college. NYMentor, a new, free internet-based information system sponsored by New York State, will help prospective students prepare for college admission, seek information about college financing, and find the best college choice for them among the State's 230 degree-granting colleges. This innovative service expected to debut November 19, 1999, is provided as a cooperative effort between New York State Higher Education Services Corporation (HESC) and XAP Corporation, the leading provider of Mentor systems around the country.

In November, the website [www.NYMentor.edu](http://www.NYMentor.edu) will take prospective students on multimedia virtual campus tours, help them match their needs and interests with specific institutions, establish direct e-mail communication with campus representatives, perform scholarship searches, help complete the federal financial aid application, and provide a host of other features including a comprehensive section on financial aid-**all on-line and free of charge**. Once students have narrowed down their campus choices, NYMentor will provide on-line admissions and financial aid applications for them to quickly and easily complete and submit over the internet.

NYMentor is going to be a tremendous help in getting the word out about the higher education opportunities available in New York State. In fact one of the most appealing aspects is that the system will be customized to benefit students of different ages and academic backgrounds. For example, high school students can use NYMentor to help plan their

curriculum to assure that they meet college admission requirements. At the same time, a graduate admissions on-line, and adults returning to college may obtain information on how to complete a degree started years before. Students of any age can also use NYMentor to get the information and help they need to fund their college expenses.

### ***Report on Federal Legislative Activities***

*by SED's Office of Legislation. July 7, 1999*

***FY 2000 Federal Funding.*** The Office of Management and Budget and Congressional Budget Office both announced optimistic news on the budget surplus. For the first time during the ongoing economic recovery, there will be a surplus over and above that of the Social Security system.

President Clinton subsequently introduced a plan to use the money to shore up Social Security and Medicare, pay off the entire Federal debt by 2015, and increase domestic spending. As part of his plan, the President called for establishing a \$156 billion Children and Education Trust Fund to be spent over fiscal years 2001-2014.

The Fund resources would be in addition to the levels provided through regular appropriations and would be exempt from the budget caps that currently limit spending. Some of the programs eligible for fund support would include Head Start, Title I, After-school programs, Class-size reduction, Safe Schools, Special Education, and Pell Grants.

These announcements could help free money to increase education allocations. Current congressional spending proposals would cut \$8 to \$11 billion from the Departments of Labor, Health and Human Services (HHS), and Education.

The House Labor, HHS, and Education appropriations bill is scheduled to be marked up in Subcommittee on July 15 and then go to the Full Committee on July 28 with hopes of bringing the bill to the floor by August 3. The Senate Labor, HHS, Education Appropriations Subcommittee plans to bring up their bill on July 15.

Elementary and Secondary Education Act (ESEA) Reauthorization. The House Committee on Education and the Workforce began considering the Teacher Empowerment Act (H.R. 1995). This is the first of at least three bills that the House is working on that will comprise the ESEA reauthorization. H.R. 1995 would combine Goals 2000 and the Title II Eisenhower professional development and class-size reduction programs into a \$2 billion professional development and teacher recruitment program. The bill was reported out of Committee 27-19, with two Democrats crossing over to vote with the Republicans.

A Democratic substitute, defeated on a party-line basis, would have kept intact the class-size reduction program, authorized \$1 billion in professional development services, and required that teachers meet quality benchmarks.

The bill is expected to move to the House floor later this month. Among other advocacy actions, we have submitted written comments on H.R. 1995 to pertinent Committee members.

The Senate Health, Education, Labor and Pensions Committee may begin drafting its ESEA reauthorization later this month with floor action projected for the fall.

**School Modernization.** Upon return from the July 4th recess, the House Committee on Ways and Means will take up the Public School Modernization Act (H.R. 1660). Representative Rangel's construction measure is similar to legislation he sponsored in the last Congress. There seems to be momentum building for some type of Federal intervention in helping to solve nationwide facilities problems. While the form of that help is being debated broadly, we continue to support Mr. Rangel's efforts, particularly by urging other members of our congressional delegation to cosponsor the bill.

**Super Ed-Flex.** The Senate and House both are considering the Academic Achievement for All Act, also called "Straight A's" (S. 1266 and H.R. 2300). This measure would give states the option to enter into five-year agreements with the Secretary of

Education to combine money from numerous Federal programs with few restrictions on subsequent use as long as state-defined performance indicators are met. Governors and state legislatures would determine how the money is spent.

Most of the education community and the Clinton administration oppose the measure. Among numerous shortcomings, the bill:

- Disregards the current targeting of Federal dollars to populations most in need of help;
- Shifts control over education policy from the state and local education system defined in a state's law or constitution to governors and legislatures; and
- Undermines the Republican-generated expansion of the existing Ed-Flex program before it is even implemented.

If you have any questions, please contact Clesson Bush or me, *Daniel Kinley, Director of Legislation, E-mail: dkinley@mail.nysed.gov Tel. 518-486-5644 Fax 518-474-1488*

### ***The State Education Department / Office of Legislation*** UPDATE -- July 8, 1999

The Congress is on its July 4 recess and due back in Washington on July 12. In the meantime, the Office of Management and Budget and Congressional Budget Office both announced optimistic news on the budget surplus. For the first time during the ongoing economic recovery, there will be a surplus over and above that of the Social Security system.

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Please continue to contact the Appropriations Committee Chairmen Ted Stevens (R-AK) in the Senate and Bill Young (R-FL) in the House and New York's House Committee members Forbes, Walsh, Hinchey, Lowey, and Serrano about the need to sustain the funding commitment to education made over the last few years of economic strength.

If you have any questions or comments, please contact Clesson Bush at 518-474-1235; fax 518-473-9466; e-mail [cbush@mail.nysed.gov](mailto:cbush@mail.nysed.gov).

### ***Report on Federal Legislative Activities --***

*July 23, 1999*

Elementary and Secondary Education Act (ESEA) Reauthorization. On July 20, the House approved H.R. 1995, the Teacher Empowerment Act. The New York delegation voted along party lines on the final vote, except for now Democratic Representative Forbes, who voted for the bill. Representatives Hinchey and Lazio did not vote.

The bill creates a new teacher training program by consolidating funding for the class-size reduction, Eisenhower professional development, and Goals 2000 programs. Approximately \$2 billion is authorized for the first year of the program, about the same level that was provided for the three programs separately.

The money goes to "states" rather than our preferred language, which more specifically assigns administration to the state education agency (SEA). The bill provides a hold harmless at FY 1999 funding levels for local education agencies (LEAs). If funding for the program increases in FY 2000 and beyond, the new funds will be distributed by states to LEAs on a formula that relies 50 percent on age 5-17 population data and 50 percent on poverty data. A state must distribute 80 percent of its allocation to LEAs according to a formula to maintain the FY 1999 hold harmless levels. The remaining 20 percent must be allocated competitively. If funds are not sufficient, states must use a portion of the 20 percent competitive allocation to maintain the hold harmless.

The final measure increases from 3 to 5 percent the amount a state may keep from its allocation for statewide activities such as teacher certification reforms, assistance to LEAs in teacher recruitment and retention, developing partnerships, and general technical assistance and coordination. No more than 5 percent of this 5 percent may be used for administration.

The passed bill also increases from 2 to 3 percent the amount that state agencies for higher education, working in conjunction with SEAs, can use to make awards for teacher training partnerships among high-need LEAs, institutions of higher education, charter schools, public or private elementary schools, nonprofit organizations, and/or businesses. Again, no more than 5 percent may be used for administration.

LEAs would be authorized to use funds for recruitment (including the use of alternative routes to certification), retention, professional development, and class-size reduction.

Amendments were added during floor debate to require the state to have a plan to ensure all teachers are fully qualified by 2003. In addition, the state must require LEA grant recipients to report annual progress on performance indicators such as improving academic achievement and closing achievement gaps between groups of students. Another change promotes mentoring.

The Senate has yet to act on a similar bill. The Administration has issued a veto threat in the unlikely event that the House bill progresses intact through the Senate because it eliminates separate authorization and funding for class-size reduction.

July 28, 1999

The House and Senate Committees on Appropriations have postponed action on their versions of the FY 2000 Labor, HHS, and Education funding bill until after Congress returns from its summer break on September 8. Both Committees have found it politically impossible to mark up a spending bill under current spending caps.

Optimistic budget surplus forecasts for future years are predicated on Congress adhering to the caps, which would require sizable cuts in discretionary programs. The House subcommittee, however, drafted a spending bill that would freeze most education funding (except for IDEA and Pell Grants increases) but could not find politically palatable offsetting cuts in other programs that would be required just to reach a freeze. Last week's scheduled markup was thus postponed.

The Appropriations Committees are continuing to act on most other spending measures before they recess on August 6, leaving action on the two largest domestic bills (Labor, HHS, Education and VA, HUD, Independent agencies) until a strategy can be worked out in September. Meanwhile, House and Senate leaders are searching for offsets, rescissions, and other budget moves that could be used to produce the necessary funding for these two remaining bills. In addition, there is still a possibility the Administration and Congress could come together and agree on a plan to lift the spending caps in time to approve all spending bills by the start of the new fiscal year October 1.

It is likely that any such budget "deal" would include the passage of a tax cut sought by many moderates and conservatives in Congress. The \$792 billion tax cut bill approved by the House last week and being debated this week in the Senate has been threatened

with a veto by President Clinton because it is excessive. Many in the education community oppose the measure as well because it will preclude any additional spending on discretionary programs including education. The cost of the tax bill over ten years exceeds the amount of the entire projected on-budget surplus, and thus would force estimated additional spending cuts of \$600 billion in the out-years to maintain the current spending caps. This tax bill is also opposed because it contains only modest provisions to address the need for new school construction and renovation.

Please continue to contact the Appropriations Committee Chairmen Ted Stevens (R-AK) in the Senate and Bill Young (R-FL) in the House and New York's House Committee members Forbes, Walsh, Hinchey, Lowey, and Serrano about the need to sustain the funding commitment to education made over the last few years of economic strength.

If you have any questions or comments, please contact Clesson Bush at 518-474-1235; fax 518-473-9466; e-mail [cbush@mail.nysed.gov](mailto:cbush@mail.nysed.gov).

## ***NYSOBBA CONFERENCE SESSIONS***

### ***Opening Session: The Power of Positive Action and the Humor Clinic***

Tim Marte, from Performance Improvement Resources, presented an energetic and thoroughly enjoyable workshop.

Interwoven through the fun and the laughter were many, many great ideas for helping us to improve our attitudes both in the workplace and in our personal lives. He made us notice how we approach problems and showed us how much more productive we can be by being positive, and by seeing the humor in many situations. The bottom line was - take our jobs seriously, but don't take ourselves so seriously!

There were many lists of suggestions and great tips. The most meaningful two lists were these:

### Take Time for Ten things:

1. *Take time to work...it is the price of success.*
2. *Take time to think...it is the source of power.*
3. *Take time to play...it is the secret of youth.*
4. *Take time to read...it is the foundation of knowledge.*
5. *Take time to worship... it is the highway of reverence and washes the dust of earth from our eyes.*
6. *Take time to help and enjoy friends...it is the source of happiness.*
7. *Take time to love...it is the one sacrament of life.*
8. *Take time to dream... it hitches the soul to the stars.*
9. *Take time to laugh...it is the singing that helps with life's loads.*
10. *Take time to plan...it is the secret of being able to have the time to take the time for the first nine things!!*

### The Three Humor Skills:

1. *The ability to see the absurdity in difficult situations*
2. *The ability to take yourself lightly while taking your work seriously*
3. *A disciplined sense of joy in being alive*

### Software Packages

Four Bursars from different schools presented an overview of the software packages that were implemented on their campuses. These very articulate people and the software they informed us about are:

- Jean Belmont, from Yeshiva University - **Banner**
- Bill Emm, from Onondaga Community College - **DataTel**
- Peter Olcott, from Cornell University - **People Soft**
- Debbie Sutliff, from Herkimer Community College - **SCT, SIS**

They all generously described the experiences they had in choosing a system, in gathering the implementation "team", in budgeting for the training

and testing necessary for minimizing problems in "going live".

There were mixed levels of recommendations from the panel. Most emphasized some common key hints for those of us in the decision stage:

- Make sure that top administration and the systems divisions are behind the project and involved in the scheduling of the implementation.
- Talk to the people in the business office of other schools that have installed the packages you are considering.
- Meet regularly with people from other related offices - such as Financial Aid and Registrar for input and to keep them informed
- Realize that there is no PERFECT system, and that you will have to live with some parts that you don't like - choose the most important features
- TEST, TEST, TEST, TEST and TEST some more!!

It was a very informative session. They all gave us a lot to think about.

### Direct Lending

This year, those of us from Direct Lending schools were able to meet to discuss some of the questions and concerns related to 99-00 and the changes involved in the DL program. Byron Belser, Client Account Manager from the New York City Office of the Department of Education, was there to help us understand the new processes and procedures with the Master Promissory Note. Of course, there is a certain level of concern about this big change, but Byron was very helpful in calming our fears and assuring us that the Loan Origination Center (LOC) and the Department of Education are really ready! There was discussion about the new origination fee, and the dates involved in the implementation of that change.

We were also able to discuss the dates and deadlines for the reconciliation efforts. It was very helpful to be able to talk directly with someone from the DC

about these issues and to be able to bounce ideas off one another.

## **Reauthorization Session**

by Jean Belmont

John Curtice, Assistant Vice Chancellor, Student Affairs and Financial Aid Services, SUNY Administration, gave the latest update on Reauthorization. The information he provided on the Higher Education Amendments was developed June 15<sup>th</sup>.

Mr. Curtice reminded us that Negotiated Rulemaking is part of Reauthorization. The Department of Education staff and people from the Community (such as NACUBO and NASFAA) were asked to assign people to help write the regulations. Each person signs an agreement which says that what they agree upon is binding. Once they sign off on the agreement, they cannot criticize or comment on the proposed rules. Only people not on the committee may comment. Mr. Curtice stressed the importance of our commenting when the NPRM comes out on June 30<sup>th</sup>. There is a 60 day comment period after that time.

The NPRM will give tentative language and we may implement the proposed regulations as of October 1, 1998 if we choose to do so. Final rules must be published by November 30, 1999 and must be implemented July 1, 2000. We can implement for 1999-2000 based on the NPRM.

The subjects covered in the NPRM are:

**Withdrawal dates** – in section 668.22c of the proposed regulations. There are five issues:

1. Requires an official institution withdrawal procedure. The withdrawal date must be defined as the beginning of the withdrawal process.
2. Must accept notice of withdrawal if outside the normal process (example. Student becomes ill and parent takes him/her home over the weekend and checks out of the dorm. This would be the beginning of the process.)

3. If neither A nor B, - use 50% point in time as default. A point later in the term and be used if we can document academically related event which occurred later than the 50% period.(example – if a person took an exam at the 60% point in time, can use 60%) (you cannot use the last meal eaten or the last day slept in dorm – must be academically related)
4. If a traumatic incident occurs, you may use the appropriate withdrawal date provided the circumstances can be documented (example a car accident – would need proof of day of accident or when brought to the hospital)
5. If none of the above, can use last documented date of attendance (example date exam taken)

Withdrawal date is important as it relates to the return of Title IV funds. A worksheet was developed by the Department of Education and distributed at the NASFAA Conference this year. An updated version should be distributed shortly. This worksheet may assist with the return of Title IV money.

The NPRM also addresses the direct credit of **Federal Work Study** earnings:

1. Written permission must be obtained from the student to transfer funds into the student's bank account or campus billing account.
2. If the student signs permission to put the earnings into the campus billing account, it can be used to pay any outstanding balance.
3. If the application of the earnings to the campus billing account creates a credit balance, it must be refunded to the student within 14 days.
4. The student may give permission for the institution to retain the money and manage it for the student.

The NPRM also has information on the carry forward/back of **Federal SEOG** monies. As of now, 1999-2000 FSEOG monies may be moved back to 1998-99. There will be a reporting line on the FISAP to handle this.

Mr. Curtice advised everyone to be on the lookout for the NPRM on June 30<sup>th</sup>, to read it carefully and to comment on any items that we favor or oppose.

### ***NYSOBBA Board of Directors Meeting***

*submitted by Barbara Servatius, Outgoing Secretary June 16, 1999*

The meeting was held at the Conference site: Roaring Brook Resort, Lake George, NY

Present: Jim Sunser, Jack Edwards, Michelle Brown-Nevers, Shirley Walker, Lucy Wiertel, Carol Gladding, Deborah Weber, Larry Brennan, Peg Ehmann, Kathy Crowder, Kathie Owens, Diane Lucchesi, Paul Danieu and Barb Servatius

President Jim Sunser called the meeting to order at 7:30 am. Jack Edwards gave a brief update of the conference. Michelle Brown-Nevers asked that each session presented at the conference be covered by volunteers to write articles for our newsletter.

Treasurer Larry Brennan announced the payments for this year's scholarship recipients will be mailed on September 1, 1999.

Regional elections were reported as follows:

*Western - Dick Augustine, Buffalo State  
New York City - Jean Belmont,  
Yeshiva University*

The following slate of officers were nominated for the election of officers for the next two years:

***President*** - Shirley Walker, University of Buffalo  
***Vice President*** - Paul Danieu, Erie Community College  
***Treasurer*** - Larry Brennan, SUNY Health Science Center  
***Secretary*** - Kim Sprague, SUNY Albany

Discussions followed for review of the resolutions for our scholarships. The meeting was adjourned.

### ***NYSOBBA Annual Meeting***

*submitted by Kim Sprague, Incoming Secretary June 17, 1999*

The meeting was held at the Conference site: Roaring Brook Resort, Lake George, New York

President Jim Sunser called the meeting to order at 12:20 PM. Dick Augustine made the motion and Peg Ehmann the second to accept the minutes of the previous annual meeting. The motion was carried. Treasurer Larry Brennan presented the group with explanations of the Statement of Revenues, Expenditures and Fund Balances for the period ending June 14, 1999. Jim Vetuskey made the motion and Peg Ehmann the second to accept the report as presented. The motion was carried. Members were given copies of the 1998-99 Membership Dues Report, a Statement of Revenues and Expenditures for the 1999 NYSOBBA Conference currently being held at Roaring Brook Resort in Lake George, NY, a listing of the 1998-99 NYSOBBA Scholarship Recipients, and the proposed 1999-2000 budget for NYSOBBA. Cheryl Smith made the motion and Barb Nelson the second to accept the reports as presented. The motion was carried.

The membership was presented with the proposal of the Resolution for Funding the John G. Karrer/NYSOBBA Scholarship. Each member had previously been E-mailed a copy of the proposal. Bill Emm made the motion and the second from Paul Danieu to accept the proposal as presented. Discussion followed and the motion was carried.

Since there were no nominations from the floor the secretary cast one ballot to elect the following slate of officers as presented:

*Shirley Walker, President  
Paul Danieu, Vice President  
Larry Brennan, Treasurer  
Kim Sprague, Secretary  
Jim Sunser, Past President*

The following regional directors were announced:

*Long Island - Deborah Weber*  
*Genesee Valley - Sandy Argentieri*  
*New York City - Jean Belmont*  
*Western - Dick Augustine*

Shirley Walker presented Jim Sunser with gifts and a plaque from the organization for a job well done as serving for two years as our president. Other outgoing officers were acknowledged for the dedication they have given to NYSOBBA. The meeting was adjourned.

### ***FFEL Consortium***

*Submitted by Cheryl Davies, Le Moyne College*

Jim Hanley moderated a panel discussion on processing the new Master Promissory Note (MPN). The panel consisted of Matt Downey, Ray Francis, Jan Klotz, and Cheryl Davies. He gave overviews and introductions of each panel member with his usual enthusiasm and professional humor.

Matt Downey from HESC discussed the details pertaining to the new Master Promissory Note process. Some of the key features of this process will be:

- Multiple loans are processed under a single promissory note
- Elimination of unnecessary check of boxes
- The note is valid for ten years unless canceled by the borrower
- The process is built into Commonline Release 4
- A paper free serial loan process is available
- Promote communication by facilitating a one-lender/guarantor/holder/servicer approach.

HESC will process both Stafford Application/Promissory Note and the MPN for the 1999-2000 academic year. After July 1, 2000, the MPN must be used for all loans.

Ray Francis from HESC discussed the new Hold and Release Option. HESC has enhanced its processing options to allow schools to comply with upcoming Federal Cash Management procedures. Effective July 1, 1999, a student account must be credited with FFEL loan funds within three business days of receipt. The Hold and Release Option is a process which will allow schools to postpone receipt of funds for students until they are sure the funds may be applied to the student account.

Three optional reports may be generated:

1. ***A Pre-Disbursement Roster*** to advise schools of pending disbursements which may be used as a turn around document
2. ***A Hold Aging Report*** to list disbursements that have not been made due to a hold status after the scheduled disbursement date
3. ***A Released Not Disbursed Report*** to list disbursements that have been designated as "release" by the school, but not reported as disbursed by the lender

All three reports will be available in paper or electronic formats. The reports may be printed through WinPATH

Jan Klotz from Educaid discussed lender responsibilities to borrowers and schools. He stressed that the schools communicate with their lenders and guarantors explaining this new MPN process should be seen as a chance to enhance partnerships. You should ask several questions of your lenders. Are they meeting basic requirements and enthusiastically embracing MPN and its potential? Are they Commonline Release 4 compliant? Do they support continuous status updates? Do they support serial loans for Fall 1999? Do they give schools and borrowers access to MPN data on-line or on a website? He stated that the questions repeatedly asked is will MPN encourage excessive borrowing? The student is currently notified of the amount borrowed through the award letter, origination point, disclosure statement, disbursement and delivery of funds. This is a good time to review the old process and think outside of the box. A debt initiative partnership is

encouraged and new educational materials should be developed by all parties to educate the borrower.

Cheryl Davies from Le Moyne College explained Le Moyne's choice to implement the MPN process this year. Le Moyne has chosen to process electronically. Communication between HESC, Lenders, the Financial Aid Office, the Bursar's Office and Information Systems was essential to make this process work. Since the conference, Le Moyne has transmitted to HESC a list of eligible students. HESC has mailed to the students an MPN and an information sheet. The student must complete borrower information and the references section (if first time borrowers and not pre-printed), sign, date, and return the MPN to HESC. The loan funds will be disbursed using the EFT process.

For future years, Le Moyne will use the Financial Aid award letter as a communication tool. The student will need to return award letter to the college with written instructions with any change to their loan, otherwise their loan will be processed for their eligible amount.

Since this new process will create a virtually paperless application process for the student, we (the colleges and universities) must become a little creative in our communication to the student. Students must understand that they have borrowed funds, which need to be repaid.

The point being stressed by all who participated was communication. We are all in this business to help educate the student. We need to use all resources available to us to help make our jobs more efficient.

### ***FERPA Issues***

An interesting and well attended session was presented on the many issues surrounding confidentiality by Diane Cecero, General Counsel at Monroe Community College.

The Family Educational Rights and Privacy Act (FERPA) is also known as the Buckley Amendment. Its basic premise is to allow students from K through graduate school to control access to or disclosure of

their academic records. Diane provided some very useful handouts, two of which summarized the important aspects of the Act. A third handout was a sample Consent to Disclose Educational Records form that she encouraged the attendees to use.

The session began by discussing who can access educational records. This is only for the student, the parents of a dependent and college officials with a legitimate educational or financial aid purpose. It is also allowable in an emergency situation but in these instances it is usually best to refer them to your Public Safety Office for proper handling.

We discussed what is an education record and what is not. Educational records are those records maintained by the institution or a party acting for the institution which directly relate to a student. The following are not educational records:

- *Directory Information*
- *Records of Instructional, Supervisory or Administrative Personnel ordinarily not accessible to others*
- *Records maintained by College Law Enforcement*
- *Medical Records used solely for the purpose of treatment of a student*
- *Alumni Records—Gathered*
- *Post---Graduation*
- *Application Records of students who did not attend*
- *Records of deceased students*

In general Directory Information may include name, address, telephone number, majors, etc... FERPA requires each institution to have a policy that defines directory information. It was suggested each attendee obtain a copy of their policy if they do not already have it. More information can be found at [www.ed.gov/offices](http://www.ed.gov/offices).

The session wrapped up with a test, yes a test. Since it was graded by ourselves and open book most in attendance passed. Even one of our past Presidents who was working feverishly with his eraser during the correcting period passed (or so he says). I think we would agree this was a very informative session.

## ***Direct Deposit Session***

*Presenter: Dick Augustine*

The Webster dictionary defines “sage” as a person of profound and scholarly wisdom; also a mature or venerable person of sound judgment. NYSOBBA’s sage, Dick Augustine of SUNY Buffalo State College, started looking into direct deposit of financial aid and college refunds three years ago. Dick’s campus enrolls 12,500 students, 7,500 of which are aid recipients, with 6,000 of those getting financial refunds.

Direct deposit was offered for the Fall 1998 semester at Buffalo and attracted 1,800 participants. Dick’s direct deposit enrollment brochure hawks the following advantages for its enrollees:

1. there is no risk of your check being lost or stolen
2. you don’t have to go to the bank to cash your check
3. your money is immediately deposited into your checking or savings account at any bank or credit union you choose
4. you will receive a notice in the mail or e-mail confirming the amount of your financial aid and the date it was deposited to your account

Enrollment of 3,000+ is anticipated for the 1999-00 academic year.

Dick’s local depository, M & T bank, provided the college with a tape of all ABA numbers as a check file for the school to be used against all student enrollment forms. If a student on direct deposit closes their account, the refund is electronically reversed by M & T and returned to Buffalo’s exchange account which prompts Buffalo to notify the student. Additionally, we learned that a match is made to the students social security number and bank account number, thus prohibiting the direct transfer of the refund to an account owned by the student’s parent or guardian. Consequently, Dick receives paper checks for all PLUS loans because of the parent/guardian social security number on the disbursement.

Always the teacher, Dick noted that the Title IV regulations allow electronic refunds to students, but cannot dictate what bank the refund can be directed to. The regs also provide for e-mail notification to students of a financial refund, noting that the amount does not need to be identified, just notification that a refund has been processed.

Dick’s parting words to those assembled was to “make your local depository work for you”.

## ***Golf Tournament***

The golf tournament was again a successful event. We had 37 people play this year, which just added to the fun of this event.

The tournament is for both women and men. Ladies please do not be so shy – come out for next year’s event. A handicap system is used to give every player an opportunity to win a prize and, yes, even the famous GREEN JACKET.

This years winner is Chris Rollins of ConServe. He gained possession of the Green Jacket and plaque with his name plate shown for one year. Chris, I must remind you that the only restriction on this award is that you are required to attend next years conference and assist in presenting this prestigious award to the new winner. The winners of the other activities during the golf tournament are as follows:

*Longest Putt – Men – Frank Roa*  
*Closest to the pin – Men – Kevin Smith*  
*Longest drive – Men – Mike Coons*  
*Longest drive – Women – Nancy Englert*

Winners of the NYSOBBA regular membership prizes, golf bags, were:

*Male – Bill Emm*  
*Female – Nancy Englert*



I want to take this opportunity to thank the following vendors for donating prizes to this years golf tournament.

*Aman Collection Services*  
*AFSA Data Corp.*  
*Buffalo State Book Store/Barnes & Noble*  
*Creditors Interchange*  
*HSBC Bank*  
*Chase – Education First*  
*Albank*  
*Security Credit Systems, Inc.*  
*Immediate Credit Recovery*  
*ConServe*

My sincere thank you to all of you. I hope everyone enjoyed themselves and look forward to next years tournament.

### ***Scholarship Fund Drive***

The scholarship fund drive was a huge success this year. From the mail solicitations, golf event, and 50/50 drawing, we raised a total of \$4,665. This is \$100 better than last year. The fund drive will continue and now be handled by our outgoing president Jim Sunser. I now leave him the challenge to enhance this years receipts. I would hope that more of our regional members would get involved personally or as an institution to raise money all year long so that we can increase the annuity base of the scholarship fund. Thank you all again for your support and participation in this years drive.

### ***Scholarship Donors***

#### **Significant Donors**

*M&T Bank*  
*Century Business Forms*  
*NYS FFEL Consortium of Lenders and Loan Services*  
*Education First Chase Manhattan*

#### **Gracious Donors**

*ConServe*  
*Mercantile Adjustment Bureau*  
*Key Bank*

*Richard Augustine*  
*NCO Financial Systems*  
*Collection Co. of America*  
*Bursar Office – SUNY Brockport*  
*Bursar Office – SUNY Oneonta*  
*Lisa Kyer*  
*Nellie Mae*  
*Immediate Credit Recovery*  
*Judith Rossi*  
*Richard Schott*  
*Jorge Vadi Jr.*

### **Golf Hole Sponsors**

*PNC Bank*  
*ConServe*  
*Chase Manhattan Bank – Education First*  
*Sallie Mae*  
*Collection Co. of America*  
*HSBC BANK*  
*Security Credit Systems*  
*Key Bank*  
*Aman Collection Service, Inc.*

### ***Western Region Scholarship Winners***

*Submitted by Paul Danieu, CSS Business Manager*

Jake Polcyn, Hilbert College  
Jennifer Clancy, ECC

### ***The Job Corner***

#### **Assistant Bursar \*Provisional**

Screening to commence -- August 2, 1999 and continue until position is filled.

Serves as second responsible administrator in the Bursar's Office. Supervises the daily operations of the office. Directs, trains and evaluates staff. Assumes office-wide responsibilities and acts on behalf of the Bursar in his/her absence. Performs extensive account reconciliations and analyses. Directly supervises clerical staff. Receives general direction from the Bursar. Does related work as required.

Graduation from high school or possession of a high school equivalency diploma plus either:

(a) Graduation from a regionally accredited or NYS registered college or university with a Bachelor's degree in Business Administration, Public Administration, Accounting, or closely related field plus two years of paid full-time or its part-time equivalent experience in Accounts Receivable, Accounts Payable, Account Keeping, Bookkeeping, one year of which shall have involved supervision, or,  
(b) Graduation from a regionally accredited or NYS registered college or university with an Associate's Degree in Business Administration, Public Administration, Accounting or closely related field plus four (4) years of experience as described in (A), one year of which shall have involved supervision.  
**SALARY:\$30,821.60**

Send application to Dr. Sherry Ralston, Director of Human Resources, Monroe Community College, 1000 E. Henrietta Rd., Rochester, NY 14623.  
*Any person with a disability needing special accommodations to the application process, please call Human Resources. #707156*

*\*Provisional: Successful candidate must be eligible to take the Civil Service Assistant Bursar test when scheduled and be reachable. MUST BE A RESIDENT OF MONROE COUNTY.*

**Assistant Director of Financial Aid, Elmira College**

Established in 1855, Elmira College is a private, co-educational liberal arts college located in the Finger Lakes region of New York State. The Office of Financial Aid serves full-time undergraduate students as well as the Continuing Education Undergraduate and Graduate Divisions.

**Responsibilities**

Under general supervision of the Dean of Financial Aid, the person will assist in the administration of College, federal, and state financial aid programs and will assist with supervision of office staff. Specific duties include: Counseling students and parents concerning financial aid and higher education financing; reviewing applications for eligibility including performing need analysis and verification, and assisting with packaging; management of loan programs and the Federal Pell Grant program.

**Qualifications**

A bachelor's degree and experience in financial aid or a related field are required. The successful candidate should have a good working knowledge of federal and state financial aid programs and related regulations. Strong organizational and analytical skills, attention to detail, and verbal and written communication skills are essential. Experience with automated financial aid computer systems, preferably PowerFAIDS and EDE. Interested candidates should submit a letter of application, resume, and name, address, and phone number of three references to Assistant Director of Financial Aid Search, Personnel Office, Elmira College, One Park Place, Elmira NY 14901.

**Assistant Director of Financial Assistance**

The successful candidate will possess a Bachelor's degree and have 3-4 years of progressively responsible financial aid experience. (A Master's degree is preferred.) This position involves management of all federal, institutional, and alternative loan programs as well as supervision of loan processing staff. Also required are knowledge of financial aid counseling, undergraduate and graduate student packaging, federal and institutional methodologies, and excellent oral and written communication skills. Salary will be commensurate with qualifications and experience.

We are looking for someone who understands both the difficulties and rewards of the position, is willing and able to put in the time to do the job well, and who keeps a good sense of humor along the way. We have a dynamic and energetic staff, and we would like to add to our team an individual who has similar characteristics.

Interested applicants should send cover letter, resume and reference information to the following address by August 30:

*Director of Financial Aid  
Position Search  
University of Rochester  
Office of Student Financial Assistance  
Third Floor, Meliora Hall  
P.O. Box 270261  
Rochester, NY 14627-0261  
E-mail: [help@finaid.rochester.edu](mailto:help@finaid.rochester.edu)*

The University of Rochester values diversity and is committed to equal opportunity for all persons regardless of age, color, disability, ethnicity, marital status, national origin, race, religion, sex, sexual orientation or veteran status.

**Ombudsman within the Office of Student Financial Assistance** July 22, 1999

The U.S. Department of Education invites qualified individuals to apply for the newly established position of Ombudsman within the Office of Student Financial Assistance (OSFA).

The Ombudsman receives, reviews, and attempts to resolve informally complaints from loan borrowers; compiles and analyzes data on complaints and makes appropriate recommendations; prepares and submits reports that describe and evaluate the activities and effectiveness of the Ombudsman.

This position reports to the Chief Operating Officer (COO), who heads the OSFA performance-based organization. The Ombudsman serves as a principal advisor to the COO and provides expert findings, advice and recommendations to the COO on matters pertaining to OSFA program development and operational effectiveness.

For additional information and application submission procedures please see the announcement on the web site: <http://ifap.ed.gov> <<http://ifap.ed.gov>> . Under "Bookshelf", click on "Electronic Announcements".

The U.S. Department of Education is an Equal Opportunity Employer.

**Director of Financial Aid**

The Albany College of Pharmacy is seeking candidates for the position of Director of Financial Aid. The successful candidate will be responsible for the management of federal and state financial aid programs, maintain a complete understanding of all financial aid rules and regulations, and work with the information technology staff to handle the financial aid delivery process.

Position requires a minimum of 5 years experience in financial aid administration, computer experience, excellent interpersonal/communication skills and strong organizational abilities. Competitive salary and excellent benefits package. Reply with resume, salary history and three references to:

*VP for Finance and Business Affairs  
Albany College of Pharmacy  
106 New Scotland Avenue  
Albany, New York 12208-3492  
Croninw@panther.acp.edu*

For more information, see our web page:  
<http://www.acp.edu>

Review of applications will begin immediately and will continue until position is filled. Desired starting date is September 1999. The Albany College of Pharmacy is an Affirmative Action/Equal Opportunity Employer

***Look for us on the web.***

**<http://wings.buffalo.edu/services/stu-acc/nysobba/>**

**NEW YORK STATE ORGANIZATION OF  
BURSARS AND BUSINESS ADMINISTRATORS**

1999-2000 INDIVIDUAL/INSTITUTIONAL MEMBERSHIP FORM

Please complete this section if you are requesting an **INDIVIDUAL** membership and attach payment of \$60.00. Make check payable to NYSOBBA. Please write/print legibly.

NAME last \_\_\_\_\_ First Mr./Mrs./Ms./Miss \_\_\_\_\_  
Title \_\_\_\_\_  
Institution \_\_\_\_\_  
Address \_\_\_\_\_ City, State \_\_\_\_\_  
Zip Code \_\_\_\_\_  
Telephone \_\_\_\_\_ Region \_\_\_\_\_ Fax # \_\_\_\_\_

Please complete this section if you are requesting an **INSTITUTIONAL** membership and attach payment of \$175.00. Make check payable to NYSOBBA. Institutional memberships allow five (5) members on NYSOBBA database.

NAME Last \_\_\_\_\_ First \_\_\_\_\_  
Title \_\_\_\_\_ Telephone # \_\_\_\_\_  
NAME Last \_\_\_\_\_ First \_\_\_\_\_  
Title \_\_\_\_\_ Telephone # \_\_\_\_\_  
NAME Last \_\_\_\_\_ First \_\_\_\_\_  
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Title \_\_\_\_\_ Telephone # \_\_\_\_\_  
NAME Last \_\_\_\_\_ First \_\_\_\_\_  
Title \_\_\_\_\_ Telephone # \_\_\_\_\_  
Institution \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Region \_\_\_\_\_ Fax # \_\_\_\_\_

Please return this form with your payment to: **Mr. Larry Brennan, Bursar**  
**SUNY Health Science Center**  
**155 Elizabeth Blackwell Street,**  
**Syracuse, NY 13210**

**REGIONS:**    Western                      Genesee Valley                      Central                      Northeast  
                  New York City                      Long Island                      Mid-Hudson

# **NYSOBBA**

c/o Office of Student Accounts  
Teachers College, Columbia University  
525 West 120th Street, Box 305  
New York, New York 10027



Peg Ehmann  
Bursar  
University of Rochester - Med/Dent  
601 Elmwood Ave, Box #601  
Rochester, NY 14642

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