



NYSOBBA

Quarterly

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Summer 2003

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IMPORTANT MEMBERSHIP MESSAGE

Dear Colleagues

In these times of "creative budgeting" and fast-paced changes in state & federal regulations it seems more beneficial than ever to be able to network with professionals from other institutions who face the same challenges as we do. The New York State Organization of Bursars and Business Administrators offers you an excellent opportunity to do just that.

With the beginning of a new academic year it is **time to renew your membership to NYSOBBA for the 2003 – 2004 academic year.** Please take the time today to complete the membership form enclosed in this newsletter and return it to Larry Brennan by **September 30, 2003.** NYSOBBA is truly a valuable resource for business administrators across the state to network with and to turn to for assistance on various issues and processes. Your membership renewal will insure that you remain on the NYSOBBA mailing list giving you access to the NYSOBBA website and also to the NYSOBBA listserve for e-mail access.

Please plan to attend the Annual NYSOBBA Conference in Long Island in June, 2004. More information concerning the conference will be posted on our website as soon as the details are finalized. A Novice Training Workshop held at last June's annual conference was so well received, that we will be offering it again in 2004. We look forward to seeing you on Long Island!

Thank you,

Bill Emm
Vice President, NYSOBBA
Membership Committee Chair

A Word from our President:

August 2003

First, I would like to thank all of you for your confidence in allowing me to serve this wonderful organization in this capacity. I promise to work very hard to keep us moving forward. The previous presidents and Boards have left some huge shoes to fill – they have been great role models and mentors – and have helped NYSOBBA grow into a strong and respected state-wide organization of which I am very proud to be a part.

For those of you who were able to attend the 2003 Conference in Saratoga Springs, I want to thank you for making it such a great experience for all of us. We had some terrific speakers, some fun and we all left knowing a lot more about our business. Many of us also came back with a renewed enthusiasm and plans for our specific regions to sponsor fall and winter get-togethers. For those of you who were not able to attend, we missed you! And I hope that you will be able to make the conference in the Long Island Region next June. As soon as we have the details, we will be getting the word out to all of you, so you can block off the time and make plans to be there.

We are starting a major drive for NYSOBBA membership renewals for 2003-04. We have set some ambitious goals, including a September 30th deadline, but with all your help, this should be a wildly successful campaign! Please process your renewal as quickly as you can. You will find the membership renewal form in this newsletter.

As part of the membership drive we are also hoping to increase our membership to include other schools in the state who are not currently participating in NYSOBBA membership or activities. Please help NYSOBBA by passing membership information along to other people with whom you interact but who don't currently belong to NYSOBBA.

We are working at getting our NYSOBBA listserve broadcast as widely as possible. If you are not yet subscribed, please contact Shirley Walker at walkersj@buffalo.edu. It is becoming the "vehicle of choice" for getting quick announcements out to all of you. There have also been some lively discussions and answers to daily dilemmas. We are also working diligently to get the NYSOBBA Website www.NYSOBBA.org as up-to-date and useful as possible. One of the new features is a section for job postings. We have set a 45-day limit on keeping the jobs out there. So check the website frequently to keep up with the latest news and job listings.

Good luck to all of you as we jump into the wild and crazy Fall term! I don't know about you, but I am already up to my eyeballs in Fall paperwork!!

Sincerely,

Peg Ehmann
NYSOBBA President

A Word from our Past President:

Well the time has come for a changing of the guard at NYSOBBA. This past conference's elections bring in a new leadership group. I am sure you will agree that the new group is a very well qualified and dedicated group of professionals. Peg Ehmann, our new President, has served on the Board for several years as both a Regional Director and more recently as the Vice President. She has been very involved in conference planning in the past and has always represented our organization in a first class manner. Peg's commitment, energy and enthusiasm will be a great asset for NYSOBBA.

Our new Vice President is a bit newer to the Board. Bill was recently the Central Region Director. What Bill may lack in years of Board experience he more than compensates with his past involvement with the organization. In his years as a member Bill has always been dedicated and committed to NYSOBBA. He has been involved in conference planning, coordinated the scholarship golf tournament the past few years, presented at our conferences, served as a Regional Director and sat on NYHESC's TAP Modernization Committee.

I truly look forward to continuing to serve on the Board in the capacity of Past President and working with Peg, Bill and the remaining members of the Board. Kathie Owens, our recently elected Secretary, has taken over the duties as Newsletter Editor and did a fantastic job in preparing her first edition this past spring. This transition was made much easier because of the years of outstanding work and the ground-work set by Michelle Brown-Nevers. The Board owes Michelle many thanks for her work in developing this first rate publication. I'm sure Kathie would greatly welcome any articles or bits of information for the newsletter.

I would like to thank the membership for the opportunity to serve as your President these past two years. I would also like to thank the Board members for their tireless work and commitment to NYSOBBA. Without them and others like them who prefer to work in the background many of the things we've accomplished over the years would never have been possible.

Paul Danjeu

Thank you Michele:

Since 1996, Michelle Brown-Nevers has done an outstanding job as our NYSOBBA Newsletter Editor. I'm not sure we could ever thank her enough. She contributed more than just an updated look to the Newsletter, more than just a more robust body of news articles, and more than just a higher level of professionalism in the content of our news -- she brought expertise and a warm, caring approach to the Newsletter as well as to the Board. She is a very valuable contributor to NYSOBBA and has become a friend to all of us who have been lucky enough to work closely with her. This past spring, Michelle made the decision to reduce her workload and commitments in order to prepare for her new adventure as a mother! So she has stepped down as the Editor and of course we will miss her in that capacity. She will certainly continue as a NYSOBBA member so we will look for her at regional meetings as well as the annual conference. Michelle, we are all thrilled for you and Harry. From the bottom of our hearts, thank you for your hard work and your friendship and enjoy this next chapter of your lives.

Kathie Owens, from Ithaca College, has generously agreed to carry on the tradition of a professional and informative newsletter as our new Editor. Thank you, Kathie. You have everyone's full support.

Submitted by Peg Ehmann

New Regional Directors:

The directorship in the Central Region became available as a result of Bill Emm, from Onondaga Community College, moving into the position of Vice President of NYSOBBA. The Central Region held a vote this month and they chose **Barbara Nelson**, from SUNY College of Environmental Science and Forestry at Syracuse to be their new Regional Director.

The Genesee Valley Region is sad to lose Jeff Ahearn, who had to step down as the result of a job change. We will miss him. At the same time, we are happy to announce that **Mary Beth Nally**, from the Rochester Institute of Technology (RIT) has offered to step in and take over the responsibilities of director for that region. We are very grateful.

Congratulations to both Barb and Mary Beth! I am sure that I speak for all of us in welcoming them into their new roles and assuring them of our help - in each region as well as in the organization as a whole. It is my sincere hope that they will enjoy the experience as much as we all will love working with them!

Submitted by Peg Ehmann

HESC Update - August/September 2003:

Loans Update:

PLUS MPN

All schools are reminded to contact HESC's Solutions Team before implementing the new PLUS MPN process. Before schools transmit loan data, HESC would like to discuss processing options, arrange for testing, and determine whether all lenders are informed of the process and production dates. To contact the Solutions Team, call 1-888-NYS-HESC (1-888-697-4372), and follow the menu prompts, or to place a toll call, dial (518) 473-0480.

Electronic Master Promissory Note (e-MPN)

In just the second year of operation, over 40% of our new student borrowers are using HESC's electronic Master Promissory Note (e-MPN). This completely paperless process offers such a streamlined application for students that several schools are recommending that it be used exclusively. The e-MPN's online edits prevent errors and omissions, and tracking of paper promissory notes is eliminated. In addition, several enhancements to the process are expected this Fall.

HESC's Electronic Funds Transfer (EFT) for Alternative Loans

HESC would like to remind schools that HESC's EFT can be used to disburse Alternative Loans. Many schools prefer the HESC EFT process because one flow can be used for FFEL funds, Alternative Loans and even New York's College Savings disbursements. HESC also works with the major alternative loan providers on this fast-growing service.

Grants and Scholarships:

2001-02 Close-out

HESC is in the process of closing out the 2001-02 academic year. A final 2001-02 TAP Payment Roster has been generated to include students who were previously in error on our system and therefore not yet certified by your institution. A hard copy of this roster has been mailed to you and is also available for printing and viewing at <https://hescweb.hesc.org/hescweb/rl.asp>. If you are authorized to access this data, you will be required to logon with your HESC User ID and Password. For assistance in obtaining a user ID and password, contact HESC's Help Desk at 1-888-NYS-HESC (1-888-697-4372).

Please review the roster and provide the appropriate certification data. The certifications must be communicated to Regina Helinski by fax at (518) 486-7679 or by telephone at (518) 473-3762. Your immediate attention to this manner is greatly appreciated.

Aid For Part-Time Study (APTS)

The close-out for the 2002-03 year is in process; transactions submitted by the July 31, 2003 deadline have all been received.

The 2003-04 allocations were mailed on July 24, 2003 to the APTS coordinators at various institutions within the state that participate in the APTS program. An e-mail was sent informing all TAP e-mail recipients that the allocations were mailed, and if they wish to know the values, they may contact their APTS Coordinator.

HESC encourages schools to submit their APTS Recipient Lists via the Web or through Web File Transfer. We are trying to discourage the use of paper in as many areas as possible. Of course the schools are only able to create the recipient list at this time. All other functions remain manual.

TAP Processing Schedule:

Beginning in July and continuing through December the 2002-03 Student Status Listing will be run on the second Tuesday of the month. The 2003-04 Status Listing will be run on each Friday until July 2004.

The remaining schedule for August is:

August 22nd
2002-03 Remittance Advice
2003-04 Student Status Listing

August 28th
2003-04 Remittance Advice/Accounting Documents
2003-04 Payment Roster – Summer and Fall

August 29th
2002-03 Remittance Advice/Accounting Documents
2003-04 Student Status Listing

TAP on the Web:

HESC strongly urges the New York financial aid community to promote the use of TAP on the Web using the online FAFSA. Students can link over to the PRE-FILLED New York financial aid application by clicking on the hyperlink located in the middle of the confirmation page at the end of the online FAFSA session.

Applicants should also be directed to apply for the Federal Student Aid (FSA) personal identification number (PIN) to use in applying for aid and making edits to their records. HESC and other education professionals continue to urge students and parents to process the FAFSA online. Although there are a variety of Web sites available, please remind your applicants that www.fafsa.ed.gov is the only Web site which allows the FAFSA to be processed online "free of charge."

We encourage you to direct students to this free "link" so they are not unnecessarily charged a fee when completing the FAFSA online. Students may also access this link via the HESC Web site at: www.hesc.com/ or www.nymentor.edu.

To learn more about how HESC's products or services can be used to streamline your operations, contact your customer service representative at (518) 474-4864.

June 2003 Conference Highlights:

The Cashiering Evolution:

Valerie VanVlack, Director of Cash Management at Syracuse University, and Peter Olcott, University

Bursar at Cornell University, presented a well organized review of electronic cashiering processes at their universities. Not only did they present some of the trials and tribulations they encountered but also the benefits of electronic processing.

Valerie reviewed the history of the payment processes that was started at Syracuse University in 1995. Although the original system provided better cash controls, fewer errors, reduction in paper along with better available information, the University recently moved to a CASHnet gateway which provided a web-based payment method using credit cards or ACH. Although the CASHnet system is not currently being used by student accounts, it has been beneficial in cash management for University departments.

Continuing the presentation, Valerie reviewed the expenses of the University's usage of processing MasterCard and Visa credit card payments for student accounts. With increases of 10-15% usage per year along with annual fees in excess of \$750,000, Syracuse University made the decision to accept credit card payments and ACH transfers through a third party servicer. This servicer could provide security, a defined audit trail, efficient processing, 24/7 operation and superior customer service, as well as no transaction charges to the University.

Thus since its inception in January 2003, the new web-based payment method has resulted in benefits that include known payments/receipts, better reporting, savings to the college of over \$700,000 annually, and better customer service with future adaptability.

Peter Olcott continued with a review of his presentation last year which emphasized Cornell's need to fulfill customer expectations with self service application, 24/7 access, with payments over the web. He highlighted the Bursar's 3-year plan's need for efficient transaction processing, a technology where Cornell would not have to maintain software, etc, and better customer service with self service applications.

Since Cornell's e-commerce has been in existence for approximately one year, Peter commented on some implementation issues that he encountered. He stressed that all feeds and interfaces should be tested because you cannot assume that if one feed works then others will. Also, Peter mentioned that in a project of this magnitude that you should try to avoid "scope creep" in which, every time a new

"wish" was envisioned, then additional time/funds must be added to the project. In addition, he stressed that documentation and training is vital for the success of the project.

All in all, Peter is satisfied with SallieMae's Net Pay product. The excellent relationship with Sallie Mae has resulted in the timely resolution of any processing issues. He commented that, since the implementation in July 2002, 3600 families have been enrolled in electronic bill presentation with a participation rate of 16% (the goal was 15% in the first year; the national average is 6 - 10%). Also, Cornell's statistics indicated that \$14 million in payments were processed where only \$602,450 (4.3%) were returned or rejected payments.

Peter concluded that there are still marketing strategies that will be undertaken to increase the number of families participating in the electronic process. Meeting customer expectations results in more customer expectations, and Cornell will be prepared to meet those expectations.

Submitted by Kathie Owens

1098T UPDATE presented by Pam Benson, Pearson Government Solutions:

Well, what can I say about this session? I think we could have stayed all-day and talked about 1098T's. With the new regulations it was an informative for all of us. Some of the issues we have to be aware of:

- Do we report payments received or amounts billed
- We do not have to collect taxpayer information
- What to do with nonresident alien individuals
- Do we send a form to everyone or is that too costly
- Do we outsource it or keep it in house
- A contact name must be on the form
- Must include some required statements on the form

There are many questions to be answered but remember we are all in this together. We will be e-mailing the answers to those few open questions as soon as possible. (see below) Don't forget to use the NYSOBBA list serve (nysobbalist@listserv.buffalo.edu) to keep in touch with one another.

Questions from the NYSOBBA Conference: Answered by Tonya Christianson, IRS, 202-622-7603

Asked: Is there a time period in which you must send out a second form (replacement) if it is required?

Answer: The regulations and instructions for Form 1098-T remain silent as to whether a replacement form is required. Therefore, we believe the University does not have an obligation to issue a replacement form if the student misplaces the original form. Since an obligation does not exist, there is no time frame in which the University must issue the replacement form to the student.

Asked: Do you have to report to the IRS if you give a non-resident alien a 1098-T after you have initially reported your students to the IRS?

Answer: Yes. The regulations state: In general, an institution or insurer is not required to file a return on behalf of a nonresident alien individual. However, if a nonresident alien individual requests an institution or insurer to report, the institution or insurer must file a return described in paragraph (b) of this section with the IRS on or before the date prescribed in paragraph (b)(5)(i) of this section, or on or before the thirtieth day after the request, whichever is later.

If a nonresident alien requests a form 1098-T, the institution is required to file the form 1098-T with the IRS and furnish a copy to the student.

Asked: If a high school student is taking college courses in high school, do those courses count toward time for the Hope Scholarship Credit?

Answer: This is a section 25A question, and unfortunately, I am not authorized to give informal advice on this code section. You will want to contact Marilyn Brookens at: 202-622-4920.

Asked: Is there any obligation on the part of the school for returned 1098-Ts?

Answer: No. The regulations state that the statement must be sent to the individual's permanent address, or the individual's temporary address if the institution or insurer does not know the individual's permanent address. Therefore, as long as the institution sends a statement to the permanent address (or temporary address), they have met their mailing obligation. We do suggest,

however, keeping a record of the returned statements and the mailing address as a precaution.

I hope these answers help out. If you, or the institutions, have any additional questions, please feel free to contact me, my (Tonya's) direct phone number is 202-622-7603.

submitted by Kevin Smith

Improving Communication Through Positive Listening Approaches, presented by Steven Green of the Berkshire Leadership Group:

Mr. Green is a truly engaging presenter – by the time the session officially began, he had made his way through most of the room, personally meeting most of the attendees. It certainly set the tone for a lively and fun session!

After defining “listening” as the ability to put meaning to what you hear (and is very hard work), and “hearing” as the physical ability to accept and transmit sound waves from the eardrum to the brain, he spoke about listening being affected by selective attention, selective interpretation and selective retention. He gave us some interesting statistics about verbal and non-verbal communications. For example, did you know that 7% of communication is through words, 38% through tone of voice and 55% is through the speaker's body language? He spoke about the causes of “tune out” – different purposes and/or pace of listener and speaker, understimulation, and overstimulation. Then he described the five different kinds of listening approaches: appreciative, empathetic, discerning, comprehensive and evaluative. Through all of it, he spoke with lots of enthusiasm and humor, keeping us engaged every minute, making it really fun to listen! He's a great role model.

We each filled out a “Personal Listening Profile”. It was a very interesting exercise, and many of us were surprised to learn in what category we fell! We then broke into groups by those categories and had great fun doing some scenarios and exercises together. It was a very interesting learning experience. A very good session.

submitted by Peg Ehmann

Web Security, presented by Dan Peterson, President & CEO of Informed Decisions:

Dan started out his presentation describing security as something like insurance. He told a story of vacationing on an isolated island where he had rented a car. Along with the car came a club, with stern instructions to always use the club. Upon turning the car in, he inquired as to why on this island with a very small population (and just a handful of cars) is there such a concern about auto theft. He was told that the ship that brought in fresh fruit and vegetables to the island once each week, upon unloading their cargo, often left the island filled with car parts. The club is used to deter the car thieves just enough so that maybe they would take the next car that had no club!

The objectives of the presentation on web security were to inform and amuse; to share a quick perspective; to identify the challenges and to provide what Dan coined as the 80/20 strategy for addressing security needs.

In the past, security used to mean covering the physical security of the building, maintaining cash controls, securing bank deposits and having safes for secure storage. Today security is also about protecting customer and employee information, protecting customer financial data as well as guarding against identity theft.

The web has allowed increased independence among departments. Internal audit, bursars and other financial professionals have not gotten relief from audit / accountability issues.

With respect to credit card activity, Dan states that the customers decide how it is used. Statistics from the Informed Decisions product, Smart Pay, show that the #1 reason their customers used the web for credit card payments was for convenience. Contrary to popular belief, frequent flyer miles ranked last behind other reasons given, such as “other” and delaying payments.

Many prestigious campuses have had their web sites attacked. A West coast university had 20,000 credit card numbers stolen from its systems. They had to notify all cardholders of the incident. In addition to being a significant security problem, it also was a public relations nightmare.

You may ask yourself, what's the threat? The loss of personal financial information—credit cards

usually have limited liability to the customer, about \$50 per, however, bank accounts (ACH) transactions are not covered by the same rules and losses may have no limit. Another threat is the potential for identity theft. Others include destruction or alteration of institutions information or records, and again, a public relations nightmare.

Why do you as a bursar care? One, it's your job! Two, it can be a PR nightmare and three - civil liberties (along with new potential criminal ones as well).

The 80/20 Ecommerce Security Strategy

1. Get a firewall!
2. Encrypt sensitive data (3DES, AES)
3. Keep your server operating system patches up to date
4. Disable accounts when staff leaves
5. Turn off (or restrict) unneeded services (telnet, finger, NFS, DNS, FTP...)
6. Encrypt client server traffic against "packet sniffing"

Things Not to Do:

- Don't fax credit card numbers
- Don't use social security numbers as primary student identification

Looking towards the future, Dan suggests "taking it off campus"- outsourcing ecommerce. According to Dan, institutions would see a cost savings, improved service, and improved security. Dan states that this is possible because as security professionals, outsourcing stays within the core competencies of those professionals. This benefits those institutions/offices where web security is outside of their competency.

Submitted by Shirley Walker

TAP BEST PRACTICES presented by Norene Grose, Brian Matthews, and Patti Ronan from HESC:

This session was an excellent one for those of us who work with Tap certification on a daily basis. It touched on some of the extras that can help us in processing TAP more easily and efficiently. It was explained in detail what needs to be done with a payment roster, remittance advice, and a student status listing. We talked about the file type that HESC sends to us and the file type we send back to them and how to better understand certain data within some of the key fields in the file.

The session stressed the importance of communication between the Bursar, Registrar, Financial Aid Office, Admissions, and Faculty/Academic Counseling throughout the certification process. All of these offices will in some way or another effect the certification process.]

The presentation also included examples of the wealth of data and the variety of services now available online. We talked about the different error messages we might see how we could see our schools pending certifications. HESC web is very helpful in seeing exactly where in the certification process a particular roster or individual student may be. Go to the HESC website and see for yourself.

Submitted by Kevin Smith

Communication for Better Collection Results:

David T. Harmon, partner in the law firm of St. John & Wayne gave an informative session on *Communication for Better Collection Results*. Mr. Harmon's presentation addressed the need to streamline transmittal of information, within and without the institution, so the best possible case can be presented to a Court and maximum dollars can be collected.

David told us that there are five basic rules for communicating for better collection results. Those five rules are:

- Communicate from the start
- Know your student
- Maintain the paper trail
- Coordinate between and among offices
- Act early to maximize results

David explained that it is important to spell out the student's obligations clearly. There are many ways that this information can be communicated to the student. A contract spelling out all collection costs is very important. Student's need to know what their financial obligations are, the consequences for failing to meet those obligations and the costs that can be incurred to collect the debt. David's point was that all different methods of communicating this information could be used. The college's catalog/bulletin, website, brochures, registration materials, payment plans and promissory notes can all be avenues of communicating this important information.

Know your student. Obtain as much accurate information about the student and keep it current. One of David's biggest points – Documentation, Documentation, and Documentation. Keep a history of all communications and loan documents. Make sure you have a well-trained collection team. Real-time sharing and coordination of information between the Student Accounts, Financial Aid and Registrar's office helps to maintain the cycle of communication. By acting early for better collection results we increase our chance to collect the debt and we beat the Statute of Limitations.

David closed by saying that if we follow these five basic rules we will have better informed students, better informed internal and outside collections teams and we will reduce our Accounts Receivable.

Submitted by Linda Terwilliger

Birds of a Feather – Community Colleges

We are not alone! This was the one consensus that all of the participants in the Community College – Birds of a Feather session agreed upon. Many ideas and processes were exchanged on topics from the certificate of residency form to office sizes, to refund policies and procedures. A very involved discussion took place concerning what procedures are followed when a student never attends a class but also never officially drops the class. As each issue was discussed it was surprising to learn that we all had many of the same issues to contend with in our offices. It was not surprising to learn that every office handles these issues and problems differently. After much discussion it was agreed that a discussion group via an e-mail list would be created to allow schools to contact each other for advice and assistance when needed. There were twelve different schools represented at this session. It is the hope of the group that we will be able to add other community colleges as time goes on. If you are interested in joining this list, please send an e-mail to emmw@sunyocc.edu.

submitted by Bill Emm

Birds of a Feather – Private colleges

We had a great session comparing notes about the ways our colleges are handling the many issues confronting us now. Some of the highlights included:

We all agreed that the GLB Privacy Act information must be posted in writing in some type of publication issued by the College. College Catalogs and Admission publications were the ones most utilized. In addition, some colleges are holding training sessions with a signed statement by the employee that they understand the regulations.

That discussion led to one on the FERPA regulations. Most representatives indicated that their Colleges use an enrollment form to provide a signed release form required by the regulations.

Discussion regarding E-billing on the web brought forward many excellent suggestions. Some colleges are now requiring that statements/bills **only** be available electronically. Requests for paper statements are fast becoming the exception. It was noted that e-billing is a cost savings due to increasing costs of paper, envelopes, and postage. Currently, most colleges are not charging any convenience fees to process credit cards and ACH transfers. However, some colleges are no longer accepting credit cards for payments due to increasing cost of processing credit cards. Most Colleges using e-billing had contracted with third party vendors and credit card processors.

International students who receive wire transfer funds in excess of balance due account were discussed. It was mentioned that a best practice would be that funds cannot be accepted by the college in excess of \$10,000 more than the cost of tuition for the academic year. The student then could not "wash" the money by intentionally sending in an overpayment and then receiving a cash/check refund back. The regulations concerning the acceptance of funds if there was no balance due on the student account were then discussed. The consensus of the group was that the Bursar's office should have a signed form on file when funds are intended to be held until the next semester.

In general, most colleges will be using the amount charged method rather than the actual amount paid method in complying with the new 1098T regulations for 2003.

Submitted by Kathie Owens

Novice Training Session:

NYSOBBA offered a novice training session as part of the annual conference for the first time this year. It was well attended, and enthusiastically received. Those of us who were fortunate enough to be a part of it, came away from it energized and even more proud of this career we have chosen.

The workshop started at noon on Monday and ended at noon on Tuesday. We covered the basics – Introduction to NYSOBBA, glossaries, lists of websites, residency and citizenship issues, FERPA, HIPPA, Title IV, tax relief, record retention, due diligence, Blue Book, and TAP/APTS certification and processing. Quite a bit to cover in those few hours! Each of the attendees were given a binder, The Bursar's Book of Knowledge, to file all the handouts in and to get them started on their own procedure manuals. (See article, "The Bursar's Book of Knowledge" to see how you can get one, if you'd like.)

NYSOBBA would like to thank the folks from HESC who spent the extra time to contribute to this workshop in addition to the conference - Patti Ronan, Brian Matthews and Barbara Hochberg.

We considered this to be such a success, that we have decided to make it part of the conference at least every other year, if not every year. We will be offering it next year for sure. It has been suggested that we hold it concurrently with the main conference. If space allows, we will try to work that out.

submitted Peg Ehmann

Bursar's Book of Knowledge:

During the conference, several people inquired about the Bursar's Book of Knowledge, a binder that was given to the people who attended the Novice Workshop. They were hoping that it was possible to obtain one. We have decided to make them available for the low cost of \$13.00. That will cover the cost of copying, the materials and the mailing. There are about 15 binders left. Please email [Peg Ehmann](mailto:Peg_Ehmann@urnc.rochester.edu) at Peg_Ehmann@urnc.rochester.edu to order a copy (she has the extras taking up space in her office!)

or write to her at UR/SMD/Bursar's Office, 601 Elmwood Ave, Box 601, Rochester, NY 14642. Checks should be written to NYSOBBA.

submitted by Peg Ehmann

NYSOBBA Golf Tournament:

The weather cooperated and a good time was had by everyone who participated in the 2003 NYSOBBA Golf Tournament on June 10th at the Saratoga Spa Golf Course.

Jeff Ahearn started things off with an eagle on the Par 5 third hole. **Ed Lewandowski** added to the festivities by winning the closest to the pin contest by hitting the ball to within 21 inches. **John Adonnino** won the longest drive of the day contest and **Ed Baker** had the fewest putts of the day with only 27 putts over 18 holes.

The lone female contestant, **Patti Ronan**, played superbly and represented the ladies very well. **Prakash Patel** successfully defended his title for most putts over 18 holes. **Kerry Flynn** made a valiant but unsuccessful effort to defend his title which he had won the past two years.

The coveted Green Jacket and trophy was awarded to **Mike Coons** who shot a scratch score of 80 and a handicapped score of 72. There were seventeen hole sponsors which benefited the John G. Karrer Scholarship fund for a total of \$1700.00. Our thanks to all of the participants and the sponsors for their support and participation.

submitted by Bill Emm

Excuses, excuses, excuses:

So, you think you've heard every possible excuse for not paying the Bursar account, but have you heard THESE:

- Brother-in-law in Alaska and can't loan money to parent
- Brother-in-law in train wreck so can't ask for money
- Mailbox on corner broken into, checks sent to college probably stolen

- Parent in hospital, doctors don't know what's wrong
- Parent had angioplasty, didn't work, needs bypass surgery
- Parent's check to open monthly payment contract lost in mail, will wire money
- Bank was robbed, hostages taken, couldn't wire money
- FBA closed bank, looking for robbers outside parent's condo
- Parent has only one leg, can't get a ride with anyone to go bank
- Western Union closed, couldn't wire money

And guess what – all of these are from the same parent for the same semester!!

Submitted by Kathie Owens

Bush Signs Higher Education Relief Opportunities for Students Act of 2003 (HEROES):

Press release from the House Committee on Education and the Workforce: President signs Kline bill to provide student loan relief to troops Contact: Dave Schnittger (202)225-4527
Date: 8/19/2003

WASHINGTON, D.C. - President George W. Bush yesterday signed into law the Higher Education Relief Opportunities for Students Act of 2003 (HEROES). The bill, authored by Rep. John Kline (R-MN), will ensure support for military personnel by allowing the U.S. Secretary of Education to provide the appropriate assistance and flexibility to our men and women in uniform as they transfer in and out of postsecondary education during times of war and military deployment.

"Today is an important day for our men and women in uniform. As President Bush signed the HEROES bill into law, he took the final step toward bringing relief to the members of our National Guard and reserves who are also students," said Kline. "By bringing a little more peace of mind to student

soldiers, we are doing our part to protect them as they protect us."

The Education & the Workforce Committee acted quickly earlier this year to address the needs of military personnel as troops were deployed to regions overseas. On March 25, Rep. Kline and members of the Education & the Workforce Committee introduced the HEROES legislation, and on April 1, the House approved the bill in an overwhelmingly bipartisan show of support for the nation's armed forces. "I'm pleased that the hard work of our committee members, and the leadership of Rep. Kline, has resulted in this important protection for the men and women defending America overseas," said Rep. John Boehner (R-OH), chairman of the Education & the Workforce Committee. "By signing HEROES into law, the President has fulfilled our collective vision that our troops deserve our full support, particularly as they strive to achieve their educational goals while protecting our freedom. This legislation will continue to ensure that those serving our nation can do so without unnecessary higher education related financial burdens."

"The cost of a college education creates a troubling financial burden for many students, but students who are also members of the armed services face a particular struggle when they are called to active duty to defend our nation overseas," said Rep. Howard P. "Buck" McKeon (R-CA), chairman of the 21st Century Competitiveness Subcommittee. "By signing HEROES into law, the President has helped ensure that these American heroes do not face additional financial hardship as they work toward the dream of a college education while serving and protecting our homeland and our freedom."

Members of the House united in 2001 and unanimously passed similar legislation providing the Secretary of Education waiver authority in the midst of the tragedy of September 11th. The legislation signed into law by the President continues this support for military personnel, allowing the Secretary to address the needs of those serving now, and provide flexibility and relief for those who may need it in the future.

Many of the men and women serving in conflicts overseas are U.S. military reservists who are college and university students participating in federal financial aid programs. The HEROES legislation extends waiver authority that allows the U.S. Secretary of Education to excuse such military

personnel from their federal student loan obligations while they are on active duty. For example, the families of military reservists who left their jobs when called to active duty could be relieved from making student loan payments during the time of service, and the families of borrowers serving on active duty could be given relief from collection calls from lenders while the conflict is taking place.

HEROES also allows the Secretary of Education to quickly react to unforeseen situations in order to provide the flexibility and protections necessary to best assist military personnel with the transition to and from postsecondary education as they work to serve our nation. Additionally, the bill asks postsecondary institutions to provide a full refund of tuition and fees to students for the period they were not able to complete because of their service, and

minimizes requirements for reapplication, making it easier for military personnel to reenter their postsecondary education when they return from active duty.

COMING NEXT EDITION:

- Legal column by David Harmon
- Job listings

NEXT NEWSLETTER EDITION

By Kathie Owens, Newsletter Publisher

As always, we welcome your articles, announcements, updates, and feedback. We continue to strive to deliver the NYSOBBA Quarterly on a timely basis. We need you to continue to support this publication with your articles and other information.

We hope to publish the next Quarterly on or before November 1, 2003. Please e-mail your articles to me no later than October 20, 2003 at kowens@ithaca.edu.

S & St. John & Wayne, L.L.C.
Attorneys at Law
— W —

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Interesting Fact:

David T. Harmon, Esq. presented "Communicate for Better Collection Results" at the June 2003 NYSOBBA Annual Meeting in Saratoga Springs, New York.

Feel Free to Contact David T. Harmon, Esq., Partner, at:

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c/o Kathie Owens
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Wednesday, August 20, 2003