

The background of the cover is a blue-tinted aerial view of a city skyline, featuring various skyscrapers and buildings. Overlaid on this image is a white network diagram consisting of several circular nodes connected by thin lines, creating a web-like pattern across the lower half of the page.

2021 **ECSI** VIRTUAL SUMMIT CONFERENCE GUIDE

WELCOME!

ENTER THE VIRTUAL SUMMIT





TUESDAY, NOVEMBER 16TH, 2021

SESSION TIMES (ALL EST)	SESSION TITLES			
10:30 AM	OPENING KEYNOTE Opening Remarks with Eric Ives			
11:00 AM	Providing an Excellent Student Experience in a Pandemic and Beyond - Kristy Pritchett			
12:00 PM	LUNCH			
TRACK	<i>Track 1</i> Breakout 1	<i>Track 2</i> Breakout 2	<i>Track 3</i> Breakout 3	<i>Track 4</i> Networking Room
1:00 PM	ServicingSelect Enhancements & Roadmap		Enhancing the Student Experience	Government Assignments & 1098-Ts
2:00 PM	RecoverySelect Overview & Enhancements	SAL Training 101	Discover the 360u Experience for Student Success	RecoverySelect & OutsourceSelect
3:00 PM	Keeping in Compliance	NACHA Update	Jira Training	RecoverySelect Client Meetup
4:00 PM	VIRTUAL RECEPTION WITH JUKEBOX BINGO!			

WEDNESDAY, NOVEMBER 17TH, 2021

SESSION TIMES (ALL EST)	SESSION TITLES			
10:00 AM	KEYNOTE SPEAKER Sean Swarner			
11:00 AM	Perkins ARC Grassroots Efforts - Lori Hartung			
12:00 PM	LUNCH			
TRACK	<i>Track 1</i> Breakout 1	<i>Track 2</i> Breakout 2	<i>Track 3</i> Breakout 3	<i>Track 4</i> Networking Room
1:00 PM	SAL Training 201	The Future of TaxSelect	Collections Update with James Jones	RecoverySelect & OutsourceSelect
2:00 PM	OutsourceSelect – What is it and how can it help?	Government Assignments from A to Z	The Critical Role of the Business Office in Student Retention	Anything Goes!
3:00 PM	Join Us in the General Session Room for Closing Remarks			
4:00 PM	CONFERENCE CONCLUDES			

Session Descriptions

The ECSI Virtual Summit will be two days full of informative, relevant, and engaging content. Please see below for the high-level descriptions of each session. We can't wait to "see" you at the summit!

GENERAL SESSIONS

Tuesday November 16, 2021

Opening Session

Eric Ives, SVP and General Manager, ECSI

Eric Ives will open the show with an update on what's new with ECSI.

Providing an Excellent Student Experience in a Pandemic and Beyond

Kristy Pritchett, Director of Student Account Services, University of Alabama

Kristy Pritchett, from the University of Alabama, will share how her school is embracing technology to provide the best possible student experience in a post-COVID world.

Wednesday November 17, 2021

Keynote Speaker

Sean Swarner, Swarner Expeditions & Adventures, Speaker | Author

Sean redefined Impossible by becoming the only person in history to climb the highest mountain on every continent, trek to the South & North Poles, and complete the Hawaii Ironman - all with one lung.

With only one functioning lung, a prognosis of fourteen days to live, and being in a medically-induced coma for a year, Sean Swarner is the first cancer survivor to stand on top of the world... Mt. Everest. Sean has broken through defined human limitations in order to redefine the way the world views success.

Perkins ARC Grassroots Efforts Update

Lori Hartung, Director, Midwest Region - Todd, Bremer, & Lawson

Lori Hartung will provide an update on the Perkins ARC Grassroots efforts.

BREAKOUT SESSIONS

Track 1

ServicingSelect Enhancements & Roadmap

Tom Sinton, Program Manager, ECSI

This session will showcase the recent enhancements to the ServicingSelect solution and the future roadmap for the product. We will highlight the regulatory items and system enhancements that have already been implemented or are in the process of being implemented.

RecoverySelect Overview & Enhancements

Sarah Cantrell, Sr. Program Manager, ECSI

This session will provide a high-level overview of the RecoverySelect solution and will highlight our recent enhancements as well as some future enhancements that will be coming down the road.

Keeping in Compliance

Cheryl Mazeski, Compliance Consultant, ECSI - Dante Gentile, Product Manager, ECSI

Get up to date on the latest and greatest compliance topics in higher education.

OutsourceSelect – What is it and how can it help?

Mike Bowman, Director, Servicing Operations, ECSI

Laura Woods, Senior Manager, Application Development Business Analysis/Quality Assurance, ECSI

ECSI's OutsourceSelect solution offers cutting edge call center solutions to schools. But, what else can OutsourceSelect offer?

SAL Training 201 - Managing Accounts in SAL

Dave McDonald, Supervisor, Training & Documentation, ECSI

In this session, users will be introduced to some of the tools and resources available in SAL to help manage a client's student loan portfolio. At the conclusion of this training, participants will be able to:

- Review loans assigned to internal collectors
- Post Reschedules
- Process Rehabilitations
- Generate Past Due letters
- Place a Stop Code on a borrower's account in SAL
- Add/create Special Codes in SAL

BREAKOUT SESSIONS *cont.*

Track 2

Government Assignments from A to Z

Chris Stompanato, Client Relationship Coordinator, SME, ECSI

Lara Allworth, Client Relationship Coordinator, SME, ECSI

With the Perkins loan program in wind-down mode, the Department of Education has notified schools requiring them to assign loans that are two years or greater past due. This presentation will offer guidance on what schools should be doing to audit their Perkins portfolio and prepare for assignments. Tips on how to complete assignment documents, common assignment errors, and other important details will also be covered.

SAL Training 101 - An Introduction to SAL: Overview of the Primary Window

Dave McDonald, Supervisor, Training & Documentation, ECSI

In this session, users will be introduced to ECSI's loan management platform, SAL. Users will receive a demonstration of basic SAL functionality and how to identify loan information from the Primary Window. At the conclusion of this training, participants will be able to:

- Access SAL using SAL Portal
- Locate an account using the Search Action Tab
- Identify the debt and billing information using loan buckets
- Use the loan info box to identify basic loan information
- Verify the most recent transaction posted to a loan
- Identify the amount due and amounts paid back on a loan

NACHA Update

Julia Norwood, Manager, Product Management, ECSI

This session will review the new NACHA rule and other ACH requirements that affect your school's incoming payments and online ACH transactions.

The Future of TaxSelect

Deanna Bassano, Program Manager, ECSI

Dante Gentile Product Manager, ECSI

TaxSelect is getting a makeover! We are moving the TaxSelect solution to our EasyPath platform. This means we will be giving our tax clients a more streamlined, user-friendly, and enhanced experience. In this session, we will show you the new system, it's features, enhancements, and answer any and all questions.

BREAKOUT SESSIONS *cont.*

Track 3

Enhancing the Student Experience

Mike Bowman, Director, Servicing Operations, ECSI

Juanita Saucedo, Manager of Student Accounts, UNLV

In this session, we will look at strategies to help your business office provide the best experience for your students. We will take a deep dive into one school's path to achieving the best possible student experience through communication, technology, and partnerships.

Discover the 360u Experience for Student Success

Chris Howard, Senior Solutions Engineer, TouchNet

Enhancing your on-campus experience with the new 360u mobile app means one-stop access for all interactions across campus. This session explores how 360u will become the single point of access for students and parents to manage their entire campus experience from permissions to payments and everything in between.

Collections Update

James Jones, Reliant Capital Solutions, Senior Executive VP of Sales & Marketing

James Jones will provide an update on the latest and greatest in collections.

The Critical Role of the Business Office in Student Retention

John Dysart - President - The Dysart Group

John Meyer - Regional Sales Executive - ECSI

This session will explore the current state of student retention in higher education and how the business and enrollment offices can work together to make a positive impact.

Jira Training

Lori Carbonara, Sr. Director, Product and Program Management, ECSI

ECSI will be transitioning to a new ticket and request system. The new system will provide more functionality for client users, provide a self-service knowledge base, and will allow ECSI to streamline our client support process. This session will focus on introducing client users to the new ticket and request system and become more familiar with the new features and functionality.

Presenter Bios



Lara Allworth

Client Relationship Coordinator, SME, ECSI

Lara has over 21 years of client consulting/marketing experience in a number of industries, including print and online advertising, business/consumer banking, HR and staffing services, promotional and special event product sales, CRM/management services/IT, and higher education. She has been with ECSI since 2015 and has had a number of different roles and responsibilities in her tenure. The purpose of Lara's role today is to maintain relationships with the existing loan servicing client base and prospective and existing 1098-T processing clients. She provides prompt and effective customer service. Responsibilities include handling any and all client issues, education, and acting as a liaison to all the necessary departments within the company, all with a sense of positivity!



Deanna Bassano

Program Manager, ECSI

Deanna started her career with ECSI in July 2011 as a Call Center Advocate. In 2013, she moved to the Servicing Operations team to work with RecoverySelect. In March 2016, Deanna began working with our TaxSelect team. Deanna took over the Program Manager position for TaxSelect in Fall 2019. In this role Deanna is responsible for testing 1098-T files, processing 1098-T files, posting these files to the web, and overall 1098-T client support. Deanna attended the Community College of Allegheny County.



Mike Bowman

Director, Servicing Operations, ECSI

Mike is responsible for all of the customer facing and back office operations at ECSI. Mike has been working in leadership positions within operations, customer service, and contact centers for over 20 years. He joined ECSI in August 2016 and has focused on designing positive customer experiences by providing both the highest level of traditional customer service, as well as, the most current, best in class digital service technology.

**Sarah Cantrell*****Manager, Program Management, ECSI***

Sarah Cantrell is the Manager of Program Management at ECSI and has been with the company for 6 years. Her primary responsibility is overseeing all the product line(s) service levels, features and functionality. Prior to ECSI, Sarah worked at Heartland Payment Systems for 8 years focusing on corporate marketing initiatives and sales incentive programs within their card processing division.

**Lori Carbonara*****Sr. Director, Product & Program Management, ECSI***

Lori is responsible for the oversight of the product and service performance for ECSI. This includes product and process performance, service levels and metrics, and system and application performance. She also oversees a team of individuals that manage all product enhancements, fixes, and new features. Lori joined ECSI in August of 2011. She has held senior-level management positions in both public and private organizations since 1996. Lori came to ECSI from the mortgage loan servicing industry and has degrees in Computer Science and Business Management.

**John Dysart*****President, The Dysart Group***

John W. Dysart is President of The Dysart Group, a higher education consulting firm specializing in recruitment, financial aid, college finance and retention. John has held leadership positions at five colleges and universities and provided consulting services for more than thirty years. John served full-time in financial aid and enrollment positions at three career colleges.

Mr. Dysart has assisted more than 200 colleges and universities in 42 states. While the majority of his consultations have been related to enrollment management and enrollment growth, he has a special expertise in finance and financial aid issues. He has consistently integrated enrollment management with institutional objectives regarding net revenue, budgeting and strategic planning.

Considered a national expert in enrollment management, John Dysart has conducted seminars and made dozens of presentations for eighteen higher education professional organizations and has written nearly 50 articles for higher education publications.

**Pasquale (Dante) Gentile*****Product Manager, ECSI***

Dante started his career at ECSI in 2015 after graduating from Saint Vincent College. He started out as an Associate Product Manager and since was promoted to Product Manager, Senior Product Manager, and most recently Program Manager for RecoverySelect. In this role, Dante is now responsible for managing and improving the RecoverySelect product. Dante enjoys watching and playing sports, overnight hiking, and spending time with his future wife, Melissa.

**Lori Hartung*****Director, Midwest Region, Todd, Bremer, & Lawson, Inc.***

Lori S. Hartung is the Director Sales & Service for Todd, Bremer & Lawson, Inc. a third-party collection agency that specializes in higher education account receivable management. Her responsibilities include managing TB&L's clients in the Midwest region and training the community on regulatory requirements.

In addition to her core responsibilities at Todd, Bremer & Lawson, Inc. Lori is the primary representative to the Coalition of Higher Education Assistance Organizations (COHEAO). Lori has been elected as COHEAO's President assuming her role in early 2019. COHEAO maintains a sharp focus on legislative and regulatory advocacy, educational access, and interactive communication for all federally funded student loan programs. In addition to her position on the Board of Directors, she is also a member of the Loan Task Force, Agenda, and Commercial Committees. COHEAO awarded Ms. Hartung the 2012 & 2019 Commercial Member of the Year.

Lori is a member of several regional organizations such as the Wisconsin Association of Student Business Office Personnel and Administrators (WASBOPA), and the Minnesota Collections Network. She currently serves on the Board of both organizations.

Ms. Hartung has been involved in the Student Loan industry in various capacities since 1991. Before joining Todd, Bremer & Lawson, Inc., she was the Senior Manager of Government and Industry Relations for University Accounting Service (UAS).

Lori is a 1989 graduate of the University of Wisconsin with a Bachelor degree in Political Science. She lives in Dousman, Wisconsin with her husband, two (2) dogs, two (2) cats, and 40,000 honey bees.

**Chris Howard*****Senior Solutions Engineer, TouchNet***

Chris Howard is a Senior Solutions Engineer at TouchNet. During his 15 year career at TouchNet, Chris has been involved in client implementations, client and internal training, and solutions engineering. His experience encompasses the entire TouchNet solutions platform. Chris has a Bachelor of Science in Accounting and a Master's of Science in Accounting with an Accounting Information Systems focus.

**Eric Ives*****Senior Vice President & General Manager, ECSI***

Eric has been with ECSI for 18 years. In this role, Eric is responsible for the oversight and performance of ECSI. Eric has performed multiple roles within the company including information technology, customer service management, and product development. Through Eric's experience and extensive knowledge, he is able to ensure optimal performance across the organization.

**James Jones*****Senior Executive VP of Sales & Marketing,
Reliant Capital Solutions, LLC***

After nearly 20 years in the hospitality industry, including owning a Bed & Breakfast, James began his career in the collections industry with Higher Education more than 30 years ago. Currently he is the Sr. Executive VP of Sales & Marketing for Reliant Capital Solutions where he has successfully partnered with more than 200 institutions. James co-founded HEARO more than 10 years ago, as well as co-founding ECHEAO just over 5 years ago (both of which he is still an active committee member of). He is the creator of the Perkins Forum, partnering with ECSI, in presenting a couple of dozen workshops across the country discussing Perkins from birth to grave. He also served on the PacWest SFS steering committee for 2 terms and is now one of the first commercial partners to serve on the Massachusetts Bursar Association steering committee. James also enjoys being married, has 4 adult children and 4 grandchildren, and running mountain trails and on the beach.

**Cheryl Mazeski*****Compliance Consultant, ECSI***

Cheryl is responsible for compliance management and ensures ECSI product lines and internal processes meet industry standards as well as comply with federal and state law and regulatory requirements associated with student loan servicing and related activities. Cheryl joined ECSI in 2009 and has maintained several positions during her tenure and has developed a strong working knowledge of the student aid industry and ECSI's many product lines. Prior to joining ECSI, Cheryl practiced in the area of defense-side products liability representing a major corporate client throughout Pennsylvania, Ohio and West Virginia. Cheryl graduated from Canisius College with a degree in Communications and received her Juris Doctor from the University of Akron, School of Law.

**Dave McDonald*****Supervisor, Training & Documentation, ECSI***

Dave has been a member of the ECSI family for 17 years, spending much of that time working in customer-facing positions with Customer Service, Production Processing, and Client Support. During the last 6 years, Dave has been a member of the training and development team, working as an educator and documentarian for both client and internal training. Dave lives in the South Hills of Pittsburgh with his lovely girlfriend, Stephanie, and their Australian Shepherd, Maggie. When not educating the education industry, Dave is active in the Pittsburgh Theater and Film scene, working on many feature films and theater productions in the area. When not in front of an audience, Dave enjoys playing hockey, softball, and golf.

**Julia Norwood*****Manager, Product Management, ECSI***

Julia started her career in Higher Education in 2007 as the Project Manager for Heartland's Give Something Back program, an all-in-one Student ID Card payment solution for on and off-campus purchases. She then joined ECSI's Product Management team and participated in the 2014 Department of Education's Negotiated Rulemaking Process for Cash Management to support Heartland's Acceluraid and ECSI's RefundSelect disbursement products. She's also led enhancement efforts for ECSI's payment solutions and implemented a self-service IVR in 2018 that provided automated account information and payment options for Federal Perkins and Institutional Loans and Tuition Payment Plans. Since that time, she has focused on ensuring ECSI's payment solutions comply with PCI and NACHA's payment rules and standards.

**Kristy Pritchett*****Director of Student Account Services, University of Alabama***

Kristy Pritchett serves as the Director of Student Account Services at The University of Alabama. Her office oversees all University revenue, more than 40 loan fund accounts including the institution's Perkins loan program, and all University collection activity. Kristy has worked in higher education for over 10 years and has more than over 20 years of experience in finance and banking. Established in 1831, the University of Alabama is the state of Alabama's oldest and largest public university enrolling over 38,000 students.

**Karin Sammons*****Regional Sales Executive, ECSI***

Karin has more than 18 years of consultative sales experience, and has been with ECSI since 2011. Her expertise is in managing our partner schools and providing prompt and courteous client support to assist schools in meeting the challenges of today's life cycle of the student. She strives to bring together both the experience and the knowledge to assist each school and prospective school with their distinct challenges.

**Juanita Saucedo*****Manager of Student Accounts, University of Nevada Las Vegas***

Juanita has been worked in higher education for 18 years. She began her career in the private higher education sector in the financial aid office. For the past 13 years, Juanita has been with UNLV as the Student Accounts Manager. In her role, Juanita oversees the daily operations of cashiering and the student accounts office which has 13 total employees. Juanita's team handles the billing, payments, and refunding of fees for all UNLV students. UNLV is one of the most diverse campuses in the U.S. with more than 30,000 students and is in the top 3% of research universities nationwide.

**Tom Sinton*****Program Manager, ECSI***

Tom has been with ECSI since 1999, and spent most of his career with ECSI as a Software Engineer. However, he has also worked in ECSI's Call Center, as well as on the Production Support and Banking Operations teams. As the Senior Program Manager for ServicingSelect and TuitionSelect, Tom oversees the day-to-day operations for the products, coordinates with other departments at ECSI to ensure the products have the necessary resources required for peak performance, works closely with Product Management and clients to identify areas of improvement for the products, and ensures the products remain compliant.

**Chris Stompanato*****Client Relationship Coordinator, SME, ECSI***

Chris has over 30 years of client consulting/marketing experience with Student Loan Servicing and has been with ECSI for over 14 years. Prior to joining ECSI, Chris spent 20 years with ACS managing Perkins loan portfolios for school clients. His resume includes responsibility for managing the partnerships of some of the largest Perkins and campus-based loan schools, a role he has assumed with ECSI. His various positions have provided him with a well-rounded background in outsourcing to institutions in higher education. Chris serves as ECSI's subject matter expert on Perkins and other campus-based loans, 1098-T's, and delinquent receivables. He has given presentations at numerous industry events and has been a COHEAO representative for over 15 years, while serving on the COHEAO Board for nearly a year. Chris is a graduate of the University of Illinois – Chicago.

**Laura Woods*****Senior Manager, Application Development Business Analysis/ Quality Assurance, ECSI***

Laura is responsible for the quality testing of all applications at ECSI. Laura has 25 years of leadership, application quality control, process improvement and project management experience. Laura joined ECSI in 2012 and is focused on utilizing technology to augment ECSI's applications and enhancing both technical and business processes via automation.

**Sean Swarner***Swarner Expeditions & Adventures,**Speaker | Author**Performance Coach Adventurer | World Record Holder*

Sean's first goal was to crawl 8 feet from the hospital bed to the bathroom. He went on to Redefine Impossible by climbing 29,035 feet to the top of Mt. Everest with one lung! From there he stood atop the highest point on all 7 continents, skied to the South and North Poles, and completed the Hawaii Ironman. Sean has been interviewed by Steve Harvey, CBS Evening News, Fox & Friends, The Today Show, Good Morning America, The Early Show, Huffington Post, Outside the Lines, Sports Center, Washington Post, USA Today, Sports Center, and countless others. His numerous articles with thought leaders such as Sir Richard Branson and Arch Bishop Desmond Tutu put him in a category by himself.

Sean is the first cancer survivor to stand on the top of the world! With only one functioning lung, a prognosis of fourteen days to live, and being in a medically-induced coma for a year, Sean Swarner is the first cancer survivor to stand on top of the world... Mt. Everest. Sean has broken through defined human limitation in order to redefine the way the world views success.

Sean was diagnosed with two deadly, different, and unrelated forms of cancer, once at the age of thirteen and again at the age of sixteen. After an incredibly poor prognosis, and being read his last rites, Sean astounded the medical community when he survived both these brutal diseases. He realized that after defeating cancer twice, no challenge would ever be too great, no peak too high.

Sean proved his theory when he crested the peak of Mt. Everest. As the first cancer survivor to do so, Sean decided to continue climbing and has since topped the highest peaks in Africa, Europe, South America, Australia, Antarctica, and North America, thus completing the "7-Summits." Upon skiing to both the South and the North Poles, Sean completed the Explorer's Grand Slam.

With the completion of the Ironman World Championship in Hawaii, Sean is the only person in history to accomplish these inhuman feats.

As Sean continues to defy the odds, test his own endurance and inspire and motivate people around the world, he shares his message of healing, hope, and triumph with cancer patients worldwide. Sean also serves as a source of inspiration as the founder of the non-profit organization, The CancerClimber Association, as author of the book "Keep Climbing," and as a motivational speaker to corporations, universities, and other organizations around the globe.



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