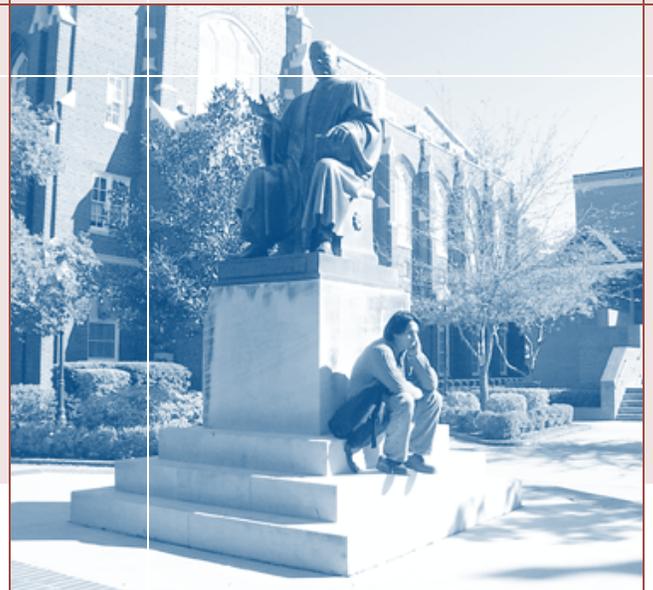


ANNUAL REPORT

2000-01



Office for Student Financial Affairs
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UNIVERSITY OF
FLORIDA

annual report

office for student
financial affairs

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SFA continued its ongoing goal of quality service for University of Florida students. As always, this involved going the extra mile needed to accommodate changing federal and state requirements as well as our own goal of providing enhanced financial aid services.

Karen Fooks
Director

office for student financial affairs

I am pleased to present the 2000-01 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 2000 and continuing through July 2001, as well as information on the general state of the office.

SFA continued its ongoing goal of quality service for UF students. As always, this involved going the extra mile needed to accommodate changing federal and state requirements as well as our own goal of providing enhanced financial aid services. Many of our departments' resources this year were directed toward revising systems and procedures to implement a new Federal Direct Loan Confirmation site available through UF's ISIS system and a new disbursement tracking system for the state's Florida Bright Futures Program.

The installation by our systems area of card-swipe readers at our customer service stations and a new Mac G-4 server were valuable new additions that resulted in increased level and quality of service for students.

The Florida Bright Futures Scholars program has continued its phenomenal growth, and the awarding of summer Florida Bright Futures Scholarships by the state for the first time this year resulted in the attendant increase in funds disbursed, requiring additional staff resources to process the awards and disbursements.

This year, 2000-01 saw the fulfillment of two long-term SFA goals with the addition of several staff positions. Our Training and Development area hired a full-time outreach adviser to work in conjunction with UF's Admissions Office to actively recruit students from diverse backgrounds to attend UF, and our Systems area added a Computer Support Specialist position to be responsible for staff training, as well as computer and network troubleshooting, and equipment and software maintenance.

SFA staff are committed to providing financial assistance to all students who wish to achieve their educational goals at the University of Florida (UF). On behalf of SFA staff, we welcome any questions or comments regarding this report.

Each year, SFA continues to enhance the quality of its financial aid services and delivery capacity. 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 \$276 million in student aid from federal, state, institutional, and private sources to close to 40,000 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 of a

student's educationally related expenses, SFA makes every effort to 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 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

SFAs primary responsibility is 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 student's family, job income, savings, and other resources.

"00-"01 summary and highlights

In 2000-01, SFA continued to enhance our Web presence within EAGLE and ISIS, greatly increasing access for student financial aid recipients to financial aid information and functions. Several SFA departments contributed to the first year on the Web of our new online Federal Direct Loan Confirmation site available through ISIS. Over the course of the year, wrinkles in the program were smoothed after observing student use of the new service. We also experienced the fruits of the first year implementing the Federal Direct Stafford Loan *Master Promissory Note (MPN)*. Due to the successful implementation of this efficient new form, UF paid out significantly more Stafford loans in the first several automated payment runs of the academic year and continued to experience this benefit throughout the year. The awarding of summer Florida Bright Futures Scholarships for the first time added to another huge increase in funds disbursed this year. Our Systems area installed card-swipe readers to our customer service stations. These and many similar projects resulted in an active year for SFA staff and significant progress toward our goal of providing UF students with the best financial aid technology and services available.

- **This was our first year implementing the Federal Direct Stafford Loan Master Promissory Note (MPN), and our opportunity to see the true payoff.** In 2000-01, promissory notes became multi-year. Students who had completed an MPN the previous year at UF and received a loan payment were set to receive their 2000-01 loans as soon as they confirmed they desired the funds.
- **SFA continues to maintain and enhance our web presence within Eagle and ISIS.** The Loan Confirmation Web site added as a new feature of ISIS was a time-consuming project for SFA staff, but highly successful. The site was designed to enable students to accept or cancel their loan, reduce the amount, and/or link to the National Student Loan Data System to review their total loan debt. As a result, modifications to students' files have been made more quickly, and loan disbursement through Batch

Net Check has become possible the same night. The new site was highly publicized through various media.

- **The Florida Bright Futures Scholars (FBFS) program continued to grow dramatically.** The awarding of summer scholarships for the first time in summer 2001 added to another huge increase in funds disbursed. In 2000-01, UF students received \$40,072,779 in FBFS—up \$10.5 million from last year.
- **An increase in student overseas program attendance was another result of the State's decision last year to fund summer Florida Bright Futures,** as well as a corresponding increase in financial aid recipients. The number of overseas students receiving financial aid increased by nearly 27% over the previous year—760 UF students participating in overseas study received financial aid.
- **SFA participated in Ask UF, a new UF web information service launched in December 2000.** Our Information/Publication Services section assumed responsibility for our participation, in conjunction with our Customer Service area. SFA provided about fifty Questions and Answers (QA) in this first year, with three QA in the top ten. "When should I apply for financial aid to attend UF?" was the number two question accessed by students.
- **Four non-traditional MBA programs were created this year, bringing the total to twelve.** Three hundred sixty-two students enrolled in these programs, up 24% over last year. SFA processed private loan applications for 48 of these students, and 131 Federal Direct Stafford Loans. Loans totaled more than \$1.9 million.
- **Our Systems and Programming area completed installation of card-swipe readers at all of the front desk advising stations in our lobby.** The new readers greatly enhance confidentiality of student records and minimize potential ID difficulties for staff and students.
- **Systems and Programming installed a new Macintosh G-4 Web Server to improve capacity to our computer system.**

fiscal review

- **Systems filled an ongoing departmental need by hiring a new Computer Support Specialist position** to be responsible for staff training, computer and network troubleshooting, and equipment and software maintenance.
- **In spring 2002, SFA consolidated and expanded our Training and Development and Information/Publications sections** under one Associate Director with the goal of improving information flow and increasing the quality control of SFA's information and outreach efforts. This reorganization included hiring a full-time outreach adviser to work in conjunction with UF's Admissions Office to actively recruit students from diverse backgrounds to attend UF. The goal of the new staff member is to reach out to incoming freshmen and transfer students through presentations, lectures, conferences, workshops, and other functions.
- **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 Supplemental Educational Opportunity Grant, 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 consumer information initiatives** continued to emphasize electronic financial aid application, the new *Master Promissory Note*, and the online Loan Confirmation site on ISIS, providing information to the media and SFAWeb site links to pertinent federal web locations. Our Information/Publications section also began offering the *SFA Newsletter* three times a year instead of two and created a *Withdrawal Information* brochure to provide concise information to assist students withdrawing from UF.

SFA functioned with a \$3,246,292 operating budget in 2000-01. Funding for the operating budget is provided from State Education and General (E & G) funds, an administrative allowance for the administration of federal financial aid programs, and student financial aid fees. State E & G funds allocations provided approximately 71% of the total budget, with the administrative allowance and financial aid fee making up the remaining 29%.

Staffing for 2000-01 was at 67.75 FTE as of July 2001, remaining unchanged from July 2000.

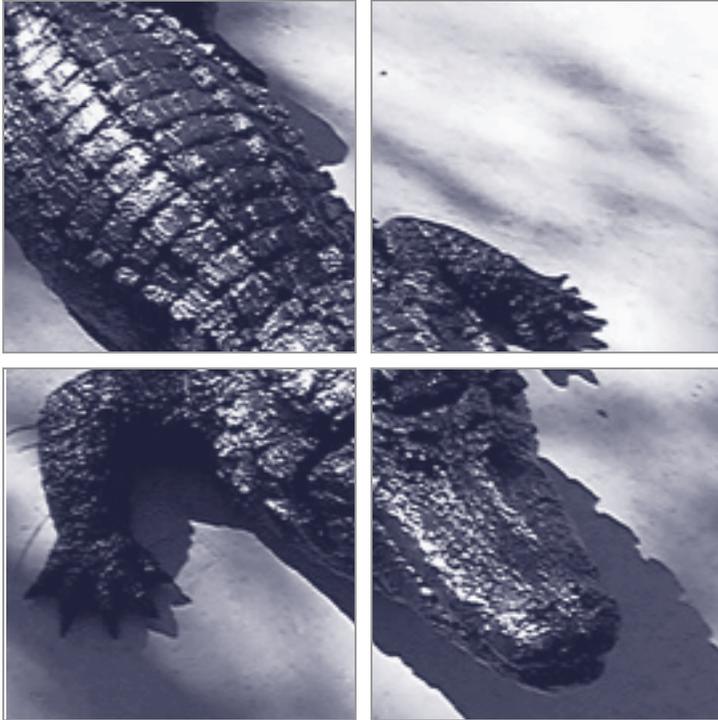
In 2000-01, the increase in Salaries is due to annual raises. Operating Expenses and Other Capital Outlay (OCO) expenditures decreased as 1999-00 expenditures were largely due to a one-time allocation of "Florida Academic Counseling and Tracking for Students (F.A.C.T.S.)" money given to UF for enhanced financial aid services and information to students. In 2000-01, SFA stepped up office informational publications, which in turn stepped up postage costs. Dollars spent on Other Personnel Services (OPS) are variable year to year depending on departmental needs and funds available.

The components of the office operating budget are as follows:

components of the office operating budget

BUDGET CATEGORY	2000-01	1999-2000	1998-99
Salary	\$2,500,005	\$2,310,455	\$2,306,149
Operating Expense	347,856	385,304	250,510
Other Personnel Services	135,298	82,133	108,577
Other Capital Outlay	74,799	127,287	91,377
Federal Work-Study Salaries	188,334	188,760	190,548

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
- data processing
- document editing
- records/optical scanning
- systems & programming

“‘Helping students be successful’ is one of our primary goals at SFA. New initiatives in areas of distance education, study abroad, and alternative educational delivery systems will continue to challenge the University of Florida's ability to fund the educational expenses of our students. Our ability to provide financial assistance to meet the needs of these students will be a major priority for 2001-2002.”

*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 SFA, including the director and associate directors, are responsible for ensuring such distribution, while also guaranteeing equal access to all prospective students to 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

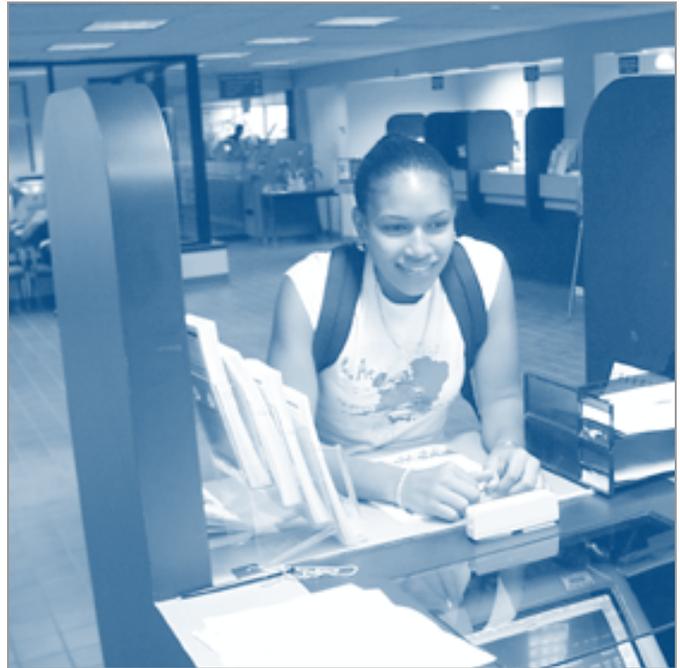
Student Financial Affairs' accounting staff maintain all departmental accounting and fiscal activities. The accountant and the fiscal assistant are responsible for all phases of purchasing and handling accounts receivable for federal administrative allowance funds and private donations. This office prepares 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.

Secretarial Support

There are three staff members in the administrative area: a receptionist who handles incoming traffic, telephone calls, and sending out facsimiles; a word processor who maintains quality control of all outgoing and in-house forms and administers a central forms catalog system for each section within SFA; and a senior secretary who assists the office manager directly with payroll and personal matters. All three, supervised by the Director's office manager, share responsibility for assisting the director and associate directors, with secondary responsibilities to the assistant directors and other SFA staff.

“Customer Service staff are associated with being the face and voice of the financial aid office in that they represent the visible image of the financial aid office to the public. Even though the stress is high, the pay is low, and the compliments are few, the reward is great when one is able to help a student realize his or her educational goals through the financial aid assistance one has given. “

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 UF financial aid office a national leader in the administration of financial aid.

In 2000-01, Customer Service staffing was characterized by a high rate of turnover. We filled a total of 10 financial aid adviser positions, promoting three Financial Aid Coordinator Is to Coordinator IIs and hiring and training seven new Financial Aid Coordinator Is. Four of the new Coordinators left after only two to eight months. This year we also endured the loss of one of our colleagues due to death. In theory, during 2000-01 Customer Service staff included a Student Affairs Coordinator III (Assistant Director), six Student Financial Aid Coordinator IIs, five Student Financial Aid Coordinator Is, one Clerical Supervisor, two Senior Clerks, and a Clerk, an overall increase of two positions from the previous year. Due to the described unstable conditions, however, we realized no real benefit this year from the two newly created positions.

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. 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 2000-01, the customer service telephone bank handled 51,663 telephone calls, 9,920 more than the previous year.

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, several MBA non-traditional programs, SFA's academic progress program, and the UF Emergency Short-Term Loan Program.

• Summer AIM Program

During Summer B, 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. Enrollment in 2000-2001 was much lower than originally predicted. The decrease has been attributed to changes in admissions procedures resulting from the One Florida initiative. Only 448 students were admitted through the AIM program in 2000-01. Of these students, 187 actually enrolled and 144 received more than \$313,219 in grant assistance to meet the total costs of the summer program. These figures represent a decrease of 204 financial aid recipients and \$381,781 less in financial aid expenditures than 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 1,077 in 1999-2000 to 1,230 in 2000-01. 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 27% over the previous year. This increase can again be attributed to the availability of Florida Bright Futures Scholarship monies during the summer term, as well as to an increase in students receiving 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 their initial eligibility evaluation. The number of petitions, 274, received in 2000-01 and the number approved, 179, decreased, which could be attributed to the overall healthy economy.

• 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 programs:

New World School of the Arts, Miami, Florida. Students take classes from Miami-Dade Community College and UF. In 2000-01, 53 students received financial aid to attend this program.

UF Milton Program, Milton, Florida. Students enrolled in this IFAS extension program may take classes at University of West Florida, Pensacola Junior College, and UF. In 2000-01, 15 students received financial aid to attend this program.

UF Fort Lauderdale Program. Students enrolled in this program may take classes at FAU and Broward Community College. Three students received aid through this IFAS extension program in Fort Lauderdale in 2000-01.

UF Fort Pierce Program. This IFAS extension program allows students to take courses through Indian River Community College. In 2000-01, 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 and disbursed by UF. Each student must be monitored individually to ensure that all requirements are met and documentation is received before aid is disbursed. In 2000-01, UF processed financial aid for 102 students participating as SUS transients.

Concurrent Enrollment & the Summer Florida Bright Futures Scholarship Program. Summer 2001 was the first time UF provided payment of Florida Bright Futures scholarships to students also concurrently enrolled for courses at another eligible Florida institution. Fifty-five students received scholarship funds that included their tuition fees both for UF and the other institution.

• **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 in 1998-99. This award year, a total of 362 students enrolled non-traditional MBA programs, an increase of 88 students over those enrolled in similar programs in 1999-00. This year four new programs were added for a total of 12. SFA first began processing Federal Direct Stafford Loans for students enrolled in these non-traditional MBA programs during the 1999-2000 year. Before this, students participating in these programs were only considered eligible for private loans. During 2000-01, SFA processed private loan applications for 48 of these students, and 131 Federal Direct Stafford Loans were processed for students enrolled in these programs, an increase of 86 students over last year. Loan awards totaled in excess of 1.9 million.

• **SFA Student Info E-Mail Service**

SFA's Student Info E-mail Hotline was established in 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 general information about the financial aid process, eligibility requirements, and program availability. The volume of e-mail inquiries to the hotline lessened in 2000-01—5,725 inquiries compared to 6,745 last year. The reduction may be a result of UF's "Ask UF" automated inquiry system.

• **Emergency Short-Term Loan Program**

The volume of short term loans (STL) has remained consistent over the past several years with the greatest need for assistance coming during the start of the fall term. During the 2000-01 year, 788 students borrowed funds through the STL program to the tune of \$708,812. During the fall term of 2000, 430 students borrowed STL funds as

opposed to 191 during the spring and 247 over the course of the summer terms. As these figures indicate, there are a good number of repeat STL borrowers during the course of an academic 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 an Academic Progress Committee member. Customer service advisers counsel students on the academic progress policy and petition process.

A total of 872 petitions were reviewed in 2000-01, a decrease from the 1,162 reviewed in 1999-2000. The decrease is proportional to the decrease in the number of students meeting academic suspension or termination conditions for the same years. During 1999-2000, 3,888 students had their financial aid eligibility suspended or terminated, as compared to the 3,399 flagged during 2000-01.

satellite offices

Unofficial Withdrawals. In recent years, the federal government has put pressure on schools to document that students who receive financial aid funds have attended class. In particular question are students who receive federal aid whose end of term grades are all 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 student's class attendance. For students for whom we cannot obtain proof of attendance, UF must reimburse the federal financial aid accounts. During 2000-01, 299 such students were flagged. UF was required to reimburse the federal financial aid accounts for 84 students in the total amount of \$71,921.

Looking Ahead

Budget call-backs and a hiring freeze may have an impact on the Customer Service section next year if staff turnover resembles that in 2000-01. The high stress coupled with low pay make it difficult to retain high quality staff. Since every one of the "senior" financial aid coordinators will be working with a team partner with less than a year's experience, 2001-02 will be a challenge. Compounding the challenges is our decision to revert to four advising teams so that we could devote a full-time position to handling all aspects of the academic progress activities. Undoubtedly this will create longer lines in the lobby and more difficulty in reaching financial aid advisers by telephone. Our limited staff resources will require us to continue to encourage the use of electronic means to access financial aid information.

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 and loan 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 UFHealth 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 UFHealth Sciences Center Room CG-96.

College of Law

Of about 1,160 UF law students, approximately 90% receive some form of financial aid. During 2000-01, almost \$14,000,000 in federal loans were paid to 955 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 for Bar-related expenses 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-six students received \$796,820 from these funds in 2000-01. In addition, approximately \$1.8 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 receive financial assistance. 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. The

special programs

College of Medicine aid office administers more than 50 loans and scholarships. In 2000-01 the office paid out \$7,470,000 in student loans and more than \$1,395,000 in scholarships.

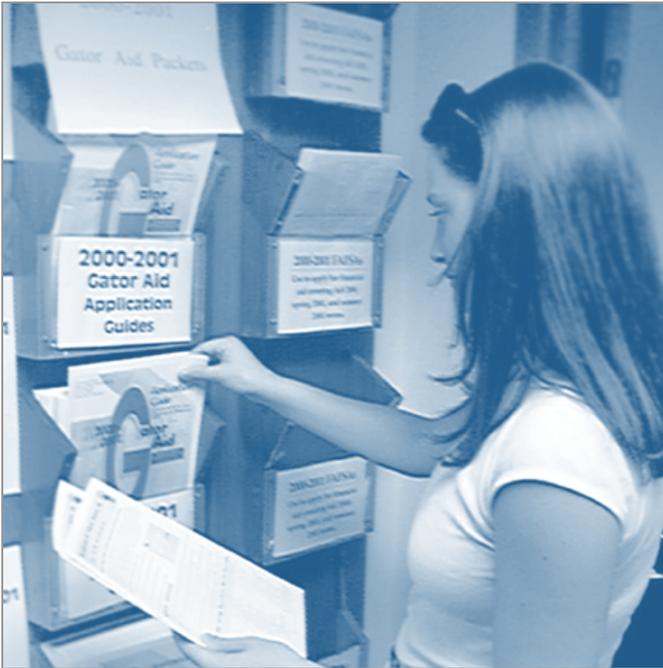
SFA administers a number of special programs on-site in Criser Hall to meet the needs of specific groups of students by financial aid professionals with specialized knowledge of federal, state, or UF requirements relating specifically to these groups. These include an adviser to athletes and an adviser 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 minimum wage, 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 part-time off the SFA lobby in S-107 Criser Hall.



“The Florida Bright Futures Scholarship program has continued its phenomenal growth and parallels the increase in the academic level of performance of our students. Our student body seems to set the standard for defining academic excellence.”

*Donna Kolb
Assistant 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 UF, SFA administers the following programs: Federal Pell Grants, Federal Supplemental Educational Opportunity Grants, Florida Student Assistance Grants (FSAG), 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 are awarded to undergraduate students with exceptional need as part of a comprehensive aid package. FSAG is a state awarded grant program.

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 increased from \$13,726,955 last year to \$15,105,724 in 2000-01. The number of Pell Grant recipients decreased from 7,038 to 6,893.

Federal Supplemental Educational Opportunity Grant (FSEOG)

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

Funding for FSEOG continues a downward trend from the past few years. In 2000-01 2,231 students received \$2,242,790 through this program, down from last year's awards of \$2,879,974 to 2,752 students.

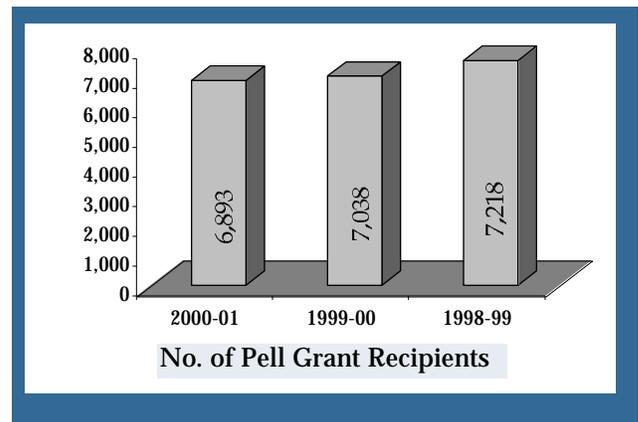
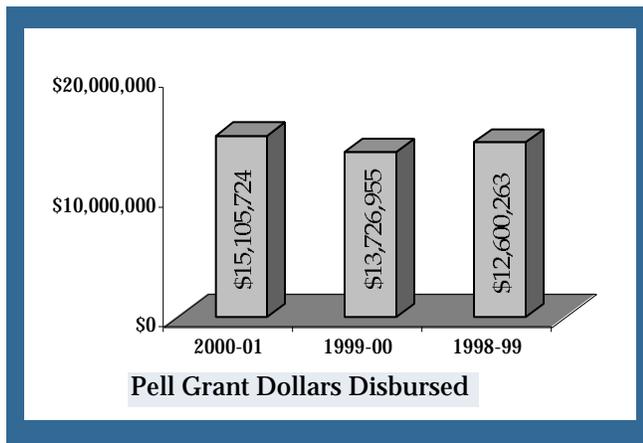
Turner Grants

Institutional grants are university-administered programs awarded by SFA to students who show exceptional financial need. The Turner Grant is funded by a variety of sources

including student fees and the state legislature. In contrast with FSEOG, Turner Grant funding increased this year. In 2000-01, \$6,625,976 were awarded to 3,343 students, up from last year's totals of \$6,045,210 awarded 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 2000-01, 3,983 UF students received awards totaling \$4,589,147, up from 1999-2000, when 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 UF, including 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.

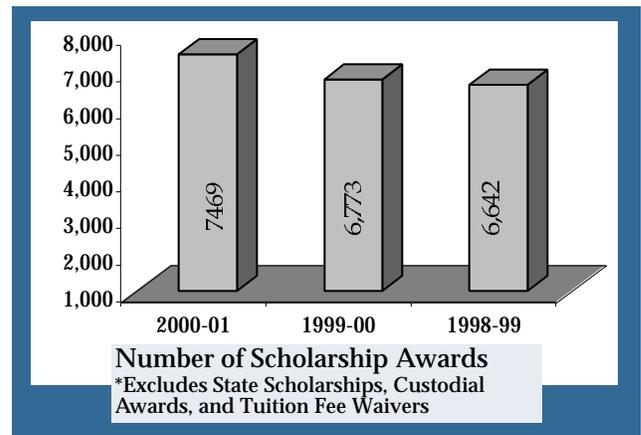
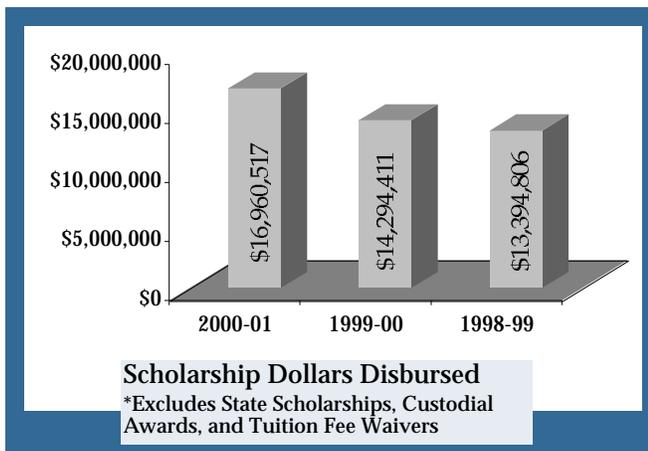
Custodial Awards (Private Donor Awards)

A review of statistics on custodial awards received by UF students reveals an area of significant growth over the last two academic years. In 1998-99 the total amount of private donor awards was \$7,736,485. This figure increased in 1999-2000 to \$9,246,294, and again a significant increase occurred in 2000-01 to \$10,361,879. This is an increase of a little over \$2.6 million over the course of two years. 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 Student 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* custodial awards, State of Florida scholarships, and tuition fee waivers. The total dollars paid out in 2000-01—\$16,960,517—demonstrates an increase of just over \$2.66 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 25,585 awards to students enrolled at UF, who received a total of \$52,494,859 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 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*
- "Chappie James" Most Promising Teacher Scholarship
- 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

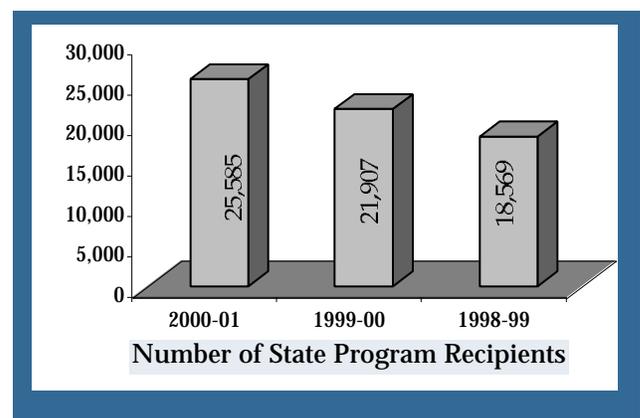
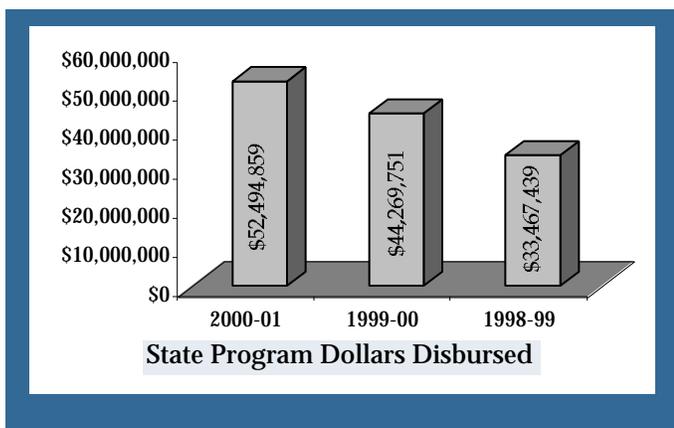
The Florida Bright Futures Scholarship program has continued its phenomenal growth and parallels the increase in the academic level of performance of our students, as reflected by the following statistics:

1998-99: \$29,488,905 to 14,864 students
 1999-00: \$40,072,779 to 17,894 students
 2000-01: \$47,132,734 to 21,187 students

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

SFA's 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 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

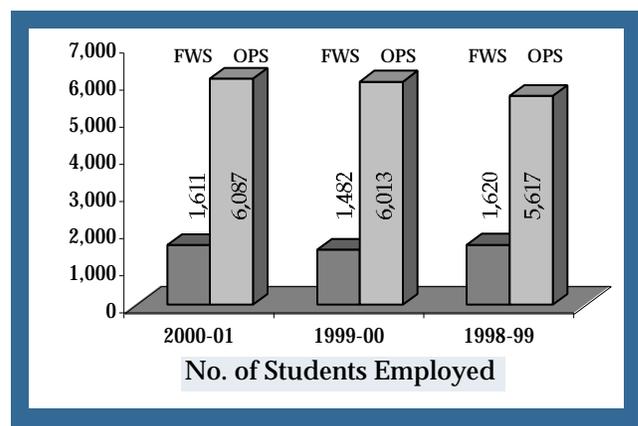
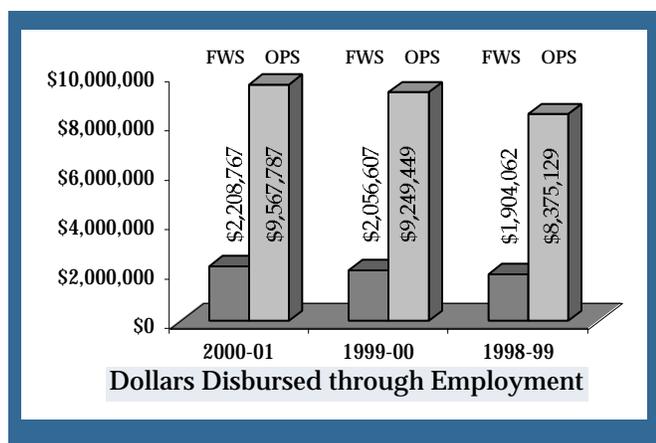
During the year 2000-01, there has been a continued increase in the number of students employed on campus through FWS (including FCS), and OPS. Earnings have risen to a total of \$11,776,554 continuing the steady increase over previous years.

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 SFAWeb site 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 accurate and efficient and can be reviewed and revised by the student.

UF continues to participate in the Ford Federal Direct Loan Program (FFDLP). The 2000-01 academic year was UF's seventh year of participation. FFDLP differs substantially from the Federal Family Education Loan Program (FFEL) in that private lenders are not involved. The U. S. Department of Education (USDOE) 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 Coordinators, and a Program Assistant.

Regulatory Changes

Regulatory changes affecting the 2000-01 academic year.

1. In July 2001 an electronic version of the federal *Master Promissory Note (MPN)* was introduced. Summer 2001 was spent educating students and staff about this new feature. One hurdle was the necessity for each student to maintain their Federal PIN. We look for this problem to be eliminated by USDOE's implementation of PIN access via the Web in January 2002. With the development of the electronic *MPN*, our department has experienced a savings in both processing time and mailing expenses.

2. In 1999-2000, 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 2000-01 UF implemented an active rather than passive confirmation process for both the subsidized and unsubsidized loan programs. Students are able to confirm, cancel, or reduce their loans on the Web via ISIS, UF's Integrated Student Information System. ISIS has also enabled students to link to the National Student Loan Data System (NSLDS) to review their loan indebtedness and to USDOE's Web site to review a copy of the *Federal Borrowers Rights and Responsibilities* and a sample repayment schedule. Through ISIS, students can also link to UF's first-time borrowers Entrance Counseling site and SFA's award files. Our staff continues to monitor the confirmation process through reports and student feedback, to verify accuracy and develop further enhancements.

3. The origination fee for 2000-01 Federal Direct Subsidized and Unsubsidized Loans remained at 3%. Direct PLUS Loans remained at 4%.

4. In October 2000 USDOE announced two new Direct Loan repayment incentive benefits. The first was an up-front interest rebate of 1.5% for Federal Direct Stafford Loan and PLUS loan borrowers beginning with loans for 2000-01. The second was an interest rate reduction of 0.8% that would be applied to all Direct Consolidation Loans made during the period 10/1/2000 to 09/30/2001.

5. July 2000 brought changes to the NSLDS system. Schools were authorized to use data from NSLDS to monitor the financial aid history of all applicants for federal student aid, including those who transfer mid-year (paper transcripts are no longer required). However, this authority was given under the condition that schools access NSLDS no earlier than 30 days prior to the beginning of the first payment period for which the school expects to pay the student. In July 2001 new regulations and the Transfer Monitoring Process replaced

prior guidance regarding mid-year transfer students. Under the new monitoring system the school informs NSLDS of its mid-year transfer students and NSLDS monitors changes to the student's financial aid history and sends the information to the school.

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.

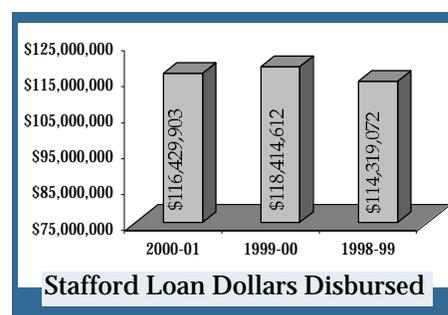
• Federal Direct Stafford Loans/Federal Direct Unsubsidized Stafford Loans

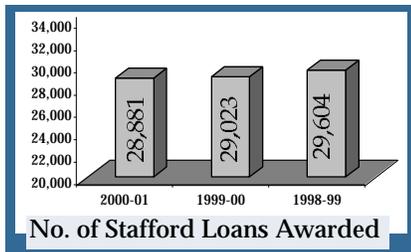
FDSL loans are need-based, federally insured loans that can be repaid after graduation. Interest does not accrue on the subsidized loan until the grace period expires, which is six months after students leave school or graduate. The Higher Education Amendments of 1992 created FDUSL, a non-need-based 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

FDSL/FDUSL funds paid to students fell from \$118,414,612 in 1999-2000 to





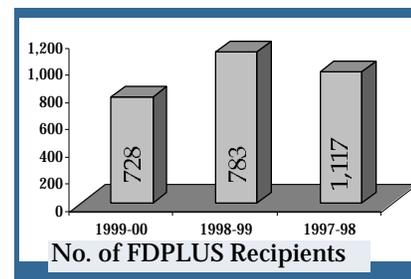
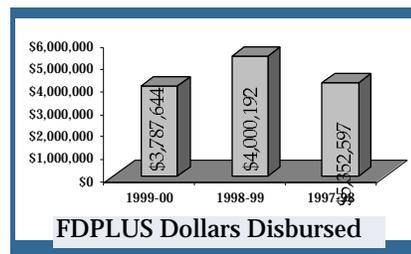
\$116,429,903 in 2000-01. The number of loans awarded also decreased, by 142. This decrease may be due to the increased amount of state-awarded aid provided to our students this year.

For the period July 1, 2000, through June 30, 2001, the FDSL/FDUSL interest rate was set at 7.59%. FDSL/FDUSL loans are capped at 8.25%.

• 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, 2000 through June 30, 2001, the variable interest rate for FDPLUS was set at 8.99% and capped at 9%.

FDPLUS borrowing by parents decreased again this year, by \$212,548 to \$3,787,644. 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

Number of private lenders offer loans that allow a student to borrow funds equal to their cost of attendance minus 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.

The dollar amount of private loans processed for UF students in 2000-01 was \$2,090,286. Again, as with Federal Direct Stafford Loans, this slight decrease from last year may be due to the increase in state funding.

• Loan Default

UF's Federal Direct Loan Program's 1999 Cohort Default Rate was 3.1%, well below the national average and threshold of 20% that mandates default reduction measures. Nevertheless, both SFA and University Financial Services continued to stress the need to avoid unnecessary borrowing and to ensure that 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, loan application materials, and the SFAWeb site. Further, the new loan 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

UF Web services to students continued to improve, with additional on-line services and added links to federal information.

The Federal Direct Loan Origination Center and the Direct Loan Servicing Center created web sites in 2000-01 so schools could review loan information.

The federal government's school portal on the web was implemented in 2001 giving schools a single Web entrance to all Title IV Federal student aid program information, resources, and activities.

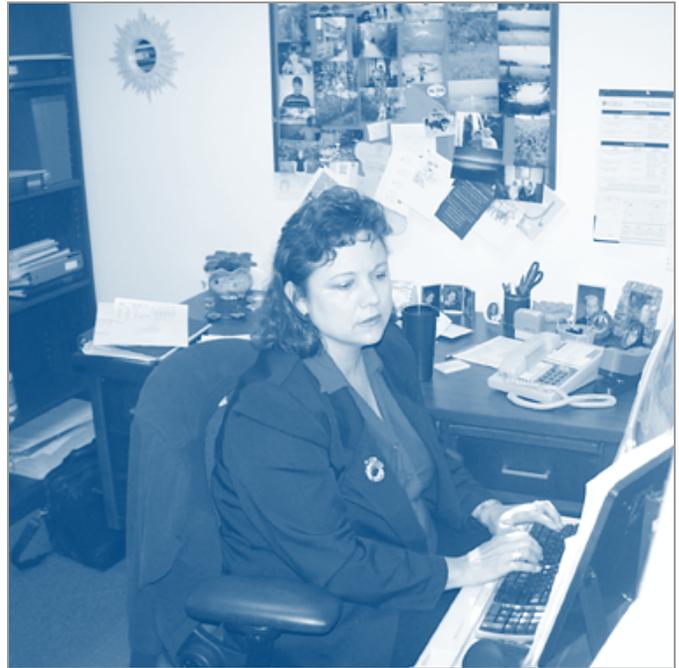
Summer 2001 was spent preparing for the system conversion from CICS screens to Eagle, a web-based processing system.

• Planning for the Future

- Continue to refine the automated loan system to ensure it is accurate, is user-friendly, and will accommodate the need for individual coding for the specialty programs developed yearly.
- Continue to prepare for NSLDS Transfer Monitoring system changes that will take effect for 2000-01.
- Develop new ways students can interact with Loan Certifications electronically.
- Monitor the electronic promissory note process and new DOE-developed enhancements to enable students to receive their federal PIN electronically.
- Simplify the confirmation process and enhance the SFAWeb site with additional links and loan information.
- Work with DOE to implement the new Common Origination and Disbursement process for 2002-03. This system re-engineers the current processes and systems for delivering and reporting Pell Grants and Direct Loans from two processes and systems into one common record and system. This common record relies on Extensible Markup Language (XML).
- Continue to test and prepare for conversion to the Eagle Web system.
- After December 2001, the Student Aid Internet Gateway (SAIG) a Web-based data transmittal system will replace the current TIVWAN data transmission system.

“Selection for verification at UF is based on criteria SFA has established as a result of our participation in the U. S. Department of Education’s Quality Assurance program. The result is a selection that focuses on information areas most prone to errors made by students and parents when completing the *Free Application for Federal Student Aid*. “

Rose Williams
Financial Aid Coordinator



special programs

Quality Assurance

In July 1989, 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 most years. 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. This process was suspended and was suspended for by the U. S. Department of Education for the 2000-01 year in order to redesign the federal quality assurance process.

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 2000-01 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
- Excluded Income

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 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 2000-01, 7,242 student files were selected for verification. Of that total, 5,510 students completed the process, yielding an 82% completion rate.

“An important Outreach and Training initiative in 2000-01 has been the hiring of a full-time outreach adviser who works in conjunction with UF’s Admissions Office to actively recruit students from diverse backgrounds to attend UF. A team travels throughout Florida and focuses its efforts on under-served areas of the state. SFAIs excited to be part of this effort to help bring quality and diverse students to UF.”

Ron Anderson
Associate Director



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 coordinates with SFA's director, associate directors, and assistant directors to assure compliance with federal consumer information dissemination regulations. The section also includes a full-time Computer Support Specialist who administers SFA's Web site, plus a paraprofessional staff of four Federal Work-Study students. Information/Publications is also responsible for in-house training materials and reports.

Major elements of the information program are: producing annual cost-effective financial aid publications, including the SFA Web site, the annual *Gator Aid Handbook*, the annual *Gator Aid Application Guide*, the *SFA Newsletter*, 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, and designs, produces, and contributes articles to the Division of Student Affairs' tri-annual newsletter, the *Student Affairs Update*.

In 2000-01, 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 were: availability to students of financial aid file tracking through ISIS (UF's Integrated Student Information System); the introduction of the Federal Direct Loan Confirmation site now available through ISIS; the introduction of the new federal electronic Master Promissory Loan web site; and the availability of online access for students to complete first-time borrowers entrance orientations, as well as to sign up for Direct Deposit of their financial aid funds.

This year SFA participated in a new UF web information service—Ask UF. Information/Publication Services section assumed responsibility, in conjunction with the Customer Service area. SFA provided about fifty Questions and Answers (QA) and had three QA in the top ten during this first year of service. "When should I apply for financial aid to attend UF?" was the number two question directed to the system.

In the area of print publications, SFA began offering the *SFA Newsletter* three times a year instead of two, and created a new Withdrawal Information brochure to provide concise information to assist students withdrawing from UF.

Information/Publications continued to enhance and improve SFA's Web site. The site provides application and program information, information on receiving aid, financial aid links and portals, a News & Updates feature, and many printable forms in PDF format. The "scholarships" feature 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 web site continues to be high. In addition to keeping our own information-heavy site current, while working toward a new home page design to facilitate easier use, SFA's Web coordinator also continued to maintain the Division of Student Affairs Web site.

Information/Publications provides ongoing support to other SFA departments, including designing and producing newsletters, reports/report covers, 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 support SFA's Training & Development section with the annual Summer PREVIEW production, and other presentations as required.

Publications

- SFA World Wide Web site
- 2000-01 Gator Aid Handbook
- 2000-01 Gator Aid Application Guide
- SFA News—a spring, summer, and fall edition newsletter to student aid recipients
- SFA TIPS/World Wide Web wallet cards
- Brochures: *First-Time Applicant's Guide to Gator Aid*, *University of Florida Withdrawal Information*, *Looking for Scholarships & Financial Aid*, *a Student Opinion Survey*, *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*.
- Notification of Financial Aid Award brochure, the Federal Direct Loan PLUS Application, the Revised Award Letter Information Sheet, plus various other forms, information sheets, bulletins, and flyers
- *Student Employer's Handbook*
- *Student Employment Coordinator*
- *1999-2000 Student Financial Affairs Annual Report*
- *2000-01 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 SFA staff and student assistants.

During 2000-01 SFA consolidated several information and outreach departments under one Associate Director with the goal of improving information flow and increasing the quality control of our information and outreach efforts. Outreach and Training, together with SFA's Information/Publication Services section now work together toward that goal.

Outreach

One Outreach and Training initiative in 2000-01 has been hiring a full-time outreach adviser who works in conjunction with UF's Admissions Office to actively recruit students from diverse backgrounds to attend UF. A team travels throughout Florida and focuses its efforts on under-served areas of the state. SFA is excited to be part of this effort to help bring quality and diverse students to UF. The primary goal of the new outreach staff member is to reach out to incoming freshmen and transfer students through presentations, lectures, conferences, workshops, and other recruitment functions.

In January and February 2001, 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 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 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, "Money Matters," was presented nineteen 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 \$1 million 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**

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-week 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 SFAMacintosh network. Specific individual training sessions are held periodically to ensure employee familiarity with the functions and capabilities of the Macintosh network. Staff members may also access a videotape training library to find answers to application problems.



"In 2000-01 we experienced our second year of using the *Stafford Loan Master Promissory Note (MPN)*, and our opportunity to see the true payoff. In 2000-01, the note became multi-year. Students who had completed an *MPN* the previous year at UF and received a loan payment were set to receive their 2000-01 loans once they confirmed they desired the funds. Consequently, significantly more Stafford loans were disbursed in the first several automated payment runs of the academic year."

Sharon Stebbins
Financial Aid Coordinator

technical systems & processing

Disbursements & Fund Reconciliation

Awarding

Awarding is comprised of two Financial Aid Coordinators who process all financial aid award revisions. Requests for revisions to students' awards generally come from customer service staff when students' enrollment, residency, or housing statuses change; when students receive additional outside funds; or when students request revisions to their awards for which they are eligible. Each term, Awarding adjusts budgets for students enrolled less than full time whose files show campus-based aid.

Awarding staff are also responsible for adjusting awards in situations where students' need has been "overmet." Students' receipt of outside resources (scholarships, fellowships, etc.) after their need has been met produces a large volume of the work for Awarding. Before the first disbursement of aid in the fall, a program known as "rolling revisions" automates most 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.

Awarding 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 2000-01, staffing, workload, resources, and responsibilities increased marginally in this department.

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

- **Stafford Loan *Master Promissory Note (MPN)***: This was our second year using the *MPN*, and our opportunity to see the true payoff. In 2000-01, the note became multi-year. Students who had completed an *MPN* the previous year at UF and received a loan payment were set to receive their

2000-01 loans once they confirmed they desired the funds. Consequently, significantly more Stafford loans were disbursed in the first several automated payment runs of the academic year.

- **Confirmation—three big changes:**
 - Our policy states students must confirm that they desire their loan funds as a requisite to SFA disbursing those funds. In this second year for active confirmation of Stafford loans, we expanded the requirement from Unsubsidized Stafford loans only, to also include Subsidized Stafford loans.
 - The method for confirming loans was upgraded from paper to an interactive web site, and the process was expanded to include new options: canceling a loan and reducing the payment to a chosen amount. As a result, modifications to students' files were made faster, and loan disbursement through Batch Net Check was possible the same night.
 - The Loan Confirmation Web site was a time-consuming project. Announcement of this new feature was made through various media. We are confident that students' familiarity with the site, as well as modifications our staff have made, will allow easier and wider usage next year.
- **Federal Direct Loan Origination Center (LOC) and the Direct Loan Servicing Center:** Both these branches created web sites in 2000-01 that schools and other agencies could access for specific loan information. Disbursements used these sites to help clarify problem areas of students' loans, confirm that repayments were properly applied, investigate loan questions from puzzled students and former students, and assist in our close-out efforts for 2000-01.
- **Reconciliation of Direct Loan data with the federal government:** LOC continued to provide new and expanded reconciliation tools. Nearing the deadline for close-out, LOC initiated a procedure to send year-to-date reports biweekly, which was quite useful. This is now standard practice year-round.

- **National Student Loan Data System (NSLDS):** This was our fourth year using NSLDS. Each year seems to present its own problems. In 2000-01 we discovered that the Direct Loan Servicing Center was using rebated loan amounts instead of true gross disbursements. This affected our calculations of students' aggregate loan limits, and was confusing for students and staff. The United States Department of Education (USDOE) promised to resolve the problem for 2001-02, although no clean-up for the existing disparity will be initiated. Time was invested preparing for the new NSLDS Student Transfer Monitoring Process. Under regulations effective as of July 1, 2001, schools are no longer required to obtain paper *Financial Aid Transcript (FAT)*s for transfer students or respond to another school's request for one. Under the Transfer Monitoring Process, NSLDS will provide *FAT* information for mid-year transfer students directly to schools that request it.
- **USDOE School Portal:** USDOE implemented a web site that provides access from a single point to many useful links pertinent to schools and Title IV financial aid. Links to help-lines, publication repositories, regulations, and Direct Loan offices are just a few resources we have used.
- In 2000-01, USDOE offered reduced interest rates on new Federal Direct Consolidation Loans disbursed prior to September 30, 2001—a potential benefit to former students and to current students with previous loans. We disseminated information to students through newsletters and other media. A number of professional students in particular (e.g., medical students) took advantage of this opportunity.
- **Loan origination fee:** The 3% origination fee for Stafford Loans remained in effect for a second year (the origination fee for PLUS loans remained at 4%).
- **Interest Rebate:** The Direct Loan Task Force instituted a 1.5% interest rebate

to students on new Stafford and PLUS loans as an incentive for timely repayment. For 2000-01 the rebate reduces students' outstanding loan balance to be used at the time of repayment. To retain eligibility for the rebate, students must make their first 12 payments on time when they enter repayment. For 2001-02, the interest rebate will be "up-front," increasing the amount students realize from their loan proceeds.

Statistics

In 2000-01, Disbursements monitored and authorized disbursement of \$32,334,963 in grant funds, \$93,015,801 in scholarships, and \$129,032,655 in student loan funds. The total amount authorized through this section was \$254,383,419.

New Year Objectives

- **Administer new Direct Loan Interest Rebates:** In 2001-02, the 1.5% interest rebate mentioned above becomes "up-front," requiring schools to carry rebate data on their files, transmit this data, calculate rebates, and pay students accordingly. This will require changes in our screens and coding as well as extensive testing.
- Pursue our goal to close out the previous year's Federal Direct Loan reconciliation well before the federal deadline. We anticipate closing out the 2000-01 year with a zero ending balance (out of \$120 million disbursed Direct Loan dollars).
- Continue monitoring NSLDS use, particularly as it relates to the new Transfer Monitoring process. This affects our Disbursements section, as we pays loans only after assurance that students are eligible.
- **Electronic MPNs:** Monitor student problem/concerns that arise using the new E-MPN process, and introduce changes made by USDOE.
- **MPN:** Beginning in 2001-02, we will eliminate expiration dates on screens and files used in tracking MPN's. The LOC will take over this function and notify schools of any 12-month or 10-year expiration problems.

- **Confirmation:** Continue to refine the Direct Loan Confirmation web site for clarity and usefulness. Changes will include warnings to students on the screen that they have not completed the E-MPN and/or Entrance Counseling, plus links to these sites to prompt quick responses by students.
- Continue to brainstorm upgrades to scholarship processing methods, including newer technology such as scanners in place of photocopying.
- Prepare for implementation of USDOE's Common Origination and Disbursement Process (COD) in 2002-03. COD is a re-engineering of current delivery and reporting methods for Pell Grants and Direct Loans from two processes to one. COD uses eXtensible Markup Language and a single file record across Pell and Direct Loan programs for origination and disbursement. Campus-Based aid will eventually be accommodated.
- The USDOE conversion from the current data transmission network, TIVWAN, to use only of the internet via the new Student Aid Internet Gateway, will take place by December 18, 2001.
- Beginning fall 2001, UF will send global e-mail messages to freshmen every Wednesday via their Gatorlink accounts. Our office will participate to reach freshmen with important loan reminders (e.g., completing the e-mpn, confirmation).
- **EAGLE(Enhanced Application Generation Language for the Enterprise):** The office will introduce this web-based file-viewing system. In 2001-02 we will be allowed dual systems for production files, using both CICS and EAGLE. Disbursements will continue to refine Disbursement and Check File screens so that in 2002-03 we are prepared to work solely on EAGLE.
- **Student identifier.** Beginning in 2001-02, Social Security number fields will be replaced by a field called UF-ID. Disbursements will change its screens and accompanying documentation.

Data Entry

The Data Entry staff is comprised of one Program Assistant. 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.

Document Editing

The Document Editing Section is where the application processing cycle begins. The staff, comprised of a clerical supervisor, an OPS employee, and several student assistants, are also responsible for the mailroom.

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. The Document Editing/Mailroom Section is where the application processing cycle begins. The staff of this section receive, sort, date-stamp, and scan certain documents and distribute all incoming mail. Most major mail outs are also handled by this area, approximately 142,935 pieces of mail, including mailing financial aid award letters, *Information Request Forms*, student loan letters, follow-up letters, and bulk mailings of financial aid application packets to Florida high schools and community colleges at the beginning of every application year.

Document Editing also edits *Plus Data Sheets* and graduation dates before routing these to Data Processing.

Records & Optical Scanning

SFA's Records/Optical Scanning Section maintains an accurate, up-to-date system of records consisting of more than 168,000 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.

KIDDS (Kofax Index Digital Document System)

KIDDS, an administrative application on UF's ISIS web server, implemented in late 1999, allows our Records area to scan student documents on a high-speed, high-resolution scanner and store them on a file server at NERDC. KIDDS enables UF staff to access student documents on a standard Web browser by using their NERDC ID and password.

Statistics

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

Following are statistics on documents received and scanned by Records for the 2000-01 school year: *Verification Checklists*, 35,600; student employment (SP-100) forms, 15,627; electronic data changes from the *FAFSA*, 8,900; and awards and award revisions, 35,728. The majority of documents were received between June and September. The total number of documents received and scanned during the year was 157,505.

Our document-processed count was down this year due to increased automation and the fact that *Federal Stafford Loan Acceptance Forms* were no longer required because the "acceptance" process went online. Office staff destroyed 6,460 microfiche records that had passed the required retention period.

Systems & Programming

Systems and Programming (S & P) develops and maintains the computer software systems needed for automated delivery of student financial aid at 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.

Office of the UF Chief Information Officer (CIO): S & P works closely with UFO office of the CIO staff on various projects, including interfaces with EAGLE (Enhanced Application Generation Language for the Enterprise), a web-based file viewing system.) EAGLE enables mainframe databases and CICS resources to be directly accessed from the Internet.

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 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 with 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 2000-01

S & P experienced another challenging year, 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 continues 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.

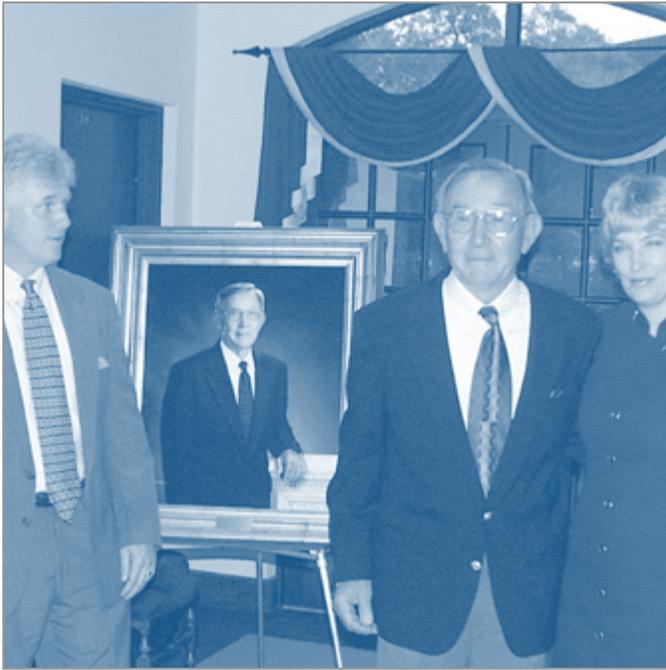
System maintenance: Financial aid software is in a continual state of flux due to changes in federal regulations and the need to stay in compliance with federal, state, and university regulations and guidelines. This requires continual modification to aid award and disbursement programs.

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

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

- S & P staff completed installation of card-swipe readers at all of our front desk advising stations. These new readers greatly enhance confidentiality of student records and minimize ID difficulties for staff and students.

- S & P continues to enhance SFA's Web presence within Eagle and ISIS. This year S & P created a web-based electronic Loan Confirmation feature as a new ISIS selection. This project was labor-intensive for staff, but the option should prove invaluable to students and staff in terms of time saved. Students will also benefit by keeping closer track of their loan debt amounts. The software was designed so that in addition to confirming that they wanted their loans, students could also cancel their loan, reduce the amount of their loan, and/or link to NSLDS to review their total student loan debt.
- S & P staff have been in training mode all year, assuring that all systems staff are on board for next year's conversion of all of our CISS screens to Eagle.
- S & P staff spent many hours writing a new disbursement tracking program for the Florida Bright Futures Scholarship Program, improving our disbursement services to student aid recipients.
- S & P installed a new Macintosh G-4 Web Server to improve capacity to our system.
- S & P added a new Computer Support Specialist position to our staff to be responsible for staff training, computer and network troubleshooting, and equipment and software maintenance.
- S & P installed new Outlook Express and Microsoft Word software on all staff computers and provided multiple staff training sessions on the use of the new applications.



"Student Financial Affairs is about teamwork. Our focus is communication within the department and globally. Through our daily interactions, we develop short-term and long-term connections. Each staff member is encouraged to continue learning and to assist other employees with their new-found knowledge. As we go along that route, we do so with a smile."

*Anne Newman
Office Manager*

staff & professional activities

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>
Kathleen Sexton	<i>Senior Secretary</i>
Lois Perkins	<i>Word Processing Operator</i>

Customer Service

Ashanta Simmons	<i>Senior Clerk</i>
Vacant	<i>Financial Aid Coordinator</i>
Debbie Coleman	<i>Financial Aid Coordinator</i>
Joyce Days	<i>Senior Clerk</i>
Vacant	<i>Financial Aid Coordinator</i>
Vacant	<i>Financial Aid Coordinator</i>
Vacant	<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

Scholarships and State Programs

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>
Vacant	<i>Program Assistant</i>

Student Employment

Ruth Strawder	<i>Financial Aid Coordinator</i>
Vacant	<i>Senior Clerk</i>
Vacant	<i>Senior Clerk</i>

Satellite Offices

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

Technical Processing and Support

Data Processing

Lisa Nelson	Program Assistant
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Disbursements

Sharon Stebbins	Financial Aid Coordinator
Jan Berlin	Program Assistant

Document Editing

Micheal Wood	Financial Aid Coordinator
Eloise Trucano	Clerical Supervisor

Manual Awarding

Richard Brauning	Financial Aid Coordinator
Donna Kolb	Financial Aid Coordinator

Information/Publications Services

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

Quality Assurance

Susan Bragg	Financial Aid Coordinator
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Pell Grant

Dawn Western	Financial Aid Coordinator
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Records/Optical Scanning

Berta Atkinson	Office Manager
Vacant	Clerical Supervisor
Vacant	Senior Clerk

Systems and Programming

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

Verification

Susan Bragg	Financial Aid Coordinator
Larry Moore	Financial Aid Coordinator
Vacant	Financial Aid Coordinator
Vacant	Clerk Typist

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 Chair, Membership Services Chair, Finance Committee Chair

UF committees: Reitz Scholars Mentor

Elaine Stuckman • Associate Director

memberships: NASFAA, SASFAA, FASFAA

UF committees: Minority Recruitment and Retention Committee, Who's Who and Hall of Fame Selection Committee, University Minority Mentor, Student Health Service Fee Committee

Ron Anderson • Associate Director

Document Editing, Information/ Publications Services, Outreach, and Training & Development

memberships: NASFAA, SASFAA, FASFAA

Tony Gordon • Coordinator of Computer Applications

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

Donna Fowler • Student Affairs Coordinator

Loan Certifications and Disbursements

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

Donna Kolb • Student Affairs Coordinator

Scholarships, State Programs, Student Employment, Records/ Optical Scanning,

memberships: NASFAA, SASFAA, FASFAA

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

Mike Menefee • Student Financial Affairs Coordinator

Health Professions, Nursing, Pharmacy, & Veterinary Medicine

memberships: NASFAA, SASFAA, FASFAA

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; Student Affairs Sexism and Homophobia 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 ADACommittee, Health Center Student Conduct Standards Committee

Rodlee Ritter • Student Affairs Coordinator

Customer Service

memberships: NASFAA, SASFAA, FASFAA

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: SASFAA, 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

Bill Watson • Student Financial Affairs Coordinator

MBA

memberships: SASFAA, FASFAA

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