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# US Department of Education

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## **FAFSA on the Web Redesign Use Case Specification: Worksheet B**

**Version 4.2**

FAFSA on the Web Redesign	Version: 4.2
Use Case Specification: Worksheet B	Date: 2/19/01

## Revision History

Date	Version	Description	Author
11/8/00	1.0	Worksheet B	Modernization Partner
11/30/00	3.3	Added Assumptions Added Business Rules Added Field Validations	Modernization Partner (Jenny Connelly, Mimi Jacobs, & Nan Li)
12/21/00	4.0	Move Navigation links from Business Rules section to Navigation Links section (Nina 12/20/00)  Add default rule for skipping data input field in Business Rule Section	Modernization Partner (Nan Li & Jennifer Connelly)
1/22/01	4.1	Added alternate flow diagram  Removed General from Help in Navigation Links  Added Preconditions to Alternate Flows  Updated Data Elements  Imbedded Basic Flow Wireframes	Modernization Partner (Jenny Connelly)
	4.2		Modernization Partner (Jenny Connelly)

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# Use Case Specification: Worksheet B

## 1. Use Case Name: Worksheet B

### 1.1 Brief Description

This use case describes how an Applicant completes Worksheet B.

### 1.2 Note

- Navigation to get page-specific 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 valid field data.
2	Applicant chooses to Fill Out a FAFSA.

## 4. Pre-Conditions

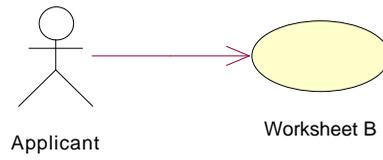
#	Pre-Conditions	Wireframe
1	Applicant begins at the Home Page	home.htm
2	Applicant selects: <b>COMPLETING A FAFSA</b>	Complete001.htm
3	Applicant selects: <b>FIRST TIME FAFSA ON THE WEB</b>	Complete013.htm
4	Applicant starts Worksheet B. (Within FAFSA Application)	<45>app\FillOutApp\filloutapp_step2ed.htm <79>app\FillOutApp\filloutapp_step4gf.htm

## 5. Post-Conditions

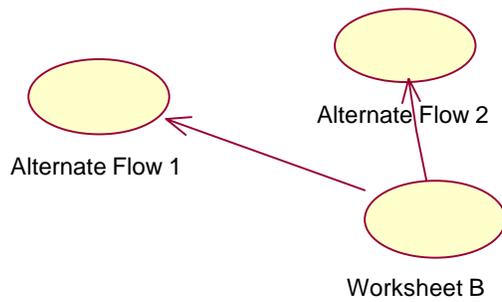
#	Post-Conditions	Wireframe
1	None	

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## 6. Diagram



## 7. Alternate Flow Diagram



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## 8. Flow of Events

### 7.18.1 Basic Flow

Basic Flow				
#		Events	Data Elements	Wireframe
1	→	This use case begins when the Applicant starts Worksheet B.		
2.1	←	System displays Worksheet B		<45>app\FillOutApp\filloutapp_step2ed.htm <79>app\FillOutApp\filloutapp_step4gf.htm
3	→	Applicant enters whole dollar amount to: WB1. Payments to tax deferred pension and savings plans (paid directly or withheld from earnings), include amounts reported on the W-2 form in Box 13, codes D, E, F, G, H, and S.	[szSTUWB1] [szPARWB1]	
4	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL] [szPARWBTOTAL]	
5	→	Applicant enters whole dollar amount to: WB2. IRA deductions and payments to self-employed SEP, SIMPLE and Keogh and other qualified plans from IRS Form 1040-total of lines 23+29 or 1040A-line 16.	[szSTUWB2] [szPARWB2]	
6	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL] [szPARWBTOTAL]	
7	→	Applicant enters whole dollar amount to: WB3. Child support <b>received</b> for all children. Don't include foster care or adoption payments:	[szSTUWB3] [szPARWB3]	
8	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL] [szPARWBTOTAL]	
9	→	Applicant enters whole dollar amount to: WB4. Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 18.	[szSTUWB4] [szPARWB4]	
10	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL] [szPARWBTOTAL]	
11		Applicant enters whole dollar amount to: WB5. Foreign income exclusion from IRS form 2555-line 43 or 2555EZ-line 18:	[szSTUWB5] [szPARWB5]	
12	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL] [szPARWBTOTAL]	
13	→	Applicant enters whole dollar amount to: WB6. Untaxed portions of pensions from IRS form 1040-lines 15a minus 15b + 16a minus 16b or 1040A-lines 11a minus 11b + 12a minus 12b excluding rollovers:	[szSTUWB6] [szPARWB6]	
14	←	System re-calculates total to Question <45> <79>	[szSTUWBTOTAL]	

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			<a href="#">[szPARWBTOTAL]</a>	
15	→	Applicant enters whole dollar amount to: WB7. Credit for federal tax on special fuels from IRS Form 4136-line 9 – nonfarmers only:	<a href="#">[szSTUWB7]</a> <a href="#">[szPARWB7]</a>	
16	←	System re-calculates total to Question <45> <79>	<a href="#">[szSTUWBTOTAL]</a> <a href="#">[szPARWBTOTAL]</a>	
17	→	Applicant enters whole dollar amount to: WB8. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits):	<a href="#">[szSTUWB8]</a> <a href="#">[szPARWB8]</a>	
18	←	System re-calculates total to Question <45> <79>	<a href="#">[szSTUWBTOTAL]</a> <a href="#">[szPARWBTOTAL]</a>	
19	→	Applicant enters whole dollar amount to: WB9. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances:	<a href="#">[szSTUWB9]</a> <a href="#">[szPARWB9]</a>	
20	←	System re-calculates total to Question <45> <79>	<a href="#">[szSTUWBTOTAL]</a> <a href="#">[szPARWBTOTAL]</a>	
21	→	Applicant enters whole dollar amount to: WB10. Any other untaxed income not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, Workforce Investments Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans:	<a href="#">[szSTUWB10]</a> <a href="#">[szPARWB10]</a>	
22	←	System re-calculates total to Question <45> <79>	<a href="#">[szSTUWBTOTAL]</a> <a href="#">[szPARWBTOTAL]</a>	
23	→	Applicant enters whole dollar amount to: WB11. Cash <b>received</b> , or any money paid on your behalf, not reported elsewhere on this form ( <b>Students only</b> ):	<a href="#">[szSTUWB11]</a> <a href="#">[szPARWB11]</a>	
24	←	System re-calculates total to Question <45> <79>	<a href="#">[szSTUWBTOTAL]</a> <a href="#">[szPARWBTOTAL]</a>	
<del>26.1</del>	→	Applicant selects <b>NEXT</b> to continue:		<45>app\FillOutApp\filloutapp_step2fe.htm <79>app\FillOutApp\filloutapp_step4hg.htm
<del>27.1</del>	→	Applicant selects <b>PREVIOUS</b> to continue:		<45>app\FillOutApp\filloutapp_step2de.htm <79>app\FillOutApp\filloutapp_step4fe.htm
		<b>Use case ends.</b>		

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WB7. Credit for federal tax on special fuels from IRS Form 4136-line 9 - nonfarmers only:

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB8. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits):

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB9. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances:

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB10. Any other untaxed income not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, Workforce Investments Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans:

\$  .00

Enter whole dollar amounts in this box, and do not use commas.

WB11. Cash **received**, or any money paid on your behalf, not reported elsewhere on this form (**Students only**):

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

**45. Total of Student's Worksheet B (WSB):**

\$  .00

Total of questions WB1 - WB11 above.

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### Notes about this screen:

- See page 88 of Common Specifications from NCS #12-603 for details
- Default value for all answers = "0"
- "Total for Worksheet B" = sum of questions WB1-WB11 (if sum >99999, then sum = 99999).
- The sum of WSB1 - WSB-11 will be automatically inserted into the answer field for Question #45.
- 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)

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Step 4: Provide Parents' Info

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Worksheet B

excluding rollovers:	\$ <input type="text"/> .00
WB7. Credit for federal tax on special fuels from IRS Form 4136-line 9 - nonfarmers only:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB8. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits):	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB9. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB10. Any other untaxed income not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, Workforce Investments Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB11. Cash <b>received</b> , or any money paid on your behalf, not reported elsewhere on this form ( <b>Students only</b> ):	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00

**79. Total of Parent's Worksheet B (WSB):** \$  .00  
 Value is equal to the total of questions WB1 - WB11 above.

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### Notes about this screen:

- See page 88 of Common Specifications from NCS #12-603 for details
- Default value for all answers = "0"
- "Total for Worksheet B" = sum of questions WB1-WB11 (if sum >99999, then sum = 99999).
- The sum of WSB1 - WSB-11 will be automatically inserted into the answer field for Question #79.
- If user selected "will not file" for Question #70, they will not need to go to Page 4 of Step 4, therefore, the "4" in the page navigation for Step 4 in the right hand corner of each screen will remain grey throughout step 4 and will not be a link. If the user selected any other answer for Question #70, the page navigation for "4" will be a link. In any case, the "2" will be colored in grey on pages 1, 2 and 3 of step 4 (filloutapp\_step4a.htm, filloutapp\_step4b.htm, filloutapp\_step4c.htm)

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## 8.2 Alternative Flows

### Alternate Course 1

**Title: Applicant chooses to Renew a FAFSA.**

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**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: <b>COMPLETING A FAFSA</b>	Complete001.htm
3	Applicant selects: <b>RENEWAL FAFSA ON THE WEB</b>	Complete004.htm
4	Applicant starts Worksheet B. (Within Renew FAFSA Application)	<45>app\RenewApp\renewapp_step2e.htm <79>app\RenewApp\renewapp_step4g.htm

Alternative Flow				
#		Events	Data Elements	Wireframe
2.2	←	System displays Worksheet B.		<45>app\RenewApp\renewapp_step2ed.htm <79>app\RenewApp\renewapp_step4gf.htm
		Continue at #3 to # <del>25</del> 24		
<del>26.2</del>	→	Applicant selects <b>NEXT</b> to continue:		<45>app\RenewApp\renewapp_step2fe.htm <79>app\RenewApp\renewapp_step4hg.htm
<del>27.2</del>	→	Applicant selects <b>PREVIOUS</b> to continue:		<45>app\RenewApp\renewapp_step2de.htm <79>app\RenewApp\renewapp_step4fe.htm
		Use case ends.		

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12b excluding rollovers:

WB7. Credit for federal tax on special fuels from IRS Form 4136-line 9 - nonfarmers only:

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB8. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits):

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB9. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances:

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB10. Any other untaxed income not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, Workforce Investments Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans:

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

WB11. Cash **received**, or any money paid on your behalf, not reported elsewhere on this form (**Students only**):

Enter whole dollar amounts in this box, and do not use commas.

\$  .00

**45. Total of Student's Worksheet B (WSB):**

\$  .00

Total of questions WB1 - WB11 above.

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	<input type="button" value="Save for Later"/> <a href="#">Save for Later</a>	<input type="button" value="View FAFSA Summary"/> <a href="#">View FAFSA Summary</a>	<input type="button" value="Exit"/> <a href="#">Exit</a>
--	---	---	---

### Notes about this screen:

- See page 88 of Common Specifications from NCS #12-603 for details
- Default value for all answers = "0"
- "Total for Worksheet B" = sum of questions WB1-WB11 (if sum >99999, then sum = 99999).
- The sum of WSB1 - WSB-11 will be automatically inserted into the answer field for Question #45.
- 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)

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**Worksheet B**

Did you (the parent) receive any of the following items in 2000?

WB7. Credit for federal tax on special fuels from IRS Form 4136-line 9 - nonfarmers only:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB8. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits):	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB9. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB10. Any other untaxed income not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, Workforce Investments Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans:	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00
WB11. Cash <b>received</b> , or any money paid on your behalf, not reported elsewhere on this form ( <b>Students only</b> ):	Enter whole dollar amounts in this box, and do not use commas. \$ <input type="text"/> .00

**79. Total of Parent's Worksheet B (WSB):** \$  .00

Value is equal to the total of questions WB1 - WB11 above.

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[Save for Later](#)
[View FAFSA Summary](#)
[Exit](#)

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Use Case Specification: Worksheet B	Date: 2/19/01

## Notes about this screen:

- See page 88 of Common Specifications from NCS #12-603 for details
- Default value for all answers = "0"
- "Total for Worksheet B" = sum of questions WB1-WB11 (if sum >99999, then sum = 99999).
- The sum of WSB1 - WSB-11 will be automatically inserted into the answer field for Question #79.
- If user selected "will not file" for Question #70, they will not need to go to Page 4 of Step 4, therefore, the "4" in the page navigation for Step 4 in the right hand corner of each screen will remain grey throughout step 4 and will not be a link. If the user selected any other answer for Question #70, the page navigation for "4" will be a link. In any case, the "2" will be colored in grey on pages 1, 2 and 3 of step 4 (renewapp\_step4a.htm, renewapp\_step4b.htm, renewapp\_step4c.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/RenewApp/exit\_renew.htm  
 FAFSA FAQs: app/RenewApp/exit\_renew.htm  
 Info About You: app/RenewApp/renewapp\_step1a.htm  
 Your Finances: app/RenewApp/renewapp\_step2a.htm  
 Your Student Status: app/RenewApp/renewapp\_step3a.htm  
 1: app/RenewApp/renewapp\_step4a.htm  
 2: app/RenewApp/renewapp\_step4b.htm  
 3: app/RenewApp/renewapp\_step4c.htm  
 4: app/RenewApp/renewapp\_step4d.htm  
 5: app/RenewApp/renewapp\_step4e.htm  
 6: app/RenewApp/renewapp\_step4f.htm  
 Need help with this page?: app/FillOutApp/filloutapp\_step4g.htm#  
 Previous: app/FillOutApp/filloutapp\_step4f.htm  
 Next: app/RenewApp/renewapp\_step4h.htm  
 Save for Later: app/RenewApp/save\_renew.htm  
 View FAFSA Summary: app/Shared\_Pages/FAFSA\_summary.htm  
 Exit: app/RenewApp/exit\_renew.htm

## Image File Listing:

TBD

### 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:](#)

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#	Pre-Conditions	Wireframe
<a href="#">1</a>	<a href="#">Applicant begins at the Home Page</a>	<a href="#">home.htm</a>
<a href="#">2</a>	<a href="#">Applicant selects: <b>COMPLETING A FAFSA</b></a>	<a href="#">Complete001.htm</a>
<a href="#">3</a>	<a href="#">Applicant selects: <b>MAKE CORRECTIONS TO A SUBMITTED FAFSA</b></a>	<a href="#">Complete014.htm</a>
<a href="#">4</a>	<a href="#">Applicant starts Worksheet B. (Within Correct FAFSA Application)</a>	<a href="#">Dynamically generate page. See FAFSA_WEB_CORRECTION.doc</a>

Alternative Flow				
#		Events	Data Elements	Wireframe
2.3	←	System displays Worksheet B.		Dynamically generate page. See FAFSA_WEB_CORRECTION.doc
		Continue at #3 to # <a href="#">2524</a>		
		Use case ends.		

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## 8.9. Business Rules

#	Business Rules
1	The 2001-2002 School Year (July 1st, 2001 - June 30th, 2002)
<del>142</del>	If applicant enters data into the input fields (WB1, WB2, WB3, WB4, WB5, WB6, WB7, WB8, WB9, WB10, WB11) in the worksheet, the total will be recalculated and the total field will be updated.  Applicant <del>can</del> <u>may not</u> enter value into the total field. <u>This field is for display only. 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.</u>
<u>3</u>	<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>
<u>4</u>	<u>The response that applicant provided for each question should be based on the parent (or student)'s information if working on parent (or student)'s worksheet.</u>

## 10. Navigation Links

#	Navigation Links
<u>1</u>	<u>Selecting <b>EXIT</b> button will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>2</u>	<u>Selecting <b>FAFSA ON THE WEB LOGO</b> will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>3</u>	<u>Selecting <b>HOME</b> will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>4</u>	<u>Selecting <b>CONTACT US</b> will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>5</u>	<u>Selecting <b>GENERAL HELP</b> will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>6</u>	<u>Selecting <b>FAFSA FAQ</b> will continue at use case <b>Exit FAFSA</b> passing current URL as parameter</u>
<u>7</u>	<u>Selecting <b>SAVE FOR LATER</b> will continue at use case <b>Save for Later</b> passing current URL as parameter</u>
<u>8</u>	<u>Selecting <b>VIEW FAFSA SUMMARY</b> will continue at View FAFSA Summary use case. (app\Shared Pages\FAFSA_summary.htm)</u>
<u>9</u>	<u>Selecting <b>FAFSA ON THE WEB INTRO</b> will continue at app\FillOutApp\filloutapp_intro.htm</u>
<u>10</u>	<u>Selecting <b>INFO ABOUT YOU</b> will continue at app\FillOutApp\filloutapp_step1a.htm</u>
<u>11</u>	<u>Selecting <b>YOUR FINANCES</b> will continue at app\FillOutApp\filloutapp_step2a.htm</u>
<u>12</u>	<u>Selecting <b>YOUR STUDENT STATUS</b> will continue at app\FillOutApp\filloutapp_step3a.htm</u>

## 9.11. Related Use Cases

#	Related Use Cases
1	Fill Out FAFSA
2	Renew a FAFSA
3	Correct a FAFSA
4	Exit FAFSA
5	Save for Later