

NASFAA



POLICIES & PROCEDURES
TOOLS

Manual Formatting

Page Formats

A standard page format can help organize a manual and keep track of the pages. When designing a format, use a numbering system that facilitates revisions and page replacements. Three sample formats are shown below.

Sample One

XYZ College

Financial Aid Office Manual of Policies and Procedures

Subject: Verification Page: 7.1-1

Issued by: P. Smith Approved by: J. Jones Effective: 01/01/03

Policy

The financial aid office will verify all applications flagged by the CPS for verification, up to 30% of the college's applicant pool.

Procedures

Application Clerk 1. Reviews report showing all students selected for verification...

Sample Two

Policies and Procedures Manual	XYZ College
Section 7: Verification	Financial Aid Office

- 7.1 The financial aid office will verify all applications for financial assistance.
- Upon receiving the ISIR, the computer system will trigger the printing of letter # ...

Sample Three

Policies and Procedures

Financial Aid Office XYZ College

Section 7: Verification	Published 2/16/03	Policy Number 7.1
Subject Selection of applications for verification	Effective Date 2003-04 award year	Page Number 1 of 3

- ◆ The financial aid office will verify all applications flagged by the Department of Education.
 1. The application clerk reviews report showing all students selected for verification...

Necessary Style Decisions

To the extent possible, you should make style decisions before starting to write the text of your manual. This will ensure consistency among the writers and avoid a lot of editing later in the process. Below are necessary style decisions in a checklist format so you can monitor your progress.

✓	Topic	Issue
	Bullets	<p>If you will use more than one style of bullet in your manual, identify each style, how it will be used in the text, and type of indentation, such as:</p> <ul style="list-style-type: none"> • Style of bullet – use when listing references; use hanging indent ⇒ Style of bullet – use to denote date specific tasks; use first line indent ❖ Style of bullet – use to denote registrar’s task ; use hanging indent
	Capitalization	Determine consistent format of capitalization for names of offices, financial aid programs, office forms, titles, etc.
	Columns	Decide on number of columns, width of each, & line spacing within each
	Font	Choose a font style that is available on your printer
	Font Size	<p>Choose different font sizes for:</p> <ul style="list-style-type: none"> • Text • Page Header • Page Footer • Title • Sub-Title
	Headers & Footers	Decide content & format (e.g., page numbers, section number or title, last change date, etc.)
	Headings & Titles	<p>Select format for headings & titles, making choices for:</p> <ul style="list-style-type: none"> • Capitalization: All caps, title case, etc. • Style: Bold only, italics only, bold & italics, etc.
	Indentation	Determine amount of space between margin text when indenting paragraphs
	Line & Paragraph Spacing	Choose amount of space to be used between & within paragraphs/rows (e.g., single, double, 1.5, etc.).
	Margins (page)	Determine page layout specifications (e.g., top, bottom, left, & right)

	Naming	Decide how references to offices, financial aid programs, forms, etc. will be used (e.g. full /formal name, acronyms, office codes, etc.)
	Numbers	Identify when words vs. numerals (e.g., twelve or 12) should be used
	Outline Format	If using an outline format, establish how levels of discussion will be represented, choosing type of outline, indentation spacing, capitalization, style, etc., such as: I. LEVEL 1 A. Level 2 1. Level 3 a) level 4
	Punctuation	Establish guidelines for consistent use of punctuation throughout manual
	Sources/Resources	Decide placement of resources in manual (e.g., footer, resource page, side margin, etc.) & determine naming conventions for resources (e.g., <i>FSA Handbook</i> , <i>Handbook</i> , <i>2003-04 FSA Handbook</i>)
	Symbols	Decide if symbols for mathematics (+, ÷, ×), money (\$) or special characters (&, @, *, %) will be used
	Voice	Determine format for use of employee names or job titles (e.g., “Mike runs the report” or “Assistant director runs the report”) & establish if text will be written in first person or third person (“Our office is open from 8 am to 5 pm” or “The financial aid office is open from 8 am to 5 pm”)

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