

Office for Student Financial Affairs

Annual Report

2002-03



UNIVERSITY OF
FLORIDA

Division of Student Affairs
Helping Students Be Successful

annual report

*office for student
financial affairs*

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Student Financial Affairs continues to support University of Florida students by providing quality service, timely and accurate financial aid awards, and reliable consumer information to achieve the mission of Student Affairs: "Helping Students be Successful."

Rick Wilder
Associate Director

office for student financial affairs

I am pleased to present the 2002-03 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 2002 and continuing through July 2003, as well as information on the general state of the office.

SFA continued its ongoing goal of quality service for University of Florida (UF) students, striving to uphold the Division of Student Affairs standard of "helping students be successful." Toward this end, this year SFA committed significant staff resources preparing for the university-wide conversions to the new student UFIDs, the UF Directory project, the new UF portal (my.ufl), and PeopleSoft software. Our customer service staff provided outstanding service again this year despite an unusual staff turnover rate, finding innovative ways to keep the quality of service high during transitional training for new staff. On the side of technology, the installation this year of three OS X servers by our systems area improved our Web and email services.

SFA staff are committed to providing financial assistance to all students who wish to achieve their educational goals at UF. As always, we believe this commitment results in first-rate financial aid services to our student body. 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 \$325 million in student aid from federal, state, institutional, and private sources to an enrolled UF student body of more than 47,000 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 and provision of financial aid information to the university's Integrated Student Information System (ISIS) on the Web. 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

SFA is a service organization with a primary responsibility to help students secure the funds necessary to pursue their educational goals at UF. SFA is committed to providing students with the resources and information they need to become fiscally responsible and to understand the rights and responsibilities incurred when they receive financial aid.

- The staff of SFA assume a proactive role, reaching out to students and potential students to educate them about the benefits of higher education and the availability of financial aid.
- SFA believes that no student should be denied the opportunity to attend UF and successfully pursue degree objectives because of financial reasons and is committed to maximizing the resources available to its students.
- SFA recognizes that each student's financial situation is unique and makes every effort to develop policies and procedures that treat each student fairly and equitably while taking unusual circumstances into account.
- SFA has the responsibility of educating, motivating, and empowering the 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.

2002-03 summary and highlights

Academic year 2002-03 has been busy and profitable as we continue to improve financial aid services. This year SFA committed significant staff resources and time in preparation for the university-wide conversions to the new UFIDs, the UF Directory Project, the new UF portal (my.ufl), and the significant changes and training involved with implementing PeopleSoft software university-wide. As always, many of our excellent professional staff contributed significantly to university-wide projects and to professional organizations, serving as officers and committee chairs. Changes in the profession and the university keep us busy striving to help UF students be successful by providing the best financial aid services available anywhere.

2002-03 Activities of Note:

- **UFID and UF Directory.** Our systems area worked many long hours converting all student systems to read and/or update the new UF Directory. In many ways, this was a more complicated and time-consuming project than the Y2K conversion, but 100% of the conversion work was completed in advance of implementation weekend.
- **EAGLE.** Academic Year 2002-03 was SFA's first year exclusively using EAGLE Web display screens for all financial aid files. Staff now can see all financial aid files with three academic years available. Staff continued to improve the accuracy of data display and system processes and to improve screen formatting.
- **UF Bridges.** Our systems area began preliminary groundwork for converting to the new PeopleSoft software, working hand in hand with our staff located at the downtown UF Bridges Office. Three staff have been dedicated full-time to UF Bridges to date, and other senior staff are serving on advisory committees and task groups.
- **Florida Bright Futures.** Florida Bright funds were disbursed to 1,067 more UF students in 2002-03 than last year. The continued growth in funds disbursed at UF through this program reflects UF's high academic standards, and the excellence of its educational programs continues to draw ever-increasing numbers of Bright Futures students to matriculation at UF.
- **New Servers Installed.** Our Systems area installed three new OS X servers to enhance our online and network capabilities: an email server, a Web server, and a Filemaker Pro server.
- **Customer Service.** During the summer, our customer service area reconfigured its operating protocol to improve the types of services SFA can provide students and to improve phone and advising staff operations. As a result, customer service advisers have a better balance between time at the front counters and time consulting with students in their offices. Morning telephone access to advisers also increased. The customer service telephone staff handled 54,511 telephone calls, almost 7500 more calls than last year. We attribute this to full phone room staffing and the enhanced features of our new phone system installed late in 2001-02.
- **Common Origination and Disbursement (COD).** The U.S. Department of Education COD system, a new system for reporting and processing financial aid data to the federal government, integrates loan and grant origination and disbursement processes into one system. As a full-participant school, SFA fully used COD's features during 2002-03 to improve Pell Grant and Direct Loan processing.
- **Professional Service.** SFA staff continue to be leaders nationally and regionally in the financial aid profession. Ron Anderson, the Associate Director of Outreach and Training, served as an instructor in the Southern Association of Financial Aid Administrators (SASF AA) Summer Workshop Series, a week-long workshop conducted annually to provide training for new aid administrators in the Southeast. Ron was also elected as President Elect for the coming year for the Florida Association of Financial Aid Administrators (FASF AA). Peggy

fiscal review

Myers, SFA Assistant Director, served as Treasurer this year for FASFAA, and Rick Wilder, Associate Director, served as FASFAA Fall Conference co-chair. In addition, Karen Fooks, SFA Director, served as a member of the National Association of Student Financial Aid Administrators (NASFAA) Reauthorization Task Force and as federal relations chair for both SASFAA and the Coalition of State University Aid Administrators (COSUAA).

- Of particular note this year, SFA's Information/Publications Services staff contributed time and skills to help with the public relations campaigns for the UF 150 celebration project, the new UFID/UF Directory, the UF Bridges (my.UFL) project, and Gatordex. Jeff Stevens, SFA's Webmaster also designed the excellent logos, posters, and other supporting material for the UFID/UF Directory, UF Bridges (my.UFL), and Gatordex, bringing credit to SFA and receiving praise for his work.

SFA functioned with a \$3,290,850 operating budget in 2002-03. 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 67 percent of the total budget, with the administrative allowance and financial aid fee making up the remaining 33 percent.

Staffing for 2002-03 was at 68.75 FTE as of July 2003, a moderate decrease from 70.75 as of July, 2002.

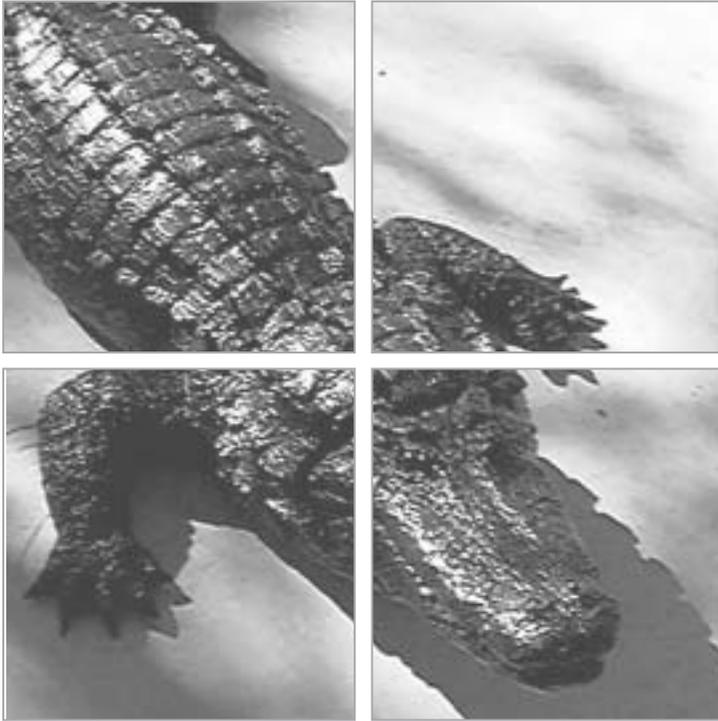
In 2002-03, the decrease in Salaries is due to state freezes on positions as a result of budget constraints. Operating Expenses decreased simultaneously as budget constraints dictated. Other Capital Outlay (OCO) and Other Personnel Services (OPS) expenditures are variable year to year depending on departmental needs and funds available.

The components of the office operating budget are as follows:

components of the office operating budget

BUDGET CATEGORY	2002-03	2001-02	2000-01
Salary	\$2,610,445	\$2,630,254	\$2,500,005
Operating Expense	294,621	384,843	347,856
Other Personnel Services (OPS)	161,039	153,344	135,298
Other Capital Outlay (OCO)	20,423	14,809	74,799
Federal Work-Study Matching	204,322	218,087	188,334

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

- information/publication services
- outreach & training

technical systems & processing

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

“Providing avenues of financial assistance to University of Florida students is our primary mission. In an ever changing financial aid climate, finding the best way to do this is our greatest challenge.”

*Ron Anderson
Associate Director*



administration

administration

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 secretarial support 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 payroll and personnel paperwork.

Associate Directors

Student Financial Affairs has three 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 second associate director (who is responsible for overseeing technical areas, processing areas, and student employment, which includes supervising two student affairs coordinators) is currently detailed to the UF Bridges department. The third associate director is responsible for the training and development, outreach, publications, and Web areas, which includes supervising two financial aid coordinators and an information/publication services coordinator. Additionally, the three associate directors 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.

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 advisers assist UF aid applicants, prospective applicants, and families with financial aid application procedures and other financial aid functions, such as case-by-case award revisions for students whose financial situation or other eligibility criteria change during the year. “

*Rodlee Ritter
Student Affairs Coordinator*



financial aid advising

SFA's Customer Service Section is the initial point of contact for all students who apply for aid or who need assistance with the financial aid application process. Our financial aid advisers are experts in the field of financial aid and continue their efforts to make the University of Florida's (UF) financial aid office a national leader in the administration of financial aid.

The customer service area was hit hard by turnover of senior financial aid advising staff during the later half of 2002-03, resulting in reassignments and several promotions for existing customer service staff. Another result was discontinuation of the SFA Student Info e-mail service since no staff were available who could assume this responsibility. In addition, five new customer service advisers were hired during this period.

These staff changes led to a complete reconfiguration of operating protocol centered around providing limited general information counseling services at our service counters in the mornings with counter staff referring students to see advisers in their offices for complex issues. Telephone access to advisers in the mornings increased as one result. The afternoon format remained basically unchanged; however, one member from each advising team works at the front desk afternoons in two-hour shifts rather than four-hour shifts, alternating with their team member. These configuration changes were designed to improve the types of services we provide to students, while also reducing stress on the phone and advising staff. The customer service staff continues to include a Student Affairs Coordinator III (Assistant Director), six Student Financial Aid Coordinator IIs, five Student Financial Aid Coordinator Is, a Clerical Supervisor, two Senior Clerks, a Clerk and a full-time OPS position.

Customer Service Advisers and Phone Reps

All UF students and aid applicants are assigned to two-member financial aid advising teams by the last two digits of students' UFID. 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 incoming phone calls to the non-administrative financial aid sections.

Customer Service advisers assist UF aid applicants, prospective applicants, and families with financial aid application procedures and other financial aid functions, such as case-by-case award revisions for students whose financial situation or other eligibility criteria change during the year.

The Customer Service telephone bank is staffed by four, full-time clerical support 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. In 2003, the phone staff also became integrated more heavily in our morning front desk general information services; they now take shifts working the front desk with the customer service general information adviser.

During 2002-03, the customer service telephone staff handled 54,511 telephone calls, 7,407 more calls than the previous year. We attribute this increase to full staffing in the phone room in addition to enhanced features associated with a new phone system installed during the later part of 2001-02.

Special Programs

A number of special financial aid programs come under the auspices of Customer Service, including the summer AIM Program, overseas study programs, financial aid for State University System (SUS) transient students, concurrent enrollment programs, revision petitions, several MBA non-traditional programs, SFA's academic progress program, and UF's 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 special admissions program. Summer 2003 admits and enrollment were slightly higher than in 2002. In summer 2003, 620 students were admitted—119 more than in 2002. Of the 620 students admitted in summer 2002, 306 actually enrolled, an increase of 26 students from last year. Of these students, 262 received more than \$589,532 total in grants to meet their costs for the summer program. This is an actual decrease from last year in both the number of students receiving aid and the overall amount of aid received and is the result of fewer students submitting applications for financial aid. (Note: Aid recipient figures do not include athletes admitted through the AIM program.)

• Overseas Study Students with Aid

The number of students participating in UF-sanctioned overseas studies programs during 2002-03 surpassed the number of participants for both 2000-01 (pre-9/11) and 2001-02 (post-9/11). The number of students attending such programs increased from 1,197 in 2001-02 to 1,271 in 2002-03. The number of participants receiving financial aid rose to 1,110, a significant increase over the 893 in 2001-02. Financial aid packages routinely are supplemented with Federal Direct Stafford Loans (subsidized and unsubsidized), Federal Direct PLUS Loans, or private loans to offset costs of studying abroad.

• Professional Judgement Revision Petitions

Customer service advisers counsel students about the professional judgment revision petition process. Students have the right to, and are given the opportunity to, petition parental contributions, student contributions, and dependency status if they have extenuating circumstances not reflected in the initial eligibility evaluation. Five hundred thirty-six petitions were received and 338 approved in 2002-03, as compared to 326 received and 178 approved in 2001-02. The approval percentage rose from 55% in 2001-02 to

63% in 2002-03. The increase in the number of petitions received and approved is indicative of the downturn in the current economic climate.

• 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. We have processed financial aid for students enrolled in the following concurrent enrollment programs:

New World School of the Arts, Miami, Florida. Students take classes from Miami-Dade Community College and UF. In 2002-03, 57 students received financial aid to attend this program.

UF Milton Program, Milton, Florida. Students enrolled in this IFAS extension program may take classes at Pensacola Junior College, University of West Florida, and UF. In 2002-03, SFA processed financial aid for 15 students

UF Fort Lauderdale Program. Students enrolled in this program may take classes at FAU and Broward Community College. No students received aid through this IFAS extension program in Fort Lauderdale in 2002-03.

UF Fort Pierce Program. This IFAS extension program allows students to take courses through Indian River Community College. In 2001-02, aid was processed for four 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 2002-03, UF processed financial aid for 80 students participating as SUS transients. Visiting students receiving aid from other schools totaled seven.

• 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 aid for which the student is eligible based on the program. To facilitate aid processing for these students, a Coordinator II is jointly funded by our office and the College of Business Administration MBA programs. This award year, one new program was added. Five hundred twenty students enrolled in fifteen non-traditional MBA programs, an increase of forty students from those enrolled in similar programs in 2001-02.

SFA first began processing Federal Direct Stafford Loans for students enrolled in these in 1999-2000. Before this, students participating in these programs were eligible only for private loans. During 2002-03, SFA processed private loan applications for 39 of these students and Federal Direct Stafford Loans for 191 students, ten more than last year. Loan awards totaled more than \$3.3 million compared to \$2.5 million in 2001-02.

• Emergency Short-Term Loan Program

Short-term loan (STL) volume has remained somewhat consistent over the past few years, with the greatest need for assistance coming at the start of fall term. During 2002-03, 969 different students borrowed STL funds to the tune of \$965,238, compared to 785 students borrowing \$739,180 last year. Some loans included in these statistics reflect repeat STL borrowers over the course of the 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 petitions 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 3,268 student files met conditions for termination or suspension in 2002-03 as compared to 3,363 in 2001-02. Likewise, 1,722 petitions were reviewed as opposed to 1,893 in the previous year. The number of students flagged for financial aid academic progress requirements has remained very consistent over the past several years. The decrease in the number of students pursuing the appeals process may be a result of students graduating or completing their course of study and not needing to request a continuation of aid eligibility based on extenuating circumstances.

Unofficial Withdrawals. In recent years, the federal government has put pressure on schools to document that students who receive financial aid funds actually have attended classes. In particular question are students who receive federal aid whose end of term

satellite offices

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 students' class attendance.

For students for whom we cannot obtain proof of attendance, UF must reimburse the federal accounts. During 2002-03, 300 such students were flagged, 18 fewer than last year, and UF was required to reimburse the accounts for 70 students in the amount of \$60,544. This reflects a \$11,598 increase in institutional liability from the previous year.

Looking Ahead

Emphasis in the customer service area will focus on training and orientation activities for the five new customer service advisers who joined our staff during the later part of the 2002-03 and beginning of the 2003-04 year. Particular attention will also be given to monitoring and evaluating the new operating format that was implemented in summer 2003 for any needed adjustments or refinements to improve the system.

Student Financial Affairs (SFA) supports four professional positions designed to accommodate special needs 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, including: financial aid presentations for dental admission days, helping students through the application process, debt management, daily walk-in counseling, and exit interviews for graduating seniors. The office is located in the UF Health Sciences Center in the Dental Tower, D3-#17A.

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

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

more than 6000 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 as well as on providing up-to-date information about federal aid programs and requirements. The HSC Financial Aid Office is located in the HPNP Bldg at 101 Newell Drive room G208.

College of Law

Of about 1,200 UF law students, approximately 90% receive some form of financial aid. During 2002-03, more than \$14,500,000 in federal loans were paid to 998 students. The Law School Financial Aid Office, in 164 Holland Hall, is administered by a Financial Aid Coordinator, who is 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 an ex-officio 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 eighty-two students received \$601,550 from these funds in 2002-03. In addition, approximately \$1 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 980 medical, graduate, and physician assistant students. More than 600 students use the office for some type of 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 College of Medicine

special programs

aid office administers more than 50 loans and scholarships. In 2001-02 COM students were paid more than \$8,850,000 in student loans and \$1,560,000 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. This adviser also coordinates the Summer B AIM Program for all student athlete recruits entering the program. 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.



“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.”

Donna Kolb
Student Affairs Coordinator

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 of Awarding (see page 28) focuses on efficient delivery of Pell Grants to students. Federal Supplemental Educational Opportunity Grants and 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 \$17,744,788 in 2001-02 to \$20,913,722 in 2002-03. The number of Pell Grant recipients increased from 7,361 to 8,072.

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 2002-03, \$2,370,288 was disbursed to 1,864 students through this program, more dollars to fewer students from last year's figures of \$2,343,549 to 2,246 students.

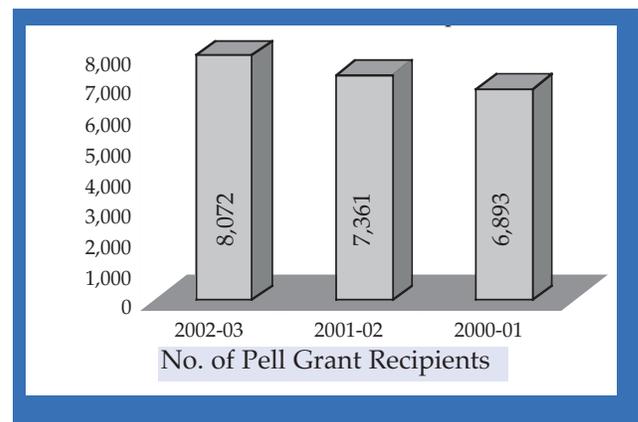
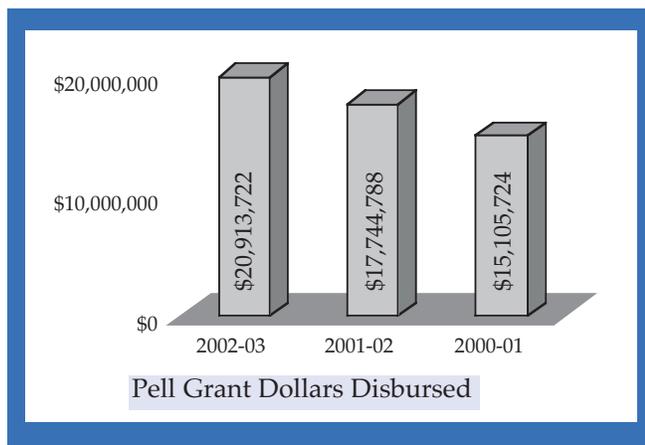
Turner Grants

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 2002-03, \$9,109,933 were awarded to 3,970 students, slightly lower than last year's totals of \$9,692,245 awarded to 4,086 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 2002-03, 4,826 UF students received awards totaling \$5,446,494, as up from 2001-02, when 3,966 UF students received awards totaling \$4,479,302. More information about state programs can be found in the State Programs section of this report.



scholarships

Scholarships are coordinated by several offices at 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 students who meet the specified requirements of donors and/or the endowment funds.

Custodial Awards (Private Donor Awards)

Over the past year custodial awards received by UF students remained at a very high level. The statistics below demonstrate the numbers of recipients and custodial dollars disbursed over the past three years:

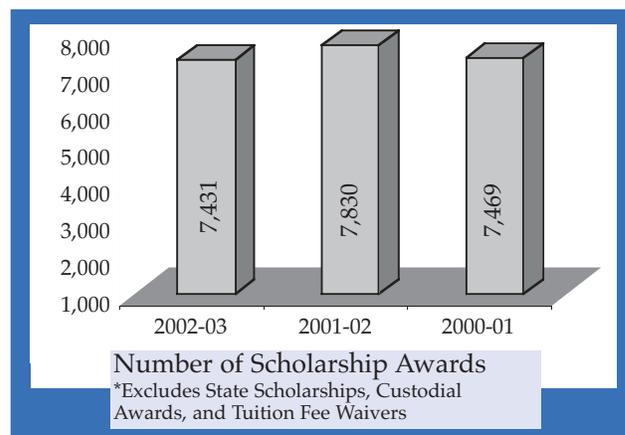
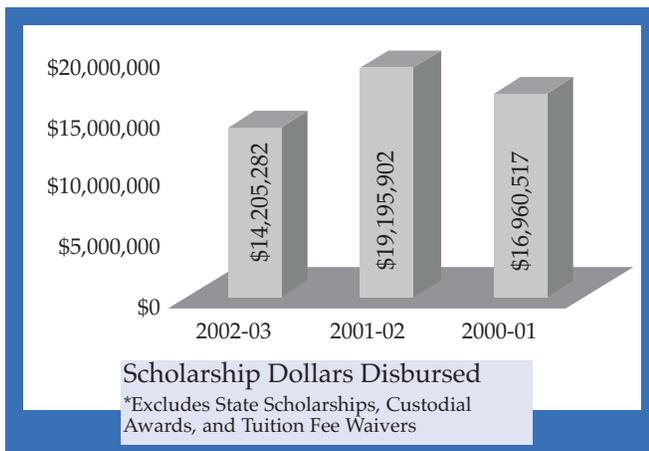
2002-03: 10,113, 519 to 5,985 students
 2001-02: 11,190,002 to 5,984 students
 2000-01: 10,361,879 to 5,574 students

This sustained level of growth may be attributed to several factors, including the high level of academic performance of our students. Academically elite students have the tendency 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.

Other Scholarship Statistics

The statistics below include all scholarships paid to students through the office for Student Financial Affairs *excluding* custodial awards, State of Florida scholarships, and tuition fee waivers.



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 28,654 awards to students enrolled at UF, who received a total of \$57,458,013 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 Medallion Scholarship*
- Florida Gold Seal Vocational Scholarship*
- Top Scholars Award*
- Children of Deceased or Disabled Veterans or Children of Servicemen Classified as Prisoners of War or Missing in Action Scholarship
- Florida Student Assistance Grant
- Florida Teacher Scholarship and Forgivable Loan
- Jose Marti Scholarship Challenge Grant
- Robert C. Byrd Honors Scholarship
- Rosewood Family Scholarship
- Occupational Therapist and Physical Therapist Scholarship Loan

* Part of the Florida Bright Futures Scholarship Program

Florida Bright Futures Program

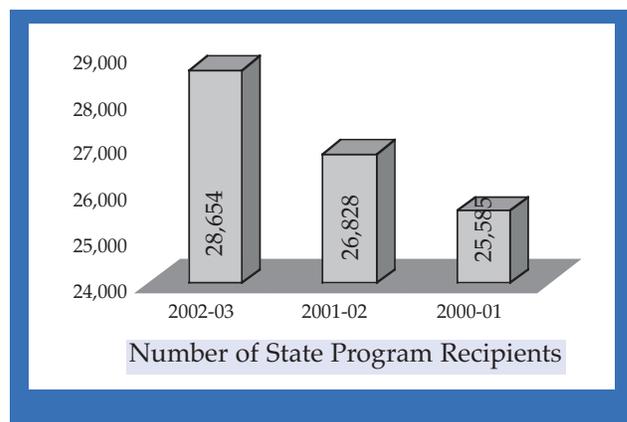
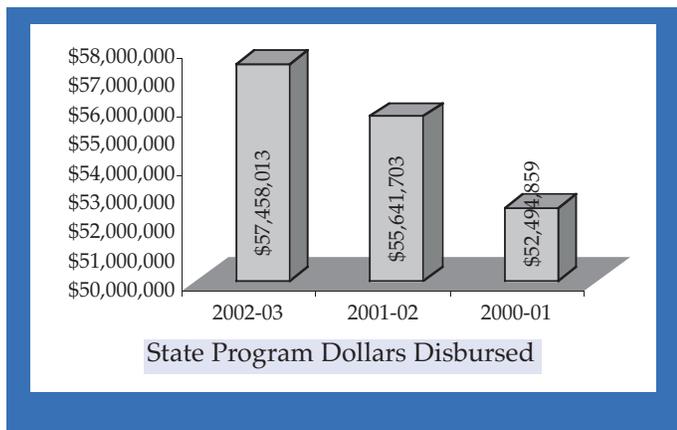
The Florida Bright Futures Program is the umbrella name for the Florida Academic Scholarship, the Florida Medallion Scholarship, the Florida Gold Seal Vocational Scholarship, and the Top Scholars Award. These programs continue to experience extraordinary growth at UF. This growth parallels the increase in the academic level of performance of our students as reflected by the following statistics:

2002-03: \$51,414,189 to 23,435 students
 2001-02: \$47,278,120 to 22,368 students
 2000-01: \$47,132,734 to 21,187 students

Florida Bright funds were disbursed to 1,067 more UF students in 2002-03 than in 2001-02. The continued growth in funds disbursed at UF through this program reflects UF's high academic standards. The excellence of its educational programs continues to draw ever-increasing numbers of Bright Futures students to matriculation at UF.

Statistics

The number of students receiving state programs as a whole continues to grow. A 6.81% increase occurred in the number of students receiving state aid in 2002-03. The increase came with the elimination of state funding for the "Chappie James" Most Promising Teacher Scholarship. The loss of "Chappie James" did not significantly impact UF's overall numbers, since an average of only 43 students has received "Chappie James" funds over the last five years.



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

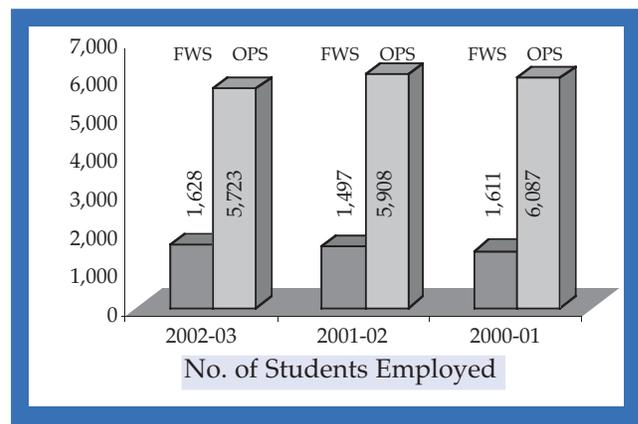
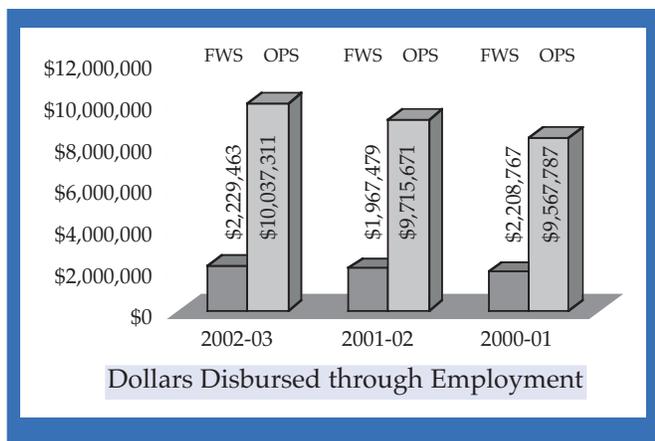
During the year 2002-03, the total amount of FWS (including FCS) and OPS Earnings was \$12,266,774 which was paid to 7,351 students.

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.

Publications

In conjunction with the Information/Publications Section, Student Employment publishes the *Student Employment Coordinator*, a periodic newsletter for campus employment coordinators. Other publications produced with Information/Publications include the *Student Employers Handbook*, for UF departmental student employment administrators, and SFA's *Student Employee Handbook*, which explains policies and procedures to SFA student assistants. These publications are maintained online on the SFA Web 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 provides access so students may review and reduce loan amounts.

UF continues to participate in the Federal Direct Loan Program (FDLP). The 2002-03 school year was UF's ninth year of participation. FDLP 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 FDLP 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. Repayments are made to USDOE's Federal Direct Loan Servicer.

Loan Certifications consists of a Financial Aid Coordinator III, a Coordinator II, two Financial Aid Coordinators, and a Program Assistant. Staff are 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.

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 certifies alternative educational (private) loans.

• 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. 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.

From July 1, 2002, through June 30, 2003, the FDSL/FDUSL interest rate was set at 3.46%. FDSL/FDUSL rates are capped at 8.25%. The interest rebate offered to encourage timely repayment remained at 1.5%.

• Federal Direct Plus Loans (FDPLUS)

The FDPLUS program was designed to help parents meet the expected family contribution toward the student's educational expenses, with loans not to exceed the student's cost of attendance. FDPLUS does not require students or families to demonstrate need.

From July 1, 2002 through June 30, 2003, the FDPLUS variable interest rate was set at 4.86% and capped at 9%.

• Private Loans

A number of private lenders offer loans allowing students to borrow funds equal to their cost of attendance less 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.

• Statistics

FDSL/FDUSL funds paid to students rose from \$118,511,375 in 2001-02 to \$127,659,990 in 2002-03. The number of loans awarded also increased—by 1226—up to 30,107.

The total amount borrowed in PLUS loans for the 2002-03 year was \$3,955,744, an increase of \$168,100 from the previous year.

For Private Loans, the dollar amount processed for UF students in 2002-03 was \$4,320,751.

• Loan Default

UF's Federal Direct Loan Program's 2000 Cohort Default Rate was 2.7%, well below the national average and threshold of 20% that mandates default reduction measures. Nevertheless, SFA

and University Financial Services continue to stress the need to avoid unnecessary borrowing and 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 SFA Web site. Further, the new loan confirmation site provides a link to the National Student Loan Data System, so students can review their loan debt prior to accepting additional loan funds.

• Regulatory Update

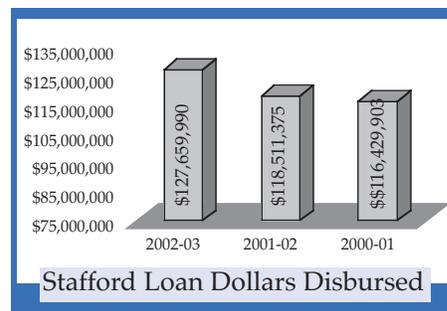
USDOE published final regulations on November 1, 2002 to be effective July 1, 2003. Two loan issues which affected this office are listed below:

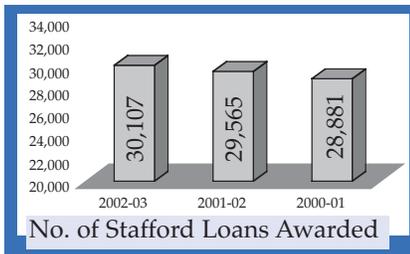
1. New total and permanent disability discharge procedures for Title IV loans.
2. Revised late disbursement provisions. Regulations were revised to allow schools to disburse Direct Loans to eligible students up to 120 days from the last day of half-time enrollment.

On September 30, 2002, the following disbursement provisions expired. Because UF is a participant in the Experimental Site Program, these provisions did not expire for this office and no modifications were required.

1. Provision allowing schools with default rates below 10% to disburse a loan in a single installment for a one-term enrollment period.
2. Provision allowing schools with default rates below 10% to waive the requirement that first-year, first-time borrower loan proceeds be withheld for 30 days.

The Office of Management and Budget approved a *Master Promissory Note* for Federal Direct PLUS Loans.





Technological Services

• Electric Master Promissory Note

On the whole, the electronic *Master Promissory Note (MPN)* process for Stafford Loans continued to be successful. However, minor problems were experienced for students with incompatible web browsers or discrepancies in their personal data.

• PLUS MPN

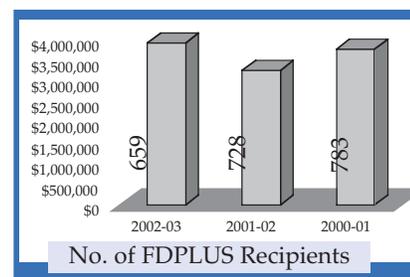
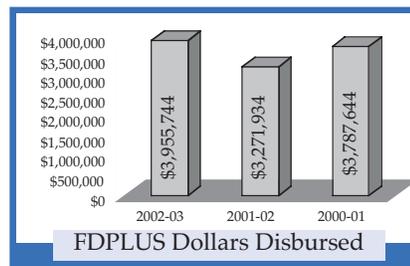
Summer 2003 was also spent preparing to implement the *PLUS Master Promissory Note (MPN)* process. All forms and documents were revised and system specifications changed to accommodate the new promissory note.

• EAGLE

Minor enhancements were made to EAGLE screens throughout 2002-03. Although the new system provided more detailed screen descriptions, staff continued to make adjustments to accommodate the production slowdown that resulted from increased scrolling.

• COD

Although conversion of the Direct Loan legacy record format to the



Common Origination & Disbursement (COD) system was on the whole a success, it was not without problems. Origination batches delayed in the COD system and the receipt of erroneous *Master Promissory Note* information were two problems that caused delays in disbursing fall funds. These and other COD system problems were not resolved until well into the fall term.

In 2002-03 COD also began updating its Web site with Daily Processing Updates to identify new issues, provide current status on open items, and inform COD Web users of any additional information that might be useful to them.

• LOC

The Loan Origination Center (LOC) closed in summer 2003, necessitating that schools report all outstanding loan information for award years prior to 2002-03 by July 15, 2003. Except for minor MPN problems, the LOC shutdown was uneventful.

• NSLDS

The National Student Loan Data System's (NSLDS) Customer Care Center (CCC) was developed to provide financial aid administrators a way to report data conflicts directly to NSLDS, instead of contacting the data provider to correct the conflict. The CCC has made it much easier for schools to resolve data conflicts and receive updated NSLDS data and programs information.

NSLDS also changed aggregate loan calculations to more accurately determine a student's eligibility for Title IV loan funds. The changes, including new definitions, new calculations, a breakdown of FFEL Consolidated Loans, and a new warning icon, save much time resolving loan history problems. With the more timely reporting of loan data to NSLDS, Loan Certifications experienced a decrease in loan history discrepancies.

• ELM

The 2002-03 year proved to be successful with regard to the ELM private loans electronic certification and disbursement process. The major problem with the private loan process continues to be coordinating the many lenders and guarantors various policies and procedures.

• Confirmation Site

Last year's specifications to simplify and enhance the Confirmation Web Site were not finalized, due to time constraints in the Systems Department.

• UF Web Services

UF Web services to students continue to improve. SFA continues to notify undergraduates of important information through Wednesday Update E-mails.

• Cohort Default

In 2002 all schools were required to enroll in the Electronic Cohort Default Rate (eCDR) notification process. Through eCDR, schools receive draft and official cohort default rate packages electronically rather than by hard copy.

• Program Automation

As a result of changes made by NSLDS, we further automated the aggregate loan edit in the Loan Certification program, saving a great deal of time. When a student is close to borrowing the aggregate loan maximum, the system can now reduce a Direct Loan to the amount of the student's remaining eligibility. Before this change, the system sent the record to a report to be researched and manually calculated.

• UFID and UF Directory

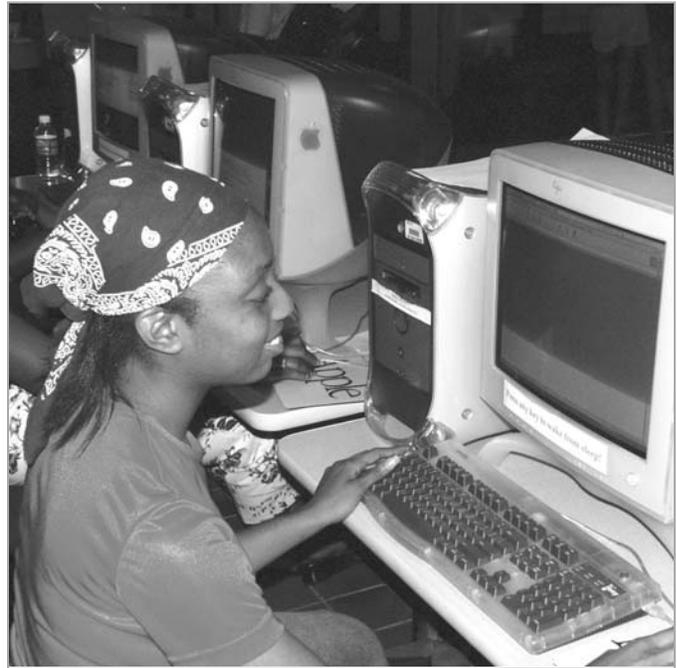
Staff spent many hours revising forms, and testing system programs to reflect the change to the new UFID. Address problems resulting from the conversion to the UF Directory created delays in loan processing for many students.

Future Objectives

- Continue to refine the automated loan system to ensure that it is accurate and user-friendly.
- Start preparing to convert to PeopleSoft, by supplying program information and loan specifications to PeopleSoft staff.
- Work with USDOE to correct errors in the COD process and suggest ways to simplify and enhance the loan process.
- Continue to monitor the Stafford electronic MPN process.
- Monitor the new PLUS MPN process.
- Review the Reauthorization proposed regulations.

“Easing students through the complicated process of institutional verification is a major focus here in Student Financial Affairs. SFA was selected to participate in the Department of Education’s Institutional Quality Control Pilot Project, which began in 1985. As a participant, UF develops and implements its own verification program, customizing it to reflect its own unique institutional setting and student population.”

Peggy Myers
Student Affairs 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. This structure continued to operate efficiently during the 2002-03 academic year.

Quality Assurance Procedure

The Department of Education initiated a redesign of Quality Assurance (QA) practices in the 2000-2001 academic year. Since that time, schools collect "initial" and "paid on" financial aid data and perform statistical analysis to assess institutional verification practices. Self assessments of management practices are also performed.

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 2002-03 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 assisted with data analysis. The consolidation of staff expedited document collection, and at the same time, exposed the verification staff to the QA methodology and philosophy.

Statistics

For 2002-03, 9,546 student files were selected for verification. Of that total, 8,121 students completed the process, yielding an 85% completion rate.

“Each year in January and February, SFA sponsors financial aid workshops to distribute applications, explain the financial aid process, and answer questions targeting all students interested in applying for financial aid. Sessions are held at local area high schools, UF residence halls, and the J. Wayne Reitz Union. Presentations are also held for professional students in the colleges of Medicine, Dentistry, Veterinary Medicine, and Law by the respective staff members of those areas.”

Ron Anderson
Associate Director



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 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 high quality, cost-effective financial aid publications, including the SFA Web site, the annual *Gator Aid Handbook*, the annual *Gator Aid Application Guide*, the *SFA Newsletter* series, 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, effective news releases for various news media.

Information/Publications also provides annual updates to SFA information contained in university catalogs and publications, and designs, produces, and contributes articles for the Division of Student Affairs' tri-annual newsletter, the *Student Affairs Update*.

In the area of print publications, this year Information/Publications designed a new four-color presentation folder, created a new SFA Bookmark, and improved our *1st-Time Applicants Guide to Financial Aid* brochure from a one-color to a four-color brochure. SFA

continued to produce the *SFA Newsletter* and our brochure series, revising, updating, and reprinting as necessary. All print publications are available from S-107 Criser. Also look for the online versions of our printed publications on our Web site.

Publications issued news releases on important financial aid activities and information. Widely publicized this year were the availability of Federal Work-Study, staff changes at the law school, the introduction of my.UFL the new university web portal, and the UF switch to a new UFID to replace the use of social security numbers as a student number.

SFA continued to write and edit financial aid information for ASK UF, a UF Web information service, in conjunction with Customer Service staff. This year's top two Ask UF financial aid questions are "When should I apply for financial aid to attend UF?" and "How do I apply for scholarships at UF?"

This year the Information/Publications coordinator worked extensively on UF communications committees this year in the areas of publicizing the new UFID/UF Directory project, the UF Bridges (UF Portal) project, and the UF 150 celebration project. Our SFA webmaster also contributed his skills to design the logos, posters, and other supporting material for UFID, UF Bridges, my.UFL, and Gatordex.

Our SFA Webmaster, an Information/Publications team member, continued to improve our Web site, which 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 requires continual maintenance, and 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 maintaining the SFA Web site, our Webmaster volunteered time in 2002-03 to design the Student Affairs portal page and to design and maintain

the UF Alcohol and Drug Education Policy Committee (ADEPC) 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*
- *2003-03 Gator Aid Handbook*
- *2002-03 Gator Aid Application Guide*
- *SFA News*—a spring, summer, and fall edition newsletter to student aid recipients
- SFA Presentation Folder
- SFA Bookmark
- 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*, *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*
- *2000-01 Student Financial Affairs Annual Report*
- *2001-02 Student Employee Handbook*

Outreach & Training

The Outreach and Training Section coordinates all outreach activities to parents, students, and high school, university, and community groups, as well as coordinating an ongoing training program for SFA staff and student assistants.

In 2001 SFA consolidated information and outreach under one Associate Director to improve information flow and increase quality control of our information and outreach efforts. Outreach and Training, together with Information/Publication Services section now work together toward that goal.

Outreach

In 2001 SFA 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. A UF team travels throughout the southeast focusing its efforts on underserved areas of these states. The primary goal of the SFA outreach adviser is to reach out to incoming freshmen and transfer students through presentations, lectures, conferences, workshops, and other recruitment functions. SFA is excited to be part of this effort to help bring quality and diverse students to UF.

SFA Outreach also provided financial aid literature and SFA publications to parents and students at college fairs and academic programs. This year about half of the students seen by SFA Outreach were potential UF students; the other half were registered or admitted UF students.

In January and February 2003, SFA sponsored financial aid workshops to distribute applications, explain the financial aid process, and answer questions targeting all students interested in applying for financial aid: sessions were held at local area high schools, UF residence halls, and 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 published in the *Independent Florida Alligator* and advertising ran on the campus housing channel (Channel 8).

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

Outreach was also involved with the following programs that facilitate minority recruitment at UF: Destination Gainesville, College Summit, PAACT & AIM, the African American High School Scholars Program, the Hispanic/Latino High School Scholars Program, the High School Guidance Counselor Workshop, and the BIOTRAC (Biomedical Residential College Experience) Program. The McNair Scholars Program, the STEPUP VIII Program, and the Institute of Black Culture also called on SFA Outreach to provide financial information to minority students.

SFA also continued to participate in Preview, the summer freshman-orientation program. Our presentation, "Money Matters," was presented twenty-one times during Summer 2003. Money Matters was formatted into a formal PowerPoint presentation that allowed Outreach and Training staff to thoroughly brief students about financial aid programs before they entered UF. In the summer of 2003, 6,900 students and around 14,000 family members attended Preview sessions. Each student received a copy of the *Gator Aid Handbook*.

SFA outreach staff also 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.

Outreach and Training also participated in all regular student orientations during 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 Associate Director represented UF at various conferences and meetings for the Florida Association of Student Financial Aid Administrators

(FASFAA), also serving this year as FASFAA President Elect. The Associate Director was also invited to serve as an instructor in the Southern Association of Financial Aid Administrators (SASFAA) Summer Workshop Series. This week-long workshop is conducted annually to provide training for new aid administrators in the Southeast.

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 matters, which 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

Standardized, quality training for all new employees is a basic and ongoing goal of our Training staff. To facilitate this, our staff conducts a formal, comprehensive, one-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 SFA Macintosh 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.



“Summer 2003 was the best ever for disbursing retroactive Summer A Direct Loan funds during Summer B. This has been a time-consuming, heavily manual process. This year we realized a breakthrough via the design and implementation of new automated edits, system-generated updates to files, and customized reports. These enhancements resulted in smoother and faster disbursement for SFA and UFS, and students received their funds more quickly.”

Sharon Stebbins
Financial Aid Coordinator

technical systems & processing

Disbursements & Fund Reconciliation

Awarding

Awarding is comprised of three Financial Aid Coordinators who monitor Pell delivery and 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 also are 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. 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, Awarding manually reviews and adjusts files.

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 "Return of Title IV" 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 2002-03, staffing increased to three coordinators. Awarding assumed responsibility for oversight of the Pell Grant program.

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 helping to manually process paper checks. The staff monitor checks from private lenders, donors and state issuing agencies, and code and file all checks.

Disbursements reviews student eligibility for loans, scholarships, and campus-based aid before disbursing these funds. Disbursements receives paper checks from various scholarship donors and private lenders. (Funds for federal and state awards are received by UFS via electronic drawdown.) Staff also return to private lenders and donors funds for which students are ineligible.

Disbursements manages monthly and academic-year fund reconciliation between UF and the federal government for all Federal Direct Loan funds. This involves transmitting and reconciling all disbursement data and repayment data (due to voluntary or obligatory repayment) and internally adjusting student files when repayment occurs.

Statistics

In 2002-03, Disbursements monitored and authorized disbursement of \$43,779,786 in grant funds, \$115,691,611 in scholarships, and \$143,283,822 in student loan funds. The total amount authorized through this section was \$302,755,219.

Disbursement Processing Updates

Regulatory Changes:

- Effective July 1, 2003, schools were given authority to disburse Direct

Loans to eligible students for up to 120 days after the last day of minimum half-time enrollment. The former limit was 90 days.

General:

- Academic year 2002-03 was SFA's first year exclusively using EAGLE web display screens for all financial aid files. Slowness of computer response became a concern for Batch Net Check review and other functions. Disbursements continued to monitor direct loan files, the checks file, and other screens for accuracy of both data display and system processes.
- To assist with the launch of the new UF-Directory system on January 21, 2003, Disbursements helped preview production screens and files before use by SFA as a whole. In addition, our internal and external documents/forms were modified to conform to the new university-wide UFID's used in place of ssn's. Batch Net Check output and all interfaces with UFS for disbursements and adjustments switched to UFID's.

During this first year of UF-Directory use, we experienced a downside of student address problems that was caused by accessing conflicting or unavailable address data to create paper checks. When these problems occurred for students not enrolled for direct deposit of financial aid funds, the result was delay or prevention of payment, or checks being mailed to incorrect addresses.

- Additional financial aid award "aidid's" (4-digit aid identifiers) were added in 2002-03 that exceeded the existing 0250 cap in the sequential numbering system. The automated Batch Net Check system currently only "recognizes" aidid's up to 0250. This occurrence necessitated special processing by Systems staff and by UFS to disburse all such awards. Additionally, Disbursements was unable to scrutinize these awards prior to payment. This concern is being targeted for resolution, so that all eligible awards/aidid's can be released via the Batch Net Check system, as desired.

Direct Loans:

- Full implementation of Common Origination and Disbursement (COD) in academic year 2002-03 affected Disbursements primarily in the reconciliation sphere of Federal Direct Loans. As the year progressed, acceptance of disbursements and adjustments in the COD system, booking of loans, and promissory note verifications had to be streamlined between COD and UF. In general, the transition went smoothly. During 2002-03, it was announced that COD would begin transmitting individual students' Direct Loan data to the Direct Loan Servicer on a daily basis. Simultaneously, the loan servicer began transmitting students' loan account data to the National Student Loan Data System (NSLDS) on a weekly basis. Both of these timetables were a tremendous improvement over previous lag times experienced by schools when trying to access accurate loan data on NSLDS' live Web site. With the inauguration of COD, came the federal COD Web site, which Disbursements used extensively when researching issues pertaining to particular students or to entire batch files of disbursement data. The site became more user-friendly during the year, and provided schools with access to a wide variety of student data and reconciliation data.
- In 2002-03, Systems staff helped us automate more of our weekly Adjustment process, used when repayments are made to Direct Loan awards already disbursed. The automation greatly reduced the need for manual entries on students' files, decreasing the chance of human error, and saving man-hours each week. Both system processing and reports were upgraded for efficiency.
- Summer 2003 was the best ever for disbursing retroactive Summer A Direct Loan funds during Summer B. This has been a time-consuming, heavily manual process. We realized a breakthrough via the design and implementation of new automated edits, system-generated updates to files, and customized reports. These

enhancements resulted in smoother and faster disbursement for SFA and UFS, and students received their funds more quickly.

- In 2002-03 Disbursements benefited from enhancements within the federal National Student Loan Data System /NSLDS. For students with consolidated FFEL loans, delays in payment due to eligibility concerns were eliminated, reducing work-hours required for research, calculations, and documenting eligibility of students' files. This resulted in swifter payment to eligible students.
- We continued to have students whose disbursement of Direct Loans was delayed because of attempting to use incompatible Web browsers to complete the electronic *Master Promissory Note* (MPN). In response, we modified SFA literature and publications to emphasize the requirement of using only prescribed browsers. We also contacted USDOE to ask that the MPN Web site display this alert to students up-front.
- A streamlined procedure was initiated for stale-dated Direct Loan checks, to match the protocol followed by UFS in its handling of these funds.
- The U.S. Department of Education changed the name of its financial aid oversight office from "Student Financial Assistance" to "Federal Student Aid." Correspondingly, the FSA Web site was upgraded and the visual presentation redesigned. Disbursements used this site for Direct Loan Bulletins, regulatory information, Title IV School Codes, contact information for federal offices, and other features.

Custodial Scholarships:

- The Disbursements section that manages computer input and deposit of custodial scholarship checks acquired an office photocopier for exclusive use in check handling. This allowed photocopying in a secure area without the interruption that occurs with a shared machine. It virtually eliminated the chance of checks being misplaced inhouse.

- Changes were made to the process of handling and inputting custodial scholarship checks. Now, photocopies are made of the checks and accompanying documentation, and input to the scholarship "Checks" file is done by Data Processing using the photocopies rather than original checks. Again, this increased efficiency and security.
- Additional automation was added to checks processing, and enhancements made to corresponding Eagle screens.
- Due to the changes above, processing time of checks from receipt to deposit with the business office was reduced from five to two days.

Private/Alternative Loans:

- Academic year 2002-03 was our second full year of using ELM/NDN. We requested that ELM make checks out directly to students (not to UF, and not co-payable). This change reduced processing steps for SFA and the business office and helped Disbursements get checks into students' hands more quickly.

Reconciliation with the U.S. Department of Education

- With the 2002-03 implementation of COD, each month a new reconciliation report—the School Account Statement (SAS) report—has been transmitted by COD to Direct Loan schools. The SAS report, combined with month-specific data and year-to-date data, proved helpful in the Direct Loan reconciliation process with USDOE. We anticipate closing out academic year 2002-03 by mid-January, with an ending cash balance of \$0 out of \$130.5 million in awards disbursed.

Looking Ahead

- We will test and implement a new COD-mandated, 5-day hold for academic year 2003-04 and beyond. For all newly processed Stafford or PLUS loans, schools must delay disbursement for 5 days to allow COD to send Disclosure Statements to borrowers.
- Custodial Scholarships: fall 2003-04 will be the first fall term using a new

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.

In 2002-03 the Records area imported all scholarship files into the KIDDS Record System, scanning and keying all 1998-99 through 2001-02 files and adding an additional 13,376 documents to student records and another 4,813 files into an SFA Scholarship batch file. Scholarship documents are not scanned into KIDDS until after the close of the academic year.

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 2002-03 school year: *Verification Checklists*, 37,586; student employment (SP-100) forms, 16,706; electronic data changes from the *FAFSA*, 8,702; Pell Calculations, 15,244; and awards and award revisions, 38,296. The majority of documents were received between June and September. The total number of documents received and scanned during the year was 172,329.

Data Entry

The Data Entry staff is comprised of one Program Assistant, one half-time data processor, and two "overflow" data processors from the Document Editing / Mailroom Section. 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. The two general categories of documents are "batch" and "online." "Batch" documents are keyed and stored throughout the day, and the data are 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/Mailroom

The Document Editing Section is where the application processing cycle begins. The staff, comprised of a Program Assistant, clerical supervisor, and fifteen student assistants, are also responsible for the Mailroom.

The Document Editing/Mailroom Section 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 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. Each semester two student assistants are "tapped" to learn basic data-entry skills. These students assist the Data Entry staff on an "as needed" basis.

paper-flow process for check input and deposit. Systems also will add new automated mail dates. We expect to see a notable improvement in efficiency of handling the huge inflow of fall-term checks.

- Late Disbursement Extension: in fall 2003 we will start using the new late disbursement time period of 120 days required for federal compliance.
- New procedures for identifying students with Continuing Education courses, and for reviewing and disbursing their aid, are planned.
- Reauthorization: we will continue to follow Reauthorization proceedings, and give input as appropriate. We will be affected if the following recommendations become law:
 - Increased Stafford Loan limits.
 - A change to Loan origination fees.
 - Increased overaward tolerance
 - Elimination of requirement to identify unofficial withdrawals.
 - R2T4 modifications to allow the 50%-point of the term to be the denominator, and to allow Professional Judgement decisions.
- ERP/BRIDGES and PeopleSoft: to prepare for implementation of PeopleSoft software, we will continue to train, to work with ERP staff to provide background information about Disbursement procedures and system needs, and to make suggestions and decisions.
- Enhancement of the Direct Loan Confirmation Site is desired. Special alerts would inform students of any additional requirements they have not met that are causing delay of their loan disbursement.

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, web-based 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 eleven, full-time systems analysts and programmers, are responsible for maintaining the records of more than 50,000 financial aid applicants.

Primary Responsibilities

Batch processing and maintenance:

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

Online processing/ maintenance:

S & P is responsible for scheduled online processing of 29 systems and the integration and maintenance of those systems 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 SAIG—Student Aid Internet Gateway). 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

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 Monthly Payment Summary Reports, and Board of Education (BOE) 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.

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 Systems

(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/Admissions: SFA's online computer screens are a subsystem of the Office of the University Registrar's Enhanced Application Generation Language for the Enterprise (EAGLE) system, a Web-based file viewing system. EAGLE enables mainframe databases and CICS resources to be directly accessed from the Internet. As such, S & P staff maintain ongoing communication with the registrar's staff to keep abreast of all changes to the EAGLE 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.

UF Computing and Network Services

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

Office of the UF CIO: S & P works closely with UF Office of the Chief Information Officer staff on various projects, including interfaces with EAGLE.

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

Board of Education (BOE): S & P staff work closely with BOE 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 Dean of Students' offices with personal computer 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

- 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 the World Wide Web.
- 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.

Systems Activities for 2002-03

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 with staff split between our Legacy systems and our new PeopleSoft Systems.

Ongoing projects: S & P continues to have a long list of ongoing projects geared toward creating a more unified and efficient work environment. One of these is continued responsibility for programming and maintenance of statistics on the Intertel phone switch in Criser Hall. Another is continued enhancement of SFA's Web presence within Eagle and ISIS.

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 had many new challenges and responsibilities.

- We have installed three OS X servers to enhance our online and network

capabilities. The three servers are the email server, the Web server, and the Filemaker Pro server.

- **Eagle:** Our Web-based system for staff to view SFA student data was completed this year. We now can see all our files with three academic years available.
- **UF Bridges:** The S & P staff has begun preliminary groundwork for converting over to the new PeopleSoft software. We are working hand in hand with our staff located at the downtown UF Bridges Office.
- **UF Directory:** The S & P staff worked many long hours to convert all student systems to read and/or update the new UF Directory. We are happy to say we were up and running 100 percent at the end of the implementation weekend.



"Student Financial Affairs staff participate in many UF, Divisional, and SFA-sponsored social and professional activities. Many also volunteer to serve on UF, Divisional, and SFA committees, or enroll for UF-sponsored educational workshops and opportunities through the Division of Human Resources as avenues for professional growth. Through these various activities, our staff enjoy the spirit and rewards of university professional life.

*Susan Mickelberry
Coordinator, Information/Publication Services*

staff & professional activities

SFA Staff

Administration

Karen Fooks	<i>Director</i>
Rick Wilder	<i>Associate Director</i>
Elaine Stuckman	<i>Associate Director</i>
Ron Anderson	<i>Associate Director—Information/Publication Services, Outreach, Training & Development</i>
Tony Gordon	<i>Computer Applications Coordinator</i>
Donna Kolb	<i>Assistant Director, Scholarships and State Programs, Student Employment, Data Processing, Mailroom, Records</i>
Donna Fowler	<i>Student Affairs Coordinator—Loans and Disbursements</i>
Peggy Myers	<i>Student Affairs Coordinator—Pell Grant, Manual Awarding, Quality Control, Verification</i>
Rodlee Ritter	<i>Student Affairs Coordinator, Customer Service</i>
Terri Wilder	<i>Senior Accountant</i>
Betty Holt	<i>Senior Fiscal Assistant</i>
Anne Newman	<i>Office Manager</i>
Cathy Thompson	<i>Senior Secretary</i>
Lois Perkins	<i>Word Processing Operator</i>
Shirley Moore	<i>Senior Clerk, Receptionist</i>

Customer Service

Erica Beard	<i>Financial Aid Coordinator</i>
Debbie Coleman	<i>Financial Aid Coordinator</i>
Carol Huber	<i>Financial Aid Coordinator</i>
Andy Lord	<i>Financial Aid Coordinator</i>
Rhonda Riley	<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>Senior Clerk</i>
Lakeatrice Williams	<i>Senior Clerk</i>
Vacant	<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

Connie Reed	<i>Financial Aid Coordinator</i>
Ruben Lopez	<i>Program Assistant</i>

Student Loans

Lora Labonte	<i>Financial Aid Coordinator</i>
Joy Devore	<i>Financial Aid Coordinator</i>
Ashanta Simmons	<i>Program Assistant</i>
Vacant	<i>Financial Aid Coordinator</i>

Student Employment

Ruth Strawder	<i>Financial Aid Coordinator</i>
Monica Johnson	<i>Senior Clerk</i>
Connie Welcome	<i>Senior Clerk</i>

Satellite Offices

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

Technical Processing and Support

Disbursements

Sharon Stebbins	<i>Financial Aid Coordinator</i>
Jan Berlin	<i>Program Assistant</i>

Document Editing

Annalise Adams	<i>Program Assistant</i>
Vacant	<i>Senior Clerk</i>

Manual Awarding

Jeff City	<i>Financial Aid Coordinator</i>
Michael Daube	<i>Financial Aid Coordinator</i>

Information/Publications Services

Susan Mickelberry	<i>Coordinator, Information/Publications Services</i>
Jeffrey Stevens	<i>Computer Support Specialist</i>

Quality Assurance

Rose Williams	<i>Financial Aid Coordinator</i>
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Pell Grant

Vacant	<i>Financial Aid Coordinator</i>
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Records/Optical Scanning

Berta Mills	<i>Office Manager</i>
Scott Glisson	<i>Clerical Supervisor</i>
Vacant	<i>Senior Clerk</i>

Systems and Programming

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

Training & Development

Chris Joseph	<i>Financial Aid Coordinator</i>
Micheal Wood	<i>Financial Aid Coordinator</i>

Verification

Rose Williams	<i>Financial Aid Coordinator</i>
Larry Moore	<i>Financial Aid Coordinator</i>
Max Mauney	<i>Financial Aid Coordinator</i>
Pat Bush	<i>Senior Clerk</i>

Professional Activities

Karen Fooks • Director

memberships: National Association of Student Financial Aid Administrators (NASFAA); Southern Association of Student Financial Aid Administrators (SASFAA); National Direct Student Loan Coalition

UF committees: Financial Aid Committee, Undergraduate Advising Council

Rick Wilder • Associate Director

memberships: NASFAA; SASFAA; FASFAA: Past President, Conference Committee Program Chair, Finance Committee Chair

UF committees: Reitz Scholars Mentor; Johnson Scholarship Committee; Minority Transfer Scholarship Committee

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: Instructor, FASFAA: President Elect

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

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, Student Affairs Tech Committee, UF 150 Editorial Committee, UF Bridges Advisory User Council (Communications), UF Portal Communications Workgroup, UFID & Directory Project Publicizing Campaign Planning Advisory Group

Peggy Myers • Student Affairs Coordinator

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

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

Eileen Parris • Student Financial Affairs Coordinator

Medical Center

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

UF committees: College of Medicine Financial Aid Committee, College of Medicine ADA Committee, Health Center Student Conduct Standards Committee

Rodlee Ritter • Student Affairs Coordinator

Customer Service

memberships: NASFAA, SASFAA, FASFAA: Fall Conference Program Committee

Nolan Simmons • Student Financial Affairs Coordinator

Athletes

memberships: SASFAA, FASFAA

Randy Patton • Student Financial Affairs Coordinator

Law School

memberships: NASFAA, SASFAA, FASFAA

UF committees: College of Law Financial Aid Committee

Bill Watson • Student Financial Affairs Coordinator

MBA

memberships: SASFAA, FASFAA

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