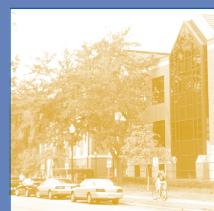
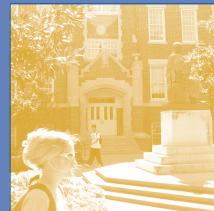
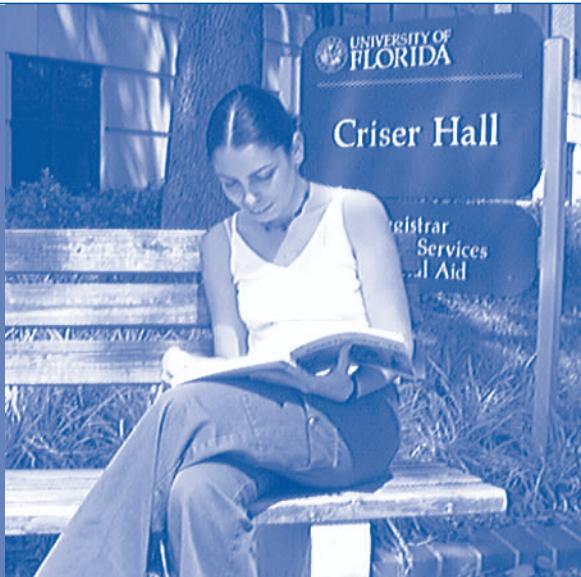


Annual Report

1999-

2000



Office for Student Financial Affairs
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UNIVERSITY OF
FLORIDA

annual report

*office for student
financial affairs*

july 1, 1999–june 30,
2000

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SFA continues its ongoing goal of quality service for University of Florida students. This year many departments resources were directed toward revising systems and procedures to implement *Federal Direct Loan Master Promissory Note* requirements, such as a new Federal Direct Loan Confirmation site available through UF's ISIS system, as well as to accommodate significant increases in disbursement and processing resulting from the expansion of the state's Florida Bright Futures Program.

*Karen Fooks
Director*

office for student financial

from the director

I am pleased to present the 1999-2000 Annual Report of the Office for Student Financial Affairs (SFA). This report provides detailed information on the major activities and events that have occurred in the reporting period beginning July 1999 and continuing through July 2000, as well as information on the general state of the office.

SFA continued its ongoing goal of quality service for University of Florida students. This year many departments resources were directed toward revising systems and procedures to implement *Federal Direct Loan Master Promissory Note* requirements, such as a new Federal Direct Loan Confirmation site available through UF's ISIS system, as well as to accommodate significant increases in disbursement and processing resulting from the expansion of the state's Florida Bright Futures Program. The total value of state scholarships received by UF students, and consequently processed by SFA, again increased dramatically.

This year we also installed KIDDs, a new digital record scanning system, continued to enhance our web presence within ISIS, and brought online our year 2000 tracking and awards system.

SFA's Systems area upgraded all computers at our advising stations to Apple iMacs. These new "all-in-one" computers allow advisers to multitask... review documents via KIDDs, check e-mail, and access NERDC screens, resulting in better access to information and less waiting for students.

We experienced another remarkable rise in E-Mail Hotline Stats. In our fifth year, the number of inquiries to our E-Mail Adviser more than doubled from 3,090 to 6,745, up by 118% from last year.

To improve phone service and access for callers, a phone room adviser position was added to our staff. SFA staff are committed to providing financial assistance to all students who wish to achieve their educational goals at the University of Florida. As we grow and evolve, we continue our efforts to meet the changing needs of our students.

On behalf of SFA staff, we welcome any questions or comments regarding the contents of this report.

an overview

Each year, Student Financial Affairs (SFA) continues to enhance the quality of its financial aid services and delivery capacity. The University of Florida (UF) is one of the country's leaders in providing financial aid to students. UF has been frequently selected by the federal government to participate in experimental programs. This year, SFA delivered more than \$260 million in student aid from federal, state, institutional, and private sources to 38,000-plus UF students.

Role

The primary role of SFA is to provide financial resources to students who would be unable to receive a post-secondary education without assistance. SFA offers eligible students financial aid packages consisting of scholarships, grants, loans, and part-time employment.

What exactly is "financial aid"?

Financial aid is defined as money provided to students and their families as either "gift aid" or "self-help" to assist in paying college costs. "Gift aid," as the name implies, is free money such as scholarships and grants, which students do not have to repay. "Self-help" programs include loans and employment and are so named because students must repay loans and work for money awarded through employment programs. Awards to students consist of scholarships, grants, loans, and work, singly or as a package.

The important factors...

SFA awards aid to students according to financial need, defined as the difference between a student's current educational costs and what the student and the student's family can afford to pay toward these costs. UF uses a federally mandated need analysis formula provided by Congress to evaluate a student's financial need from family information provided on the student's financial aid applications.

Students and parents have the primary responsibility for paying students' expenses. When the funds available from

family, job income, savings, and other resources are insufficient to cover all educationally related expenses, SFA makes every effort to meet the student's remaining financial need.

Beyond the dollar signs...

In addition to providing assistance to eligible students, SFA offers financial aid advising services throughout the year, comprehensive financial aid publications, and state-of-the-art technical support, including such features as a continually updated home page on the Web, provision of financial aid information to the university's Integrated Student Information System (ISIS) on the Web, and SFA TIPS, a touchtone dial-in voice response unit. SFA's computerized Resource Center off of our main lobby in S-107 Criser is available Monday through Friday to assist students with financial aid status checks, online aid application, and scholarship searches. Advising services include personal interviews, orientation workshops, budget and debt management counseling, and financial planning. SFA also provides access to alternative resources to help students who do not qualify for financial aid, or who need more assistance than SFA can provide.

Facilities

The environment of the Marshall M. Criser Student Services Center, established in 1991, provides the ideal setting for convenient and efficient delivery of financial assistance to students. The Criser center also houses the Admissions Office, the Office of the University Registrar, University Financial Services, Student Services, and the University Counseling Center, providing students easy access to all student services. The Criser Center is accessible to students with disabilities.

philosophy and mission statement

The University of Florida's (UF) Office for Student Financial Affairs (SFA) is a service organization with a primary responsibility to help students secure the funds necessary to pursue their educational goals at UF. SFA is committed to providing students with the resources and information they need to become fiscally responsible and to understand the rights and responsibilities incurred when they receive financial aid.

- The staff of SFA assume a proactive role, reaching out to students and potential students to educate them about the benefits of higher education and the availability of financial aid.
- SFA believes that no student should be denied the opportunity to attend UF and successfully pursue degree objectives because of financial reasons and is committed to maximizing the resources available to its students.
- SFA recognizes that each student's financial situation is unique and makes every effort to develop policies and procedures which treat each student fairly and equitably and take unusual circumstances into account.
- SFA has the responsibility of educating, motivating, and empowering staff and each other. SFA's management team members believe in the importance of listening to each other, inspiring those in subordinate positions, and rewarding dedication, competence, hard work, and positive attitudes. SFA managers will make every effort to develop managerial plans that promote leadership that will benefit and be appreciated by all staff.

The awarding philosophy of SFA is to award aid to students as a *part of the means* by which they can attend college. While students and parents have the primary responsibility for paying the student's expenses, our goal is to fill the financial gap that may exist between the cost of the individual student's education and money available from the students family, job income, savings, and other resources.

"99-'00 summary and highlights

Year 1999-2000 at SFA was again productive, and challenging. Many SFA departments were involved in revising our systems and procedures to facilitate the new requirements, such as a new Federal Direct Loan Confirmation site through ISIS, and to accommodate huge increases in disbursement and awarding resulting from the expansion of the state's Florida Bright Futures Program. This year we installed a new digital record scanning system, continued to enhance our web presence within ISIS, and brought online our year 2000 tracking and awards system. A phone room adviser position was added to improve phone service and access for callers. We also upgraded our customer service computers, providing faster access to information for our advisers and improving confidentiality for our students.

- **SFA fully implemented use of Master Promissory Notes (MPN).** The development, tracking, and editing of this MPN process required extensive staff hours and system modifications. Revisions and enhancements to this process continued throughout the year. Summer 2000 was spent preparing to implement the multi-year feature of the MPN, which would be effective for 2000-01.
- With the MPN came a mandate that a notification or confirmation process replace the requirement that borrowers sign a new note for each academic year. For 1999-2000, UF used a passive confirmation process for Subsidized Stafford Loans (students are notified of their loan information but not required to return a formal acceptance before disbursement of funds) and an active confirmation for Unsubsidized Stafford Loans (students must return an acceptance form to the school before disbursement).
- In addition to monitoring the 1999-2000 confirmation process, staff prepared to expand the automated confirmation process for 2000-01 to require students to actively confirm both Subsidized and Unsubsidized Federal Direct Stafford Loans using UF's Integrated Student Information System (ISIS), prior to disbursement of

their loan(s). The new Confirmation site available through ISIS is also designed to enable students to revise the amount of their loan(s), to link to NSLDS to review their loan debt, and to access the Federal Department of Education's Borrowers Rights and Responsibilities.

- **The Florida Bright Futures Scholars (FBFS) program continued to grow dramatically.** The awarding of summer scholarships for the first time added to another huge increase in funds disbursed this year. In 1999-2000, UF students received a total of \$40,072,779 in FBFS —up \$10.5 million from last year.
- As a result of the State's decision to fund Florida Bright Futures for the first time in a summer term, the volume of transient students receiving aid in the summer increased dramatically—from an average of 63 students to 608 students, and the number of overseas students receiving financial aid increased by nearly 49% over last year.
- **SFA again enhanced our web presence within Eagle and ISIS.** borrowers for 2000-2001, as Systems and Programming staff wrote the web-based Loan Acceptance System. The Direct Loan Confirmation Site for Federal Direct Loans was hugely successful due to staff extensive planning and information dissemination.
- **Year 2000. Our Systems and Programming area** completed the year 2000 software conversion and testing. Year 2000 tracking and award systems were brought online.
- SFA's Systems area upgraded all computers at our front desk advising stations to Apple iMacs. These new "all-in-one" computers allow advisers to multitask... review documents via KIDDS, check e-mail, and access NERDC screens. Major benefits are ease of use for the advisers and very stable operation, less down-time, better access to information, and less waiting for students!
- SFA'S Systems Area installed KIDDS, Kofax Imaging Digital Document System, a new digital records system

fiscal review

in the Record Retention area. KIDDs allows our Records area to scan student documents on a high-speed, high-resolution scanner and store them on a file server at the Northeast Regional Data Center (NERDC), where they become accessible as an administrative application on UF's Integrated Student Information System (ISIS) web server.

- **Another huge surge in SFA's E-Mail Hotline Stats.** For comparison purposes, SFA's Email Adviser received 752 inquiries in 1997-98 and 3,090 inquiries in 1998-99. This year our inquiries doubled to 6,745 inquiries, a 118% increase.
- **New Phone Room Adviser.** During 1999-2000, Customer Service's telephone bank handled 41,743 telephone calls. To improve phone service and access for callers, a full-time USPS position was added to our phone room staff.
- **SFA continued to participate in the National Student Loan Data System (NSLDS),** a centralized federal data bank that provides a complete history of a student's Title IV aid disbursements, loan default information, overpayments of Pell; Grant, Perkins Loan, or SEOG, and any active bankruptcy.
- **UF continued as an "experimental site" in the Ford Federal Direct Loan Program,** which allows UF exemption from federal requirements such as mandatory multiple disbursements for single-term loans and a 30-day delay in first-time borrowers disbursements.
- **SFA's Website.** We continued to enhance our website. This year we have greatly expanded our Printable Forms section, enabling students to print the forms they need for employment, verification, and petitioning directly from the site.
- Our Publications/Information area continued to emphasize electronic financial aid application, providing links on our website to all pertinent federal web locations.

The Office for Student Financial Affairs (SFA) functioned with a \$3,093,939 operating budget in 1999-2000. Funding for the operating budget is provided from state "education and general" (E & G) funds, an administrative allowance for administration of federal financial aid programs, and student financial aid fees. State E & G fund allocations provided about 72 percent of the total budget, with the administrative allowance and financial aid fees making up the remaining 28 percent.

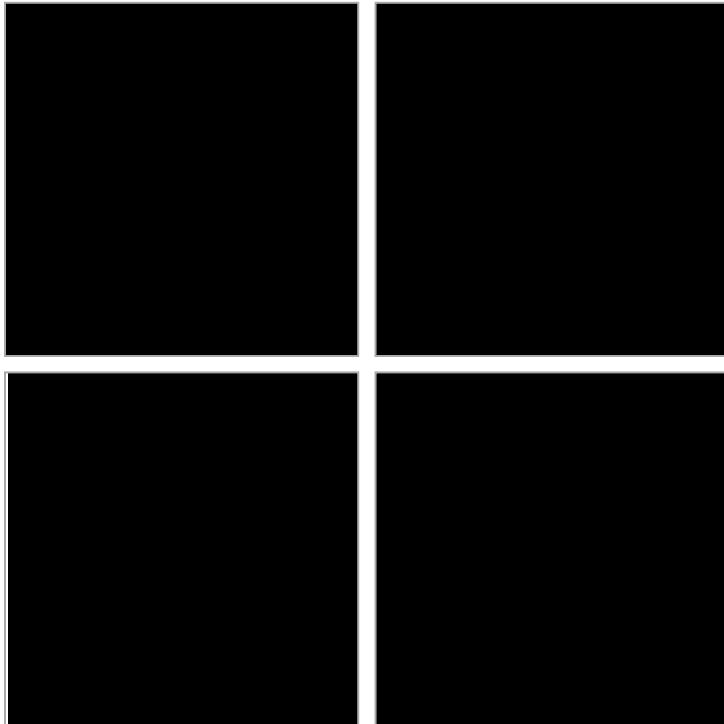
Staffing for 1999-2000 was at 67.75 FTE as of June 2000, compared to 64.75 as of June 1999.

In 1999-2000, the increase in Salaries is due to annual raises. Increases in Operating Expenses and OCO were largely due to a one-time allocation of Florida Academic Counseling and Tracking for Students (F.A.C.T.s.) money given to UF for enhanced financial aid services and information to students. SFA, thus far, purchased and installed a new imaging system, along with all the equipment, software, and training necessary to run it. Dollars spent on OPS are variable year to year depending upon departmental needs and funds available.

components of the office operating budget

BUDGET CATEGORY	1999-2000	1998-99	1997-98
Salary	\$2,310,455	\$2,306,149	\$2,112,753
Operating Expense	385,304	250,510	239,864
Other Personnel Services (OPS)	82,133	108,577	30,058
Other Capital Outlay (OCO)	127,287	91,377	79,206
Federal Work-Study Salaries	188,760	190,548	182,258

SFA Sections



administration

financial aid advising

- customer service
- satellite offices
- special programs

financial aid
programs

- grants
- scholarships
- state programs
- student employment
- loan certifications

special programs

- quality assurance
- verification

support services

- outreach & training
- information/publication services

technical systems &
processing

- awarding
- disbursements & fund reconciliation
- document editing
- records/optical scanning
- systems & programming

"The University of Florida Office for Student Financial Affairs (SFA) remains at the forefront of universities in shaping financial aid policy issues that affect students nationwide. As college costs continue to rise, SFA continues to develop innovative programs for funding students' postsecondary educational expenses."

*Rick Wilder
Associate Director*



As federal and state funding of student education grants continues to decrease and borrowing continues to rise, effective distribution by the financial aid office of funds available to qualified students becomes increasingly important. The administrative staff of Student Financial Affairs (SFA), including the director and associate directors, are responsible for ensuring such distribution, while also guaranteeing equal access to all prospective students to the University of Florida (UF). The smooth and efficient administration of financial aid programs and systems necessary for awarding and distributing program funds is the charge of SFA's administration. The Director's office manager and the accounting and word processing staff provide all necessary support services.

Director's Office

The Director of SFA is responsible for the overall administration of financial aid programs at UF. She also represents the University statewide and nationally, helping to shape long-range policies and goals. The Director's Office is responsible for all personnel matters within the office, and the office manager administers personnel, payroll, and coordinates travel paperwork.

Associate Directors

Student Financial Affairs has two associate directors. One is responsible for customer service, loan processing, disbursements, and satellite offices in the Colleges of Dentistry, Law, Medicine, and Health Professions, which includes supervising six assistant directors and/or student affairs coordinators and their respective areas of responsibility. The other associate director oversees technical areas and student employment, which includes supervising one assistant director and two student affairs coordinators. Additionally, both coordinate all data processing requests with the systems coordinator in charge of the Systems and Programming area, supervise funds management and research, coordinate the delivery systems, and are responsible for all federal, state, and institutional audits.

Accounting

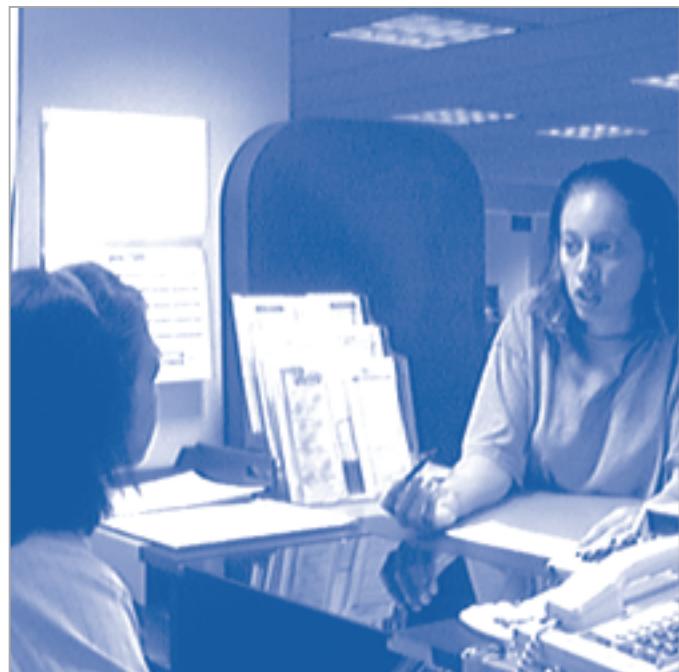
Student Financial Affairs' accounting staff maintain all departmental accounting and fiscal activities. The accountant and the fiscal assistant are responsible for all phases of purchasing and handling accounts receivable for federal administrative allowance funds and private donations. This office prepares financial and compliance reports for federal, state, and institutional donors and helps the director and associate directors with special fiscal projects. Internal control duties include maintaining departmental ledgers and preparing the departmental operating budget. Accounting also supervises building services such as telephones, equipment, repairs, and custodial and safety maintenance.

Word Processing

The primary responsibility of the word processing area is to produce and maintain quality control of all outgoing and in-house office correspondence; to process in-house forms and maintain a central forms catalogue system for each section within SFA; and to lend secretarial and telephone support for the director and associate directors, with secondary responsibilities to the assistant directors and other staff members. The word processing staff also respond to requests from parents and students for general financial aid information materials and applications. Word processing staff are supervised by the Director's office manager.

"Customer Service advisers assist UF aid applicants, prospective applicants, and families with financial aid application and all other financial aid issues, including case-by-case award revisions for students whose financial situations or other eligibility criteria change during the year. "

*Rodlee Ritter
Student Affairs Coordinator*



financial aid advising

SFA's Customer Service Section is the initial point of contact for all students who apply for aid or who need assistance with the financial aid application process. Our financial aid advisers are experts in the field of financial aid and continue their efforts to make the University of Florida's (UF) financial aid office a national leader in the administration of financial aid. During the 1999-2000 academic year, Customer Service staff included a Student Affairs Coordinator (Assistant Director), five Student Financial Aid Coordinator IIs, four Student Financial Aid Coordinator Is, one Clerical Supervisor, two Senior Clerks, and one Clerk. Late in spring term, two additional adviser positions were funded, but these new positions did not become operational until 2000-01.

Customer Service Advisers

All UF students and aid applicants are assigned to two-member financial aid advising teams by the last two digits of students' Social Security numbers. Each advising team consists of a Student Financial Aid Coordinator II and a Student Financial Aid Coordinator I.

Customer Service advisers provide service to students via several methods: (1) on a walk-in basis, (2) by office appointments, (3) by telephone, or (4) by written communication. In addition, Customer Service is responsible for handling incoming phone calls to the non-administrative financial aid departments. The Customer Service telephone bank is staffed by four, full-time USPS clerical personnel and up to twelve student assistants. To improve phone access for callers, a full-time USPS position was added this year. The phone bank handles all general financial aid inquiry calls and is trained to provide assistance for basic status inquiries. Complex financial aid questions are routed to a member of the student's advising team for assistance. During the 1999-2000 academic year, the customer service telephone bank handled 41,743 telephone calls.

Customer Service advisers assist UF aid applicants, prospective applicants, and families with financial aid application procedures and all other financial aid functions. This includes case-by-case

award revisions for students whose financial situation or other eligibility criteria change during the year.

Special Programs

A number of special financial aid programs come under the auspices of Customer Service. These include: the summer Achievements in Mainstreaming (AIM) Program, overseas study programs, financial aid for State University System (SUS) transient students, concurrent enrollment programs, revision petitions, the SFA Student Info e-mail service, and several MBA non-traditional programs. This year, Customer Service assumed the responsibility for SFA's academic progress program and the UF Emergency Short-Term Loan Program.

• Summer AIM Program

During Summer B term, SFA works closely with the Admissions Office and the AIM Program Office to process financial aid for students admitted through this summer special admissions program. In 1999-2000, 677 students were admitted as AIM program participants. Applications were processed in accordance with AIM program guidelines for financial aid consideration by our office. Of the 677 admitted students, 407 enrolled and 348 received more than \$695,000 in grant assistance to meet the total costs of the summer program. These figures represent an increase of 22 financial aid recipients and more than \$12,000 in financial aid expenditures over last year. (NOTE: aid recipient totals and dollars disbursed do not include athletes admitted through the AIM program.)

• Overseas Study Students with Aid

The trend in increased participation in UF-sanctioned overseas studies programs continues. The number of students attending such programs increased from 928 in 1998-99 to 1,077 in 1999-2000. The increase in student overseas program attendance resulted in a corresponding increase in financial aid recipients. A total of 760 UF students participating in overseas study programs received financial aid. The number of overseas students receiving financial aid increased by nearly 49% over the previous year. The increase can be

attributed to the availability of Florida Bright Futures Scholarship monies for the first time in a summer term, as well as to an increase in students getting private loans. Financial aid packages are routinely supplemented with Federal Direct Stafford Loans (subsidized and unsubsidized) or Federal Direct PLUS Loans to offset costs of studying abroad.

• Extenuating Circumstances Reviews

Customer service advisers counsel students about the revision petition process. Students have the right to, and are given the opportunity to, petition parental contributions, student contributions, and dependency status if they have extenuating circumstances not reflected in the initial evaluation of their eligibility. A total of 289 petitions were received in 1999-2000, and 207 were approved, 86 more than last year. The approval rate increased from 63% to 72%.

• Consortium Programs

Before financial aid can be disbursed to students in concurrent enrollment or transient programs, consortium agreements must be completed for each student to account for hours he/she may be taking concurrently at the partner institution(s) and to ensure that financial aid is not also being received from the other institutions. Several formally recognized concurrent enrollment programs are conducted at sites away from the Gainesville UF campus. Although enrolled at off-site locations, students apply for financial aid through our office. Most are completing a part of their curriculum requirements at "partner" institutions while taking UF coursework. For several years, we have processed financial aid for students enrolled in the following concurrent enrollment programs:

New World School of the Arts, Miami, Florida. Students take classes from Miami-Dade Community College and UF. In 1999-2000, 62 students received financial aid to attend this program.

UF Milton Program, Milton, Florida. Students enrolled in this IFAS extension program may take classes at Pensacola Junior College, University of West Florida, and UF. In 1999-2000, SFA processed financial aid for 10 students.

UF Fort Lauderdale Program. No students received aid through this IFAS extension program in Fort Lauderdale in 1999-2000.

UF Fort Pierce Program. This IFAS extension program allows students to take courses through Indian River Community College. In 1999-2000, aid was processed for two students.

State University System (SUS) Transient Program. UF students awarded financial aid and attending another SUS school as transient students may have their financial aid processed at UF and sent to the other institution. Each must be monitored individually to ensure that all requirements are met and documentation is received before aid is disbursed. In 1999-2000, UF processed financial aid for 631 students participating as SUS transients. As a result of the State's decision to fund Florida Bright Futures for the summer, the volume of transient students receiving aid increased dramatically. Most transient processing occurs in the summer. This used to involve between 50 and 75 students. This summer we had 608 students enrolled as transients!

● Non-Traditional MBA Programs

The number of non-traditional MBA programs continues to increase as do the number of students enrolling. Because these programs do not follow the standard UF semester format, the progress of these students must be manually tracked, taking care to process the appropriate type of aid for which the student is eligible, based on the program. To facilitate the processing of aid for these students, a Coordinator II position jointly funded by our office and the College of Business was created during the 1998-99 academic year. This award year, a total of 274 students enrolled in eight different non-traditional MBA programs, an increase of 100 students from those enrolled in similar programs during 1998-99 and the addition of three new programs from the prior year. During 1999-2000, SFA also began processing Federal Direct Stafford Loans for students enrolled in these programs. Before 1999-2000, students participating in these programs were only considered eligible for private loans. During 1999-

2000, SFA processed private loan applications for 85 of these students, up from 66 processed applications last year. Forty-five Federal Direct Stafford Loans were processed for students enrolled in these programs effective for the spring and summer 2000 terms.

● SFA Student Info E-Mail Service

SFA's Student Info E-mail Hotline was established in September 1995 to enable students to ask general financial aid questions without having to come to Criser Hall. Due to confidentiality regulations, we cannot respond to specific requests about individual financial aid files, but we can provide helpful, general information about the financial aid process as well as program availability and eligibility requirements. The volume of e-mail inquiries our office has received has increased dramatically over the last three years. To compare, SFA received 752 inquiries in 1997-98, 3,090 inquiries in 1998-99, and 6,745 inquiries in 1999-2000, a 118% increase from last year.

● Academic Progress Program

To comply with federal regulations, UF must ensure that all federal aid recipients maintain satisfactory academic progress. Students who fail to meet specified standards are suspended or terminated from financial aid eligibility. Students are notified of the academic progress policy in a brochure they receive with their original financial aid award letter. The policy requires that students make progress toward their degree by maintaining a satisfactory qualitative standard (grade point average—GPA) and a quantitative standard (such as credit hours earned or terms of aid received).

Three times a year a financial aid academic progress program generates letters to students not meeting required standards. The academic progress coordinator in Customer Service oversees notifying these students. A petition procedure is available for students who believe their failure to maintain satisfactory progress is due to extenuating circumstances. The academic progress coordinator reviews petitions and determines which require referral to an Academic Progress

Appeals Committee member. Routine petitions (i.e., graduating senior requiring one final term to complete a degree) may be approved without going to a committee. Customer service advisers counsel students on the academic progress policy and petition process.

More than 3,595 petitions were reviewed in 1999-2000, an increase of 748 from 1998-99. This increase is proportional to the increase in aid recipients. The two most common conditions causing students to lose financial aid eligibility continue to be: exceeding the maximum number of terms allowed on aid, and GPA less than a 2.00 for students who have carried 60 credit hours. This can be attributed to transfer students with more than 60 credit hours not achieving a 2.0 GPA in their first semesters at UF. A high percentage of students who petition are conditionally reinstated and raise their GPA after the next period of attendance.

Unofficial Withdrawals. In recent years, the federal government has put pressure on schools to document that students who receive financial aid funds actually have attended class. In particular question are students who receive federal aid whose end of term grades are solely incompletes (I), no grades (N) or failing grades (E). As part of each term's academic progress program, student files are selected that indicate this situation. Letters are sent to the student and to the appropriate department in an effort to document the students' class attendance. For students for whom we cannot obtain proof of attendance, UF must reimburse the federal accounts. During 1999-2000, 320 such students were flagged. UF was ultimately required to reimburse the accounts for 29 students in the total amount of \$88,232.

Looking Ahead

As a result of the addition of two new positions we look forward to being able to increase our financial aid advising teams from four to five. This should improve the current adviser caseload and enhance the service we provide to our students. We will continue to emphasize looking for ways to improve our automated information systems so students can access routine financial aid information electronically through ISIS.

satellite offices

Student Financial Affairs (SFA) supports four professional positions designed to accommodate special needs, housed at sites away from the main financial aid office. These positions were created at the request of, and with financial support from, colleges and agencies whose students have particular difficulty coming to the aid office because of distance and class schedules, or who have other special needs. The satellite offices are jointly funded and operated by SFA and the sponsoring organizations: the College of Dentistry, the College of Law, the College of Medicine, and the Colleges of Health Professions, Nursing, Pharmacy, and Veterinary Medicine. Since the initiation of these outreach programs, students in these colleges have reaped the benefits of having a representative from SFA with comprehensive knowledge of financial aid programs and procedures as they pertain to them.

College of Dentistry

The College of Dentistry financial aid office serves D.M.D. dental students, postdoctoral dental students, and F.T.D. (Foreign Trained Dentists) students, administering Title IV loan programs, Title VII loans and scholarships, and various outside scholarship funds. A Financial Aid Coordinator is responsible for all aspects of financial aid at the College of Dentistry: financial aid presentations for dental admission days, helping students through the application process, debt management, daily walk-in counseling, and exit interviews for graduating seniors. The office is located in the UF Health Sciences Center in the Dental Tower, D3-#17A.

Colleges of Health Professions, Nursing, Pharmacy, and Veterinary Medicine

The Health Sciences Center (HSC) Financial Aid Administrator is responsible for the coordination of all financial aid services for each college. These services include awarding, aid packaging, and debt counseling for more than 1,900 students. Further, the HSC aid

administrator provides the colleges with the financial data needed to award scholarships, coordinates all financial aid services, and assists in awarding and packaging all college-based loans and scholarships. Emphasis is placed on counseling students to reduce student loan debts and on providing up-to-date information about federal aid programs and requirements. The HSC Financial Aid Office is in UF Health Sciences Center Room CG-96.

College of Law

Of about 1,160 UF law students, almost 80% receive some form of financial aid. During 1999-2000, almost \$14,000,000 in federal loans were paid to 959 students. The Law School Financial Aid Office, in 164 Holland Law Center, is administered by a Financial Aid Coordinator, responsible for guiding students through the financial aid application process, from completing applications to explaining disbursement procedures. Private loan applications, including Bar Exam Loans and Bar Study Loans from The Access Group and Law Loans are certified by this office. The law school adviser serves as a member of the law school financial aid committee, prepares meeting materials, and awards and disburses College of Law scholarships based on committee decision. Two hundred twenty-three students received \$645,301 from these funds in 1999-2000. In addition, approximately \$1.6 million in state grants and scholarships were administered to minority students through this office.

College of Medicine

The College of Medicine (COM) comprises more than 780 medical, graduate, and physician assistant students. More than 550 students are financial aid award recipients. The medical school adviser is a Financial Aid Coordinator responsible for all aspects of financial aid involving COM students, such as counseling new admissions and giving application assistance by providing consumer information, debt management counseling, and exit interviews. In 1999-2000, the College of Medicine aid office administered more than 50 loans and scholarships and paid out \$7,350,000 in student loans and more than \$1,100,000 in scholarships.

special programs

SFA administers a number of special programs onsite in Criser Hall to meet the needs of specific groups of students by financial aid professionals with specialized knowledge of federal, state, or UF requirements relating specifically to these groups. These include an adviser to athletes and an adviser to veterans.

Adviser to Athletes

A Financial Aid Coordinator specializing in both financial aid and NCAA /SEC guidelines coordinates and administers financial aid for student athletes. The Athletes Adviser works with the University Athletic Association (UAA) to coordinate athletic scholarships with other financial aid, to complete required NCAA reports, to counsel athletes about their financial aid and about their rights and responsibilities, and to assure compliance with both federal and NCAA regulations. The Athletes Adviser is located in Peabody Hall, and also counsels student athletes at the Office of Student Life in the Academic Advisement Center.

VA Work-Study/Tutorial Assistance Adviser

The position for the adviser for the federal VA Work-Study and VA Tutorial Assistance programs is funded by the federal government to provide VA Work-Study and VA Tutorial Assistance to veterans who are enrolled students. VA Work-Study is available for veterans to work in positions at UF up to 25 hours a week making \$5.15 an hour, tax-free. The VA Tutorial Assistance Program allows veterans to be reimbursed for the costs of tutorial assistance needed in the course of their education. The VA Work-Study Adviser, who counsels students on both of these programs, is located in S-107G Criser Hall.

"SFA added numerous technical enhancements and upgrades and continued to improve services provided to University of Florida students this year. We renew our commitment to providing the highest quality of service, financial aid information, and delivery of aid funds to UF students."

*Rick Wilder
Associate Director*



What makes up a financial aid package?

Financial aid comes in many forms.

Financial aid packages are combinations of aid made up of funds from the following programs: grants, scholarships, state programs, loans, and student employment.

financial aid programs

Grants are gift aid (no repayment required) awarded to students who show financial need. At the University of Florida (UF), Student Financial Affairs (SFA) administers the following programs: Federal Pell Grants, Federal Supplemental Educational Opportunity Grants, Florida Student Assistance Grants, the Lottery Trust Grant, and institutional grants such as I. D. Turner Grants.

Programs

The Pell Grant Section focuses on efficient delivery of Pell Grants to students. Federal Supplemental Educational Opportunity Grants, Turner Grants, and Lottery Grants are also awarded to undergraduate students with exceptional need as part of a comprehensive aid package.

Federal Pell Grant

The Federal Pell Grant program provides grants designed to assist those students with the greatest financial need. Pell Grants are the foundation upon which all other need-based aid programs are built.

The government awards grants according to students' financial need as determined by a federally established need analysis formula. Need for other

aid is based upon and determined around the student's eligibility for a Federal Pell Grant.

The total dollar amount of Pell Grants disbursed to students decreased from \$13,734,658 last year to \$13,726,955 in 1999-2000. The number of Pell Grant recipients decreased from 7,571 to 7,038

Federal Supplemental Educational Opportunity Grant (FSEOG)

This federal grant program is a campus-based grant available to all undergraduates who show exceptional financial need. Campus-based means that, although federally funded, the selection of the recipients and award amounts are determined by SFA.

Funding for FSEOG remains relatively stable, although there was a slight decrease from the past few years. The amount of dollars disbursed decreased from \$2,930,080 in the 1998-99 academic year to \$2,879,974 in 1999-2000. This decrease reflects the decrease in the number of recipients, which went from 2,847 in 1998-99 to 2,752 this year.

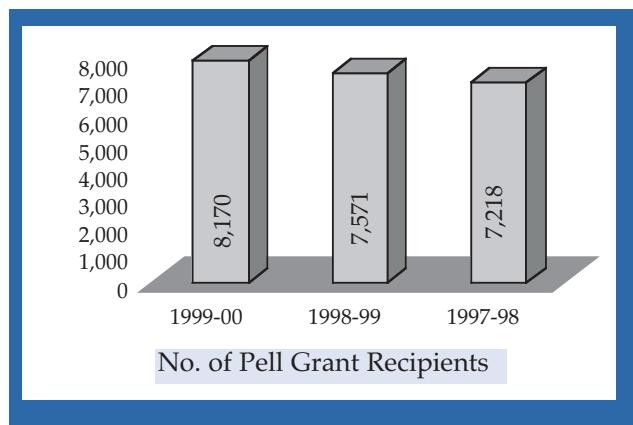
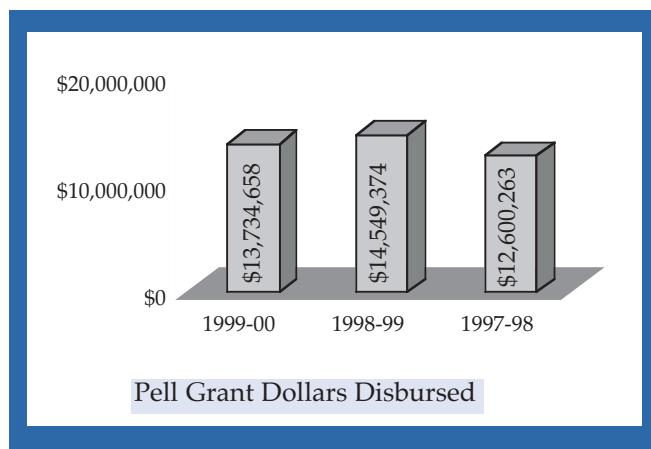
Turner Grants

Institutional grants are university-administered programs awarded by SFA to students who show exceptional

financial need. The Turner Grant is funded by student fees. Grants are funded by the state Educational Trust Fund Lottery. During the 1999-2000 award year, a total of \$6,045,210 in Turner Grant funds was disbursed to 3,092 recipients.

Florida Student Assistance Grant (FSAG)

FSAG is a state-funded, need-based financial aid program awarded by the State of Florida Office of Student Financial Assistance, but coordinated at UF by SFA. In 1999-2000, 3,598 UF students received awards totaling \$3,539,020. More information about state programs can be found in the State Programs section of this report.



scholarships

Scholarships are coordinated by several offices at the University of Florida (UF), including Student Financial Affairs (SFA), the Admissions Office, and individual colleges and departments within the university. Additionally, the state of Florida, private organizations, and corporate sponsors provide significant financial support to UF students.

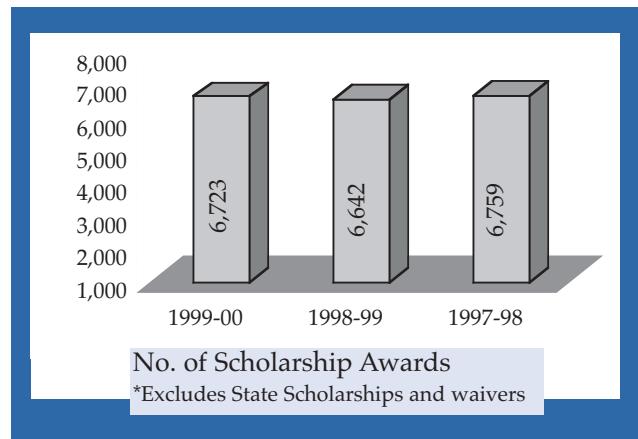
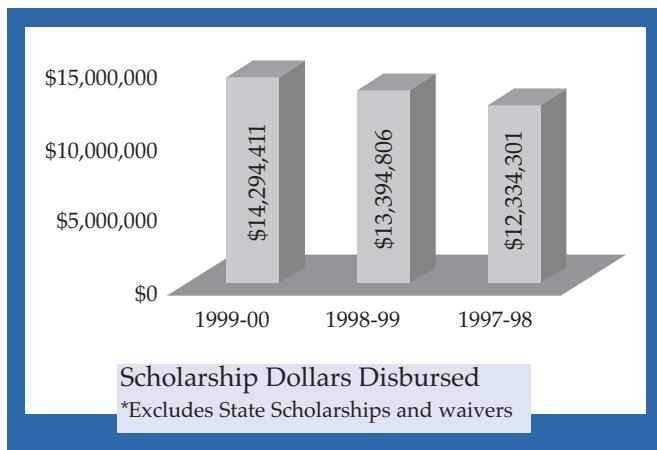
SFA's Scholarship Section coordinates and administers numerous college-awarded scholarships. Private donor and UF-endowed scholarships are also available to students and are awarded by SFA to full-time, undergraduate students who meet the specified requirements of donors and/or the endowment funds.

Custodial Awards

A review of statistics on custodial awards received by UF students reveals an area of significant growth in recent years. The increase from 1998-99 to 1999-2000 was \$1,509,809. This may be attributed to several factors, including the higher academic performance level of our students. Academically able students tend to apply for and receive more scholarships. Also, our new Student Financial Affairs Resource Center, with its electronic Outside Scholarship Bulletin Board, has brought more scholarships to the attention of students. Further, our advertising of and the availability of more free scholarship searches on the internet has undoubtedly encouraged more students to pursue donor scholarships.

Statistics

The following statistics include all scholarships paid to students through the office for Student Financial Affairs *excluding* tuition fee waivers, State of Florida scholarships, and custodial awards. The total dollars paid out through the Scholarships Section in 1999-2000—\$13,394,806—demonstrates an increase of almost a million dollars from the previous year.



state programs

The Florida Department of Education offers a variety of student assistance programs that are administered by the State of Florida Bureau of Student Financial Assistance in Tallahassee, Florida. These state programs, excluding loans, supported 18,569 awards to students enrolled at UF, who received a total of \$33,467,439 this year. Applications and information on these programs are provided to students primarily by high school guidance counselors or the Florida Office of Student Financial Assistance.

SFA's State Programs Section is the University of Florida (UF) liaison with the Bureau of Student Financial Assistance in Tallahassee and is the campus administrator for most state-funded student scholarships and grants.

The State Programs staff monitors student eligibility for state aid, processes information from a state computer data base, maintains records of each transaction, and arranges for disbursement of state funds through UF's University Financial Services.

Programs

Major state of Florida programs administered through this section include:

- Florida Academic Scholarship*
- Florida Merit Scholarship*
- Florida Gold Seal Vocational Scholarship*
- Top Scholars Award*
- Children of Deceased or Disabled Veterans or Children of Servicemen Classified as Prisoners of War or Missing in Action Scholarship
- Florida Student Assistance Grant
- Florida Teacher Scholarship and Forgivable Loan
- Jose Marti Scholarship Challenge Grant
- Robert C. Byrd Honors Scholarship
- Rosewood Family Scholarship
- Occupational Therapist and Physical Therapist Scholarship Loan

* Part of the Florida Bright Futures Scholarship Program.

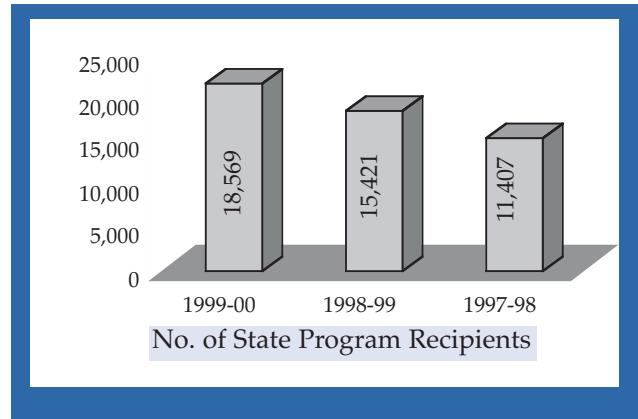
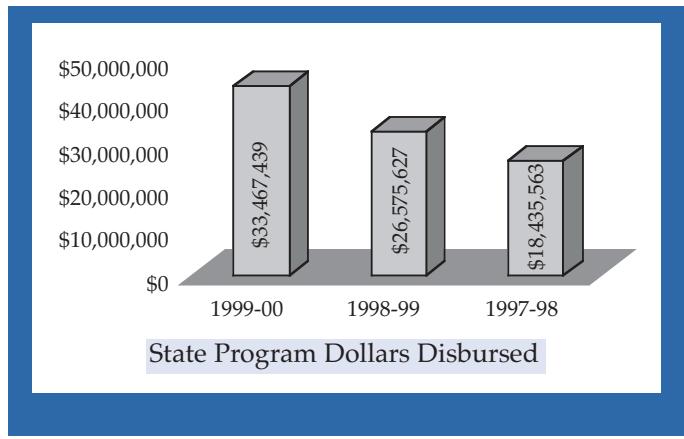
Florida Bright Futures Program

The Florida Bright Futures Scholars program has continued its phenomenal growth. As the academic level of performance of our students has increased and the state puts more funds into the academic-based Florida Bright Futures program, the total value of state scholarships received by UF students, and consequently processed by SFA, has increased dramatically. The awarding of summer scholarships for the first time dramatically increased funds disbursed. The increase of more than \$7 million in funds received by UF students from academic year 1997-98 to 1998-99 has been followed by a \$10.5 million increase from 1998-99 to 1999-2000.

Statistics

The State of Florida's continued support of higher education at UF is seen in the following graphs.

Many more UF students qualified for state academic scholarships this year than previously because of the expanded state funds available through this program.



student employment

Student Financial Affairs' (SFA) Student Employment Office continues to serve as a clearinghouse for all on- and off-campus employment activity. Part-time employment continues to be a valuable source for students needing funds to help pay educational expenses. Student employment on campus contributes greatly to the operation of the university, while providing students with valuable work experience, often in their major fields of study.

Student Employment acts as coordinator for all student jobs at the University of Florida (UF). As such, Student Employment communicates employment policies and procedures to UF offices and conducts annual training sessions for departmental employment coordinators.

Student Employment processes all paperwork required to appoint students to campus jobs and enter them into the university payroll system; develops and updates forms; monitors student earnings; maintains and posts job listings from on- and off-campus employers; provides job counseling to students; and issues UF *Work-Permits*, offering the Dial-Up Work-Permit Request Service, which allows students to request work permits by phone.

Programs

Student Employment coordinates the following programs: Federal Work-Study (FWS), including the Federal Community Service (FCS) component; and Other Personnel Services (OPS).

• Federal Work-Study (FWS)

FWS is funded 75% by the federal government and 25% by the institution. Awards are based on financial need as determined from information students provide on the *Free Application for Federal Student Aid*. To be eligible students must maintain a minimum 2.0 GPA. Jobs pay at least minimum wage.

• Federal Community Service (FCS)

In fall 1994, Student Employment implemented the FCS program, a new component of FWS. FCS allows students to work with various community agencies dedicated to improving community living, especially for low-income individuals.

• Other Personnel Services (OPS) Jobs

OPS is a state-funded campus student work program which is not based on financial need. To be eligible, students must maintain a minimum 2.0 GPA. Jobs pay at least minimum wage.

• Off-Campus Jobs

The Student Employment Office acts as a referral agent, helping to link job-seeking students with potential employers. Off-campus employers list their jobs, which are not based on need, with Student Employment for posting. Wages vary by employer.

Statistics

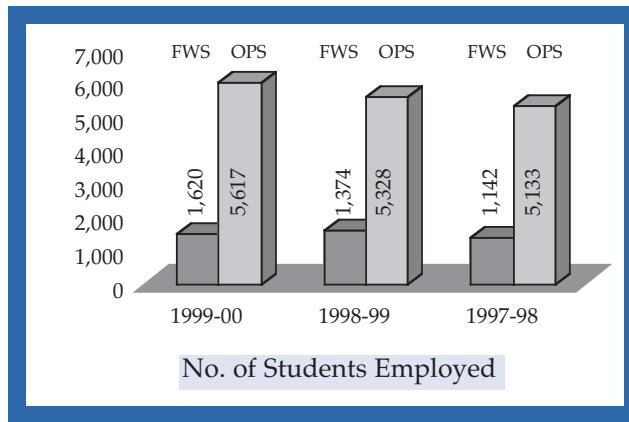
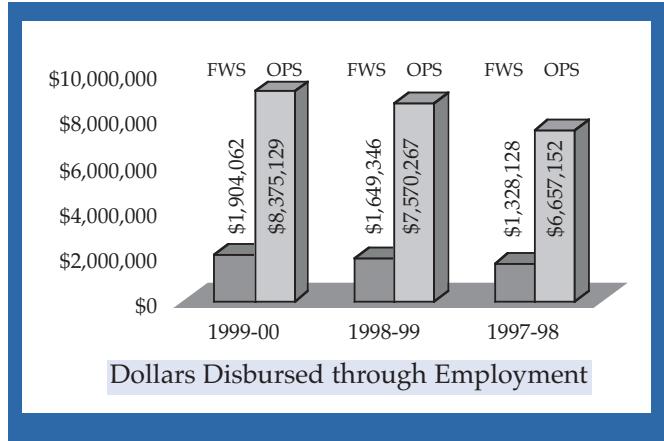
During the year 1999-2000, there has been a continued increase in the number of students employed on campus through FWS (including FCS), and OPS. Earnings have risen to a total of \$11,306,052 continuing the steady increase over previous years by more than one million dollars.

Job Bulletin Boards

FWS, FCS, OPS, and Off-Campus job boards are located at various campus locations. The job board outside SFA in the Criser courtyard is updated daily. The boards located at Norman Hall, McCarty Hall, G-1 Reitz Union, 305 Reitz Union, and the Health Sciences Center are updated on Tuesdays and Thursdays. In cooperation with SFA's Information/Publication Services, the up-to-date job lists are also maintained online on the World Wide Web.

Publications

In conjunction with the Information/ Publications Section, Student Employment publishes the *Student Employment Coordinator*, a periodic newsletter for campus employment coordinators. Other publications produced with Information/ Publications include the *Student Employers Handbook*, for UF departmental student employment administrators, and SFA's *Student Employee Handbook*, which explains policies and procedures to SFA student assistants. These publications are maintained online on the SFA website at: www.ufsa.ufl.edu/sfa/



loan certifications

The goal of the Loan Certification department is to use today's technology to develop a loan process that is efficient and correct and can be accessed and reviewed by the student.

The University of Florida (UF) continues to participate in the Ford Federal Direct Loan Program (FFDLP). The 1999-2000 academic year was UF's sixth year of participation. FFDLP differs substantially from the Federal Family Education Loan Program (FFEL) in that private lenders are not involved. The Federal Department of Education acts as both lender and guarantor for FFDLP loans, so only two agencies are involved: the federal government and the university. The university originates loans, processes promissory notes, and disburses students' loan funds when they have been approved. When it is time for repayment, payments are made to the Department of Education's Federal Loan Servicer.

Loan Certifications is responsible for monitoring the Federal Direct Loan automated application process, the promissory note program, the correction program, and various cancellation programs to ensure that they run correctly and efficiently. This department also certifies private loans from various lending institutions.

The staff consists of a Financial Aid Coordinator III, an Assistant Director, two Financial Aid Coordinator's, and a Program Assistant.

Regulatory Changes

Regulatory changes affecting the 1999-2000 academic year.

1. The Master Promissory Note (MPN) was implemented in 1999-2000. With the new process, borrowers receive loans for multiple academic years under one MPN. The development, tracking, and editing of this new MPN process required extensive staff hours and system modifications. Revisions and enhancements to this process continued throughout the year.

The summer of 2000 was spent preparing to implement the multi-year feature of the MPN, which would be effective for the 2000-01 academic year.

2. Along with the MPN came a mandate that a notification or confirmation process replace the requirement that borrowers sign a new note for each academic year. For the 1999-2000 academic year UF chose a passive confirmation process for Subsidized Stafford Loans (students are notified of their loan information but not required to return a formal acceptance before disbursement of funds) and an active confirmation for Unsubsidized Stafford Loans (students must return an acceptance form to the school before disbursement).

In addition to monitoring the 1999-2000 confirmation process, the staff made preparations to implement a new automated confirmation process for 2000-01. This new process requires students to actively confirm both Subsidized and Unsubsidized Stafford Loans using UF's Integrated Student Information System (ISIS), prior to disbursement of their loan(s). The Confirmation site available through ISIS also will enable students to revise the amount of their loan(s), to link to NSLDS to review their loan debt, and to access the Federal Department of Education's Borrowers Rights and Responsibilities.

3. The origination fee for 1999-2000 Federal Direct Subsidized and Unsubsidized Loans was reduced from 4% to 3%. Direct PLUS Loans remained at 4%.

4. Revised federal regulations also increased the amount of additional Unsubsidized Stafford Loan that some health-related programs (dentistry, medicine, pharmacy, and veterinary medicine) students could borrow for 1999-2000.

5. The federal Higher Education Amendment of 1998 extended the amount of time a borrower may be delinquent on loan payments before their loan is considered to be in default from 180 days to 270 days. The first Direct Loan defaults to fall under this new provision occurred in July 1999.

Programs

Loan Certifications administers FDLP programs—including Federal Direct

Stafford Loans (FDSL), Federal Direct Unsubsidized Stafford Loans (FDUSL), and Federal Direct PLUS Loans (FDPLUS)—and processes private loans through various lenders.

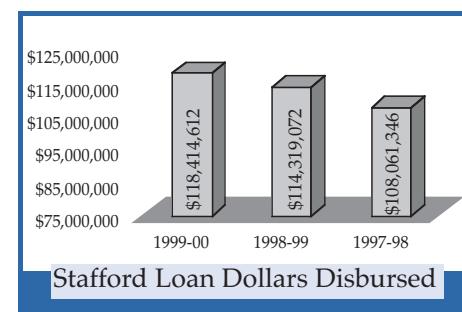
• **Federal Direct Stafford Loans/Federal Direct Unsubsidized Stafford Loans**

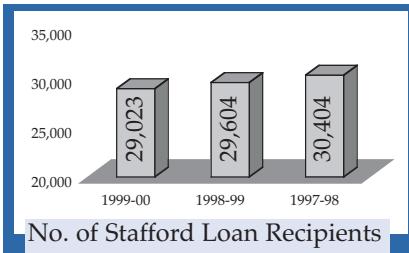
FDSL loans are need-based, federally insured loans that can be repaid after graduation. Interest does not accrue on the subsidized loan until the grace period expires, which is six months after students leave school or graduate. The Higher Education Amendments of 1992 created FDUSL, a non-need-based program. FDUSL was developed to meet the educational costs for middle-income students who do not qualify, in whole or in part, for FDSL.

"Unsubsidized" means the interest is not deferred while the student is in school. Because unsubsidized loans are not need-based, students may borrow funds over and above their eligibility for subsidized Direct Stafford funds, either up to their cost of attendance minus other aid, or up to Federal Stafford Loan program limits, whichever is less.

• **FDSL & FDUSL Statistics**

While FDSL / FDUSL funds paid to students rose from \$114,319,072 in 1998-99 to \$118,414,612 in 1999-2000 (a substantial increase of \$4,095,540), the total number of recipients decreased by 581. One reason for the increases can be attributed to the number of students choosing to process an FDUSL in excess of their need. The number of students studying abroad increased again, and certain colleges now require students to have computers and specialized software to complete their degrees. These factors contribute to the increased demand for loans. The high number of



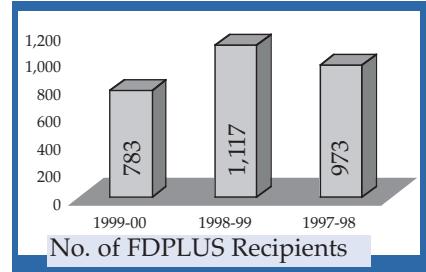
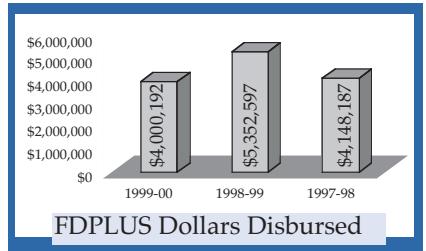


loans and ever-increasing loan amounts awarded continues to be a concern to financial aid administrators, since students reach their aggregate loan maximums faster. Another reason for the increase in student loans is that credit checks for the FDPLUS Loan are stringent. When parent borrowers are denied PLUS funds, dependent students can become eligible for an unsubsidized loan as well as a subsidized loan.

For the period July 1, 1999, through June 30, 2000, the FDSL/FDUSL interest rate was set at 6.32 percent. FDSL/FDUSL loans are capped at 8.25 percent.

• Federal Direct Plus Loans (FDPLUS)

The FDPLUS program was designed to help parents meet the expected family contribution toward students' educational expenses, with loans not to exceed the student's cost of attendance. FDPLUS does not require students or families to demonstrate need. For the period July 1, 1999 through June 30, 2000, the variable interest rate for FDPLUS was set at 7.72 percent and capped at 9 percent.



FDPLUS borrowing by parents decreased again this year, by \$1,352,405 to \$4,000,192. This decrease may be due in part to the marketing efforts of the private loan sector. Other reasons may be that parents creditworthiness and the ability of students to then borrow unsubsidized loan funds.

• Private Loans

A number of private lenders and companies offer loans that allow a student to borrow funds equal to their cost of attendance minus any other resources. These loans do not fall within federal guidelines when determining awards or distributing funds. In most cases, however, the student and/or the parent must be verified as creditworthy.

Private loans processed for UF students increased substantially this year up to \$3,105,573 from 2,724,768 in 1998-99. One reason is that some students reach their yearly maximums before the end of the academic term, causing them to seek alternative loan resources for the additional term. Another reason is the increase in the number of graduate programs UF offers. Some new graduate programs do not fall within federal guidelines for term length, causing their students to become ineligible for federal aid.

• Loan Default

UF's Federal Direct Loan Program's 1998 Cohort Default Rate was 3.9 percent, well below the national average and the threshold of 20 percent that mandates default reduction measures.

Nevertheless, both SFA and University Financial Services continued to stress the need to avoid unnecessary borrowing and to make sure students are aware of their rights and responsibilities when contracting for a student loan. Customer service staff and SFA's

Information/Publications section emphasize this through personal student contact, in loan application materials, and on the SFA website. Information/Publications provides a web brochure on debt responsibility: *Student Loans and Debt Management*. In addition the new confirmation site provides a link to the National Student Loan Data System, so that students can review their loan debt prior to accepting additional loan funds.

• Technological Services

Throughout the beginning of the 1999-2000, Loan Certifications continued to test both internally and with the Direct Loan Origination Center (LOC) to make sure the transition into Year 2000 (Y2K) would go smoothly.

UF web services to students continued to improve, with additional online services and added links to federal information that allow students to stay up-to-date on information such as total amount borrowed and the date of their last payment. SFA linked to a new Direct Loan site through the federal government's student portal on the web, at which both school staff and students can access and review Direct Loan information. At the site, students can stay up-to-date on information such as total amount borrowed and the date of their last payment.

The Loan Department continued to work with the systems staff to develop an online correction screen and to enhance the correction process. The new screen enables staff to view more correction information and send more corrections at a time to the LOC.

• Planning for the Future

- Continue to refine the automated loan system to ensure that it is accurate, user-friendly, and will accommodate the need for individual coding for the new specialty programs developed yearly.
- Continue to prepare for the National Student Loan Data Systems (NSLDS) changes that will take effect for the 2000-01 academic year.
- Continue to interact with the Federal Direct Loan Origination Center and the Department of Education, recommending improvements to ensure that all changes are workable for mainframe schools as well as for the PC-based EOE Express.
- Continue system modifications to accommodate tracking the *Master Promissory Note* across school years.
- Develop more ways students can interact with Loan Certifications electronically.



"Verification is a review process established to confirm the accuracy of information reported on financial aid documents. Because the University of Florida participates in the Federal Quality Assurance Program, it designs its own verification criteria to best target error-prone items among its unique applicant population."

*Peggy Myers
Assistant Director*

special programs

Quality Assurance

In July 1989, the University of Florida's (UF) Office for Student Financial Affairs (SFA) was selected to participate in the Department of Education's Institutional Quality Control Pilot Project, which began in 1985. This project, now called the Federal Quality Assurance Program, is a management experiment to test the feasibility of giving institutions more discretion in designing policies and procedures that will result in quality administration of Title IV student financial aid. This was one of the first initiatives on the part of the federal government to involve institutions in developing internal controls, rather than mandating them from the federal level.

As a participating institution, UF is exempt from certain verification requirements as long as it remains actively involved in conducting quality assurance activities. The university develops and implements its own verification program, customizing it to reflect its own unique institutional setting and student population.

At SFA the Quality Assurance (QA) Section was established to administer this program. A major goal of QA is to identify potential student application errors and establish ways to prevent them from happening in the future. A tandem goal is to identify potential weaknesses or error-prone processes within the office and to target those for improvement. QA continually evaluates and reviews all aspects of financial aid processing with the goals of streamlining the process and reducing errors.

In 1994-95, the QA and Verification Sections consolidated staff resources, and the verification staff performed QA document collection and data analysis. In recent years additional assistance has been provided by an awarding coordinator. The additional human resources expedited QA document collection, as well as exposing the verification and awarding staff to the QA methodology and philosophy. The arrangement resulted in a much faster completion rate of QA files. This structure continued to operate efficiently in this year.

Quality Assurance Procedure

A special Quality Assurance random sample group is selected in the fall of each year. Students in this group are required to provide special documentation to verify the information they reported on their *Free Applications for Federal Student Aid*. Receipt of aid is contingent upon submission of requested information.

Corrective Action Procedure

QA uses the data returned by students in the sample to determine areas for corrective action. Areas chosen for corrective action are those with the largest variance, measured in dollars, between what students in the QA sample originally received and what they should have received, based on current federal and university policies and procedures.

The 1999-2000 sample consisted of 267 students, of which 259 completed all of the requirements of the QA study, providing a 97% completion rate.

Statistics

Based on review of the dollar variances measured annually from 1990-91 through 1999-2000, the total dollar variance amount (for all errors) has dropped significantly. While pleased with the continued decline of variances in the areas targeted, SFA believes in continuous quality improvement. The QA staff will continue to evaluate all aspects of office organization and procedures, looking for ways to reduce errors and potential audit liabilities, simplify processes, and improve customer service.

Verification

Verification is a review process established to confirm the accuracy of information reported on financial aid documents. Because the University of Florida participates in the Federal Quality Assurance Program, it designs its own verification criteria to best target error-prone items among its unique applicant population. This is done in lieu of verifying students selected by the federal processor.

During 1999-2000, as in the previous year, items selected for verification were:

- Parents' and students' adjusted gross income
- Amount of federal income tax paid
- Nontaxable income reflected on tax returns and W-2 forms
- Household size and number of persons in college

Our efforts to streamline the process of selecting files for verification continued through the design of very specific criteria, each component of which must be met in order for selection to occur. These criteria are constructed based on results from the prior year's in-depth quality assurance study. Applications/ data elements that appear to be most error-prone in the quality assurance study are selected for special review in the following year.

In 1994-95, the Verification Department and the QA Section consolidated staff resources, and since then the verification staff has continued to perform QA document collection and data analysis. The consolidation of staff expedited QA document collection, and at the same time, exposed the verification staff to the QA methodology and philosophy.

Statistics

For 1999-2000, 6,747 student files were selected for verification. Of that total, 5,510 students completed the process, yielding a completion rate of about 82%.



"In 1999-2000, SFA's Information/Publication Services office continued its goals of producing quality financial aid publications for students and of maintaining a website that provides students and prospective students the information they need. SFA's website coordinator streamlined and improved our site's organization and content, striving toward the simplest design to provide the maximum amount of information."

Susan Mickelberry
Coordinator, Information/Publication Services

support services

Information/Publication Services

SFA's Information/Publications Services Section is responsible for the office's consumer information program, including comprehensive financial aid publications, maintaining a home page on the world wide web, a news release program, and audio-visual presentations. The Coordinator of Publications & Information Services who administers this section, composed of a full-time Computer Support Specialist and a paraprofessional staff of three to six Federal Work-Study students, coordinates with SFA's director, associate directors, and assistant directors to assure compliance with federal consumer information dissemination regulations. Information/Publications is also responsible for inhouse training materials and reports.

Major elements of the information program are: producing annual cost-effective financial aid publications, including the *Gator Aid Handbook*, the annual *Gator Aid Application Guide*, newsletters, brochures, slide presentations, in-house training materials, and the *SFA Annual Report*; producing student application and award materials that facilitate efficient processing and meet federal information dissemination regulations while communicating the application process and program requirements in terms understandable by students; and interfacing with the director and associate directors to produce timely news releases.

Information/Publications also provides annual updates to SFA information contained in university catalogs and publications, maintaining the NEXUS Tapes information series, and contributing articles to the *Student Affairs Update*. This year Information/Publications expanded participation in production of the *Update*, by assuming responsibility for the design and production of individual issues for the Division of Student Affairs.

We continued to produce our brochures series, revising, updating, and reprinting as necessary.

Information/Publications continued to issue news releases on important financial aid activities and information. Widely publicized this year was: SFA's expanded participation in UF's Integrated Student Information System (ISIS) by making students' financial aid file information available through this online web application; the state's Florida Bright Futures Scholarship Program; and the availability of online access for students to complete first-time borrowers entrance orientations.

In 1999-2000 Information/Publications continued to enhance SFA's website. SFA's website coordinator continued to maintain the Division of Student Affairs site up to date, adding many back issues of the *Student Affairs Update*, as well as keeping our own information-heavy site updated, while striving toward the simplest design to provide the maximum amount of information. The site provides application and program information, information on receiving aid, valuable financial aid links and portals, a News & Updates feature, and many printable forms in PDF format. The Scholarships section of the SFA Resource Center also requires continual maintenance. Online SFA publications such as the *SFA Newsletter*, *Student Employer's Handbook*, and all SFA brochures are also maintained. The numbers of visits to our website continues to be phenomenally high, keeping our knowledgeable use of this media a primary publication of our information services section.

Information/Publications also provides ongoing support to other SFA departments, including designing and producing newsletters, reports/report covers, slide shows, posters, flyers, etc. The annual *Student Employment Office Employers' Handbook* and the *Student Employment*

Coordinator (a university-wide newsletter to campus employers) were produced to support Student Employment Office activities. Information/Publications continues to provide support to SFA's Training & Development section with the annual Summer PREVIEW production, and other presentations as required.

Publications

- n *SFA World Wide website*
- n *1999-2000 Gator Aid Handbook*
- n *1999-2000 Gator Aid Application Guide*
- n *SFA News*—a spring and fall edition newsletter to students
- n *SFA TIPS*/World Wide Web wallet cards
- n *Brochures: First-Time Applicant's Guide to Gator Aid, Looking for Scholarships & Financial Aid, a Student Opinion Survey, and Welcome to the Office for Student Financial Affairs, 1st-Time Borrowers Entrance Orientations, Florida Prepaid College Program, SFA TIPS, We're on the WEB, Direct Deposit, Student Employment, Financial Aid for Students with Disabilities, International Student Aid, and Studying Abroad & Financial Aid.*
- n *Student Employer's Handbook*
- n *Student Employment Coordinator*
- n *1998-99 Student Financial Affairs Annual Report*
- n *1999-2000 Student Employee Handbook*

Outreach and Training

The Outreach and Training Section is responsible for coordinating and delivering all outreach activities to parents, students, and high school and community groups, as well as coordinating an ongoing training program for Student Financial Affairs (SFA) staff and student assistants.

Outreach

In January and February of 2000, SFA sponsored its annual financial aid workshops to distribute applications, explain the financial aid process, and answer questions. These workshops targeted all students interested in processing applications for financial aid: five were held at local area high schools, two at University of Florida (UF) residence halls, and three at the J. Wayne Reitz Union. Presentations were also made for professional students in the colleges of Medicine, Dentistry, Veterinary Medicine, and Law by the respective staff members of those areas.

Workshop dates were included in application packets, an article was published in the *Independent Florida Alligator*, posters were displayed in the Student Financial Affairs lobby, and advertising ran on the campus housing channel (Channel 8).

Additional outreach presentations were made to special-interest groups and high schools bringing the financial aid message to large numbers of students, parents, and college administrators. Presentations were made to high school guidance counselors, UF admissions officers, and UF academic advisers (CLAS).

The following outreach sessions were also requested and presented: Upward Bound, Minority Graduate Student Recruitment, Phi Theta Kappa Recruitment Day, and a session at Gainesville High School on student loans, debt, and consumer issues.

SFA also continued its participation in Preview, the summer freshman-orientation program. Our presentation, entitled "Money Matters," was

presented 19 times during Summer 2000. Money Matters was reformatted into a formal Powerpoint presentation that allowed Outreach and Training staff to thoroughly brief students about financial aid programs before they entered UF. The show was seen by more than 15,000 parents, students, and guests. Each student received a copy of the *Gator Aid Handbook*.

During this summer's Preview sessions, the "red zone" (online, on-site manual updating) was successfully tested as a means to update student files. SFA outreach staff collected and input data about outside scholarships from *Additional Aid Forms* from Day One Preview participants. As a result, this information was already showing online during Day Two visits by families to SFA. Information gathered from the *Additional Aid Forms* provided notice to SFA of more than one million dollars in outside scholarships to incoming freshmen. These scholarships are included as part of students' aid when awarding the complete package.

Outreach and Training also participated in all regular student orientations throughout the year to accommodate lower- or upper-division transfer students. As at PREVIEW, each student received a copy of the *Gator Aid Handbook*.

The Outreach Coordinator represented UF at various conferences and meetings for the Florida Association of Student Financial Aid Administrators this year. Presentations included an overview of the National Student Loan Data System, a New Aid Officers Workshop, and a retreat for support staff.

Training

Because of the large number of financial aid programs administered by SFA, the complexity of the financial aid process, and the need for compliance with federal and state regulations, on-going staff training is critical to maintaining a successful operation.

- **Weekly counselor training sessions**

The training staff coordinate 30-minute training sessions on timely subject matter that are held immediately after the weekly counseling staff meeting. These sessions are presented by an SFA staff member or representative from another UF department or agency and generally deal with technical training, updates on specific areas of program responsibility, and / or information that will help our staff function efficiently with other UF offices and departments.

- **New employee orientation**

A need for standardized training for all new employees was expressed. To facilitate this, Outreach formalized a comprehensive two-day orientation and training program that gives new employees a solid foundation in the financial aid basics before being assigned to their specific departments.

- **Macintosh computer training**

All professional staff members have access to the SFA Macintosh network. Specific individual training sessions are held periodically to ensure employees' familiarity with the functions and capabilities of the Macintosh network. In addition, staff members may access a videotape training library to seek direction on a particular application problems. Members of the systems staff provide essential training.

"This year we upgraded all computers at our front desk advising stations to Apple iMacs.

These new "all-in-one" computers allow advisers to multitask... review documents via

KIDDS, check e-mail, and access NERDC screens. Major benefits include ease of use for the advisers, less down-time, better access to information, and less waiting for students."

*Tony Gordon
Systems Coordinator*



technical systems &

Awarding

Awarding is comprised of two Financial Aid Coordinators who process all award revisions. Requests for revisions to students' awards generally come from customer service staff when students' enrollment, residency, or housing statuses change; when they receive additional outside funds; and/or when they request revisions to their financial aid awards for which they are eligible. Awarding also processes *Additional Aid Forms*, which are distributed to students with their initial award letters and which students use to report additional outside resources.

Awarding staff are also responsible for adjusting students' awards in situations where their need has been "overmet." The receipt of outside resources (scholarships, fellowships, etc.) by students after their need has been met produces a large volume of the work for this area. Before the first disbursement of aid in the fall, a program known as "rolling revisions" automates any file adjustments necessary because of overmet student need. After the first fall semester disbursement of aid, files are manually reviewed and adjusted.

Awarding also monitors and documents students' repayments of aid funds when required. When students whose need is overmet have repaid required amounts, the staff update the SFA award file to reflect corrected amounts.

Mid-year status changes (undergraduate to graduate, out-of-state student to Florida resident, etc.) also require a manual review and documentation of the file. In addition, awarding completes the approved *Budget Revision Petitions* that revise a student's cost of attendance figures, sometimes changing the student's award maximum.

The Awarding Section coordinates "withdrawal" information between University Financial Services, the Office of the University Registrar, and SFA's Customer Service Department in situations when a student withdraws from school during a semester when that student is receiving aid.

In 1999-2000, staffing, workload, resources, and responsibilities increased marginally in this department.

Disbursements & Fund Reconciliation

The Disbursements Department monitors and controls the automated disbursement systems and works with University Financial Services (UFS) to ensure that the batch disbursement programs run correctly and efficiently.

The staff consists of a Financial Aid Coordinator III, who develops the program specifications for the numerous automated systems; a Financial Aid Coordinator II, responsible for implementing regulatory requirements mandated by the federal and state governments and supervising an OPS worker in daily quality control review of reports; and a Program Assistant who supervises a student worker assisting in manually processing paper checks. The staff monitor checks from private lenders, state issuing agencies, and donors, and code and file all checks.

Disbursements is in charge of final review of student eligibility for loans, scholarships, and campus-based aid before disbursement of these funds. Disbursements receives both paper checks from various scholarship donors and private lenders and electronic draw-downs for federal funds. These monies are for direct disbursement to students, or for deposit with UFS for disbursement to students. The staff also returns to donors funds for which students are ineligible.

Disbursements also manages monthly and per academic year fund reconciliation between the university and the federal government for all Federal Direct Loan funds. This process involves transmitting and reconciling all disbursement data, as well as award-file adjustment, and transmission and reconciliation of data for all loan funds returned by students—either voluntarily or due to obligatory repayment.

In Review

Most of the 1999-2000 academic year was spent testing, monitoring and enhancing the new programs to be effective in 1999-2000, as mandated by the Higher Education Amendment of 1998.

- **Master Promissory Note (MPN) for Stafford loans:** The new MPN process, which allows borrowers to receive loans for multiple academic years under one promissory note, was a challenge throughout the year. The beginning of the year was spent recording and tracking the MPN. In the summer we implemented the multi-year feature of the MPN, to be effective for the 2000-01 academic year, which required moving MPN information from one year to another as well as retrieving information from the National Student Loan Data System (NSLDS) and the Direct Loan Origination Center.

- **Confirmation:** In lieu of a yearly promissory note, a notification process was required to ensure students were informed of loan funds awarded to them before the loan was disbursed. For the 1999-2000 academic year, UF chose a passive confirmation process for Subsidized Stafford Loans (students are notified of their loan award but not required to formally accept the funds prior to a disbursement) and an active process for Unsubsidized Loans (students are required to return a *Loan Acceptance Form* to the school before disbursement).

In addition to monitoring the 1999-2000 confirmation process, staff worked to develop an automated confirmation process for 2000-01 that requires students to actively confirm both Subsidized and Unsubsidized Stafford Loans on UF's Integrated Student Information System (ISIS) website prior to disbursement of their loan(s). Through the ISIS site, students will also be able to revise their loan amounts, link to NSLDS to review their loan debt, and access the Department of Education's Borrowers Rights and Responsibilities.

- **Federal Direct Loan Origination Center (LOC):** Our fourth year working with the LOC in Montgomery proved to be a challenge for both the LOC and UF. The new systems required close

monitoring and random manual intervention by both parties throughout the year. The open line of communication provided by LOC was very much appreciated during this transitional period.

- **Reconciliation of Direct Loan data with the federal government:** The new *Direct Loan School Account Statement* (DLSAS) designed by the Federal Direct Loan Task Force proved to be an ineffective reconciliation tool. Because the DLSAS was a monthly reconciliation report rather than a year-to-date report, there were often discrepancies in tracking in which month a loan should be reconciled. UF gave recommendations and feedback to the Direct Loan administration and revisions continue to be made. In the future the DLSAS will be optional, and the year-to-date 732-Report will also be available for schools to use as a reconciliation tool.
- **National Student Loan Data System (NSLDS):** We participated in our third year using this national system to assess students' loan totals and other Title IV aid totals. We continue to refine our in-house system for using NSLDS to comply with federal requirements to be effective in academic year 2000-01.
- **Y2K:** Preparation and testing continued to allow the best defense against problems transitioning into the new millennium. Testing this year occurred not only in-house, but also in conjunction with other UF offices, and with federal entities.
- **Extra \$ for health-related degrees:** Per federal regulation, additional Unsubsidized Stafford funds were made available in the 1999-2000 academic year to some health-related degree programs including medicine, veterinary medicine, and dentistry. The new coding initiated during the prior summer continued to be monitored throughout the school year.
- **Loan origination fee reduced:** The federal government's revision of the origination fee amount for Stafford loans (excluding PLUS) from 4% to

3% was effective for all 1999-2000 loans. Students nationwide have benefited from this fee reduction.

- **More on-line data for students:** UF web services continued to improve throughout the year, with even more online services available and new download capabilities.

Statistics

In 1999-2000, Disbursements monitored and authorized disbursement of \$30,132,258 in grant funds, \$88,320,700 in scholarships (a monumental increase of almost \$23,000,000 over last year), and \$130,858,039 in student loan funds. The total amount authorized through this section was \$249,310,997.

Disbursements (PWDs) and more: continue to research and ensure compliance for new Reauthorization regulations signed into law October 7, 1998, including PWDs. PWD procedures will include tracking students' dates of withdrawal, calculations of PWD eligibility, tracking notifications to students and their response time, etc.

- Prepare to convert from the current data transmission network, TIVWAN, to use only of the Internet. Although the Federal Department of Education had targeted the conversion for March 1999, the changeover hasn't occurred.

New Year Objectives

- Continue our goal to close out the previous year's Federal Direct Loan reconciliation significantly before the federal deadline. Academic year 1999-2000 saw us close on time with a zero ending balance (out of \$122 million disbursed Direct Loan dollars).
- Continue monitoring use of NSLDS, particularly in the areas of NSLDS post-screening updates, MYTR (mid-year transfer), and SUTR (summer transfer) complexities.
- Continue system modifications to accommodate the ever-changing *Master Promissory Note* tracking system. This will include applying information pertaining to the MPN from the *Federal Student Aid Report* to our internal system.
- Prepare for loan confirmation via the Web by students for both Subsidized and Unsubsidized Stafford Loans, by term, to be implemented for academic year 2000-01. If they wish, students will also be able to reduce their loan amounts through the same website.
- Continue to monitor on-line systems.
- Continue to brainstorm upgrades to scholarship processing methods, including newer technology such as scanners in place of photocopying.
- New Post-Withdrawal

Document Editing

The Document Editing Section is where the application processing cycle begins. The staff, comprised of a financial aid coordinator and a clerical supervisor, are also responsible for the mailroom.

The staff of this section receive, sort, date-stamp and distribute all incoming mail and date and edit incoming application forms for problems. They then forward all forms and documents to the data entry section to be keyed into the system. Document Editing also coordinates incoming and outgoing financial aid transcript activities, requesting financial aid transcripts from other institutions for all schools listed on students' aid applications and honoring similar requests from other institutions. Most major mailouts are also handled by this area, including mailing of financial aid award letters, student loan promissory notes, and bulk financial aid application packet mailings to Florida high schools and community colleges at the beginning of every application year.

This year a major physical reconstruction and reconfiguration of the application processing area provided expanded workspace for the staff. The mailroom has acquired a PFE Automailer 2MKII folder/stuffer to handle large mailouts. More room was also allocated for document editing.

Application Statistics

SFA receives *Federal Student Aid Reports (FSARs)* electronically from the federal processor. In 1998-99, SFA received a total of 37,708 FSARs online.

This year, the introduction of bar-coding of *Master Promissory Notes*, NSLDS, verification, and other processing documents greatly enhanced and expedited the application tracking process.

Records & Optical Scanning

SFA's Records/Optical Scanning Section maintains an accurate, up-to-date system of records consisting of more than 128,000 active and inactive files. This section, including an office manager, a clerical supervisor, a senior clerk, and a staff of work-study students, optically scans all records, purges the file system once a year, and merges current files with those of previous years' applications.

MARS (Multi-user Archival Retrieval System) System

Since 1992, SFA has used an optical imaging record scanning system from Micro Dynamics called MARS. In late 1999, to integrate our records system with the system in use by the rest of the university, SFA switched from MARS to the Kofax Index Digital Document System (KIDD), a component compatible with IBM's Imaging Archival System, which is used campus-wide.

Statistics

Documents generally are scanned within two to four working days after their receipt.

Following are statistics on documents received and scanned by Records for the 1999-2000 school year: *Verification Checklists*, 38,357; student employment (SP-100) forms, 18,253; electronic data changes from the FAFSA, 8,616; awards and award revisions, 33,602; and *Financial Aid Transcripts*, 2,696. The *Financial Aid Transcript* figures include mid-year transfer students. The majority of documents were received between June and September. The total number of documents received and scanned during the year was 183,792.

Factors in the increased number of documents processed this year included a new required form, the *Federal Stafford Loan Acceptance Form*, which accounted for a large increase of just over 11,000 documents, and an increase in the number of *Transient Forms* from transient students, which rose to 687.

Systems & Programming

Systems and Programming (S & P) develops and maintains the computer software systems needed for automated delivery of student financial aid at the University of Florida (UF). The Student Financial Affairs computer system is a fully functioning, automated system comprising numerous files and/or modules, involving both batch and online processing. Among the staff's many responsibilities are designing and maintaining the online terminal display system and coordinating electronic data exchange with federal, state, and local agencies to gather all information required to process students' financial aid.

S & P's staff, consisting of ten, full-time systems analysts and programmers, are responsible for maintaining the records of more than 30,000 financial aid applicants.

Primary S & P Activities and Responsibilities

Batch processing and maintenance: S & P is responsible for the scheduled batch production of 1,500 programs and for maintenance of those modules as needed.

Online processing and maintenance:

S & P is responsible for scheduled online processing of 29-plus screens and integration and maintenance of those modules as needed. The section is also responsible for the online, real-time, updatable interface with University Financial Services (UFS) for student award and disbursement data and read-only access to all registrar files, student loan collections, accounts receivable, payroll files, etc.

Nightly interfaces:

S & P is responsible for nightly production interfaces with UF's Registrar's Office, UFS, and student payroll files to: pick up changes in enrollment status, in academic and financial flags, and in payroll earnings; receive payment status information; and exchange student fee deferment

and award information. Nightly production also involves interfaces within SFA files to trigger or halt the next step of financial aid processing.

Electronic telecommunication:

- **Federal Department of Education.** S & P is responsible for scheduling and monitoring the daily, two-way, electronic transmission of student records to and from the federal processor (currently Electronic Data Systems). The records are then loaded into the SFA database for continued processing as needed.
- **Macintosh Network.** S & P is responsible for daily and ongoing maintenance of the network, determining hardware and software purchase requirements, and training users in hardware and software use.

Programming updates and development:

Since students must apply for financial aid annually, a minimum of two years of data must be maintained and processed simultaneously. Furthermore, because of changes in federal, state, and institutional laws and policies, virtually all programs must be modified at least once annually to reflect these required changes. Some of the more volatile programs, such as the Federal Direct Stafford Loan Program and the verification modules, must be modified more frequently. Program modification and development of new programs and modules are completed as needed.

Federal and state reporting:

S & P is responsible for the scheduled production and maintenance of federal reports as needed. Annual and quarterly reports such as the federal Fiscal Operations/Application for Funds report, the Pell Grant Quarterly Institutional Payment Summary Reports, and Board of Regents data file reports are part of scheduled production. Other reports are generated by request.

Statistical reporting:

S & P is responsible for production and maintenance of statistical reports on an "as-needed" basis. Annual and quarterly

reports are part of scheduled production. Other statistical reports are generated by request.

Data Entry

The Data Entry staff has been reduced to one and a half full-time employees due to the introduction of our new bar-coding system that has reduced the amount of required data entry. The Data Entry area has also been relocated to a more central area. The primary activities of the Data Entry Section are data entry of all documents received from students or generated inhouse during the process of applying for financial aid. There are two general categories of documents—"batch" and "online." "Batch" documents are keyed and stored throughout the day and the data applied to the SFA production files during the evening computer production run. "Online" documents are keyed throughout the day, and the data is applied to the SFA production files as the data is keyed.

Relationships with Outside Departments/Agencies

SFA's S & P Section is involved in many ongoing and necessary relationships both within and outside the university. Among the departments and agencies that this unit serves and from which it receives services are:

University Information Services (UIS): SFA's online award file is updatable and directly linked to the UFS net check system (administered by UIS). Payments are read into SFA's files daily. Nightly interfaces with UFS's files are an integral part of financial aid processing, so production schedules must be carefully coordinated between these two units. UIS and SFA also share use of hardware as needed (primarily high speed printers).

Registrar: SFA's online computer screens are a subsystem of the Office of the University Registrar's GATA system. As such, S & P staff maintain ongoing communication with the registrar's staff to keep abreast of all

changes to the GATA operating systems, feedback problems and suggestions, and to ensure system security. Further, interfaces with the registrar's files nightly are an integral part of financial aid processing, so production schedules must be carefully coordinated between these two units.

Northeast Regional Data Center

(NERDC): S & P works closely with NERDC staff for maintenance and updates to SFA's online line modules, to programming language changes and updates, and to systems security. Additionally, NERDC houses the storage of all SFA data files.

Federal Department of Education: S & P staff work closely with federal Department of Education contractors to ensure proper transmission and receipt of electronic student aid records. This includes scheduling and monitoring transmissions, annual testing, and installation of program updates.

Florida Information Resource Network (FIRN): Receipt and transmission of electronic, online loan application processing between UF and the state contractor takes place over the FIRN network. Periodic communication with FIRN staff is required to keep abreast of changes and to resolve transmission problems.

Knott Data Center: State processing for automated financial aid grant and scholarship systems is handled through the Knott Data Center in Tallahassee. Periodic communication is required to schedule and monitor electronic record transmissions and resolve transmission and programming problems.

Board of Regents (BOR): S & P staff work closely with BOR systems staff to provide statistical reports as needed and to transmit the annual financial aid database file.

Vice Presidents: S & P staff interact with the vice presidents' offices, particularly the Office of the Vice President of Student Affairs, to provide statistical information or data

processing support as needed. Additionally, S & P staff are informally called upon to assist the Vice President of Student Affairs' and Student Services' offices with Macintosh network installation, training, problems, and special projects.

Faculty and Staff: S & P staff interact with UF faculty and staff to provide statistical information as necessary, assist in resolving problems, provide or limit access to and interpret SFA records, and act as an informal resource for Macintosh PC questions or problems.

Continuing Goals

- Continue to work toward a "paperless" office by: (1) increasing electronic data transmission of student information and electronic completion and transmission of federal, state, and institutional reports, (2) investigating the feasibility of an electronic student application process, and (3) adding new ways of capturing data.
- Increase and improve students' access to their financial aid records via such techniques as the World Wide Web, access via modem, and an IBM Voice Response Unit.
- Develop online training modules on the Macintosh PC network for in-service and pre-service training for staff and student assistants.
- Adapt and enhance existing systems to remain in compliance with federal and state regulations as program statutes change.
- Plan for upgrades to technology in our Student Resource Center, which provides students on-site access to computer resources. We plan to upgrade with five state-of-the-art Apple G4 computers and a high-capacity printer.
- Investigate the purchase and programming of card swipe readers to be used at our front desk advising counter. With the readers, students will simply swipe their GatorOne cards through the readers, and their information will appear on the adviser's screen. This technology will improve staff efficiency and enhance student confidentiality.

- Develop a web-based, office-supply ordering system for SFA staff use.

Systems Activities for 1999-2000

S & P experienced another challenging year, readying all computer programs for the year 2000, continuing with ongoing projects and system maintenance while absorbing many new projects and changes. Areas of change, primarily in personnel, hardware, and the financial aid delivery system fall into five categories: personnel, ongoing projects, system maintenance, new acquisitions, and new projects.

Personnel: S & P is now at full strength.

Ongoing projects: S & P continues to have a long list of ongoing projects geared toward creating a more unified and efficient work environment. S & P continues to refine Student Affairs' and SFA's presence on the World Wide Web. S & P also continues to be responsible for programming and maintenance of statistics on the Rolm phone switch in the Criser Student Services Center.

System maintenance: Financial aid software is in a continual state of flux due to changes in federal regulations and the need to stay in compliance with federal, state, and university regulations and guidelines. This requires continual modification to aid award and disbursement programs.

New acquisitions: S & P continues to upgrade our desktop computers to the Power PC standard as funds permit. This year we have continued to replace older equipment.

New projects: The year has been filled with new challenges and responsibilities.

- S & P completed the year 2000 software conversion and testing.
- Year 2000 Tracking and Award systems were brought online.
- S & P staff wrote the web-based Loan Acceptance System.
- We continue to enhance our web presence within Eagle and ISIS, adding student access to financial aid information. The new access allows

students to keep track of their aid file by providing information such as their aid awards, the status of their aid file, documents they still need, their deferment status, and their disbursement status.

- KIDDs, an administrative application on UF's Integrated Student Information System (ISIS) web server, was implemented in late 1999. KIDDs allows our Records area to scan student documents on a high-speed, high-resolution scanner and store them on a file server at the NERDC. To meet requirements of SFA and the Registrar's Office, UF's Chief Information Officer's office developed a web interface for KIDDs that enables UF staff to access these documents (with their NERDC ID and password) on a standard Web browser.
- We upgraded all computers at our front desk advising stations to Apple iMacs. These new "all-in-one" computers allow advisers to multitask... review documents via KIDDs, check e-mail, and access NERDC screens. Major benefits are ease of use for the advisers, stable operation, less down-time, better access to information, and less waiting for students.
- We purchased and installed a barcode scanner in the Document Editing area, realizing huge benefits in efficiency for staff and improving student service. The scanner functions as a document tracking mechanism, informing our online systems as soon as many crucial student documents are received, including loan *Promissory Notes*, verification forms, *Additional Aid Forms*, and NSLDS documents. A lag previously occurred from the time these documents were received until they were keyed in Data Entry. Now, when students are mailed a document request, the barcode is already attached. When returned, Mailroom staff scan the barcode, immediately entering the document into the system.

"Attendance at various University of Florida and Division of Student Affairs social and professional functions affords our staff numerous opportunities to share departmental news and advances, as well as to interact socially."

*Anne Newman
Office Manager*



staff & professional

SFA Staff

Administration

Karen Fooks	<i>Director</i>
Rick Wilder	<i>Associate Director</i>
Elaine Stuckman	<i>Associate Director</i>
Tony Gordon	<i>Computer Applications Coordinator</i>
Gordon Andrews	<i>Assistant Director, Scholarships and State Programs</i>
Donna Fowler	<i>Student Affairs Coordinator—Loans and Disbursements</i>
Ron Anderson	<i>Student Affairs Coordinator—Document Editing, Information/Publication Services, Outreach, Records/Optical Scanning, Training & Development</i>
Peggy Myers	<i>Student Affairs Coordinator—Pell Grant, Manual Awarding, Quality Control, Verification</i>
Rodlee Ritter	<i>Student Affairs Coordinator, Customer Service</i>
Rita Rygler	<i>Assistant Director, Loan Certification</i>
Terri Wilder	<i>Senior Accountant</i>
Betty Holt	<i>Senior Fiscal Assistant</i>
Anne Newman	<i>Office Manager</i>
Valerie Southwell	<i>Word Processing Supervisor</i>
Vacant	<i>Word Processing Operator</i>

Customer Service

Ashanta Simmons	<i>Senior Clerk</i>
Marina Cloud	<i>Financial Aid Coordinator</i>
Debbie Coleman	<i>Financial Aid Coordinator</i>
Joyce Days	<i>Senior Clerk</i>
Chansone Durden	<i>Financial Aid Coordinator</i>
Jack Graham	<i>Financial Aid Coordinator</i>
Chandra Hardy	<i>Financial Aid Coordinator</i>
Cindy Jensen	<i>Financial Aid Coordinator</i>
Chiney Jones	<i>Clerical Supervisor</i>
Cecile Kamath	<i>Financial Aid Coordinator</i>
Connie Reed	<i>Financial Aid Coordinator</i>
Laura McNamara	<i>Financial Aid Coordinator</i>
Fred Pearce	<i>Financial Aid Coordinator</i>
Tonja Cave	<i>Clerk</i>

Special Programs

Nolan Simmons	<i>Financial Aid Coordinator, Athletes</i>
Bill Watson	<i>Financial Aid Coordinator, MBA</i>

Financial Aid Programs

<i>Scholarships and State Programs</i>	
Brenda Langley	<i>Financial Aid Coordinator</i>
Ruben Lopez	<i>Program Assistant</i>

Student Loans

Amber Harvey	<i>Financial Aid Coordinator</i>
Dimitra Canellis	<i>Financial Aid Coordinator</i>
Denise Flinchum	<i>Program Assistant</i>

Student Employment

Ruth Strawder	<i>Financial Aid Coordinator</i>
Pat Bush	<i>Senior Clerk</i>
Birdella Williams	<i>Senior Clerk</i>

Satellite Offices

Mike Menefee	<i>Student Financial Affairs Coordinator, Health Professions, Nursing, Pharmacy, & Veterinary Medicine</i>
Eileen Parris	<i>Student Financial Affairs Coordinator, Medical Center</i>
Tom Kolb	<i>Student Financial Affairs Coordinator, Dental School</i>
Trish Varnes	<i>Student Financial Affairs Coordinator, Law School</i>

Technical Processing and Support

Data Processing

Lisa Nelson	<i>Program Assistant</i>
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Disbursements

Sharon Stebbins	<i>Financial Aid Coordinator</i>
Vacant	<i>Program Assistant</i>

Document Editing

Micheal Wood	<i>Financial Aid Coordinator</i>
Eloise Trucano	<i>Clerical Supervisor</i>

Manual Awarding

Richard Brauning	<i>Financial Aid Coordinator</i>
Donna Kolb	<i>Financial Aid Coordinator</i>

Information/Publications Services

Susan Mickelberry	<i>Coordinator, Information/Publications Services</i>
Michael Daube	<i>Computer Support Specialist</i>

Quality Assurance

Susan Bragg	<i>Financial Aid Coordinator</i>
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Pell Grant

Dawn Western	<i>Financial Aid Coordinator</i>
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Records/Optical Scanning

Berta Atkinson	<i>Office Manager</i>
Rubenia Ellis	<i>Clerical Supervisor</i>
Laurie Sandlin	<i>Senior Clerk</i>

Systems and Programming

Sharon Brown	<i>Computer Programmer Analyst</i>
Darius Cauthen	<i>Computer Programmer</i>
Mike Dugger	<i>Senior Computer Programmer Analyst</i>
John Gifford	<i>Computer Support Analyst</i>
Norma Kuhr	<i>Computer Programmer Analyst Manager</i>
Cathy Murray	<i>Senior Computer Programmer Analyst</i>
Richard Omer	<i>Senior Computer Programmer Analyst</i>
Raleigh Pickard	<i>Senior Computer Programmer Analyst</i>
Susan Smith	<i>Senior Computer Programmer Analyst</i>

Verification

Susan Bragg	<i>Financial Aid Coordinator</i>
Larry Moore	<i>Financial Aid Coordinator</i>
Nicole Young	<i>Financial Aid Coordinator</i>
Vince Lipford	<i>Clerk Typist</i>

Professional Activities

Karen Fooks • Director

memberships: National Association of Student Financial Aid Administrators (NASFAA); Southern Association of Student Financial Aid Administrators (SASFAA); Coalition of State University Aid Administrators (COSUAA); Steering Committee

UF committees: Financial Aid Committee, Undergraduate Advising Council

Rick Wilder • Associate Director

memberships: NASFAA; SASFAA; FASFAA: Past President, Executive Board, Conference Committee, Membership Services, Finance Committee

UF committees: Minority Recruitment and Retention Council, Reitz Scholars Mentor

Elaine Stuckman • Associate Director

memberships: NASFAA, SASFAA, FASFAA: Executive Board, Membership Services

Tony Gordon • Coordinator of Computer Applications

memberships: NASFAA, SASFAA, FASFAA: Executive Board, WEB Site/Electronic Communications Chair

Mike Menefee • Student Financial Affairs Coordinator

Health Professions, Nursing, Pharmacy, & Veterinary Medicine

memberships: NASFAA, SASFAA, FASFAA

Gordon Andrews • Assistant Director

Scholarships, State Programs, Student Employment, VA Work-Study, SFA Resource Center

memberships: NASFAA, SASFAA, FASFAA

UF committees: University Payroll/Personnel Council, Reitz Scholars Mentor

Donna Fowler • Student Affairs Coordinator

Loan Certifications and Disbursements

memberships: NASFAA, SASFAA, FASFAA: Federal Direct Loan Committee

Tom Kolb • Student Financial Affairs Coordinator

College of Dentistry

memberships: NASFAA, SASFAA, FASFAA

UF committees: College of Dentistry Financial Aid Committee, College of Dentistry Admissions Committee

Ron Anderson • Student Affairs Coordinator

*Document Editing, Information/Publications Services, Outreach,
Records/Optical Scanning, and Training & Development*

memberships: NASFAA, FASFAA, SASFAA

Susan Mickelberry • Coordinator, Information/Publication Services

memberships: University of Florida Communications Network (UFCN), SASFAA, FASFAA

UF committees: Student Affairs Update Committee

Peggy Myers • Student Affairs Coordinator

Pell Grant, Awarding, Verification, Quality Assurance, and Athletes

memberships: NASFAA, SASFAA, FASFAA: Bonnie Pirkle Scholarship Committee

Eileen Parris • Student Financial Affairs Coordinator

Medical Center

memberships: NASFAA, SASFAA, FASFAA, Association of American Medical Schools Committee on Student Financial Affairs (COSFA)

UF committees: College of Medicine Financial Aid Committee, College of Medicine ADA Committee

Rodlee Ritter • Student Affairs Coordinator

Customer Service

memberships: NASFAA, SASFAA, FASFAA: Early Awareness Committee

Rita Rygler • Assistant Director

Loan Certifications

memberships: NASFAA, SASFAA, FASFAA, Florida A & M University Alumni Association Pi Lambda Theta

Nolan Simmons • Financial Aid Coordinator

Athletes

memberships: FASFAA, N4A

Trish Varnes • Student Financial Affairs Coordinator

Law School

memberships: NASFAA, SASFAA, FASFAA, Key Bank Graduate and Professional Aid Advisors Conference

UF committees: College of Law Financial Aid Committee, Student Affairs Volunteer Committee (SAVE)

Bill Watson • Student Financial Affairs Coordinator

MBA

memberships: SASFAA, FASFAA

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