OASFAA Executive Meeting
February 15, 2024
MINUTES

Present: Shaun Anderson, Brenda Cromb, Mary Santoli, Tina Obediah, Lana Hardwick, Leslie Aitchison, Mary Beth Scott, Celeste Coles, Jeremy Potter, Anik Powell

Regrets: Elaine Cottell, Liz Way. Marian Doll, Jessica Husted

1. **Business Arising**

   - **LTD:** Clarification on application:

     - If you get a T4A for it (employer-paid premiums, whether full or partial), you claim it on your taxes and is part of line 15000

     - If you don't get a T4A for it (employee-paid premiums, has to be 100%), then it would not be claimed on taxes and should be claimed as part of non-tax income.

2. No indication anywhere on manual how it is to be treated? This needs to be addressed especially because 2024-2025 manual is likely being comoed

   Chair's Report

   - **SFAB Staffing Changes**

     - Travis Coulter is no longer the director as he has accepted a position in another ministry
     - Tricia Dorman is Acting Director for 3 months, until the position is filled through a formal competition
     - Sandra Muzzi-Pedota is covering Tricia as manage of ICU

   - **OURA Report**

     - Submitted written report to OURA for their AGM on February 14
       o Attached at end

- **HRSDC & Learning Branch** – Looking for opportunities to expand awareness on federal programs

  - https://www.canada.ca/en/employment-social-development/corporate/reports/briefing-binder-2019/book-1/department-101.html#h2.03-h3.01

- **Updated Tracking Sheet for MCU Requests**
  - Has been updated. Will need to review with MCU to re-prioritize our wish-list items & maybe start adding to our Business Arising agenda
  - Add Data Retention to the Tracking Spreadsheet

3. **Policy Report**
   - Nothing to report

4. **Past-Chair's Report**
   - Nothing to report

5. **Treasurer's Report**
   - Attached at end

6. **Committee Reports**

   - **Professional Development**

     Joint Conference Planning

     - They would like data on attendance at previous in person conferences to help make projections for this year.

     - Would the OASFAA Executive like to speak during the conference wrap up?

     - Conference will be in-person only; no live-streaming
     - Registration form will be ready soon
     - Co-Chairs – do you want wrap-up session at end
     - Call for Proposals will be sent back out
     - Agenda almost ready

- **Procedures**
  - Refunds – maybe a revision to how manual is wrote. More beneficial if schools could have more flexibility & it could be more streamlined. Also, review process for returning grants, in general would also be beneficial (ie: no way to track with NSLSC, takes a long time to show up on portal). Add a clause in manual for Financial Aid Officers to be able to use their 'professional judgement' <mark>Refer to MCU</mark>
  - PT OSAP – does not allow child care costs for online courses. <mark>Refer to MCU</mark>
  - Fixed Contribution Review – working on this
  - Canadian Residency Form – what happened to our suggestions? Submitted last summer. Needs discussion as residency still needs improving <mark>Refer to MCU</mark>

- **Communications**
  - January – transitioned to a new workspace, which included an additional fee (included in report)
  - Ready to update website for conference infomration

- **Systems**

  - Cost code rollover scheduled for the last week of February. A portal posting will follow with additional information.

  - Language around funding release dates, and parent information not available, has been updated for the 2024-2025 cycle.

  - MCU is developing a batch upload process to reinstate applications. Further consultation will take place after the start of the fall term.

  - Minutes attached (below)

7. **External Liaison Report (CASFAA)**
   - Benchmarking Survey (Academica) has been extended until February 23rd
   - CASFAA will be using Displayr instead of a PDF report – this allows users to filter on both aggregate data by province as well as year over year tracking which is a huge benefit compared to static reports. Users can pull out pages with/without filters into PDF, PPT, Excel as desire.
   - More schools in Ontario need to complete the survey – the more data that is entered, the better the results
   - <mark>OASFAA needs to find a new CASFAA rep (as Liz is stepping away) – What is process?</mark>

8. **New Business**

- **Residency through Parents.** Do parents need to be in ON during the study period for a student to use their residency?
    - No, they do not need to be
    - You don't lose residency unless you gain it from another province/territory

- **HCR**. Can Residency form ask the following questions:

    - Have you ever lived in Ontario?
    - Have you ever lived in any other Canadian province?
    - Why does the form only ask for 5 years of residence history?

    - Can it be simplified? When did you move to Ontario? Have you ever lived in another province or territory? – same as Procedures info – refer to MCU

- **PT OSAP.** If assessment is $0, students are directed to complete a schedule 2 form. Can language on app be updated to direct them to complete the ECOE instead of the outdated paper form?
    - Change wording to the NSLSC online (instead of directing to paper) Refer to MCU

- **Spring Conference –** Can the MCU session be livestreamed & recorded for those who cannot attend in person?
    - No, it will not be live-streamed

- **BC Student Aid Working Group**. Members expressed interest about forming a working group to work through the BC student aid updates (uploading cost codes). Can we ask the regional reps. to send out an email asking if there is any interest OR do we set up a new forum on the OASFAA website?
    - Not just BC Student Aid. Focus group for all Out-of-Province student aid

- **Landlord Signatures**. 1.   Are schools accepting digital signatures from landlords on leases? Manual says we can only accept professional third party and a landlord is not professional.
    - Becoming more common as lease agreements are downloadable
    - Majority of schools accept this with the landlord's digital signature. Signature should be through docu-sign (shouldn't be able to TYPE your name) Refer to MCU
    - Is a landlord a 'professional"

- **Academic Progress -** Clarification on the study period plus one and if an appeal can be used if a student takes longer due to a personal circumstance situation but not necessarily

a PCR because the student is not on probation or restriction. Manual is not clear if we can make an exception or not.

- At end of website, it states if you have other circumstances, please reach out to your school – if there is no appeal, this information should be removed
    - o As suggested previously, we suggested an Academic Progress Working Group – can we re-visit this? Refer to MCU

- **Proposed HCR previously sent**
    - o What is status on our proposal? Refer to MCU

    - **BSWD Manual Page 53** – Remove language for student to authorize FOI and school to cross-reference services. Services can be approved
        - o Student shouldn't have to authorize this; the manual covers this
        - o Need language to be consistent

    - **PSSP Reference in Sponsorship Letters** – Letters should clearly reference the type of funding (e.g. PSSSP, ISET, MNPSES, IPSES) in order to determine if needs to be reported as an award on app
        - o Because MCU is engaging with Indigenous community, this should be on their agenda
        - o If it's identifiable on the form, it's easier for FAO – have a TEMPLATE sponsorship letter (cultivated in collaboration with MCU/Indigenous Student Relations & OASFAA)

- **PSW Bridge Program to PN –** Defer to next meeting

9. **Regional Reports**

    - **Eastern Region:**
        - o Nothing to report
    - **Central Region:**
        - o Nothing to report
    - **Western Region:**
        - o Included in new business
    - **Northern Region:**
        - o Bankruptcy – all supporting documentation presented (same documentation as previous 3 years but it was denied). Told to put back into queue, where it was approved
        - o Another example – errors being made. Another example at other school – denials from new staff member
        - o Send examples to Co-Chairs for follow-up with MaryJane or Krista

OASFAA Chair – Finance & Membership Management Committee Report February 2024

Follow-up from Fall 2023 Conference
- Purchased Large Meeting Fall Conference $75.71
- Wix Forms Package $71.41

November/December/January/February Expenses
- November Monthly Fee RBC $12.00
- December Visa Annual Renewal Fee $12.00
- December 2nd Visa Annual Renewal Fee $12.00
- December Wix Website Charge $227.20
- December Monthly Fee $4.00
- January Monthly Fee $4.00
- February – Paid Visa – Wix Website Charge $104.50

Bank Balance: $11,754.64   **Credit Card:** $0.00   **GIC's total:** $66,627.50 as of February 14, 2024

GICs: June 17, 2024	3.25%	$25,000.00
February 13, 2025 (Cashable 1 year)	2.25%	$15,487.50
February 13, 2025	4.65%	$15,697.50
February 13, 2025	4.50%	$5,225.00
February 13, 2026	4.35%	$5,217.50

OASFAA Finance & Membership Management Committee
- Met on February 6, 2024
- Issue for sending invoices via Wix has been resolved for the Chair; sent invoices to 7 institutions.

WIX System Issues:
- No longer able to search via institution. This creates difficulties when having to see how many members are at each location when doing membership adds/drops/swaps. – Tina to follow up with WIX

Spring 2024 OASFAA Conference Prep
- Any to do items? When should planning start?

OASFAA Systems/MCU Meeting Minutes

February 8th, 2024

OASFAA: Asim Mohammad, Celeste Coles, Jeremy Potter, Tina Obediah, Brenda Cromb, Marian Doll, Anik Powell
MCU: James Cawlishaw, Laura Pomanti, Alan Edwards
Regrets:

Shaun Anderson

Agenda

Update from MCU regarding priority items identified on last joint call

1. Follow up regarding outstanding OASFAA items:
   a. Item #86: proposed supporting document download file
   b. Item #73: full view of restriction codes
2. Review of new issues arising (items 83-89 in Systems Issues Tracking file)

MCU Updates

BPS Launch

- MCU reports that for the most part, users appear to have migrated successfully. Minor issues identified during launch were identified and addressed. Committee agreed that the rollout was smooth.
- MCU confirms that any issues emerging should be forwarded to the FAO Webmaster for follow up

Current Projects

- Return to Government/Claims for Micro Credential Programs
- Grant to loan conversion process for Ontario Learn and Stay Grant
- Service Commitment process for the Ontario Learn and Stay Grant
- Prepping for new year release – Schedule TBD

Cost codes

MCU is aiming for a rollover during the last week of February. An FAO Portal Posting will go out before the rollover.

AS400 Update

MCU is exploring options to move to host the legacy functionality via a virtual solution on a new platform. The current hardware is difficult to maintain/repair, so the intention is to move the system to a new platform but retain the existing functionality for now, after which MCU can resume work moving pieces off the legacy system.

Updates on priority items

- **Seeking additional information:**

- **Away from Home and Local Travel review codes do not combine** (Raised during exec/MCU teleconference)
  Issue has been confirmed – SLT and KAH review codes do not stack. MCU has asked for follow up regarding scenarios where this might be appropriate.
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- **In development:**

- **Item 65: Allowing FAAs to see the full detail on restriction codes**
  Work has moved to the policy team to update descriptive language. Access may be phased in over the cycle.

- **Item 82: Developing a mass upload process for reinstatements**
  Design will take time, and will benefit from collaboration with OASFAA as the process is developed. Further consultation to take place beginning perhaps in the fall.

Demonstration:

MCU demonstrated enhancements proposed for the 2024-2025 cycle.

- **Item 11: Providing better communication to students around funding release dates**
  The Student's Funding Summary screen now leads with the application status, so that a student encounters a hold message before they see the expected release date. Language has been added to explain that the date will continue to roll forward until enrolment has been confirmed.

- **When parent information is not available,** the application now provides a link to the Parental Information form, and directs the student to use the paper application only if other information is missing. The section now links directly to the optional upload page.

On hold/under consideration:

- **Item 2:** Allowing Part Time applications to use Full Time Cost Codes
  Not possible to implement for the 2024/2025 cycle.

- **Item 63: Allowing FAAs to move uploaded documents into different queues**
  Not currently possible, as there are extra functions associated with this access that aren't available to FAOs

- **Item 75: Colour coding based on funding instrument**
  Requires careful consideration on implementation, as well as AODA compliance

- **Item 79: Adding headers to all download files**
  May not be possible, as it increases the potential severity of a data breach

Report of the Student Finance Committee/Ontario Association of Student Financial Aid Administrators (OASFAA)
2023-24

In many ways, the 2023-24 school year has felt like a return to normalcy. For those of us that love the buzz of a busy campus, September was wonderful. At the same time, the virtual tools we adopted during the pandemic allow us to remain more connected. Support, guidance, and advocacy across Ontario's higher education professionals is stronger than ever, thanks to our new collaboration skills. OASFAA has seen this and I'm sure OURA has as well.

This return is also being reflected in government student aid. The Ontario Student Assistance Program (OSAP) is reporting a higher number of full-time applications at this time compared to 2022-23.

I am happy to share some OASFAA highlights from 2022-23:

- Re-introduced our Systems Committee (was discontinued while the Ministry ran a modernization group). Focus of this committee is to identify system enhancements that increase administrative efficiency and student experience. Committee must contain members well versed in functional and semi-technical administrative requirements of OSAP delivery

- Expanded Treasurer role into Finance and Membership Management Committee. Chair of this committee is Treasurer and has support from committee members.

- OSAP satisfactory academic progress requirements are now publicly available on the ontario.ca website: https://www.ontario.ca/page/how-maintain-eligibilityosap-and-ontario-learn-and-stay-grant

- Improved messaging on process for when students move from a 9-series SIN (protected person) to a permanent SIN and are applying for OSAP

- Increased number of document queues to ensure restriction and clearance documents are completed faster. Also introduced new queue solely for Bankruptcy reviews. Students are no longer waitng 16+ weeks.

- Ongoing engagement and feedback regarding new Ontario Learn & Stay Grant

- Increased communication to the Ministry of Children, Community, and Social Services (MCCSS) regarding the interaction between ODSP and OSAP.

- Planned return to an in-person OASFAA conference this spring, in collaboration with the Canadian Association of Student Financial Aid Administrators (CASFAA).

OASFAA will connue advocang for both high level program changes, and day-to-day administrative efficiencies. At the higher level, we connue to pressure the Ministry for better full-Time/part-tme application integraton, three-term disbursements (important for colleges), and less funding delays at the National Student Loans Service Centre (NSLSC).

Our Systems Committee is currently tracking 82 requests that if implemented, will improve OSAP for both students and financial aid administrators.

I want to thank OURA for allowing OASFAA to be part of your extended family and a chance to engage and share important news from the world of financial aid. I look forward to seeing you all soon.

Shaun Anderson
University Co-Chair
Ontario Association of Student Financial Aid Administrators