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# US Department of Education

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

**Version 4.3**

FAFSA on the Web Redesign	Version: 4.3
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)
3/5/01	4.3	Accept changes.	Modernization Partner

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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

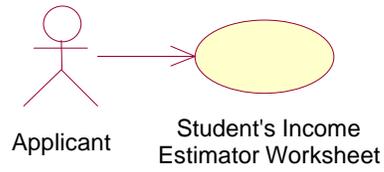
#	Pre-Conditions	Wireframe
1	Applicant begins at the Home Page	home.htm
2	Applicant selects: <b>COMPLETING A FAFSA</b>	Complete001.htm
3	Applicant selects: <b>FIRST TIME FAFSA ON THE WEB</b>	Complete013.htm
4	Applicant starts the <b>STUDENT'S INCOME ESTIMATOR WORKSHEET</b> (Within the FAFSA Application)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

## 5. Post-Conditions

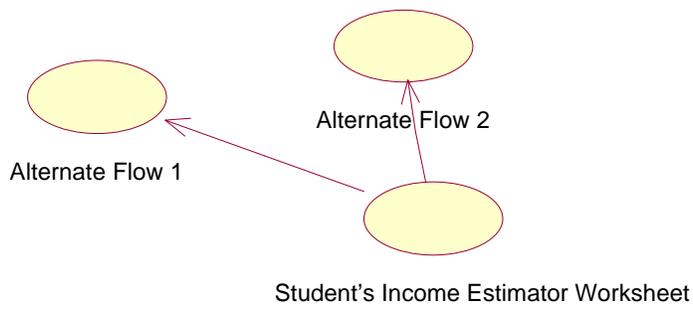
#	Post-Conditions	Wireframe
1	None	

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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 starts the <b>STUDENT'S INCOME ESTIMATOR WORKSHEET</b>		
2.1	←	System displays: Student's Income estimator Worksheet		\app\FilloutApp_step2b.htm
3	→	Applicant enters whole dollar amount to: Wages, salaries, tips, etc.	[szStuIncWages]	
4	←	System calculates and updates: Total Estimated Income for you (and your spouse) for 2000 (Question 39)	[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)	[szSTUAGI]	
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)	[szSTUAGI]	
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)	[szSTUAGI]	
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)	[szSTUAGI]	
13	→	Applicant enters whole dollar amount to: Total Estimated Income for you (and your spouse) for 2000 (Question 39)	[szSTUAGI]	
		<b>NEXT</b>		\app\FilloutApp\filloutapp_step2c.htm
		<b>PREVIOUS</b>		\app\FilloutApp\filloutapp_step2a.htm
		<b>Use case ends.</b>		

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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?**

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

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**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](app/FillOutApp/exit_app.htm)  
FAFSA on the Web Intro: [app/FillOutApp/filloutapp\\_intro.htm](app/FillOutApp/filloutapp_intro.htm)  
Contact Us: [app/FillOutApp/exit\\_app.htm](app/FillOutApp/exit_app.htm)  
Help: [app/FillOutApp/exit\\_app.htm](app/FillOutApp/exit_app.htm)  
FAFSA FAQs: [app/FillOutApp/exit\\_app.htm](app/FillOutApp/exit_app.htm)  
Info About You: [app/FillOutApp/filloutapp\\_step1a.htm](app/FillOutApp/filloutapp_step1a.htm)  
1: [app/FillOutApp/filloutapp\\_step2a.htm](app/FillOutApp/filloutapp_step2a.htm)  
Need help with this page?: [app/page\\_help/chelp\\_s2p2.htm](app/page_help/chelp_s2p2.htm)  
1040ez OR Telefile: [app/Shared\\_Pages/chelp\\_sample.htm](app/Shared_Pages/chelp_sample.htm)  
Previous: [app/FillOutApp/filloutapp\\_step2a.htm](app/FillOutApp/filloutapp_step2a.htm)  
Next: [app/FillOutApp/filloutapp\\_step2c.htm](app/FillOutApp/filloutapp_step2c.htm)  
Save for Later: [app/FillOutApp/save\\_app.htm](app/FillOutApp/save_app.htm)  
View FAFSA Summary: [app/Shared\\_Pages/FAFSA\\_summary.htm](app/Shared_Pages/FAFSA_summary.htm)  
Exit: [app/Shared\\_Pages/exit\\_app.htm](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	<a href="#">home.htm</a>
2	Applicant selects: <b>COMPLETING A FAFSA</b>	Complete001.htm
3	Applicant selects: <b>RENEWAL FAFSA ON THE WEB</b>	Complete004.htm
4	Applicant selects: <b>STUDENT'S INCOME WORKSHEET</b> (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		
		<b>NEXT</b>		app\RenewApp\renewapp_step2c.htm
		<b>PREVIOUS</b>		app\RenewApp\renewapp_step2a.htm
		Use case ends		

**Alternate Flow Specific Navigation Links:**

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

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## 2001 - 2002 FAFSA on the Web Renewal

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### FAFSA Steps:

**1** [Info About You](#)

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Select

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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:

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### URL Listing:

FAFSA on the Web logo: [app/RenewApp/exit\\_renew.htm](app/RenewApp/exit_renew.htm)  
FAFSA on the Web Intro: [app/RenewApp/renewapp\\_intro.htm](app/RenewApp/renewapp_intro.htm)  
Contact Us: [app/RenewApp/exit\\_renew.htm](app/RenewApp/exit_renew.htm)  
Help: [app/FillOutApp/exit\\_renew.htm](app/FillOutApp/exit_renew.htm)  
FAFSA FAQs: [app/RenewApp/exit\\_renew.htm](app/RenewApp/exit_renew.htm)  
Info About You: [app/RenewApp/renewapp\\_step1a.htm](app/RenewApp/renewapp_step1a.htm)  
1: [app/RenewApp/renewapp\\_step2a.htm](app/RenewApp/renewapp_step2a.htm)  
Need help with this page?: [app/page\\_help/chelp\\_s2p2.htm](app/page_help/chelp_s2p2.htm)  
Previous: [app/RenewApp/renewapp\\_step2a.htm](app/RenewApp/renewapp_step2a.htm)  
Next: Your Student Status: [app/RenewApp/renewapp\\_step2c.htm](app/RenewApp/renewapp_step2c.htm)  
Save for Later: [app/RenewApp/save\\_app.htm](app/RenewApp/save_app.htm)  
View FAFSA Summary: [app/Shared\\_Pages/FAFSA\\_summary.htm](app/Shared_Pages/FAFSA_summary.htm)  
Exit: [app/RenewApp/exit\\_renew.htm](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	<a href="#">home.htm</a>
2	Applicant selects: <b>COMPLETING A FAFSA</b>	Complete001.htm
3	Applicant selects: <b>MAKE CORRECTIONS TO A SUBMITTED FAFSA</b>	Complete014.htm
4	Applicant selects: <b>STUDENT'S INCOME WORKSHEET</b> (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_CORRECTION.doc
		Continue at #3 - #13		
		Use case ends		

#### Alternate Flow Specific Navigation Links:

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

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## 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.
4	If applicant enters data into other fields in the worksheet, the total will be recalculated and the total field will be updated.  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.
5	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.

## 10. Navigation Links

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

## 11. Related Use Cases

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