

**Institutional Participation Agreement (IPA)
Required Documentation Checklist for New Institutions**

The California Student Aid Commission provides forms for items 1 – 7.				
Forms are online at: http://www.csac.ca.gov/doc.asp?id=1361	New Public Schools	New Non-Public Schools	New Out- of- State Schools	*10% Schools
1. Cal Grant Institutional Participation Agreement initialed and with original signature	X	X	X	X
2. Cal Grant Program Review Survey	X	X	X	X
3. College Cost Estimate Form	X	X	X	X
4. Contact Information Form	X	X	X	X
5. Information Security and Confidentiality Agreement	X	X	X	X
6. System Administrator's Access Request Form	X	X	X	X
7. Electronic Fund Transfer Application	X	X	X	X
The Institution provides documentation for items 8 – 13.				
Institution documents required:	New Public Schools	New Non-Public Schools	New Out- of- State Schools	*10% Schools
8. Proof of Receipt of funds for the Pell Grant Program and at least two of the following federal campus-based student aid programs: Federal Work-Study, Perkins Loan Program, Supplemental Educational Opportunity Grant Program from the U.S. Department of Education (i.e. e-Campus Statement of Account, e-Campus Statement of Account, e-Campus-based Institutional Worksheet, and / or Pell Electronic Statement of Account)		X	X	*see below
9. Proof of Disbursement of funds for the Pell Grant Program and at least two of the following federal campus-based student aid programs: Federal Work-Study, Perkins Loan Program, Supplemental Educational Opportunity Grant Program from the U.S. Department of Education (i.e. institution's statement of accounts or accounting ledger for student disbursement)		X	X	*see below
10. Current Institutional Catalog	X	X	X	X
11. Third Party Audited Financial Statement for the past two years	X	X	X	X
12. Financial Aid Disbursement Policy	X	X	X	X
13. Cal Grant Refund Policy	X	X	X	X

- 10% School Defined: The institution is a nonprofit postsecondary institution headquartered and operating in California that: (a) expends at least 10% of the institution's operating budget, as demonstrated in an audited financial statement, for the purposes of institutionally funded student financial aid in the form of grants, (b) has demonstrated to the Commission that it has the administrative capability to administer the funds, and (c) is accredited by the Western Association of Schools and Colleges.

Institutions qualifying under the 10% Rule must also submit the "Financial Statement and Demonstration of Administrative Capability".