



How to Rollover Your P&P Manual

January 2020



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The screenshot shows the website <https://compliance.nasfaa.org>. A blue callout box points to the address bar with the text "Navigate to https://compliance.nasfaa.org". The website header includes the logo "ce NASFAA SELF-EVALUATION CHECKLISTS A COMPLIANCE ENGINE MODEL" and navigation links: "MY CHECKLISTS", "ASSIGNMENTS", "START A NEW CHECKLIST", and "GO TO P&P BUILDER". The main content area is divided into two sections: "Unsure where to start?" with a list of goals and a "GET STARTED" button, and "Search and Browse Checklists" with a search bar and checkboxes for "Include User-Entered Content" and "Include Archived Content". The footer contains the NASFAA logo, "© 2020 NASFAA", and the page number "1".

1

This screenshot is identical to the first one, but a blue callout box points to the "GO TO P&P BUILDER" button in the top right corner with the text "Click on 'Go to P&P Builder'".

2

How to Rollover Your P&P Manual

The screenshot shows the 'MY MANUALS' dashboard. At the top right, there are navigation links: 'MY MANUALS', 'ASSIGNMENTS', and 'START A NEW MANUAL'. A callout box points to the 'START A NEW MANUAL' link with the text 'Click "Start a New Manual"'. Below the navigation is a search bar with the text 'Search Manuals' and a 'Search' button. There are also checkboxes for 'Include User-Entered Content' and 'Include Archived Content'. A paragraph explains that saved and assigned manuals are listed below, and users can sort by column titles. A table lists three manuals:

DATE CREATED / ASSIGNED	MANUAL NAME	LAST MODIFIED	
8/23/2017	XYZ University 2017-18 EDIT ▲ Components Assigned Section 1: Manual Introduction: Tiffany Gibbs Section 2: Administrative Organization and Office Management: Tiffany Gibbs Section 2: Administrative Organization and Office Management: Debra LaGrone	5/10/2018	Actions
5/2/2018	Tiffany Test 2 EDIT	5/2/2018	Actions
5/10/2018	Xyz University 2017-18 EDIT	5/10/2018	Actions

At the bottom left is the NASFAA logo, and at the bottom right is the page number '3'.

3

The screenshot shows the 'Start A New Manual' form. At the top right, there are navigation links: 'MY MANUALS', 'ASSIGNMENTS', and 'START A NEW MANUAL'. A callout box points to the 'START A NEW MANUAL' link with the text 'Click "Start a New Manual"'. Below the navigation is a search bar with the text 'Search Manuals' and a 'Search' button. There are also checkboxes for 'Include User-Entered Content' and 'Include Archived Content'. A paragraph explains that saved and assigned manuals are listed below, and users can sort by column titles. A form field is labeled 'Enter a custom name for this institution's Policies & Procedures Manual:' and contains the text 'XYZ University 2018-19'. A callout box points to this field with the text 'Enter the name of the updated manual'. Below the form field are two radio button options for access control. A 'CREATE A NEW MANUAL' button is highlighted with a callout box that says 'Click "Create a New Manual"'. Below the form is a search bar with the text 'Search Manuals' and a 'SEARCH MANUALS' button. At the bottom left is the NASFAA logo, and at the bottom right is the page number '4'.

4

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The screenshot shows the top navigation bar with the NASFAA P&P BUILDER logo on the left and user information on the right. The user is identified as Tiffany, with options for LOGOUT and GO TO COMPLIANCE ENGINE. Below the navigation bar, the current institution is XYZ University 2018-19. A dark navigation bar contains three tabs: Contents, Section 1: Manual Introduction, Section 2: Administrative Organization and Office Management, and Section 3: Financial Aid Programs. The 'Section 1: Manual Introduction' tab is highlighted in yellow. A blue callout box with a white border points to this tab, containing the text 'Click a highlighted section or tab.' Below the navigation bar, the content area shows three links: 'Section 1: Manual Introduction' (highlighted), 'Section 2: Administrative Organization and Office Management', and 'Section 3: Financial Aid Programs'. The NASFAA logo and copyright information '© 2020 NASFAA' are at the bottom, along with the page number '5'.

5

The screenshot shows the same P&P BUILDER interface as above, but with a modal dialog box open. The dialog box is titled 'Pre-fill with Existing Data?' and contains the text: 'NASFAA has data for this form from current or previous years. Would you like to pre-fill your form with existing data? Select an option below.' Below this text is a list of radio buttons, each followed by a description of the data source and a 'Preview' link. Some entries have a 'Private' label. A blue callout box with a white border points to the dialog box, containing the text: '“Pre-fill with Existing Data” from any other manual your institution has created from current or previous years'. The background shows the same navigation bar and content area as in the previous screenshot. The NASFAA logo and copyright information '© 2020 NASFAA' are at the bottom, along with the page number '6'.

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Section 8: Student Budgets Filled out by Ardra Love and last updated on 1/13/2017. [Preview](#)

Section 9: Awarding and Packaging Filled out by David Futrell and last updated on 1/23/2017. [Preview](#)

Section 10: Professional Judgment Filled out by Carrie Conrad and last updated on 6/27/2017. [Preview](#)

Section 11: Disbursements Filled out by Emily MS and last updated on 2/6/2017. [Preview](#)

Section 12: Satisfactory Academic Progress Filled out by Laura Aberant and last updated on 2/8/2017. [Preview](#)

Section 13: Return of Title IV Funds Filled out by Beth Maglione and last updated on 2/10/2017. [Preview](#)

Section 14: Institutional Refunds Filled out by Dana Kelly and last updated on 2/24/2017. [Preview](#)

Section 15: Title IV Fraud Filled out by Margot O' Meara and last updated on 11/3/2017. [Preview](#)

Section 16: Audits Filled out by Laura Aberant and last updated on 6/27/2017. [Preview](#)

Section 17: Reserved for Institutional Use Filled out by Laura Aberant and last updated on 6/28/2017. [Preview](#)

Section 18: Appendices Filled out by Tiffany Gibbs and last updated on 5/10/2018. [Preview](#)

Do not pre-fill my form.

Select a manual

Click "Proceed"

Proceed

PROCEED

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Welcome, Tiffany [LOGOUT](#) [GO TO COMPLIANCE ENGINE](#)

P&P BUILDER

XYZ University 2018-19 [View/Add Assignments/Comments](#)

MY MANUALS | ASSIGNMENTS | START A NEW MANUAL

[ASSIGN P&P ITEMS](#)

Contents | Section 1: Manual Introduction | Section 2: Administrative Organization and Office Management | Section 3: Financial Aid Programs

3 COLUMN(S) DISPLAY

RESOURCES	ITEM	Show All Item Comments	Expand All Items	Collapse All Items	DUE DATE	COMPLETE?
	1.1 INTRODUCTION TO THE FINANCIAL AID OFFICE					<input type="checkbox"/>

Include a statement introducing your school's financial aid office to staff and others (such as appeals committees, other offices, or auditors) that may have reason to use or review the information contained in your policies and procedures manual.

Include the financial aid offices:

- Location(s)
- Hours of operation
- Fax and telephone numbers
- Email address
- Public website
- Social media sites, as applicable

Clarify the use and scope of the manual.

XYZ University is a public, 4-year institution with approximately 5,000 students, with all undergraduate students. They are located in the basement of the library.

Hours of Operation: Monday through Friday, 8:30 a.m. to 5:00 p.m.

Telephone number: (123) 456-7899

Fax number: (123) 456-0000

financial@xyz.edu

www.xyz.edu

The manual will be used to instruct all employees on the proper policies and procedures for handling student aid at the university.

Last Updated: 5/2/2018 | Last Updated By: Tiffany Gibbs

Save

Next

Preview

The manual now contains data from the most recent manual and now may be updated

Click "Save" after updates or changes are made

Click "Next" to proceed to the next section of the manual

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**The National Association
of Student Financial Aid
Administrators (NASFAA)
provides professional
development for financial
aid administrators; advocates
for public policies that increase
student access and success;
serves as a forum on student
financial aid issues; and is
committed to diversity
throughout all activities.**

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NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

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