



# Your Policy Manual: Is It Working for You?

Erika Callahan, Senior Financial Aid Counselor  
Northern Essex Community College, Haverhill and Lawrence, MA  
Shannon Carroll, Financial Aid Analyst  
Community College System of New Hampshire, Concord, NH  
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# We Plan to Cover

- ▶ Policy vs. Procedure
- ▶ Format
- ▶ Where to Start
- ▶ What is Required
- ▶ What Should be Included
- ▶ Updates
- ▶ Best Practices



# What's the Difference?

- ▶ Policies are clear and concise statements of how your organization will conduct business. Policies provide a guide.



- ▶ Procedures are how the policies are administered.
  - Should include who will do what and when.
  - What steps are taken.
  - What documents and/or programs are needed to complete the task.

# For Example: Policy/Procedure on awarding an institutional scholarship

## ABC Scholarship Policy

- ▶ Awarded to students with an EFC below \$10,000
- ▶ FAFSA must be submitted by the school's priority deadline of March 15th
- ▶ Applications begin April 1<sup>st</sup> and are accepted through May 1<sup>st</sup> for the following academic year
- ▶ GPA of over 3.5
- ▶ In the last year of a four year program
- ▶ Late applicants will be reviewed if funding is still available
- ▶ In cases where a student does not meet the above criteria, the scholarship coordinator can make an exception if he/she feels the student is at risk of withdrawing from the program

## ABC Scholarship Procedure

- ▶ Students self-identify by submitting the scholarship application to the FAO
- ▶ Applicants are coded in Banner as ABCsch in RRAAREQ in "N" status
- ▶ The Scholarship coordinator reviews all on-time applicants between May 2<sup>nd</sup> and May 15<sup>th</sup>
- ▶ The Scholarship coordinator compiles an excel spreadsheet of all on-time applicants using all the requirements of the scholarship which can be found at S:FAO/scholarships
- ▶ Students will be notified in writing (approved or denied) from the scholarship coordinator no later than June 1<sup>st</sup>
- ▶ Awards are added to Banner under the appropriate aid year and requirement of ABCsch is satisfied in RRAAREQ

Why bother?



# Why bother?

- ▶ Is it required?

## **Scope of this Policy & Procedures Manual:**

Federal regulations mandate that institutions have written policies and procedures. Beyond the federal requirement, there are many benefits to having a written document outlining office operations and practices. A policies and procedures manual provides a comprehensive resource for the FAO staff and is used in training new staff members. In addition, the manual can be distributed as an educational tool to other College employees who work outside of the FAO.

# Why Bother?

- ▶ Is it required?
- ▶ Federal regulations require written policies for *some* things.

# Why Bother?

- ▶ Is it required?

## The obvious ones:

- ▶ Verification
- ▶ Satisfactory Academic Progress



# Why bother?

- ▶ Is it required?
- ▶ In What Format?



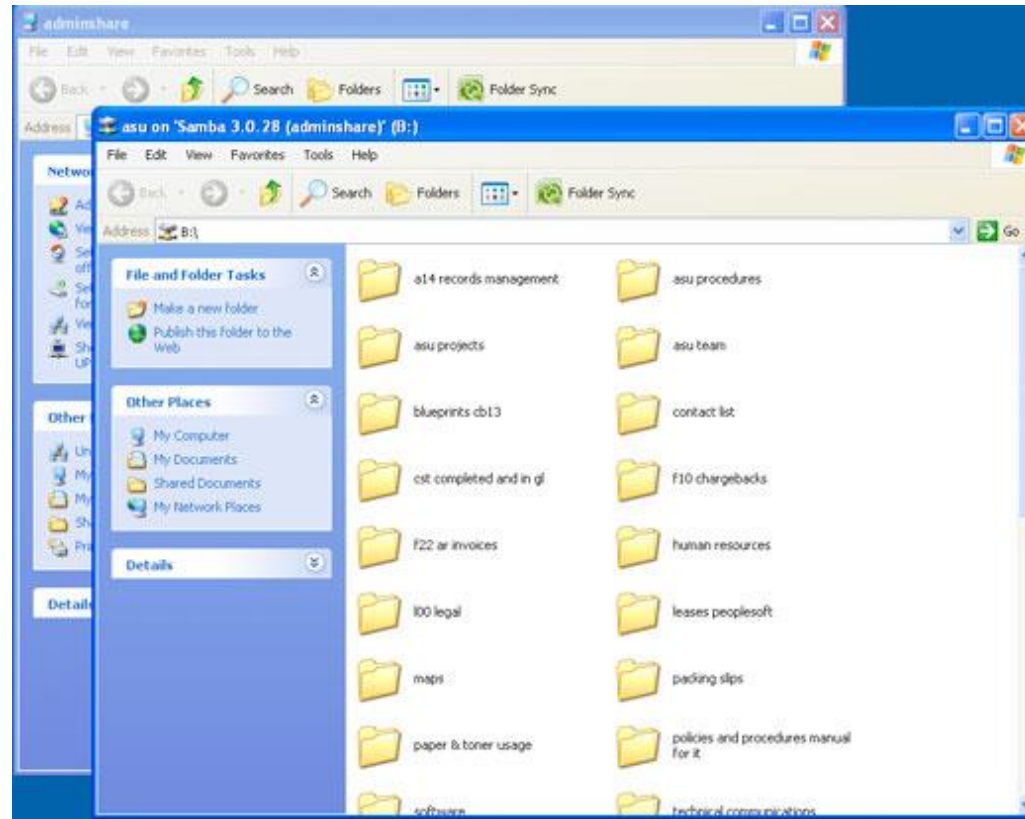
# Why Bother?

- ▶ Is it required?
- ▶ In What Format?



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# Why Bother?

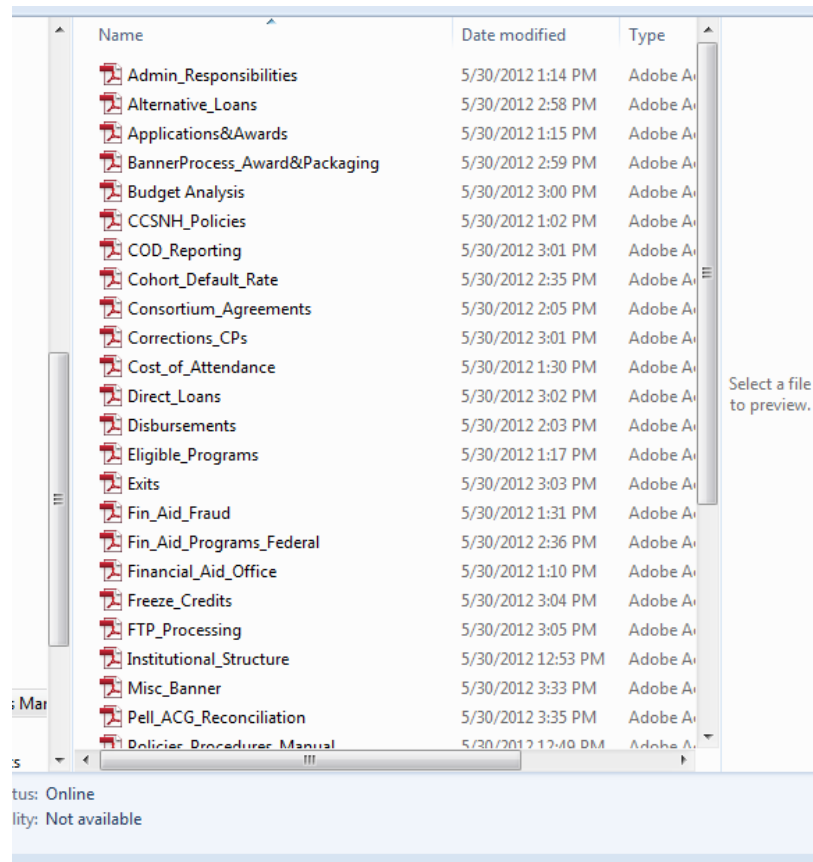
- ▶ Is it required?
- ▶ In What Format?
- ▶ What is the Purpose?

The purpose of this document is to record the policies and procedures related to the delivery of financial aid at [Insert Your College Here]. This manual provides the financial aid staff with the most up-to-date policies and procedures pertaining to the delivery of federal, state and institutional financial aid programs. This document ensures that the administration of financial aid at [Your College] is handled in a systematic and consistent manner.

# How Do I Get Started?



# The Brief History of a Policy & Procedure Manual



Name	Date modified	Type
Admin_Responsibilities	5/30/2012 1:14 PM	Adobe Acrobat PDF File
Alternative_Loans	5/30/2012 2:58 PM	Adobe Acrobat PDF File
Applications&Awards	5/30/2012 1:15 PM	Adobe Acrobat PDF File
BannerProcess_Award&Packaging	5/30/2012 2:59 PM	Adobe Acrobat PDF File
Budget Analysis	5/30/2012 3:00 PM	Adobe Acrobat PDF File
CCSNH_Policies	5/30/2012 1:02 PM	Adobe Acrobat PDF File
COD_Reporting	5/30/2012 3:01 PM	Adobe Acrobat PDF File
Cohort_Default_Rate	5/30/2012 2:35 PM	Adobe Acrobat PDF File
Consortium_Agreements	5/30/2012 2:05 PM	Adobe Acrobat PDF File
Corrections_CPs	5/30/2012 3:01 PM	Adobe Acrobat PDF File
Cost_of_Attendance	5/30/2012 1:30 PM	Adobe Acrobat PDF File
Direct_Loans	5/30/2012 3:02 PM	Adobe Acrobat PDF File
Disbursements	5/30/2012 2:03 PM	Adobe Acrobat PDF File
Eligible_Programs	5/30/2012 1:17 PM	Adobe Acrobat PDF File
Exits	5/30/2012 3:03 PM	Adobe Acrobat PDF File
Fin_Aid_Fraud	5/30/2012 1:31 PM	Adobe Acrobat PDF File
Fin_Aid_Programs_Federal	5/30/2012 2:36 PM	Adobe Acrobat PDF File
Financial_Aid_Office	5/30/2012 1:10 PM	Adobe Acrobat PDF File
Freeze_Credits	5/30/2012 3:04 PM	Adobe Acrobat PDF File
FTP_Processing	5/30/2012 3:05 PM	Adobe Acrobat PDF File
Institutional_Structure	5/30/2012 12:53 PM	Adobe Acrobat PDF File
Misc_Banner	5/30/2012 3:33 PM	Adobe Acrobat PDF File
Pell_ACG_Reconciliation	5/30/2012 3:35 PM	Adobe Acrobat PDF File
Policy_Procedures_Manual	5/30/2012 12:40 PM	Adobe Acrobat PDF File

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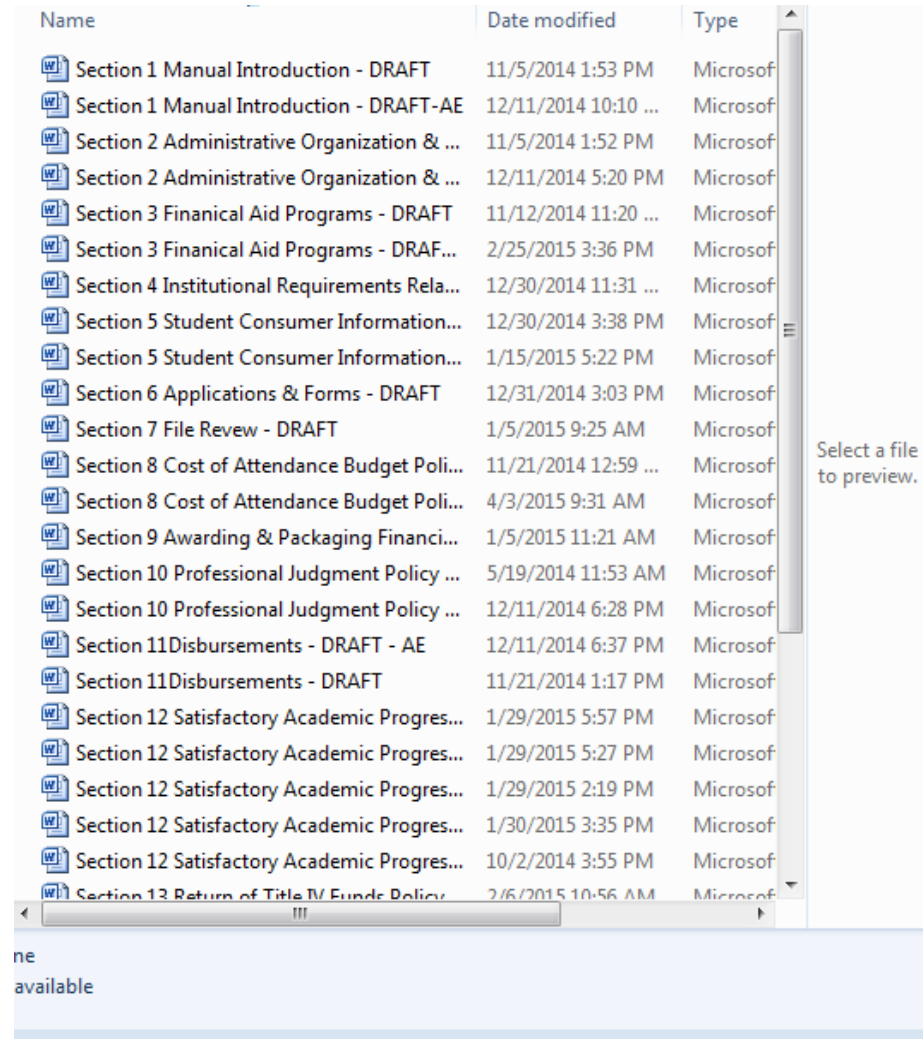
# How Should It Look?



[\[Click here to insert Your School's Name\]](#)

POLICIES & PROCEDURES MANUAL

# All In One Place?



Name	Date modified	Type
Section 1 Manual Introduction - DRAFT	11/5/2014 1:53 PM	Microsof
Section 1 Manual Introduction - DRAFT-AE	12/11/2014 10:10 ...	Microsof
Section 2 Administrative Organization & ...	11/5/2014 1:52 PM	Microsof
Section 2 Administrative Organization & ...	12/11/2014 5:20 PM	Microsof
Section 3 Financial Aid Programs - DRAFT	11/12/2014 11:20 ...	Microsof
Section 3 Financial Aid Programs - DRAF...	2/25/2015 3:36 PM	Microsof
Section 4 Institutional Requirements Rela...	12/30/2014 11:31 ...	Microsof
Section 5 Student Consumer Information...	12/30/2014 3:38 PM	Microsof
Section 5 Student Consumer Information...	1/15/2015 5:22 PM	Microsof
Section 6 Applications & Forms - DRAFT	12/31/2014 3:03 PM	Microsof
Section 7 File Review - DRAFT	1/5/2015 9:25 AM	Microsof
Section 8 Cost of Attendance Budget Poli...	11/21/2014 12:59 ...	Microsof
Section 8 Cost of Attendance Budget Poli...	4/3/2015 9:31 AM	Microsof
Section 9 Awarding & Packaging Financi...	1/5/2015 11:21 AM	Microsof
Section 10 Professional Judgment Policy ...	5/19/2014 11:53 AM	Microsof
Section 10 Professional Judgment Policy ...	12/11/2014 6:28 PM	Microsof
Section 11 Disbursements - DRAFT - AE	12/11/2014 6:37 PM	Microsof
Section 11 Disbursements - DRAFT	11/21/2014 1:17 PM	Microsof
Section 12 Satisfactory Academic Progres...	1/29/2015 5:57 PM	Microsof
Section 12 Satisfactory Academic Progres...	1/29/2015 5:27 PM	Microsof
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Section 12 Satisfactory Academic Progres...	1/30/2015 3:35 PM	Microsof
Section 12 Satisfactory Academic Progres...	10/2/2014 3:55 PM	Microsof
Section 13 Return of Title IV Funds Policy	2/6/2015 10:56 AM	Microsof

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# Final Product

Financial Aid | myCCSNH - Google Chrome

https://my.ccsnh.edu/policies/operational-policies-and-procedures-0/financial-aid

Apps Fin Aid Bookmarks CCSNH Related Sites Ellucian DJs - 105.5 JYJ Convert Word Docu... Bookmarks John H Fuller: Staff ... Other bookmarks

Dashboard Content Structure Help Hello scarroll Log out

## Financial Aid

Home » Policies

**Policies**

- Accounts Payable
- Accounts Receivable
- Board Policies
- CCN Employment Posting
- Fees
- Financial Aid
- Grants
- System

**View** **Edit**

### Policies:

*This page contains the financial aid policies developed by the Financial Aid Directors of the seven Community College System of New Hampshire institutions. These policies will be reviewed and updated annually at the start of each aid year. Should a discrepancy be found between these policies and the [Federal Student Aid Handbook](#), the content of the Federal Student Aid Handbook shall be considered the final authority.*

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- [Section 2: Administrative Organization & Office Management Policy](#)
- [Section 3: Financial Aid Programs](#)
- [Section 4: Institutional Requirements Relating to Educational Loans](#)
- [Section 5: Student Consumer Information Requests](#)
- [Section 6: Applications & Forms](#)
- [Section 7: File Review](#)
- [Section 8: Cost of Attendance Budget Policy](#)

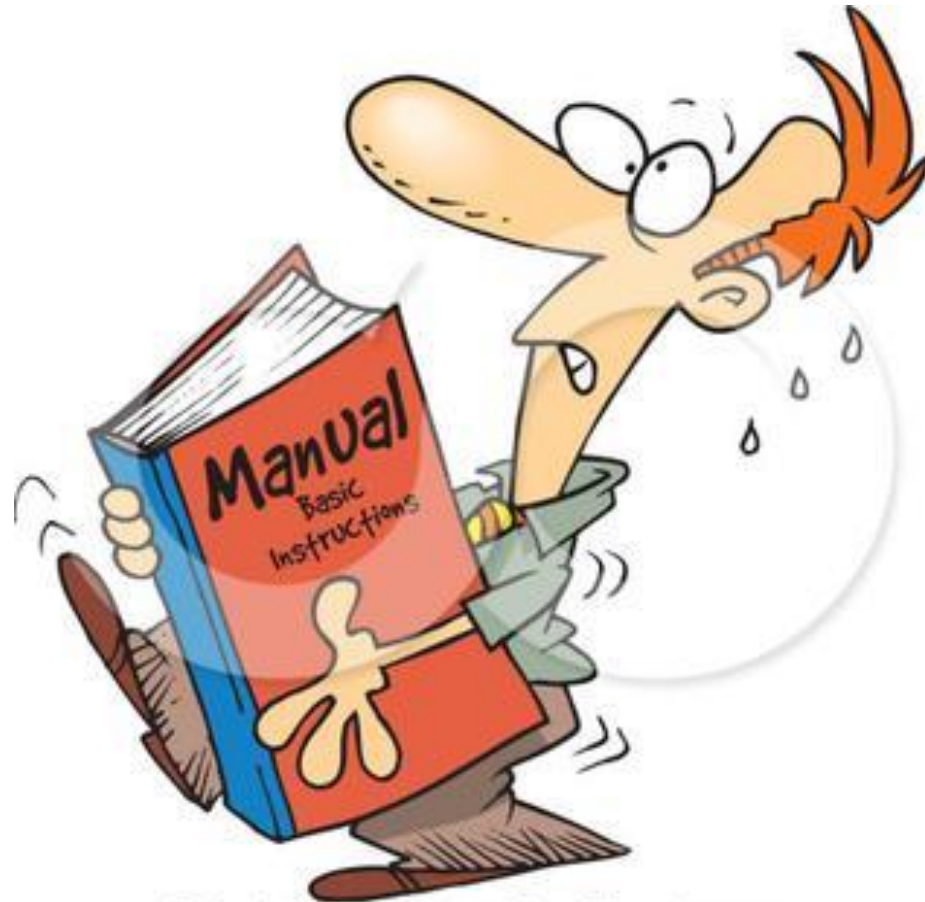
# Where Do I Start?

*Know Your Resources*



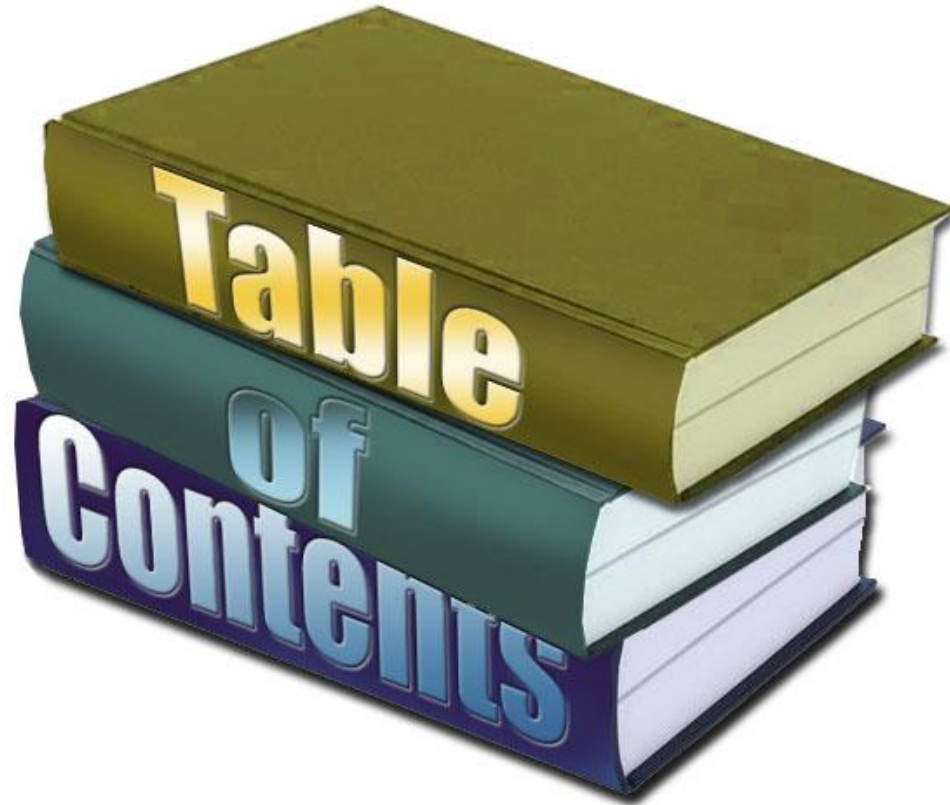
# Where Do I Start?

*Deciding on Location and Format*



Where to Start?

*Organizing and Drafting Manual Content*



# Where to Start?

## *Document Review and Approval*



# Policy vs. Guidance

- ▶ If it is required
- ▶ If it is practice
- ▶ If it is professional judgment



# Best Practices

- ▶ Review Annually
- ▶ Update As You Go
- ▶ Federal and State Changes & Guidance
- ▶ Emails
- ▶ Trainings & Presentations
- ▶ Program Area Responsibilities
- ▶ Meeting Notes
- ▶ Two Team Members Retain Overall Ownership

