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Cal Grant Application Checklist
For a new school applying to participate in the Cal Grant Program

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Note: If your institution is requesting participation for additional locations, you may be required to submit additional documents for each campus. Please direct questions about required documents to csacipa@csac.ca.gov.

1. **Cal Grant Institutional Participation Agreement (IPA) – make sure to read the entire agreement**
   - ☐ Page 1: Addresses & list of officials should match what's listed on the ECAR.
   - ☐ Page 3: Fill in the name of your institution.
   - ☐ Page 20 & 21: Fill in your main institution's information, along with additional location information, if applicable. Additional locations should match those listed with the U.S. Department of Education.
   - ☐ Page 22: Select your type of institution (check only one box)
   - ☐ Page 23: President/CEO/Chancellor must sign the Cal Grant IPA.

2. **Cal Grant Program Review Survey**
   - ☐ Complete the survey to the best of your knowledge as it pertains currently to your institution.

2B. **Provide a copy of your institution's ECAR.**
   - ☐ Please make sure it is a current copy

3. **College Cost Estimate Form**
   - ☐ Please submit one College Cost Estimate for the program with the highest cost. Identify the start dates for your terms as they would be applicable for your Cal Grant payment periods. The payment period will apply to all programs.

4. **Institutional Contacts Form**
   - ☐ Officials should match those listed with the U.S. Department of Education. The Financial Aid Director cannot be the same person as the Chief Fiscal Officer. The Authorized Official and the System Administrator also cannot be the same person.

5. **System Administrator's Access Request Form & Information Security and Confidentiality Agreement**
   - ☐ The System Administrator cannot be the same person as the Authorized Official. The System Administrator and Authorized Official must align with those listed on the Institutional Contacts Form.
   - ☐ If you require access to additional locations, make sure to complete and send the additional locations form along with your access request form.

6. **Electronic Fund Transfer (EFT) Form**
   - ☐ Bank must have a California presence.

6B. **Provide interest-bearing documentation for your bank account**
   - ☐ In the form of a bank statement or a letter from your banking institution. The statement or the letter must include the full account number.

7. **Third-Party Audited Financial Statement Reports**
   - ☐ The reports must cover the two (2) most recently completed fiscal years.

8. Institutional Catalog

☐ Provide a current copy of your institution's catalog. If your main campus is outside the state of California, the catalog must be provided for California-based campuses.

☐ Please provide the page numbers of the following financial aid information: Satisfactory Academic Progress (SAP) policy, disbursement policy, refund policy, & add/drop dates.

9. CA License Exam Certification

☐ Identify all programs that require the passage of a California exam in which your institution has provided passage rates to your students if it is available. All institutions must complete this form annually, regardless of whether programs require CA license exam.

10. Certification of Compliance with CA Education Code 67386 (Student Safety Policy)

☐ Certain programs and policies must be established regarding student safety in order for any California college or university to be eligible to receive student financial aid from the State of California.

11. Certification of Compliance with CA Education Code 66281.8 (Sex Equity in Education)

☐ In order for any California college or university to be eligible to receive student financial aid from the State of California, certain policies and procedures must be established regarding sex equity.

12. Title IX or California Equity in Higher Education Act Exemption

☐ If your institution holds an exemption from Title IX provisions, provide a statement for your institution's basis for exemption. Please provide copies of all materials submitted to and received from the U.S. Department of Education granting the exemption. If your institution is <u>not</u> exempt, please provide a brief written declaration stating so.

Non-Public institutions qualifying under CEC 69432.7(l)(1)(A) under the Pell Grant and in at least two other federal student aid programs must submit:

13. Proof of Authorization of Title IV Funding from U.S. Department of Education (G-5 Report)

☐ Clearly identify the following federal student aid programs for the current academic year: Pell Grant, Federal Supplemental Education Opportunity Grant (FSEOG), Stafford Direct Loan Program (DL), or Federal Work-Study (FWS).

14. Proof of Disbursement of Title IV Funds to Students

☐ Student ledgers must clearly identify disbursements to students for: Pell Grant, FSEOG, Stafford Direct Loan Program, or FWS.
☐ FWS must identify the student to the location and demonstrate payment for work.
☐ Additional locations must show disbursements at each campus

Non-Public Institutions qualifying under CEC 69432.7(l)(1)(B) under the 10% Rule

15. Financial Statement and Demonstration of Administrative Capability Form

☐ Only submit this form if your institution has confirmed with CSAC that it qualifies under the 10% rule.