



NASFAA's Compliance Engine

GREG GEARHART, DIRECTOR OF FINANCIAL AID, MESSIAH COLLEGE
TIFFANY GIBBS, COMPLIANCE PRODUCTS MANAGER, NASFAA

Self-Evaluation Checklists



Intended Uses of the Self-Evaluation Checklists



Self-audit tool to help prepare for outside audits and program reviews;

Develop a profile of financial aid operations for affirmation and/or revision of institutional policies, office procedures, and administrative controls;

Document the need for an operating budget, staffing, and/or physical accommodations commensurate with the size and scope of the institution's financial aid programs;

Train new staff and enhance the skills and knowledge of current staff;

Assist in the preparation of reports;

Serve as an outline for periodic checks of financial aid operations to determine progress being made in plans for improvement; and

Provide an outline of information to be included in the financial aid and/or institutional policies and procedures manuals.



Unsure where to start?

Choose compliance goals below to view applicable checklists.

WHAT WOULD YOU LIKE TO DO?

- ☐ Assess our administrative capability
- ☐ Evaluate our federal grant programs
- ☐ Evaluate our federal loan programs
- ☐ Evaluate our campus-based programs
- ☐ Assess student eligibility requirements
- ☐ Assess needs of special populations
- ☐ Review supporting compliance-related materials

GET STARTED

Search and Browse Checklists

Keyword:

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS

Choose Checklists According to Goals

Unsure where to start?

Choose compliance goals below to view applicable checklists.

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GET STARTED

Search and Browse Checklists

Keyword:

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS



Search by Checklist Title or Topic

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☒ Include Archived Content

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GET STARTED

Search and Browse Checklists

Keyword:

Satisfactory Academic Progress

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS

View all checklists

Search Results

Enter a term to search saved and new checklists and if selected, user-entered content. You may wish to make your search term specific to limit results.

Satisfactory Academic Progre

Search

☒ Include

Any Saved Checklists
will show first

Keyword: *Satisfactory Academic Progress*

13 Results

Sorted by: [Checklist Name](#) | **Date Created**

My Saved Checklists

Your search term appears in the following checklists. Select an item to work within that existing checklist, or review checklists managed by your colleagues.

Keyword: *Satisfactory Academic Progress*

13 Results

Sorted by: [Checklist Name](#) | **Date Created**

Followed by any New
Checklists

New Checklists

Enter a term to search template and, if selected, user-entered content. You may wish to make your search term specific to limit results.

Federal Direct Student Loan Program - 2017-18 April 2018

Tab: Loan Limits

Item: Direct Loans - VI.L.



Satisfactory Academic Progress - 2018-19

Note: Periodically, exceptions to or waivers of certain statutory and regulatory requirements are granted due to national emergencies and/or federally declared disasters. Information regarding exceptions/waivers for the 2018-19 award year may be found in the [Checklist Instructions](#).

Select Sub-Tab

General

Pace of Progression and Transfer Credits

Review of SAP After Each Payment Period

Note: Institutions that review SAP less frequently than after each payment period should skip this section.

Review of SAP Annually

Note: Institutions that completed the section, "Review of SAP After Each Payment Period" should skip this section.

Schools That Do Not Allow Appeals, Students Who Do Not Appeal, and Students Whose Appeals Have Been Denied

PROCEED

Satisfactory Academic Progress - 2018-19

ASSIGN CHECKLIST ITEMS

View/Add Assignments Comments

Contents | General | Pace of Progression and Transfer Credits | Review of SAP After Each Payment Period | Review

Jump to first unanswered checklist item

5 COLUMN(s) DISPLAY

RESOURCES	ITEM	Responsible Office	RESPONSE	DUE DATE	COMPLETE?
668.16(e) 668.42(c)(2)	A. Does the school have a financial aid satisfactory academic progress (SAP) policy that it publishes and makes readily available to current and prospective students? Add Comments	Responsible Office <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>
668.34(a)(1) 2018-19 FSA Handbook, Vol. 1, Ch. 1	<i>Updated item since previous version</i> B. Is the financial aid SAP policy the same as or stricter than the school's academic progress policy for non-Title IV recipients? Add Comments	Responsible Office <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>

Direct Links to Compiled Regulations and Other Resources



Satisfactory Academic Progress - 2018-19

View/Add Assignments Comments

ASSIGN CHECKLIST ITEMS

[Contents](#) | [General](#) | [Pace of Progression](#) | [Payment Period](#) | [Review of SAP Annually](#) | [Schedule](#)

[Jump to first unanswered checklist item](#)

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Satisfactory Academic Progress - 2018-19

[View/Add Assignments](#) [Comments](#)

ASSIGN CHECKLIST ITEMS

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[General](#)
[Pace of Progression and Transfer Credits](#)
[Review of SAP After Each Payment Period](#)
[Review of SAP Annually](#)
[Sche](#)

Jump to first unanswered

RESOURCES

668.16(e)
668.42(c)(2)

668.34(a)(1)
2018-19 FSA
Handbook, Vol. 1,
Ch. 1

IT

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Updated item since previous version

B. Is the financial aid SAP policy the same as or stricter than the school's academic progress policy for non-Title IV recipients? [Add Comments](#)

Responsible Office

Responsible Office

Responsible Office

RESPONSE

☐ Yes ☐ No

☐ Yes ☐ No

DUE DATE

COMPLETE?

☐

☐

Note Appropriate Office
Not an Assignment

5 COLUMN(s) DISPLAY ▾

Satisfactory Academic Progress - 2018-19

[View/Add Assignments](#) [Comments](#)

ASSIGN CHECKLIST ITEMS

◀ Contents | General | Pace of Progression and Transfer Credits | Review of SAP After Each Payment Period | Review of SAP Annually | Schc ▶

Jump to first unanswered checklist item

Record Response

5 COLUMN(S) DISPLAY ▼

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What Do the Responses Mean?

A "**yes**" response to a question indicates the institution is meeting the requirement or standard presented;

A "**no**" response means some follow-up action is necessary to ensure the requirement is met;

A "**n/a**" response should be used whenever the question is not applicable to the institution (e.g., the institution may not be participating in all of the Title IV programs); and

Comments or explanations of certain responses may be provided in the space available with each individual item.

Satisfactory Academic Progress - 2018-19

[View/Add Assignments](#) [Comments](#)

ASSIGN CHECKLIST ITEMS

Contents General Pace of Progression and Transfer Credits Review of SAP After Each Payment Period Review of SAP Annually Scho				
Jump to first unanswered checklist item		Populates if Assigned		5 COLUMN(S) DISPLAY ▾
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Satisfactory Academic Progress - 2018-19

[View/Add Assignments](#) [Comments](#)

[◀](#)
[Contents](#)
[General](#)
[Pace of Progression and Transfer Credits](#)
[Review of SAP After Each Payment Period](#)
[Review of SAP Annually](#)
[Schc](#)
[▶](#)

Jump to first unanswered checklist item

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Indicate if Complete

5 COLUMN(s) DISPLAY ▼

Satisfactory Academic Progress - 2018-19

View/Add Assignments Comments

◀ Contents | General | Pace of Progression and Transfer Credits | Review of SAP After Each Payment Period | Review of SAP Annually | Schc ▶

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Assign Items for: Satisfactory Academic Progress - 2018-19: General

Individuals you can assign tasks to are listed below. Primary contacts can [visit the myNASFAA area of the NASFAA website](#) to adjust the roster.

☒ Assign Tab ☐ Assign Entire Checklist

ASSIGN TO

Comments/Instructions

Due Date

ASSIGN

An email notification will be sent immediately to the assignee.

[Assign Individual Checklist Items or Unassign Items](#)

Promote Interdepartmental collaboration.

Assign to individuals in your organization

Assign individual items, tabs or entire checklist (all tabs)

Set due date

Include message if desired

Assignments emailed to users



NASFAA
**SELF-EVALUATION
CHECKLISTS**
A COMPLIANCE ENGINE MODULE

View Your Checklists

Welcome, Tiffany

LOGOUT

GO TO P&P BUILDER

MY CHECKLISTS

ASSIGNMENTS

START A NEW CHECKLIST

Unsure where to start?

Choose compliance goals below to view applicable checklists.

WHAT WOULD YOU LIKE TO DO?

- ☐ Assess our administrative capability
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- ☐ Evaluate our campus-based programs
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- ☐ Assess needs of special populations
- ☐ Review supporting compliance-related materials

GET STARTED

Search

Keyword:

Keyword

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS

- Checklists you started
- Checklists assigned to you
- Print Checklist data

Unsure where to start?

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GET STARTED

Search and

Keyword:

Keyword

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS

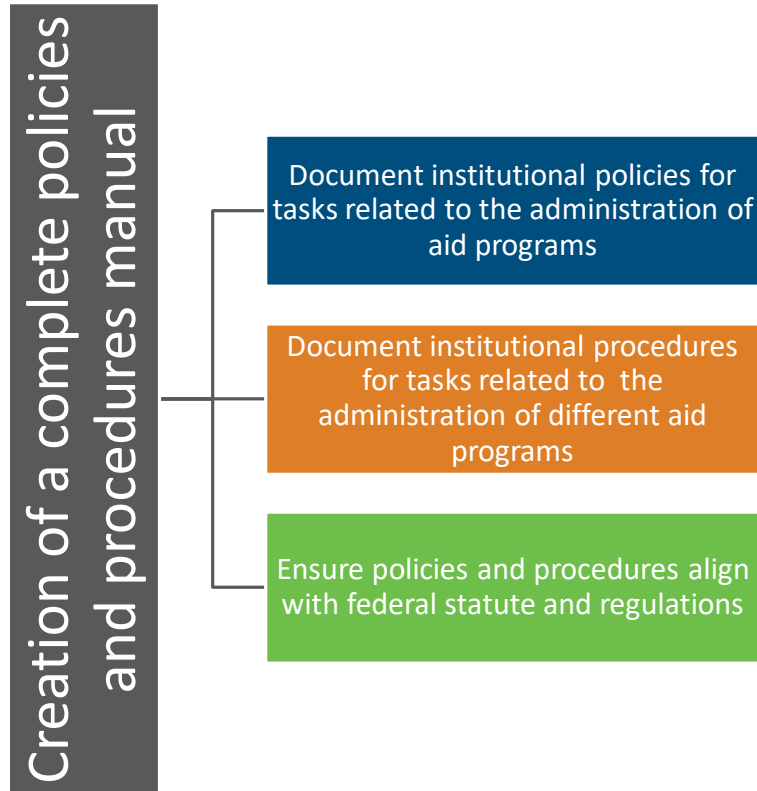
- Checklists you assigned
- Checklists assigned to you
- Print assignments info



Screenshare

Policies and Procedures Builder

Intended Uses of the P&P Builder



Create Policies and Procedures Manuals

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GET STARTED

Search and Browse Checklists

Keyword:

- ☒ Include User-Entered Content
- ☒ Include Archived Content

SEARCH CHECKLISTS

Start A New Manual

When naming your manual, we suggest including the academic year in your manual name, such as "University of School's 2016-17 Policies & Procedures." Proceed to enter your manual content. After you've selected "Save" or "Save and Proceed" in any section, your manual will be available in your My Manuals dashboard. Once saved, P&P manual components can be assigned to staff on your institution/organization roster and, across departments. We welcome your feedback and suggestions via the [Compliance Engine Feedback Form](#).

NASFAA is pleased to offer an option for schools that want help with this work from experienced professionals. [Financial Aid Services \(FAS\)](#), NASFAA's preferred provider for P&P conversions, has tenured consultants with deep financial aid knowledge who can do the heavy lifting for you.

Enter a custom name for your institution's Policies & Procedures Manual:

- ☐ Limit access of this manual to owner and assignees, only. Other users in your organization will not be able to view this item, but the manual will still appear in organization lists. Owners and Primary Contacts are able to transfer ownership of items with this setting.
- ☒ Allow anyone from my organization read-only access to this manual. Owner and assignees can make changes, owners and Primary Contacts can transfer ownership.

CREATE A NEW MANUAL



View Manuals and Assignment Summaries

Welcome, Tiffany

LOGOUT

GO TO COMPLIANCE ENGINE

MY MANUALS

ASSIGNMENTS

START A NEW MANUAL

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CREATE A NEW MANUAL



Welcome, Tiffany

LOGOUT

GO TO COMPLIANCE ENGINE

MY MANUALS

ASSIGNMENTS

START A NEW MANUAL

XYZ University 2019-20

[View/Add Assignments](#) [Comments](#)

ASSIGN P&P ITEMS

◀ Section 2: Administrative Organization and Office Management | Section 3: Financial Aid Programs | Section 4: Institutional Requirements Relating to Financial Aid ▶

RESOURCES

ITEM [Show All Item Comments](#) | [Expand All Items](#) | [Collapse All Items](#)

DUE DATE

COMPLETE?

▼ 4.1 PRIVATE EDUCATION LOAN DISCLOSURES

0

☐

▼ 4.2 PREFERRED LENDER ARRANGEMENTS

0

☐

Select the section to edit

1 N(s) DISPLAY ▼

Direct Links to Compiled Regulations and Other Resources

ITEM [Show All Item Comments](#)

0

☐

4.1 PRIVATE EDUCATION

2017-18 FSA
Handbook, Vol.
2, Ch. 5

Updated item or resource from last year's version.

If the institution or any of its institution-affiliated organizations provides information regarding a private education loan from a lender to a prospective borrower, the institution or institution-affiliated organization also must provide the following disclosures regardless of whether a preferred-lender arrangement exists:

- Information required under section 1238(e)(1) of the Truth in Lending Act (TILA) for private education loans
- The borrower may qualify for loans or other assistance under Title IV programs
- The terms and conditions of loans under the Title IV programs may be more favorable than those of private education loans

The financial aid office staff should be aware of institutional policies and practices for providing information about private academic office, and institution-affiliated institution's policies for providing information

[illegible]

NEXT

Preview

4.1 PRIVATE EDUCATION LOAN

Enter Content into Template

Policies

601.2(b)
601.11(a-c)

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The financial aid office staff should be aware of institutional policies and practices for providing information about private education information prospective borrowers. Identify any administrative office, academic office, and institution-affiliated organization that provide information about loans to prospective borrowers.

Procedures

Explain how institutional offices and institution-affiliated organizations are made aware of the disclosure requirements. Describe procedures for making the required disclosures, when they must be made, and in what format. Identify who is responsible for ensuring the information about private education loans is presented distinctly from information about Title IV loans, monitoring any change in the disclosure requirements, updating the disclosure information as needed, and making the disclosure information available to each institutional office and institution-affiliated organization. If another office is responsible, you may want to cross-reference that office's policies and procedures.

Populates if Assigned

RESOURCES

ITEM [Show All Item Comments](#) | [Expand All Items](#) | [Collapse All Items](#)

DUE DATE

COMPLETE?

▲ 4.1 PRIVATE EDUCATION LOAN DISCLOSURES

0

Policies

601.2(b)

601.11(a-c)

Federal Register,
10/28/09, p.
55628

2017-18 FSA
Handbook, Vol.
2, Ch. 5

Updated item or resource from last year's version.

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Paragraph 11pt B I U T_x A A Academic office, and institution-affiliated
institution's policies for providing information

SAVE

NEXT

Preview

Indicate if Complete

[UPDATE](#) [COMPLETE?](#)

▲ 4.1 PRIVATE EDUCATION LOAN DISCLOSURES

0



Policies

601.2(b)

601.11(a-c)

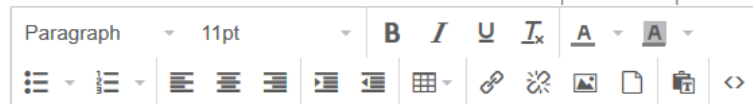
[Federal Register](#),
10/28/09, p.
55628[2017-18 FSA](#)
Handbook, Vol.
2, Ch. 5*Updated item or resource from last year's version.*

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academic office, and institution-affiliated
institution's policies for providing information



SAVE

NEXT

Preview



XYZ University 2019-20

[View/Add Assignments](#) [Comments](#)

Welcome, Tiffany

LOGOUT

GO TO COMPLIANCE ENGINE

Assign items to others

ASSIGNMENTS

START A NEW MANUAL

ASSIGN P&P ITEMS

◀ Section 2: Administrative Organization and Office Management | Section 3: Financial Aid Programs | Section 4: Institutional Requirements Relating to ▶

3 COLUMN(s) DISPLAY ▼

RESOURCES

ITEM [Show All Item Comments](#) | [Expand All Items](#) | [Collapse All Items](#)

DUE DATE

COMPLETE?

▼ 4.1 PRIVATE EDUCATION LOAN DISCLOSURES

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▼ 4.2 PREFERRED LENDER ARRANGEMENTS

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XYZ University 2019-20

View/Add Assignments Comments

Section 2: Administrative Organ

RESOURCES

ITEM Show All Item Comm

4.1 PRIVATE EDUC

Policies

601.2(b)

601.11(a-c)

Federal Register, 10/28/09, p. 55628

2017-18 FSA Handbook, Vol. 2, Ch. 5

Updated item or resou

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- Information required u
- The borrower may qua
- The terms and condit

The financial aid office sta education information pr organization that provide about private education loans to prospective borrowers.

Welcome, Tiffany

LOGOUT

GO TO COMPLIANCE ENGINE

MENTS

START A NEW MANUAL

ASSIGN P&P ITEMS

Institutional Requirements Relating

3 COLUMN(s) DISPLAY

DUE DATE COMPLETE?

0

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loans

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SAVE

NEXT

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Assign Items for: XYZ University 2019-20: Section 4: Institutional Requirements Relating to Educational Loans

Individuals you can assign tasks to are listed below. Primary contacts can [visit the myNASFAA area of the NASFAA website](#) to adjust the roster.

☒ Assign Section ☐ Assign Entire Manual

ASSIGN TO

Comments/Instructions

Due Date

ASSIGN *An email notification will be sent immediately to the assignee.*

[Assign Individual P&P Items or Unassign Items](#)

Close



Screenshare

Cost

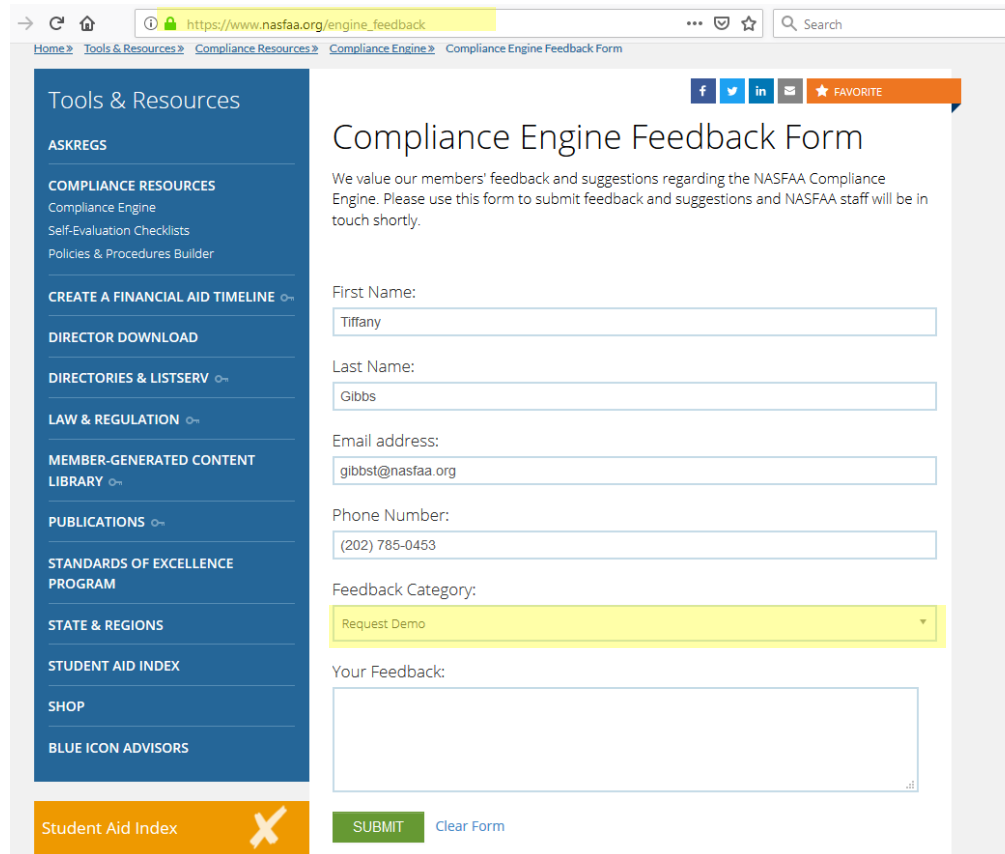


Self-Evaluation
Checklist Module =
Free member benefit!



P&P Builder = \$99 or
**Included with Value
Plus Membership!**

Request a Demonstration of the P&P Builder



The screenshot shows a web browser window with the URL https://www.nasfaa.org/engine_feedback. The page title is "Compliance Engine Feedback Form". The left sidebar contains a "Tools & Resources" menu with links to "ASKREGS", "COMPLIANCE RESOURCES" (including Compliance Engine, Self-Evaluation Checklists, and Policies & Procedures Builder), "CREATE A FINANCIAL AID TIMELINE", "DIRECTOR DOWNLOAD", "DIRECTORIES & LISTSERV", "LAW & REGULATION", "MEMBER-GENERATED CONTENT LIBRARY", "PUBLICATIONS", "STANDARDS OF EXCELLENCE PROGRAM", "STATE & REGIONS", "STUDENT AID INDEX", "SHOP", and "BLUE ICON ADVISORS". The main content area has a "Compliance Engine Feedback Form" heading and a message: "We value our members' feedback and suggestions regarding the NASFAA Compliance Engine. Please use this form to submit feedback and suggestions and NASFAA staff will be in touch shortly." The form fields include: "First Name:" (text box with "Tiffany"), "Last Name:" (text box with "Gibbs"), "Email address:" (text box with "gibbst@nasfaa.org"), "Phone Number:" (text box with "(202) 785-0453"), "Feedback Category:" (dropdown menu with "Request Demo" selected), and "Your Feedback:" (text area). At the bottom, there is a "SUBMIT" button and a "Clear Form" link. A "Student Aid Index" button with a red 'X' icon is also visible in the bottom left corner.

Tools & Resources

ASKREGS

COMPLIANCE RESOURCES

Compliance Engine

Self-Evaluation Checklists

Policies & Procedures Builder

CREATE A FINANCIAL AID TIMELINE

DIRECTOR DOWNLOAD

DIRECTORIES & LISTSERV

LAW & REGULATION

MEMBER-GENERATED CONTENT LIBRARY

PUBLICATIONS

STANDARDS OF EXCELLENCE PROGRAM

STATE & REGIONS

STUDENT AID INDEX

SHOP

BLUE ICON ADVISORS

Compliance Engine Feedback Form

We value our members' feedback and suggestions regarding the NASFAA Compliance Engine. Please use this form to submit feedback and suggestions and NASFAA staff will be in touch shortly.

First Name:

Tiffany

Last Name:

Gibbs

Email address:

gibbst@nasfaa.org

Phone Number:

(202) 785-0453

Feedback Category:

Request Demo

Your Feedback:

Student Aid Index

SUBMIT Clear Form