
US Department of Education



FAFSA on the Web Redesign Use Case Specification: Student Income Estimator Worksheet

Version 4.2

FAFSA on the Web Redesign	Version: 4.2
Use Case Specification: Student Income Estimator Worksheet	Date: 3/5/01

Revision History

Date	Version	Description	Author
11/6/00	1.0	Student Income Estimator Worksheet	Modernization Partner
11/15/00	2.0	Added Field Validation	Modernization Partner (Larry Bach)
11/17/00	3.3	Added Diagrams Added Assumption Updated Related Use Cases Added file names to Wireframes Renumbered Flow Elaborated Description	Modernization Partner (Jenny Connelly & Nan Li)
12/7/00	4.0	Moved data entry rules to Glossary Move navigation from Business Rules section to Navigation Links sections (Nina) Add default rule for skipping data input field (NCS)	Modernization Partner (Jenny Connelly & Nan Li)
1/23/01	4.1	Added Alternative Flow Diagram Removed General From Help in Navigation Links Added Previous and Next to Renew alternate flow Replaced “pops up” with “displays.” Imbedded Basic Flow Wireframes – problems imbedding entire page	Modernization Partner (Jennifer Connelly)
3/5/01	4.2	No changes from change log to be implemented. Updated wireframes	Modernization Partner (Jennifer Connelly)

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Use Case Specification: Student's Income Estimator Worksheet

1. Use Case Name: Student's Income Estimator Worksheet

1.1 Brief Description

This use case describes how an Applicant completes the Student's Income Estimator Worksheet. If you (and your spouse) have not yet completed your 2000 taxes, this worksheet will help you figure out your adjusted gross income for 2000.

This is an "included" use-case for FillOut FAFSA, Renew FAFSA, or Correct FAFSA.

1.2 Note

- Navigation to get help messages is not documented in this use case. Please refer to "FAFSA_WEB_Help.doc" for more information.
- Description of concept, data, variables and database interactions is defined in "FAFSA_WEB_Glossary.doc."
- Edit error process (validation and error display) is defined in "FAFSA_WEB_Edit_Error.doc."

2. Actors

#	Actor Name	Actor Type
1	Applicant	Primary

3. Assumptions

#	Assumptions
1	Applicant enters all valid data into input fields
2	Applicant chooses to Fill Out a FAFSA.

4. Pre-Conditions

#	Pre-Conditions	Wireframe
1	Applicant begins at the Home Page	home.htm
2	Applicant selects: COMPLETING A FAFSA	Complete001.htm
3	Applicant selects: FIRST TIME FAFSA ON THE WEB	Complete013.htm
4	Applicant selects: <u>starts the</u> STUDENT'S INCOME ESTIMATOR WORKSHEET (Within the FAFSA Application)	\app\FillOutApp\filloutapp_step2b.htm

~~Note, it can also started from Renew FAFSA or Correct FAFSA, where the applicant also selects: **STUDENTS' INCOME ESTIMATOR WORKSHEET** (Within that application).~~

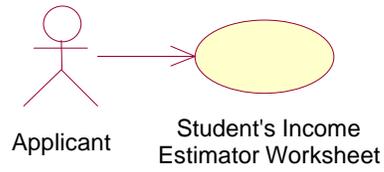
5. Post-Conditions

#	Post-Conditions	Wireframe
1	None	

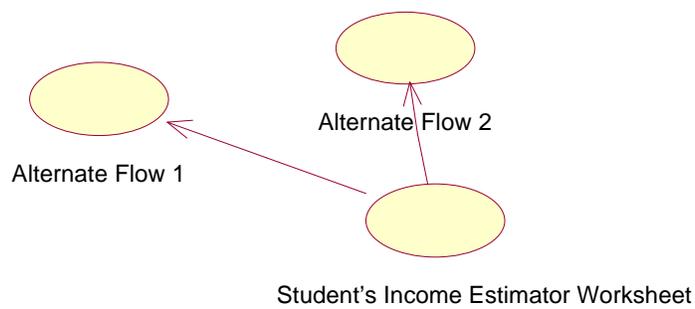
~~Note, if it is started from Renew FAFSA or Correct FAFSA, it will return back to Renew FAFSA or Correct FAFSA respectively.~~

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6. Diagram



7. Alternate Flow Diagram



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8. Flow of Events

8.1 Basic Flow

Basic Flow				
#		Events	Data Elements	Wireframe
1	→	This use case begins when the Applicant chooses to complete <u>starts</u> the STUDENT'S INCOME ESTIMATOR WORKSHEET		
<u>2.1</u>	←	<u>System displays: Student's Income estimator Worksheet</u>		\app\FilloutApp_step2b.htm
3	→	Applicant enters whole dollar amount to: Wages, salaries, tips, etc.	[szStuIncWages]	
4	←	System calculates and updates: subtotal <u>Total Estimated Income for you (and your spouse) for 2000 (Question 39)</u>	[szStuIncSubtotal][szSTUAGI]	
5	→	Applicant enters whole dollar amount to: Interest Income	[szStuIncInterests]	
6	←	System calculates and updates: Total Estimated Income for you (and your spouse) for 2000 (Question 39) <u>System re-calculates and updates: subtotal</u>	[szSTUAGI][szStuIncSubtotal]	
7	→	Applicant enters whole dollar amount to: Dividends	[szStuIncDividends]	
8	←	System calculates and updates: Total Estimated Income for you (and your spouse) for 2000 (Question 39) <u>System re-calculates and updates: subtotal</u>	[szSTUAGI][szStuIncSubtotal]	
9	→	Applicant enters whole dollar amount to: Other taxable income (alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, Social Security, Railroad Retirement, and all other taxable income)	[szStuIncOther]	
10	←	System calculates and updates: Total Estimated Income for you (and your spouse) for 2000 (Question 39) <u>System displays a subtotal of the entered values</u>	[szSTUAGI][szStuIncSubtotal]	
11	→	Applicant enters whole dollar amount to: IRS-allowable adjustments to income (payment to IRA and Keogh Plans, one half of self employment tax, self-employed health insurance deduction, interest penalty on early withdrawal of savings, alimony paid, and student loan interest deduction) <i>This amount will be subtracted to equal you (and your spouse)' estimated income for the year 2000.</i>	[szStuIncAdjustments]	
12	←	System calculates and updates: Total Estimated Income for you (and your spouse) for 2000 (Question 39) <u>System calculates and updates: Total estimated income for you (and your spouse) for 2000.</u>	[szSTUAGI][szStuIncTotal]	
<u>13</u>	→	<u>Applicant enters whole dollar amount to: Total Estimated Income for you (and your spouse) for 2000 (Question 39)</u>	[szSTUAGI]	
		<u>NEXT</u>		\app\FilloutApp\filloutapp_step2c.htm
		<u>PREVIOUS</u>		\app\FilloutApp\filloutapp_step2a.htm
		Use case ends.		

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2001 - 2002 FAFSA on the Web

[FAFSA on the Web Intro](#)

Step 2: Provide Your Financial Info

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FAFSA Steps:

1 [Info About You](#)

2 Your Finances

3 Your Student Status

4 Your Parents' Info

5 Your Household Info

6 Schools to Receive Results

7 Provide Preparer Info

8 Review Completed FAFSA

9 Signatures

10 Submit Your FAFSA

37. What income tax return did you file or will you file for 2000?

Select

38. If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ?

- Yes
 No
 Don't Know

Select Yes if you (and your spouse) filed or will file a 1040 but were eligible to file a 1040A or 1040EZ. In general, you are eligible to file a 1040A or 1040EZ if you:

- Make less than \$50,000,
- Do not itemize deductions,
- Do not receive income from your own business or farm,
- Do not receive self-employment income, or alimony, and
- Are not required to file Schedule D for capital gains.

Select No if you (and your spouse) filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if you (and your spouse) filed or will file a 1040 and do not know whether you are eligible to file a 1040A or 1040EZ.

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Select No if you (and your spouse) filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if you (and your spouse) filed or will file a 1040 and do not know whether you are eligible to file a 1040A or 1040EZ.

Student's Income Estimator

If you (and your spouse) have not yet completed your 2000 taxes, this worksheet will help you figure out your adjusted gross income for 2000. The calculated total will be entered on your FAFSA for Question 39. **All questions refer to income earned in the year 2000.**

Wages, salaries, tips, etc.	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Interest Income	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Dividends	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Other taxable income (alimony received, business and farm	Enter whole dollar amounts in this box, and do not use commas.

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Notes about this screen:

- Value received from the Student Income Estimator Worksheet will be inserted into answer field for Question 39.
- If user selected "will not file" for Question #36, they will not need to go to Page 2 of Step 2, therefore, the "2" in the page navigation for Step 2 in the right hand corner of each screen will remain grey throughout step 2 and will not be a link. If the user selected any other answer for Question #36, the page navigation for "2" will be a link. In any case, the "2" will be colored in grey on the first page of step 2 (filloutapp_step2a.htm)

URL Listing:

FAFSA on the Web logo: app/FillOutApp/exit_app.htm
FAFSA on the Web Intro: app/FillOutApp/filloutapp_intro.htm
Contact Us: app/FillOutApp/exit_app.htm
Help: app/FillOutApp/exit_app.htm
FAFSA FAQs: app/FillOutApp/exit_app.htm
Info About You: app/FillOutApp/filloutapp_step1a.htm
1: app/FillOutApp/filloutapp_step2a.htm
Need help with this page?: app/page_help/chelp_s2p2.htm
1040ez OR Telefile: app/Shared_Pages/chelp_sample.htm
Previous: app/FillOutApp/filloutapp_step2a.htm
Next: app/FillOutApp/filloutapp_step2c.htm
Save for Later: app/FillOutApp/save_app.htm
View FAFSA Summary: app/Shared_Pages/FAFSA_summary.htm
Exit: app/Shared_Pages/exit_app.htm

Image File Listing:

TBD

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8.2 Alternative Flows

Alternate Course 1

Title: Applicant chooses to Renew a FAFSA

Assumptions:

#	Assumptions
1	Applicant enters valid field data.
2	Applicant chooses to Renew a FAFSA

Pre-Conditions:

#	Pre-Conditions	Wireframe
1	Applicant begins at the home page	home.htm
2	Applicant selects: COMPLETING A FAFSA	Complete001.htm
3	Applicant selects: RENEWAL FAFSA ON THE WEB	Complete004.htm
4	Applicant selects: STUDENT'S INCOME WORKSHEET (Within Renew FAFSA Application)	app\RenewApp\renewapp_step2b.htm

Alternative Flow				
#		Events	Data Elements	Wireframe
2.2	←	System displays: Student's Income Worksheet		app\RenewApp\renewapp_step2b.htm
		Continue at #3 - #13		
		NEXT		app\RenewApp\renewapp_step2c.htm
		PREVIOUS		app\RenewApp\renewapp_step2a.htm
		Use case ends		

Alternate Flow Specific Navigation Links:

#	Navigation Links
1	Selecting EXIT button will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination
2	Selecting FAFSA ON THE WEB LOGO will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination
3	Selecting HOME will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination
4	Selecting CONTACT US will continue at use case Exit FAFSA passing current URL as parameter for origination, and contact.htm as parameter for destination
5	Selecting GENERAL HELP will continue at use case Exit FAFSA passing current URL as parameter for origination, and help.htm as parameter for destination
6	Selecting FAFSA FAQ will continue at use case Exit FAFSA passing current URL as parameter for origination, and FAQ001.htm as parameter for destination
7	Selecting NEED HELP WITH THIS PAGE will continue at template page specific help passing current URL as parameter
8	Selecting SAVE FOR LATER will continue at use case Save for Later passing current URL as parameter
9	Selecting VIEW FAFSA SUMMARY will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)
10	Selecting INFO ABOUT YOU will continue at app\RenewApp\renewapp_step1a.htm
11	Selecting YOUR FINANCES will continue at app\RenewApp\renewapp_step2a.htm

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2001 - 2002 FAFSA on the Web Renewal

[Renewal FAFSA on the Web Intro](#)

Step 2: Provide Your Financial Info Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

FAFSA Steps:

- 1** [Info About You](#)
- 2** Your Finances
- 3** Your Student Status
- 4** Your Parents' Info
- 5** Your Household Info
- 6** Schools to Receive Results
- 7** Provide Preparer Info
- 8** Review Completed FAFSA
- 9** Signatures
- 10** Submit Your FAFSA

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- Do not receive income from your own business or farm,
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- Are not required to file Schedule D for capital gains.

Select No if you (and your spouse) filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if you (and your spouse) filed or will file a 1040 and do not know whether you are eligible to file a 1040A or 1040EZ.

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37. What income tax return did you file or will you file for 2000?

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Select Yes if you (and your spouse) filed or will file a 1040 but were eligible to file a 1040A or 1040EZ. In general, you are eligible to file a 1040A or 1040EZ if you:

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- Do not receive self-employment income, or alimony, and
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Select No if you (and your spouse) filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if you (and your spouse) filed or will file a 1040 and do not know whether you are eligible to file a 1040A or 1040EZ.

Student's Income Estimator

If you (and your spouse) have not yet completed your 2000 taxes, this worksheet will help you figure out your adjusted gross income for 2000. The calculated total will be entered on your FAFSA for Question 39. **All questions refer to income earned in the year 2000.**

Wages, salaries, tips, etc.	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Interest Income	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Dividends	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
Other taxable income (alimony received, business and farm	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00

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Notes about this screen:

- Value received from the Student Income Estimator Worksheet will be inserted into answer field for Question 39.
- If user selected "will not file" for Question #36, they will not need to go to Page 2 of Step 2, therefore, the "2" in the page navigation for Step 2 in the right hand corner of each screen will remain grey throughout step 2 and will not be a link. If the user selected any other answer for Question #36, the page navigation for "2" will be a link. In any case, the "2" will be colored in grey on the first page of step 2 (renewapp_step2a.htm)

URL Listing:

FAFSA on the Web logo: app/RenewApp/exit_renew.htm
FAFSA on the Web Intro: app/RenewApp/renewapp_intro.htm
Contact Us: app/RenewApp/exit_renew.htm
Help: app/FillOutApp/exit_renew.htm
FAFSA FAQs: app/RenewApp/exit_renew.htm
Info About You: app/RenewApp/renewapp_step1a.htm
1: app/RenewApp/renewapp_step2a.htm
Need help with this page?: app/page_help/chelp_s2p2.htm
Previous: app/RenewApp/renewapp_step2a.htm
Next: Your Student Status: app/RenewApp/renewapp_step2c.htm
Save for Later: app/RenewApp/save_app.htm
View FAFSA Summary: app/Shared_Pages/FAFSA_summary.htm
Exit: app/RenewApp/exit_renew.htm

Image File Listing:

TBD

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Alternate Course 2

Title: Applicant chooses to Correct a FAFSA

Assumptions:

#	Assumptions
1	Applicant enters valid field data.
2	Applicant chooses to Correct a FAFSA

Pre-Conditions:

#	Pre-Conditions	Wireframe
1	Applicant begins at the home page	home.htm
2	Applicant selects: COMPLETING A FAFSA	Complete001.htm
3	Applicant selects: MAKE CORRECTIONS TO A SUBMITTED FAFSA	Complete014.htm
4	Applicant selects: STUDENT'S INCOME WORKSHEET (Within Correct FAFSA Application)	Dynamically generate page. See FAFSA_WEB_CORRECTION.doc

Alternative Flow				
#		Events	Data Elements	Wireframe
2.3	←	System displays: Student's Income Worksheet		Dynamically generate page. See FAFSA_WEB_CORRECT ION.doc
		Continue at #3 - #13		
		Use case ends		

Alternate Flow Specific Navigation Links:

#	Navigation Links
1	Selecting EXIT button will continue at use case Exit FAFSA passing current URL as parameter
2	Selecting NEED HELP WITH THIS PAGE will continue at template page specific help passing current URL as parameter
3	Selecting FAFSA ON THE WEB LOGO will continue at use case Exit FAFSA passing current URL as parameter
4	Selecting HOME will continue at use case Exit FAFSA passing current URL as parameter
5	Selecting CONTACT US will continue at use case Exit FAFSA passing current URL as parameter
6	Selecting GENERAL HELP will continue at use case Exit FAFSA passing current URL as parameter
7	Selecting FAFSA FAQ will continue at use case Exit FAFSA passing current URL as parameter
8	Selecting SAVE FOR LATER will continue at use case Save for Later passing current URL as parameter
9	Selecting VIEW FAFSA SUMMARY will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)
10	Selecting CORRECTIONS ON THE WEB INTRO will continue at app\CorrApp\corrapp_intro.htm
11	Selecting INFO ABOUT YOU will continue at app\CorrApp\corrapp_1.htm
12	Selecting YOUR FINANCES will continue at app\CorrApp\corrapp_2.htm
13	Selecting YOUR STUDENT STATUS will continue at app\CorrApp\corrapp_3.htm
14	Selecting YOUR PARENTS' INFO will continue at app\CorrApp\corrapp_4.htm
15	Selecting YOUR HOUSEHOLD INFO will continue at app\CorrApp\corrapp_5.htm
16	Selecting SCHOOLS TO RECEIVE RESULTS will continue at app\CorrApp\corrapp_6.htm
17	Selecting PROVIDE PREPARER INFO will continue at app\CorrApp\corrapp_7.htm
18	Selecting SIGNATURE will continue at app\CorrApp\corrapp_sign1.htm
19	Selecting SUBMIT will continue at app\CorrApp\corrapp_submit1a.htm

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8.9. Business Rules

#	Business Rules
1	All questions refer to income earned in the year 2000.
2	All numbers are limited to 999,999. If the total or subtotal is greater than 999,999, it will be changed to 999,999.
3	If a field is blank, treat the value as 0.
5 4	<u>If applicant enters data into other fields in the worksheet, the total will be recalculated and the total field will be updated.</u> <u>Applicant can enter values into the total field. However, the entered total can only be taken when other input fields in the worksheet are left blank. Otherwise, the entered total will be discarded and the calculated total will be used. Applicant can change the value in Total field in “\app\Shared_Wksheets\ws_SIncomeEst2.htm,” but the system will automatically recalculate the total every time a field is changed.</u>
5	<u>By default, applicant can skip any data entry field. Fields that cannot be skipped will either have specification in Data Element field or have validation function ISNOTBLANK() listed for the variables that hold the input data, in Glossary.</u>

10. Navigation Links

#	Navigation Links
1	<u>Selecting EXIT button will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination</u>
2	<u>Selecting FAFSA ON THE WEB LOGO will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination</u>
3	<u>Selecting HOME will continue at use case Exit FAFSA passing current URL as parameter for origination, and home.htm as parameter for destination</u>
4	<u>Selecting CONTACT US will continue at use case Exit FAFSA passing current URL as parameter for origination, and contact.htm as parameter for destination</u>
5	<u>Selecting GENERAL HELP will continue at use case Exit FAFSA passing current URL as parameter for origination, and help.htm as parameter for destination</u>
6	<u>Selecting FAFSA FAQ will continue at use case Exit FAFSA passing current URL as parameter for origination, and FAQ001.htm as parameter for destination</u>
7	<u>Selecting NEED HELP WITH THIS PAGE will continue at template page specific help passing current URL as parameter</u>
8	<u>Selecting SAVE FOR LATER will continue at use case Save for Later passing current URL as parameter</u>
9	<u>Selecting VIEW FAFSA SUMMARY will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)</u>
10	<u>Selecting FAFSA ON THE WEB INTRO will continue at app\FillOutApp\filloutapp_intro.htm</u>
11	<u>Selecting INFO ABOUT YOU will continue at app\FillOutApp\filloutapp_step1a.htm</u>

9.11. Related Use Cases

#	Related Use Cases
1	Fill Out FAFSA
2	Renew FAFSA
3	Correct FAFSA