

# The PacWest Post

PacWest Student Financial Services

Fall 2014

## President's Message

Welcome to the first addition of the PacWest Post! You may want to hold on to this one knowing how valuable first additions can be. As your peers, we understand how overwhelming your days can be with just your "regular" work routine, not to mention those heightened situations that arise on any given day. So our design is to keep this newsletter simple with focus on a few key stories in the Higher Ed realm, highlight corporate partners and provide an opportunity to spotlight our members. We are looking to engage our members with exciting stories and accomplishments from your campus! This is the area where we share a common goal to educate, connect and inspire. So we want to hear from you. Our next newsletter is set for press in February so please drop us a line at [info@pacwestsfs.org](mailto:info@pacwestsfs.org) telling us what's happening on your campus and you could be the spotlight of the next post edition!

- Denise Burt, President

### President's Bio

Denise has been working in Higher Ed for nearly 25 years now. She is currently the Bursar of Santa Clara University but has worked in both sides of the house; collections and academia. She has been in management for the majority of her career and believes in the power of exceptional customer service and effective collaboration. She was a board member in 2008 with the inception of PacWest and this is her second term as President.

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*"PacWest was a great experience, full of wonderful participants and informative speakers. The conference was very educational with a wide variety of topics. Hope to be able to attend again."*

*Shannon Medina  
Senior Advisor  
University of North Dakota*

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2015 Conference Location - Leews Coronado Bay in Coronado, CA

## In This Issue

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- Meet the Committee



In-depth discussion taking place in Newport Beach

## Kudos to Coast!

### — Corporate Partner Profile

Did you know that Coast Professional employees select a different charity each month to support? They have donated to such causes as ARMIng Heroes, Pilots of Patients, and the Humane Society of Northeast Louisiana. To date in 2014, Coast and its employees have donated more than \$50,000 to these and other great causes.

Coast has pioneered the educational webinar series and offers a quarterly webinar at no cost to clients and invited guests. To host an event, contact Rechele Brown at (313) 307-3810 or at [rbrown@coastprofessional.com](mailto:rbrown@coastprofessional.com).



## Perkins Advocacy

On October 1, 2015, the Perkins Loan Program and all programs in the Higher Education Act (HEA) received an automatic one-year extension to operate through September 30, 2015, under section 422(s) of the General Education Provisions Act (GEPA). If Congress does not pass a bill to reauthorize HEA by the end of FY 2015 (September 30, 2015), **the Perkins program will end.**

### Your voice is needed.

To save the Perkins Loan Program, COHEAO has organized a grassroots effort to help in this process. We need you and your colleagues, students and parent to contact your U.S. Congressmen and Senators to request their support to reauthorize the Perkins Program.

Many congressmen seem to support the “simplified” One Grant One Loan Program that has been floated. This plan would reduce your ability to assist your students and would limit the options and benefits available to your students. It would also seal the demise of the Perkins Program. COHEAO has presented an alternative to this plan that would include the continuation of the Perkins Program and would enable you to continue to customize options to meet the individual needs of your students. The Campus Flex Program is gaining support, but we need you to help educate your legislators about this preferable plan.

### Your resources...

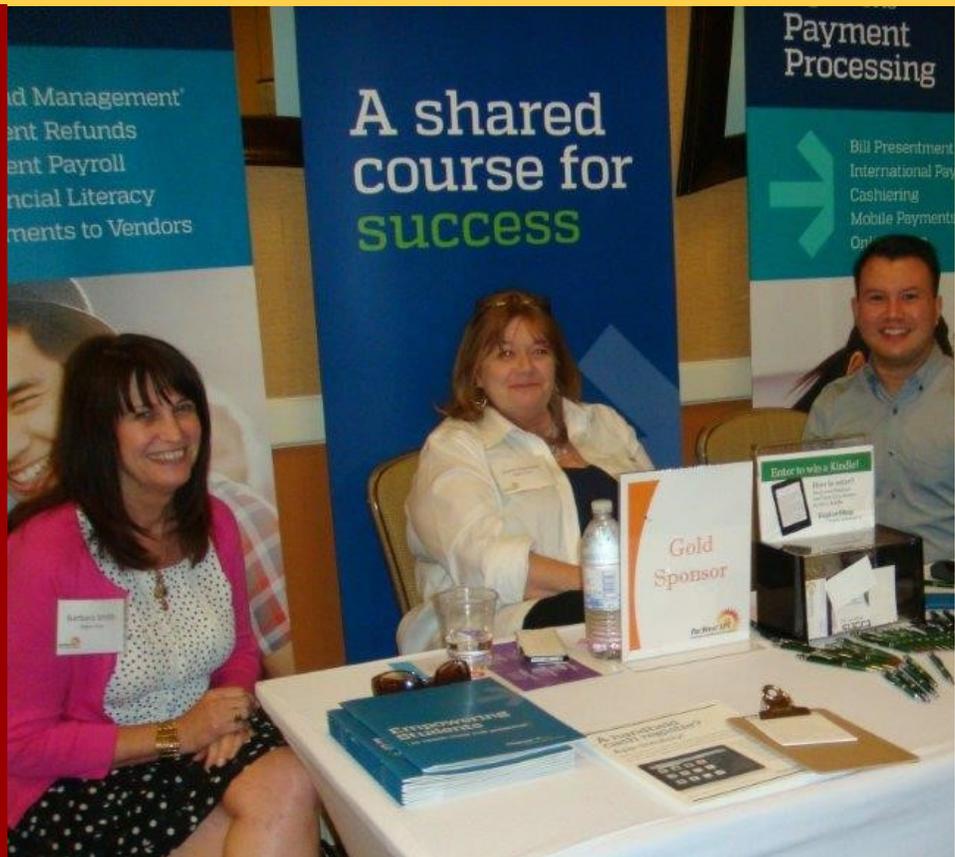
To find out what you and your institution can do to save the Perkins Loan program, beneficial to more than half a million borrowers per year, and to learn more about the Campus Flex Plan, please go to COHEAO's Advocacy webpage for an action checklist and sample letters to send to members of Congress, students, and colleagues. <http://www.coheao.com/advocacy/the-future-of-perkins-loans-what-you-can-do-to-help/>.



Making industry connections.

## PacWest Conference Locations

- 2008 - Napa, CA
- 2009 - Anaheim, CA
- 2010 - Fullerton, CA
- 2011 - Santa Cruz, CA
- 2012 - La Jolla, CA
- 2013 - Palm Desert, CA
- 2014 - Newport Beach, CA
- 2015 - San Diego, CA
- 2016 - To be announced in San Diego!



Gold Sponsors HigherOne at the 2014 Conference in Newport Beach

## News from Nelnet

### - Corporate Partner Profile

Nelnet Business Solutions (NBS) is committed to delivering superior technology and innovative business tools that improve service and reduce costs for you! They have a full solution suite from tuition payment plans to student choice refunds to campus-wide commerce management.

Look for their webinars offered in conjunction with University Business which are open to all institutions to attend. Contact Caryne Mesquita at (303) 872-3436 or [caryne.mesquita@nelnet.net](mailto:caryne.mesquita@nelnet.net).



## History of PacWest

PacWest was established in 2008 by the joining of two long-standing and reputable California non-profit organizations: CCULAA—California Colleges & Universities Loan Administrators Association and CBA—California Bursar Association. With schools already moving to cross-functionality in these two worlds, we decided it was time to blend the two, and behold ... PacWest was born.

We are still a non-profit organization and all Board members serve on a volunteer basis. The majority of our member portfolio is California-based but we continue to branch out to our neighboring states. Our conferences and session material is geared toward members working in the Student Financial Services arena across the nation and is not solely California-based information. Check out our website to learn more about who we are and to view past and upcoming conference information. The great weather is here. Come join us!

### 2015 San Diego Conference Agenda Highlights

- \* U.S. Department of Education Updates
- \* The Challenge of Preventing School Shootings
- \* Mobile Payment Solutions/EMV
- \* TIVAS / Loan Consolidation
- \* Legal Hot Topics / MPN for Tuition Receivables



Post-conferencing patio at the Loews Coronado Bay Resort

## 1098-T Best Practices

- Check for Valid TINs
- Solicit Twice a Year
- Use Form W9s
- Warn Against Emailing TINs
- Include Required Notifications
- Utilize a Secure Student Portal
- Keep Records
- Exercise Caution in Placing Holds for Noncompliance

## Collecting TINs for Form 1098-T

On October 1, 2014, the National Association of College and University Business Officers (NACUBO) released their third advisory report (2014-1) related to 1098-T reporting and audits. This most recent report is intended to help colleges and universities think through the steps they should take to collect student TINs in order to meet their reporting obligations and avoid potential fines.

### NACUBO Efforts

According to NACUBO they are continuing “to encourage the IRS to develop more reasonable procedures to ensure that higher education institutions comply with 1098-T reporting requirements. The association has recommended that the IRS consider allowing schools to certify, at the time of filing, that they have met the requirements for soliciting missing TINs at least annually, or that the regulations be revised to allow institutions to stop filing Form 1098-T for students who have not provided their TINs.”

### Your resources...

#### NACUBO Staff Members

Anne Gross, VP Regulatory Affairs, [anne.gross@nacubo.org](mailto:anne.gross@nacubo.org)

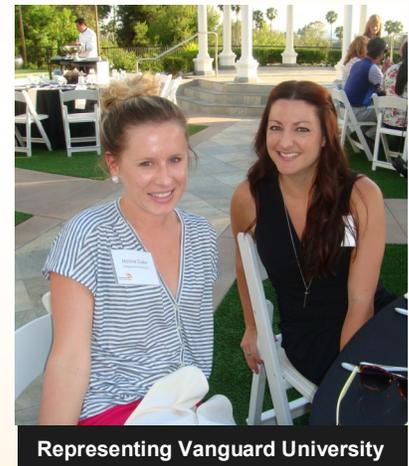
Mary Bachinger, Director of Tax Policy, [mary.bachinger@nacubo.org](mailto:mary.bachinger@nacubo.org)

#### Link to NACUBO Advisory Report 2014-1:

[www.nacubo.org/Documents/BusinessPolicyAreas/  
Substitute\\_W9s\\_Advisory\\_Report.pdf](http://www.nacubo.org/Documents/BusinessPolicyAreas/Substitute_W9s_Advisory_Report.pdf)

#### Link to IRS form W9s:

[www.irs.gov/pub/irs-pdf/fw9s.pdf](http://www.irs.gov/pub/irs-pdf/fw9s.pdf)



Representing Vanguard University

# Meet the Committee

President - Denise Burt, Santa Clara University

Vice President - Suzette Calderone, University of the Pacific

Treasurer - Cindy Chappell, Point Loma Nazarene University

Secretary - Bobbie Seiler, San Jose State University

Web Coordinator - Steve Woods, California Lutheran University

Member-at-Large - Jose Almeida, CSU Fresno

Member-at-Large - May Ligh, CSU Northridge

Member-at Large - Karla Giron, CSU Northridge

Member-at Large - Geri White, Pepperdine University

Corporate Partner - James Jones, Reliant Recovery

Corporate Partner - Caryne Mesquita, Nelnet Business Solutions

Corporate Partner - Rechelle Brown, Coast Professional

Corporate Partner - Cindy Schick, NCC Business Services

Conference Coordinator - Marlene Anderson, SJSU (ret.)

## Contact Us

Send us an email for more information about our conference and services.

**PacWest Student  
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[info@pacwestsfs.org](mailto:info@pacwestsfs.org)

Visit us on the web at  
[www.pacwestsfs.org](http://www.pacwestsfs.org)

2014-15 PacWest Steering Committee at the Loews Coronado Bay Resort

