



Checklist for Change in Financial Aid Director

OUTGOING FINANCIAL AID DIRECTOR	✓
Revoke Access to all Federal Sites at: https://fsawebenroll.ed.gov/pmenroll/index.jsp	
Revoke Access to Institutional Systems	
Retrieve Any Equipment Issued to Individual	
Revise Voicemail on Office Phone	
Retrieve Building Keys	
Forward Email to New Director	

INCOMING FINANCIAL AID DIRECTOR	✓
BUILDING ACCESS	
Issue Keys to Building and Offices	
Set up Security Codes for Building(s)	
Set up Voicemail on Office Phone	
SYSTEM ACCESS	
Set up Security Access to Institutional System(s)	
Set up Access and Email on Director's Computer	
FEDERAL ACCESS	
Update E-App Within 10 Days of Change (must be done twice if more than 10 days elapses between departure/arrival of directors) at: http://eligcert.ed.gov/	
Designate Director as Primary Destination Point Administrator (DPA) at: https://fsawebenroll.ed.gov/PMEnroll/PMAccountServlet.jrun	
Set up Access to CPS, COD, FISAP, NSLDS, FMS, and CSB at: https://fsawebenroll.ed.gov/PMEnroll/PMAccountServlet.jrun	
MISCELLANEOUS	
Revise Director Contact Information in School Catalogue/Materials	
Revise Financial Aid Web Page	
Update Director Contact Information with Servicers & Other Third Parties	
Update Director Contact Information with State Aid & Loan Agencies	
Update Director Contact Information with Professional Associations (NASFAA, etc.)	
Other:	
Other:	
Other:	