Jenzabar CX

Financial Aid Need Analysis

JENZABAR

User Guide

JENZABAR, INC.
FINANCIAL AID NEED ANALYSIS USER GUIDE

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SECTION 1 - GETTING STARTED

Overview

Introduction

Financial Aid Need Analysis is a product developed by Jenzabar, Inc. that allows you to enter and maintain students' financial aid need analysis information. Information can be entered manually or with automated processes using information from magnetic tape or electronic (EDE) files.

Product Differences

This guide contains information for using all the features developed for the Financial Aid Need Analysis product. Your institution may or may not have all the features discussed in this guide.

Purpose of This Guide

This guide serves as a learning tool and a reference guide for adding, updating, and deleting students' financial aid need analysis information.

Intended Audience

This guide is intended for menu users in the Financial Aid office who perform data entry operations. Menu users include the application coordinator, administrative assistants, and operators.

Learning Objectives

Using this guide, you will be able to:
- Accumulate need analysis information in CX.
- Assign budget (cost of attendance) information to individual students.
- Modify budget information for specific students.
- Use the following methodologies to compute students' Expected Family Contribution (EFC):
  - Estimated Federal Methodology (EFM/EFMS) which uses federal formulas.
  - Institutional Methodology (IM/IMS) which initially uses the federal formulas but may be customized by your Financial Aid office staff.
- Enter or display students' Expected Family Contribution based on the Federal Methodology calculation method.
- Estimate students' family contribution and unmet need using simulations.

How to Use This Guide

If you are unfamiliar with how your institution maintains its financial aid need analysis information, read this guide for detailed information about how to use Financial Aid Need Analysis.

If you are familiar with how your institution maintains this information and just need information in a particular area of CX, review the table of contents or index, then refer to the pages you need.

Structure of Jenzabar CX User Guides

Jenzabar CX user guides contain the following sections:
- Section 1 - An overview of general information
- Section 2 - A reference of the screens, fields, and commands for the application
- Section 3 (and up) - Detailed procedures for using the application
- Last Section - A reference of application error and warning messages
- Index

Other Information Resources

Introduction

This user guide contains information about the screens, options, and procedures specific to Financial Aid Need Analysis. However, some of these may be used in other Jenzabar CX products. Documentation for these common features appears in the manuals or guides to which they most specifically relate.

Resource List

The following provides references to other CX documentation for certain functions, screens, and options that are not described in this user guide.

For more information about:	*See:*
Common windows	*Getting Started User Guide*
Communications Management	*Communications Management User Guide*
Detail windows	*Getting Started User Guide*
CX menus	*Getting Started User Guide*

CX universal commands:
    Help
    ID-type
    Query
    Scroll
    Table Lookup
	Getting Started User Guide

Electronic Data Exchange (EDE) for Financial Aid	*Financial Aid Electronic Data Exchange (EDE) User Guide*
Financial Aid Packaging	*Financial Aid Packaging User Guide*
Financial Aid Pell Grant processing	*Financial Aid Electronic Data Exchange (EDE) User Guide*
Financial Aid Reports	*Financial Aid Technical Manual*
Financial Aid screen flow diagram	*Financial Aid Technical Manual*
Financial Aid Tables and table maintenance	*Financial Aid Technical Manual*
General screens and procedures for Financial Aid	*Financial Aid User Guide*

PERFORM screens:
    Common commands
    General description
    Ring menus
	Getting Started User Guide

Program screens:
    Common commands
    General description
    Toolbars
	Getting Started User Guide

Query tools	*Getting Started User Guide*
QuickMate	*QuickMate Installation Guide* and QuickMate online help
Reporting tools	*Getting Started User Guide*
Terminology	*Master Glossary*

Menus and Menu Options

Menus are not illustrated in CX documentation because they may have been modified by your institution. For information about what menus you can access, as well as the menu options available from them, refer to the section, *Using the Menus* in the *Getting Started User Guide*.

Before You Begin Financial Aid Need Analysis

Introduction

This section provides the following:
- The purpose of Financial Aid Need Analysis.
- A summary of the Financial Aid Need Analysis methodologies and Need Analysis Form records (naf_rec).
- A checklist of information you need to know and tasks you need to perform before using Financial Aid Need Analysis.
- Background knowledge you must possess to use Financial Aid Need Analysis.
- A summary of the financial aid reports.
- A summary of the Financial Aid Entry process.

Purpose of Financial Aid Need Analysis

The primary purpose of Financial Aid Need Analysis is to enable you to enter or access a student's need analysis information to determine his/her need for federal, state, local, or institutional financial assistance.

Financial Aid Need Analysis Methodologies

The CX Financial Aid Need Analysis program relies on underlying calculations to determine the amount of financial aid a student is eligible to receive. The Federal Methodology (FM) Need Analysis Form record stores applicant data (e.g., income and asset information about a student and his/her parents) collected from a Student Need Analysis screen.

Financial Aid Need Analysis performs calculations on the remaining three kinds of Need Analysis Form records (naf_rec):
- Estimated Federal Methodology (EFM)
- Institutional Methodology (IM)
- Simulation (SIM)

The Federal Methodology calculation serves as a basis for all Financial Aid Need Analysis calculations. The Department of Education defines the calculation that determines eligibility for Title IV federal financial aid, including Federal Pell Grants, Federal Stafford Loans, Federal Perkins Loans, and Federal Work Study programs.

You may use any or all of the following Need Analysis Form records:

EFM

This record uses the Estimated Federal Methodology. It unofficially calculates the regular and simplified Department of Education Expected Family Contribution (EFC) using the Federal Methodology formula.

FM

This record uses the Federal Methodology. It stores official Department of Education Expected Family Contribution (EFC) information as determined by the Central Processing Service (CPS). No calculation is done on this record.

IM

This record uses the Institutional Methodology. It calculates an Expected Family Contribution (EFC) based on assumptions and information that can be customized for each institution.

SIM

This record uses the Simulation Methodology. It calculates an Expected Family Contribution (EFC) that matches the Estimated Federal Methodology calculation and enables you to store

a simulation for a student. The system uses the Federal Methodology formula to calculate the regular or simplified Department of Education Expected Family Contribution, but like EFM, it is unofficial and estimated.

VER
This record uses the Verification Methodology. It calculates the tolerance for a student, using the student's financial data and federal specifications.

Multiple Need Analysis Form Records

You can maintain several Need Analysis Form records (naf_rec) for every student. Each Need Analysis Form record relates to one of the five methodologies described above.

Prerequisite Tasks

Use the following checklist to ensure you have reviewed all required tasks before you begin using Financial Aid Need Analysis:
- Enter or update the following budget tables for the processing year. This is an annual process.
    - Financial Aid Budget table (fabgt_table)
    - Financial Aid Budget Association table (fabgtas_table)
    - Financial Aid Item table (fa_item_table)
- If you are using an Institutional Methodology calculation, enter or update the Need Analysis tables for the Institutional Methodology calculation for the processing year. This is an annual process.
- Obtain all the financial aid information for each student.
- Identify the budget information that relates to each student.

Background Knowledge

This list describes the necessary background information that you should know.

Authorized personnel
Know answers to the following questions:
- Who is authorized to change financial aid need information?
- Who is authorized to access online financial aid need information?

Important dates
Know when the following occur:
- Advance registration
- Open registration
- Late registration
- Refund periods
- Withdrawal dates

> **Note:** Ensure that the CX Registration and Fiscal/Financial applications have been set up so the fiscal and academic calendars include the sessions for which you are awarding aid. Ensure that all offices use the same values for sessions (e.g., FA for fall, SP for spring, SM for summer).

- When the Business office posts aid to students' accounts
- When Automatic Recalculation ceases to occur

Financial aid policies and procedures
Know answers to the following questions:
- Does your institution use a different methodology to determine aid eligibility for institutional funds that differs from the Federal Methodology used for Title IV fund awarding?
- Does your institution use Electronic Data Exchange (EDE) processes?

- Does your institution now use, or plan to use, EDE processes to create original applications for, or corrections to, student need information?
- Does your institution change cost of attendance budget item amounts for individual students?
- Do you know how to use the Department of Education software on the PC to send or receive need analysis information?
- Do you know how to move files to and from the PC to CX?

Note: For more information about using EDE, see the *Financial Aid Electronic Data Exchange (EDE) User Guide.*

Reporting Tools

CX provides several solutions to serve the Financial Aid application reporting needs. In addition to standard reports located on the Table Maintenance menu, your institution can choose from a variety of reporting tools. The reporting tools are as follows:

ACE Reports

The standard reports located in the CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard financial aid reports appear on the Financial Aid: Reports menu.

The initial screen that appears when you select a report prompts you to enter any required parameters for producing it. Once you have entered these, you can send the output to the screen or to a file, print the report immediately, or schedule it to be produced at a later time.

> **Note:** For more information on running ACE reports, see *Producing Standard and Customized Reports* in the *Getting Started User Guide.*

Impromptu®

A PC/Windows-based reporting tool intended for technical users. Using Impromptu and the Jenzabar CX ODBC driver, you can access CX data to produce reports. Impromptu organizes reporting information in *catalogs.* Jenzabar created the Financial Aid Services catalog to serve the reporting needs of financial aid.

> **Note:** For more information on using Impromptu, see the online help provided with the product.

PowerPlay®

A PC/Windows-based executive and management data analysis tool. Using static data files downloaded from CX, you can use PowerPlay to display and analyze data in a graphical, multilevel, drill-down structure.

> **Note:** For more information on using PowerPlay, see the online help provided with the product.

Prism

A PC/Windows-based reporting tool intended for nontechnical users. Using Prism and the Jenzabar CX ODBC driver, you can access CX data to produce reports. Prism contains specific information lookup and retrieval windows for financial aid.

> **Note:** For more information on using Prism, see the online help provided with the product.

Financial Aid Need Analysis Process

This list describes the overall process involved in using Financial Aid Need Analysis.

Note: The process shown below is an example and is not intended as policy guidance. Your institution's Financial Aid Need Analysis process may vary. For more information about using EDE, see the *Financial Aid Electronic Data Exchange (EDE) User Guide.*

1. Obtain financial aid information for the student from one of the three following sources:
   - Electronic Data Exchange (EDE)
   - Hard-copy Student Aid Report (SAR)
   - Tape from a Multiple Data Entry (MDE) resource

2. If the financial aid information source is electronic or tape, use EDE processes or tape conversion to load the information into the CX database. If the financial aid information source is hard copy, manually enter the information into the CX database.

3. Assign a budget (cost of attendance) to each student.

4. Change or add budget amounts for each student, if necessary.

5. If desired, create an Original Application file or Corrections file and use EDE processes to transmit the files to the Central Processing Service (CPS).

6. If desired, create need analysis simulations for current or prospective students.

Conventions Used in This Guide

Introduction

Jenzabar, Inc. has established a set of conventions to help you use this guide. The conventions presented below are not exhaustive, but they include the more frequently used styles and terms.

Style Conventions

Jenzabar CX guides observe the following style conventions.

Boldface type

Represents text that you type into the system (e.g., Type **UNDG**.), command names (e.g., **Finish**), or keys you use to execute a command or function (e.g., **<Enter>**).

Bulleted lists

Show items not ranked or without a sequential performance.

CAUTION:

Indicates a caution or warning of a potential risk or condition.

<Enter>

Represents the Enter, Return, Line Feed, or ↵ key on your keyboard.

Italic type

Is used in any of these ways:
- To represent a new or key term
- To add emphasis to a word
- To reference another manual or a section within this guide
- To represent a variable for which you substitute another variable (e.g., substitute *filename* with an appropriate filename)

<Key name>

Represents a key that you must press.

Note:

Indicates a note, tip, hint, or additional information.

Numbered lists

Show ranking of items or sequence of performance.

Parentheses

When used around a field name, indicate the field is unlabeled. The field description includes the location of the field.

Quotation marks

Represent information written in this guide exactly as it appears on the screen (e.g., The message, "Now Running..." appears.).

Jenzabar-Specific Terms

Some terms used in this guide may be unfamiliar to you, either because they are terms you have not used before or because Jenzabar has assigned a slightly different meaning to a familiar term. The following list identifies and explains the most common Jenzabar-specific terms:

Application

One or more software programs that enable you to perform a particular procedure (e.g., registering students).

Data

Specific information you enter into fields on a particular data entry screen.

Enter

To type information on a keyboard and execute by doing one of the following actions:

- Pressing the **<Enter>** key
- Clicking on the **OK** button
- Selecting **Finish**

F key

Any of the function keys located on your keyboard (e.g., **<F1>**).

Hot key

The capitalized and highlighted letter of a command on a command line, menu bar, or ring menu.

ID

The number assigned to each student or organization associated with your institution (e.g., 12345).

Parameter

A variable in the system that is given a constant value for a specific application (e.g., a date can be a parameter for producing a report).

Select

To execute a command by any of the following actions:

- Performing the keystrokes
- Pressing the hot key
- Highlighting the command or option and pressing **<Enter>**
- Clicking the mouse

System

The Jenzabar product, CX.

Keystrokes

When you see two keys separated by a dash (e.g., **<Ctrl-c>**), hold down the first key (**<Ctrl>**) while pressing the second (**<c>**).

SECTION 2 - USING THE FINANCIAL AID NEED ANALYSIS SCREENS

Overview

Introduction

This section shows each screen and window that you use in Financial Aid Need Analysis and provides explanations for each of their fields. This section also provides a quick reference of the commands and options you use to perform procedures in Financial Aid Need Analysis.

Refer to this section when you have questions about a specific field or command, or when you are performing procedures associated with Financial Aid Need Analysis.

Organization

The screens, windows, fields, and commands are listed by title in alphabetical order (unless otherwise noted) so you can locate the information quickly.

Screen Access

Access instructions for screens presume you are starting at the Financial Aid Main Menu unless otherwise noted.

Screen Differences

The screen and window examples in this section represent those contained in the CX standard product in GUI format unless otherwise noted. Screen examples show question marks (?) for the Table Lookup command where space permits. If your institution changes these screens and windows to meet its specific needs, yours will differ from those shown in this section. Your screens and windows will also look different if you use CX in character-based format.

Note: The screens in this section relate specifically to information requirements for the academic year 1997/1998. The screens change annually in response to changing requirements from the Department of Education.

Admissions Enrollment Window

Purpose

The Admissions Enrollment window enables you to view a student's admissions enrollment information.
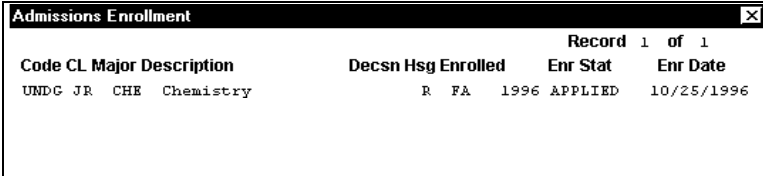
Access

Access the Admissions Enrollment window by selecting the following, beginning at the Need Analysis Information screen:

1. **Options** from the Commands menu
2. **Admissions Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Admissions Enrollment window.

```
Admissions Enrollment                                              [X]
                                               Record  1  of  1
    Code CL Major Description    Decsn Hsg Enrolled    Enr Stat    Enr Date
    UNDG JR  CHE  Chemistry            R  FA   1996 APPLIED   10/25/1996
```

Fields

The following list describes the fields that appear on the Admissions Enrollment window.

   Note: The system maintains all fields, which are display-only.

CL
   A code identifying the student's class year at your institution (e.g., JR for junior).

Code
   A code identifying the program in which the student is enrolled (e.g., UNDG for undergraduate).

Decsn
   A code identifying the institution's decision regarding the student's admission (e.g., FULL for full acceptance).

Description
   A description of the code appearing in the Major field (e.g., Chemistry).

Enr Date
   The date (mm/dd/yyyy) on which the student first enrolled at your institution.

Enr Stat
   A code identifying the student's enrollment status.

Enrolled
   The session and year (e.g., FA 1996) in which the student is currently enrolled.

Hsg

A code identifying the type of housing in which the student intends to reside (e.g., R for resident, if the student intends to live on campus).

Major
A code identifying the student's intended major (e.g., CHE).

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

Commands

The following list describes the commands you can execute from the Admissions Enrollment window.

> **Note:** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Closes the Admissions Enrollment window.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous
Enables you to move back one screen of data, if additional screens exist.

Available Income Screen

Purpose

The Available Income screen enables you to view a student's available income and total family contribution figures for a nine-month Expected Family Contribution (EFC) for the specified methodology for the specified financial aid award year. The values are from the intermediate calculations of the need analysis methodology.

> **Note:** If you manually enter a Federal Methodology (FM) record, there will be no values in the Available Income screen because the system does not perform a calculation on the FM information. If the FM data is entered into the CX database by tape or EDE, the values for these intermediate calculations will be displayed as provided by the tape/EDE agency.

Access

Access the Available Income screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing
2. Student Need Analysis
3. Enter parameters and select **Finish**
4. Specify program parameters for a valid form (e.g., FAFSA) and select **Finish**
5. Perform a query and select **Finished**
6. From Commands menu, select **Detail**

> **Note:** The Available Income screen provides information for a specific methodology (e.g., FM or FMS). If you want to view information for another methodology, you must return to the Student Need Analysis screen for the specified form, then select **Method** to access the Financial Aid Methodology Selection window. You can then select another methodology.

Example

Following is an example of the Available Income screen.

```
 Student Need Analysis                                              _ ロ X
File  Edit  Commands  Help
┌──┐
│✓ │                                                              DETAIL
└──┘
      AVAILABLE INCOME AND TOTAL FAMILY CONTRIBUTION SUMMARY FOR 9-MONTH EFC
                  Computation Method EFM  :   Estimated FM
ID No: 1267048  Sonnentag, Shawn L.                SS No: 914-72-0321  Yr: 9899


Total Income.............(TI)      35000  Education and Savings
Fisap Total Income......(FTI)      85000    Asset Prot Allow.....(APA)      49400
Allow Against Total Inc.(ATI)      23508  Par Cont from Assets...(PCA)          0
St and Other Tax Allow..(STX)       1050  Adj Available Income...(AAI)      11492
Inc Protection Allow....(IPA)      19780  Total Parents' Cont....(TPC)       2549
Employment Allowance.....(EA)          0  Total Student's Cont...(TSC)          0
Available Income.........(AI)      27921  Adjusted Parents' Cont..(PC)       1275
Disc Net Worth..........(DNW)      -7410  Dep Stu's Income Cont..(SIC)      16429
Dependent Student's Cont                  Cont from Avail Income.(CAI)          0
  From Assets...........(SCA)        350
Stu's Total Income......(STI)        987

NOTE:   In the case of a zero EFC condition, only Total Income (TI) is computed.
```

Fields

The following is a list of fields that appear on the Available Income screen and their descriptions.

> **Note:** The system maintains all fields, which are display-only.

Adj Available Income (AAI)
> The dollar amount of income available for education-related expenses after any adjustments are made (e.g., 11492).

Adjusted Parents' Cont (PC)
> The dollar amount of the parents' contribution available for education-related expenses after any adjustments are made (e.g., 1275).

Allow Against Total Income (ATI)
> The dollar amount of allowances to be deducted from the total income (e.g., 23508).

Available Income (AI)
> The dollar amount of income available to use (e.g., 27921).

Computation Method
> The methodology and its description for which you are viewing income information (e.g., EFM for Estimated Federal Methodology). The description of the method appears to the right of the field.

Cont from Avail Income (CAI)
> The total dollar amount of the Contribution from Available Income. If blank, none was calculated.

Dependent Student's Cont From Assets (SCA)
> The dollar amount of the student's asset contribution to his/her education-related expenses (e.g., 350).

Dep Stu's Income Cont (SIC)
> The dollar amount of the student's income contribution to his/her education-related expenses (e.g., 16429).

Disc Net Worth (DNW)

The dollar amount of income available for education-related expenses or other uses (e.g., -7410).

Education and Savings Asset Prot Allow (APA)
The dollar amount of an allowance for the protection of assets (e.g., 49400).

Employment Allowance (EA)
The dollar amount of an allowance for the student's employment income. If blank, none was calculated.

FISAP Total Income (FTI)
The total dollar amount of the Family Total Income, which is used for FISAP reporting (e.g., 85000). If blank, none was calculated.

ID No
The system-generated number identifying the student in the database (e.g., 1267048). The student's name appears to the right.

Inc Protection Allow (IPA)
The dollar amount of an allowance for the protection of income (e.g., 19780).

Par Cont from Assets (PCA)
The dollar amount of the parents' contribution to the student's education-related expenses. If blank, none was calculated.

SS No
The student's social security number (e.g., 914-72-0321).

St and Other Tax Allow (STX)
The dollar amount of an allowance for state taxes (e.g., 1050).

Stu's Total Income (STI)
The total dollar amount of the income from the student (and from his/her spouse, if applicable) (e.g., 987).

Total Income (TI)
The total dollar amount of the income from the student (and from his/her spouse and/or parents, if applicable) (e.g., 35000).

Total Parents' Cont (TPC)
The total dollar amount of the parents' contribution to the student's education-related expenses (e.g., 2549).

Total Student's Cont (TSC)
The total dollar amount of the student's contribution to his/her education-related expenses. If blank, none was calculated.

Yr
The financial aid award year for which you are processing need analysis information (e.g., 9899).

Commands

The following list describes the commands you can execute from the Available Income screen.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Need

Accesses the Need Analysis Information screen enabling you to view and/or update a variety of information for the student.

Budget Detail Entry Screen

Purpose

The Budget Detail Entry screen enables you to add, delete, update, or view a student's financial aid budget information on a session basis.

Access

Access the Budget Detail Entry screen from the Need Analysis Information screen by selecting Budget.

To access the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Budget Detail Entry screen.

Fields

The following list describes the fields that appear on the Budget Detail window.

Act Exp

The actual dollar expense incurred for the indicated budget expense item if it is a Direct Expense item. This is a display-only field.

Active

A code indicating whether the displayed budget is active (A) or inactive (I) for the session. This field is active in Add mode.

Bgt Exp

The budgeted dollar expense for the indicated budget expense item (e.g., 12,500). This field is active in Update mode.

Budget Code

A code identifying the Budget Group or Budget you are viewing or adding. The description of the code appears to the right. This field is active in Add mode. Use **Table Lookup** for a list of valid codes.

Budget Expense Item

The description of the code in the Item field (e.g., Misc. personal expenses). This is a display-only field.

Budget Method

The methodology used for the budget (e.g., FMS). A display-only field, the description of the methodology appears to the right.

> **Note:** To select another methodology to use, select **Method**.

Dir

A code indicating whether the budget expense item is a direct (Y) or indirect (N) expense. This is a display-only field.

Direct Cost Total

The total dollar expense for the direct budget expense items (e.g., 1,200). A display-only field, the system calculates this total.

ID

The system-generated number identifying the student in the database (e.g., 1245740). A display-only field, the student's name appears to the right.

Item

A code identifying the specific budget expense item (e.g., MISC). This field is active in Update mode. Use **Table Lookup** for a list of valid codes.

Schd

A code identifying the student's potential or actual enrollment status for the session. A display-only field, valid codes are:

- F (Full-time)
- H (Half-time)
- L (Less than half-time)
- T (3/4-time)
- W (Withdrawal)

Sess

The session to which the budget relates (e.g., FA96). This field is active in Add mode.

SS No

The student's social security number (e.g., 161-33-5820).

Totals

The total dollar expense for both direct and indirect budget expense items (e.g., 10,700). A display-only field, the system calculates this total.

Var

The percent variance between the actual and budgeted dollar expense for the budget expense item. A display-only field, the system calculates this total.

Year

The financial aid award year to which the budget relates (e.g., 9697). This is a display-only field.

Commands

The following list describes the commands you can execute from the Budget Detail window.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Active
Enables you to make the displayed budget the active budget for this session. This determines if the budget is for full-time, three-quarter time, half-time or less than half-time enrollment.

Add
Puts the screen into Add mode enabling you to add a budget for a session.

Add-line
In Update mode, creates a blank line enabling you to add another budget expense item.

Back
In Update mode, enables you to move back one screen of data, if additional screens exist.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Del-line
In Update mode, enables you to remove a budget expense item.

Delete
Enables you to remove the displayed budget.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Forward
In Update mode, enables you to move forward one screen of data, if additional screens exist.

Lookup
In Add and Update modes, accesses a Table Lookup window listing valid codes or values from which you can choose.

Method
Accesses the Financial Aid Methodology Selection window enabling you to select another methodology to apply to the budget.

Next session
Enables you to view the next session's budget, if additional budgets exist.

Page Down
Enables you to move forward one screen of data, if additional screens exist.

Page Up

Enables you to move back one screen of data, if additional screens exist.

Previous session
Enables you to view the previous session's budget, if additional budgets exist.

Update
Puts the screen into Update mode enabling you to change an existing budget.

Comments Screen

Purpose

The Comments window enables you to view, add, delete, and/or update any comments associated with a student and his/her financial aid record(s).

Access

Access the Comments window from any of the Student Need Analysis screens for the various forms (e.g., FAFSA) by selecting **Text**.

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Comments screen.
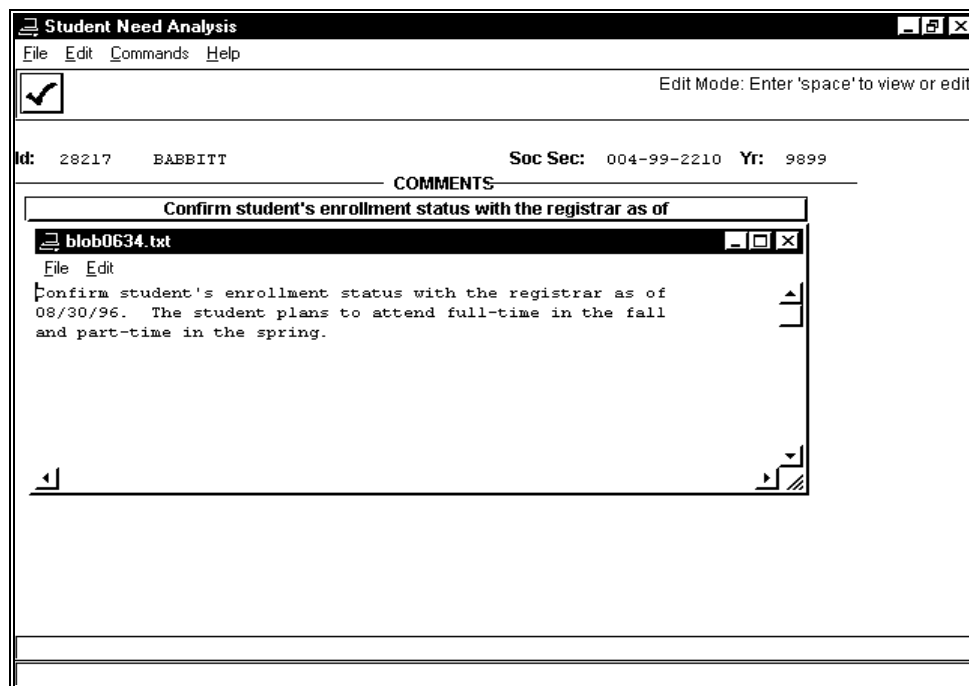
Fields

The following list describes the fields that appear on the Comments screen.

(Comments)

This is an unlabeled field located below the Comments title. It is a button you can click on to access a blob text window. You can view, enter, or edit any comment in this window that is associated with the student. If a comment exists, the first line of text in the blob text window appears on the button. Otherwise, an asterisk (*) appears.

Id

The system-generated number identifying the student in the database (e.g., 1245740). A display-only field, the student's name appears to the right.

Soc Sec

The student's social security number (e.g., 161-33-5820). This is a display-only field.

Yr
The financial aid award year for which you are processing need analysis information (e.g., 9697). This is a display-only field.

Commands

The following list describes the commands you can execute from the Comments window and from the blob text window.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Edit
Available on the menu bar of the blob text window. Enables you to access the following commands:
- **Copy** - Duplicates selected (highlighted) text and sends it to the clipboard, enabling you to paste it in another area. Text remains on the clipboard until you **Copy** or **Cut** new text.
  Cut - Removes selected (highlighted) text and sends it to the clipboard, enabling you to paste it in another area. Text remains on the clipboard until you **Copy** or **Cut** new text.
- **Delete** - Permanently removes selected (highlighted) text.
  Paste - Inserts a copy of the text from the clipboard where the cursor is located. Replaces selected (highlighted) text.
- **Undo** - Reverses one action (e.g., typing, deleting, or pasting an incorrect word or sentence).

File
Available on the menu bar of the blob text window. Enables you to access the following commands:
- **Exit** - Closes the blob text window without saving any changes you made. If you made changes, the message "There are changes in this file. Should these changes be kept?" appears. Select **Yes** to save them or **No** not to.
- **Update and Exit** - Saves any changes you have made and closes the blob text window.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Financial Aid Methodology Selection Window

Purpose

The Financial Aid Methodology Selection window is a view-only window that enables you to select the financial aid need analysis methodology and its associated records that you want to view. You can also select the methodology that you want to use for your need analysis processing.

The financial aid need analysis methodology you select controls what is highlighted on the Need Analysis Information screen and what information will be displayed on the Student Need Analysis screens and the Available Income screen. In the case of regular versus simplified (e.g., FM versus FMS), the need analysis form data would be the same, but the detail information could be different.

Access

Access the Financial Aid Methodology Selection window from the Need Analysis Information screen by selecting **Method**.

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

> **Note:** You can also access this window by selecting **Method** from the Budget Detail or any of the Student Need Analysis screens for the various forms, such as FAFSA.

Example

Following is an example of the Financial Aid Methodology Selection window.

```
Student Need Analysis                                              ×
                   Financial Aid Methodology Selection

         Current method:        FMS       Simple FM

     Analysis              Method                    NAF    Budget   Calc
     Method             Description         Prior    Form   Method   Method
     _____       _____       ___     ___    ___      ___

  a   FMS    Simple FM                       0       FM      FM       FM
  b   FM     Federal Methodology             1       FM      FM       FM
  c   EFMS   Simple Estimated FM             2       EFM     FM       EFM
  d   EFM    Estimated FM                    3       EFM     FM       EFM
  e   SIM    EFM Simulation                  8       SIM     FM       EFM
  f   SIMS   Simple EFM Simulation           8       SIM     FM       EFM
  g   IMS    Simple IM                       9       IM      FM       IM
  h   IM     Institutional Method            9       IM      FM       IM
  i   VER    Verification                    9       VER     FM       EFM
```

Fields

The following list describes the fields that appear on the Financial Aid Methodology Selection window.

> **Note:** The system maintains all fields, which are display-only. This information is defined in the Need Analysis Method table (fameth_table).

Analysis Method

The codes for the available financial aid need analysis methodologies (e.g., FMS for Simple FM).

> **Note:** Each methodology is assigned a letter, shown to the left, which you use to select one (e.g., in the screen example, FMS is assigned the letter a).

Budget Method
The methodology associated with the financial aid need budget (e.g., FM).

Calc Method
The methodology used to calculate the financial aid need (e.g., FM).

Current method
The current methodology being viewed and its description (e.g., FMS Simple FM).

Method Description
The descriptions of the available financial aid need analysis methodology codes.

NAF Form
The Need Analysis Form (NAF) associated with the financial aid need budget (e.g., FM).

Prior
The priority of the methodology, with zero as the highest priority.

Commands

The following list describes the commands you can execute from the Financial Aid Methodology Selection window.

Abort
Enables you to exit from the Financial Aid Methodology Selection window without making a selection.

Backward
Enables you to move back one screen of data, if additional screens exist.

Forward
Enables you to move forward one screen of data, if additional screens exist.

Return
Enables you to exit from the Financial Aid Methodology Selection window without making a selection.

Select Method
Enables you to select the methodology to be used.

> **Note:** To select a methodology, type the letter assigned to the code (e.g., in the screen example, you would type **a** to select FMS).

GPA Totals Window

Purpose

The GPA Totals window enables you to view a student's academic history information, such as grade point average and quality points.

Access
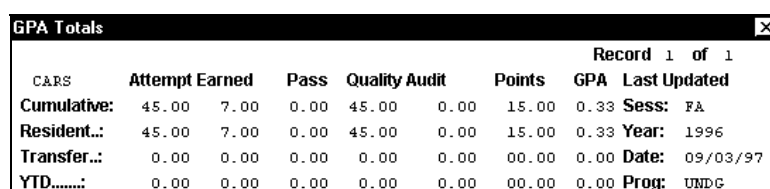
Access the GPA Totals window by selecting the following, beginning at the Need Analysis Information screen:
1. **Options** from the Commands menu
2. **Student Statistics Info**

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the GPA Totals window.

GPA Totals								
							Record 1 of 1	
CARS	**Attempt**	**Earned**	**Pass**	**Quality**	**Audit**	**Points**	**GPA**	**Last Updated**
Cumulative:	45.00	7.00	0.00	45.00	0.00	15.00	0.33	**Sess:** FA
Resident..:	45.00	7.00	0.00	45.00	0.00	15.00	0.33	**Year:** 1996
Transfer..:	0.00	0.00	0.00	0.00	0.00	00.00	0.00	**Date:** 09/03/97
YTD.......:	0.00	0.00	0.00	0.00	0.00	00.00	0.00	**Prog:** UNDG

Fields

The following list describes the fields that appear on the GPA Totals window.

> **Note:** The system maintains all fields, which are display-only. The system calculates all statistical information for the following circumstances as of the last update:
> - Cumulative - The total including information transferred from other institutions
> - Resident - The total applicable to your institution
> - Transfer - The total applicable to other institutions
> - YTD - The total for the current academic year

Attempt
The number of credit hours the student has attempted to complete (e.g., 45.00).

Audit
The number of credit hours of courses the student has audited (e.g., 0.00).

Earned
The number of credit hours that the student has earned (e.g., 7.00).

GPA
The student's grade point average (e.g., 0.33).

Last Updated - Date
The date the student's statistical information was last updated (e.g., 09/03/97).

Last Updated - Prog
A code identifying the program in which the student was enrolled as of the last update (e.g., UNDG for undergraduate).

Last Updated - Sess

A code identifying the session in which the student was enrolled as of the last update (e.g., FA for fall).

Last Updated - Year
The year in which the student was enrolled as of the last update (e.g., 1996).

Pass
The number of credit hours pertaining to courses the student had taken as pass-fail (e.g., 0.00).

Points
The number of quality hours multiplied by the numerical value of the grade earned. For example, if the student completed a five-credit-hour course and earned a grade of B, which has a numerical value of 3.0, the student earned fifteen points (5 x 3.0).

Quality
The total number of hours that are included in the grade point average calculation (e.g., 45.00).

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

(Site)
This is an unlabeled field located to the left of the Attempt field. The location where the student attends classes (e.g., Jenzabar).

Commands

The following list describes the commands you can execute from the GPA Totals window.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous
Enables you to move back one screen of data, if additional screens exist.

Need Analysis Information Screen

Purpose

The Need Analysis Information screen enables you to view and/or update the following kinds of information:

- The methodology(ies) used to calculate the student's expected contribution.
- The budget, expected contribution figures, and amount of need.
- The student's dependency status for the various methodologies.
- The category you have assigned the student that can be used by the automated Financial Aid Packaging processes, if the product is available.
- The Packaging Group to which the student is assigned that can be used by the automated Financial Aid Packaging processes, if the product is available.
- Whether or not the system is allowed to package the student using the automated Financial Aid Packaging processes, if the product is available.
- The Department of Education assumption and reject codes.
- The student's Need Analysis Form records (naf_rec).
- Whether or not the student is selected for verification and the date verification is/was completed.
- Additional information about the student (using the **Options** command).
- The origin of the federal data.
- The primary and secondary Expected Family Contribution (EFC) methodologies for the FM and EFM data.

Note: For more information about the automated Financial Aid Packaging processes, see the *Financial Aid Packaging User Guide*.

Access

You can access the Need Analysis Information screen from one of the following locations on the CX menu:

- Student Need Analysis
- Financial Aid Entry

To access the Need Analysis Information screen via Student Need Analysis, select the following, beginning at the Financial Aid Main Menu:

1. Student Processing.
2. Student Need Analysis.
3. At the Student Need Analysis screen, change the financial aid award year and session, if desired, and select **Finish**.
4. At the Need Analysis Program Parameters screen, change any desired parameters and select **Finish**. A blank form of the Student Need Analysis screens appears.
5. Enter the student's ID or social security number in the ID field, or perform a query to find the student. Select **Finished**. The first page of the form of the Student Need Analysis screens appears displaying information from the student's records.
6. Select **Need**. The Need Analysis Information screen appears.

Access the Need Analysis Information screen from Financial Aid Entry, beginning at the Financial Aid Main Menu:

1. Student Processing.
2. Financial Aid Entry.
3. Select **Finish**. The Financial Aid Entry Program Parameters screen appears.
4. Change any desired parameters and select **Finish**. The Financial Aid Entry screen appears.
5. Enter the student's ID or social security number in the ID field, or perform a query to

find the student. Select **Finished**. The student's aid information appears.
6. Select **Need**. The Need Analysis Information screen appears.

Note: For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

Example

Following is an example of the Need Analysis Information screen:
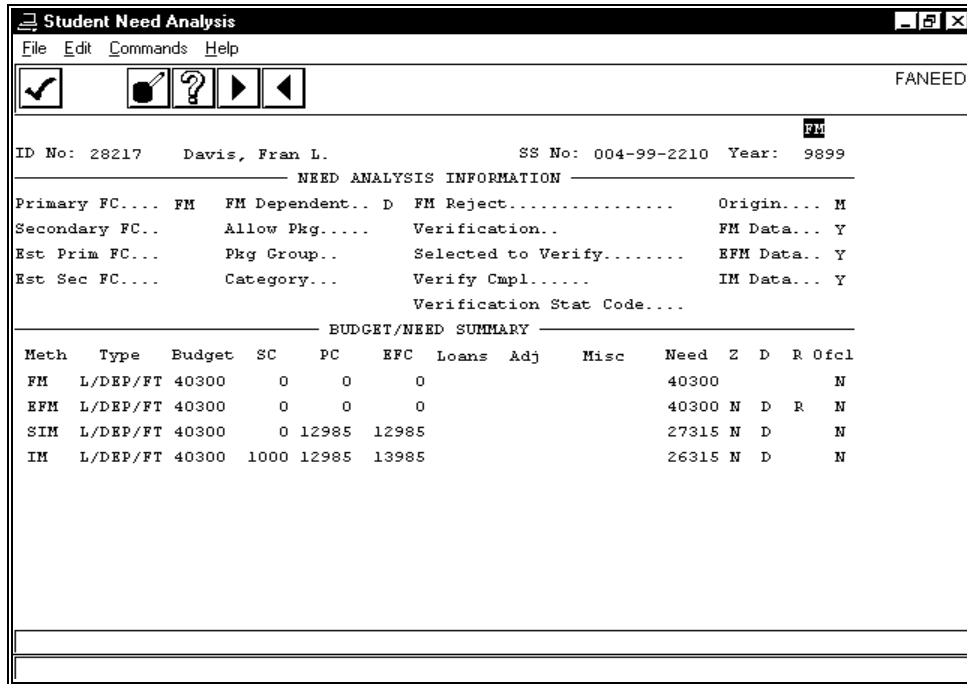
Segments

The Need Analysis Information screen is divided into three segments:
- The Header segment provides information about the selected student and the financial aid award year to which the information relates.
- The Need Analysis Information segment provides information associated with the student's need analysis data.
- The Budget/Need Summary segment provides a summary of the student's budget and need data.

Fields on the Header Segment

The following list describes the fields that appear on the Header segment of the Need Analysis Information screen.

Note: The system maintains all fields, which are display-only.

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located above the Year field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM). This will be blank if a Need Analysis Form record (naf_rec) for the student does not exist.

ID No

The system-generated number identifying the student in the database (e.g., 28217). The student's name appears to the right.

SS No
The student's social security number (e.g., 004-99-2210).

Year
The financial aid year to which the need analysis information and budget/need summary relates (e.g., 9899).

Fields on the Need Analysis Information Segment

The following list describes the fields that appear on the Need Analysis Information segment of the Need Analysis Information screen.

Allow Pkg
A code indicating whether the student can be packaged in the background using automated Financial Aid Packaging (Y) or not (N).

> **Note:** Students can be packaged using automated Financial Aid Packaging only if the product is available.

Category
A code identifying the student's aid fund balance category. Use **Table Lookup** for a list of valid codes.

EFM Data
A code indicating whether an EFM Need Analysis Form record exists for the student (Y) or not (N). This is a display-only field.

Est Prim FC
A code identifying the student's estimated primary need analysis methodology. Valid codes are:
- EFM (Estimated Federal Methodology)
- EFMS (Simple Estimated Federal Methodology)
- Blank (None)

Est Sec FC
A code identifying the student's estimated secondary need analysis methodology. Valid codes are:
- EFM (Estimated Federal Methodology)
- EFMS (Simple Estimated Federal Methodology)
- Blank (None)

> **Note:** If EFM is the estimated primary need analysis methodology, no secondary methodology is used. If EFMS is the estimated primary, the estimated secondary is EFM.

FM Data
A code indicating whether an FM Need Analysis Form record exists for the student (Y) or not (N). This is a display-only field.

FM Dependent
A code identifying the student's dependency status for the Federal Methodology calculation method. Valid codes are:
- D (Dependent)
- I (Independent)
- Blank (None)

FM Reject

A code identifying the reason why the Federal Methodology calculation method could not calculate the Expected Family Contribution (EFC). A display-only field, select **Reject Help** for a list of valid U.S.E.D. Reject codes and their descriptions.

IM Data

A code indicating whether other (i.e., IM or SIM) Need Analysis Form records exist for the student (Y) or not (N). This is a display-only field.

Origin

A code identifying the source of the federal financial aid need analysis information. This is a display-only field. Valid codes are:

- E (Electronic)
- M (Manual)
- T (Tape)

Pkg Group

A code identifying the Packaging Group to which the student is assigned if automated Financial Aid Packaging is available and if your institution uses Packaging Groups.

> **Note:** You can enter any value for a Packaging Group because it does not reference any predefined code in a table. However, for those students you want to package as a group, you must enter the same value. For more information, see the *Financial Aid Packaging User Guide*.

Prev SAP

A code identifying the student's previous SAP status (e.g., FSAP for failed). The system enters this code when you run the SAP compliance process, or you can enter it manually. Use **Table Lookup** for a list of valid codes.

> **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

Primary FC

A code identifying the student's primary need analysis methodology. Valid codes are:

- FM (Federal Methodology)
- FMS (Simple Federal Methodology)
- Blank (None)

> **Note:** If completed, this field determines the Need/Budget information displayed in the Financial Aid Entry screen. It also determines the Current Method and Need Analysis Form record displayed if you access the Financial Aid Need Analysis program from the Financial Aid Entry program. If the field is blank, the Current Method and Need Analysis Form record is determined by the priority value of the Need Analysis Method from the Need Analysis Method table (fameth_table). For more information, see the *Financial Aid User Guide*.

SAP

A code identifying the student's current SAP status (e.g., FSAP for failed). The system enters this code when you run the SAP compliance process, or you can enter it manually. Use **Table Lookup** for a list of valid codes.

> **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

SAP Cum Hrs

A code indicating whether the student passed the cumulative hours criteria for SAP (Y) or not (N). A display-only field, the system enters this code when you run the SAP processes.

> **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

SAP Cur Hrs

A code indicating whether the student passed the percent of current hours criteria for SAP (Y) or not (N). A display-only field, the system enters this code when you run the SAP processes.

>   **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

(SAP Cur Hrs %)
This is an unlabeled field located to the right of the SAP Cur Hrs field. The percentage of current hours the student has completed (e.g., 0.00%). A display-only field, the system enters this percentage when you run the SAP processes.

>   **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled.

SAP GPA
A code indicating whether the student passed the GPA criteria for SAP (Y) or not (N). The system enters this code when you run the SAP processes.

>   **Note:** This field appears if the SAP macro (ENABLE_FEAT_FA_SAP) is enabled

Secondary FC
A code identifying the student's secondary need analysis methodology. Valid codes are:
- FM (Federal Methodology)
- FMS (Simple Federal Methodology)
- Blank (None)

>   **Note:** If FM is the primary need analysis methodology, no secondary methodology is used. If FMS is the primary, the secondary is FM.

Selected to Verify
A code indicating whether the student is selected for institutional verification (Y) or not (N).

>   **Note:** If the student was chosen for verification by the Department of Education and the need analysis information is loaded to the database using the tape or EDE processes, the system sets this to Y. If not, you can manually enter **Y** if your institution chooses the student for verification. For more information, see the *Financial Aid Electronic Data Exchange (EDE) User Guide*.

Verification
A Verification code assigned by the Central Processing Service (CPS). This is a display-only field.

Verification Stat Code
A code identifying the Verification Status used with Pell Payment reporting. The system enters a code of T or A when the user selects them; other verification codes must be entered manually. Valid codes are:
- A
- C
- N
- R
- S
- T
- W

>   **Note:** The Pell Payment program uses the value in this field when it creates a Pell Payment record.

Verify Cmpl

The date (mm/dd/yyyy) that verification for the student was completed. The system enters this date when you run the Verification process, or you can enter it manually. You can enter **t** or **today** to enter the current date.

> **Note:** Complete this field only if the Selected to Verify field contains Y.

Fields on the Budget/Need Summary Segment

The following list describes the fields that appear on the Budget/Need Summary segment of the Need Analysis Information screen.

Adj
A user-defined column and title that you can customize for Institutional Methodology processing. To customize, use the Institutional Methodology table (immeth_table).

Budget
The total dollar amount of the cost of attendance associated with the code specified in the Type field (e.g., 40300). This is a display-only field.

D
A code identifying the Dependency Status for the specified methodology. A display-only field, valid codes are:
- D (Dependent)
- I (Independent)

> **Note:** For the FM and FMS methodologies, this field is blank since information for FM is displayed in the FM Dependent field in the Need Analysis Information segment.

EFC
The total dollar amount of the Expected Family Contribution. If you enter a dollar amount in this field, the SC (student's contribution) and PC (parents' contribution) fields will contain zeroes. Otherwise, the system calculates this amount using the following formula: SC plus PC.

Loans
A user-defined column and title that you can customize for Institutional Methodology processing. To customize, use the Institutional Methodology table (immeth_table).

Meth
A code identifying the methodology to which the budget/need information relates (e.g., FM). This is a display-only field.

Misc
A user-defined column and title that you can customize for Institutional Methodology processing. To customize, use the Institutional Methodology table (immeth_table).

Need
The total dollar amount of unmet need. A display-only field, the system calculates this amount using the following formula: Budget minus EFC; except for the IM and IMS methodologies, which use the following formula: Budget minus EFC minus user-defined columns (i.e., the Loans, Adj, Misc fields).

Ofcl
A code identifying the calculation status for the code specified in the Type field. Valid codes are:
- A (Adjusted budget length, which is used when you assign a budget whose duration is more or less than 9 months)
- N (Non-official, which is used when the methodology is EFM, SIM, or IM)
- O (Official, which is used when the CPS provides the data)
- P (Professional discretion, which is used to override the CPS calculation)

PC

The total dollar amount of the parents' contribution to the Expected Family Contribution (EFC).

R

A code identifying the reason why the specified methodology could not calculate the Expected Family Contribution (EFC). A display-only field, select **Reject Help** for a list of valid U.S.E.D. Reject codes and their descriptions.

> **Note:** For the FM and FMS methodologies, this field is blank since information for FM is displayed in the FM Reject field in the Need Analysis Information segment.

SC

The total dollar amount of the student's contribution to the Expected Family Contribution (EFC).

Type

The Budget Group or Budget code for the specified methodology. Use **Table Lookup** for a list of valid codes.

> **Note:** If the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled, the code will reflect a Budget Group, which also uses the Budget Detail records and is enrollment level and session specific. If it is disabled, the code will reflect an individual Budget, which uses the Financial Aid Budget table (fabgt_table) enrollment level value and is session specific.

Z

A code indicating whether the student qualifies for automatic Zero EFC (Y) or not (N) for the specified methodology.

> **Note:** For the FM and FMS methodologies, this field is blank since information for FM is displayed in the Available Income screen.

Commands

The following list describes the commands you can execute from the Need Analysis Information screen.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add-Line

In Update mode, creates a blank line enabling you to add additional budget/need information for the student.

Assum

Enables you to view the assumptions the program made in processing the student's information, if they exist.

> **Note:** You can only view assumptions for the methodology appearing in the (Financial Aid Need Analysis Form Record/Method) field in the Header segment. Select **Method** to select another methodology. The word Assumption appears highlighted to the left of the (Financial Aid Need Analysis Form Record/Method) field if assumptions exist.

Budget

Accesses the Budget Detail window enabling you to view and/or update additional budget information for the student.

Cancel

In Update mode, does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Exit
Enables you to leave the current screen or program.

Finish
In Update mode, saves your field entries when you have completed your data entry or selection and want to continue.

Method
Accesses the Financial Aid Methodology Selection window enabling you to select another methodology.

Next Page
Enables you to move forward one screen of data, if additional screens exist.

Options
Enables you to select the following commands to access the corresponding windows relating to the student:
- **Admissions Info** - Accesses the Admissions Enrollment window enabling you to view the student's admissions enrollment information.
- **Profile Info** - Accesses the Profile Information window enabling you to view the student's demographic information.
- **Program Enrollment Info** - Accesses the Program Enrollment Information window enabling you to view the student's admissions and enrollment information
- **SAP Info** - Accesses the SAP Criteria window.
- **Student Academic Info** - Accesses the Student Academic Information window enabling you to view the student's historical academic information.
- **Student Services Info** - Accesses the Residence Hall window enabling you to view information about the on-campus services the student uses.
- **Student Statistics Info** - Accesses the GPA Totals window enabling you to view the student's academic history information.
- **Transaction Selection** - Accesses the Student ISIR Transaction Numbers window enabling you to view a list of the student's alternate ISIR transaction results and to select one.

Previous Page
Enables you to move back one screen of data, if additional screens exist.

Reject
Enables you to view the reasons why the calculation could not be completed for the student.

> **Note:** You can only view rejections for the methodology appearing in the (Financial Aid Need Analysis Form Record/Method) field in the Header segment. Select **Method** to select another methodology. The word Rejects appears highlighted to the left of the (Financial Aid Need Analysis Form Record/Method) field if rejects exist.

Return to Previous Screen
Returns you to the Student Need Analysis screen.

Reject Help
Accesses the Reject Help screen enabling you to see the valid U.S.E.D. Reject codes and their descriptions.

Student

Enables you to access and update certain fields in the Need Analysis Information segment.

Update Need

Puts the screen into Update mode. Accesses the Budget/Need Summary segment enabling you to update the information.

Need Analysis Program Parameters Screen

Purpose

The Need Analysis Program Parameters screen enables you to select the session, program, form type, subsidiary, and printer that you intend to use to process need analysis information.

> **CAUTION:** Make sure that you know this information before you begin to process need analysis information.

Access

Access the Need Analysis Program Parameters screen by selecting the following, beginning at the Financial Aid Main Menu:

1. Student Processing.
2. Student Need Analysis.
3. At the Student Need Analysis screen, change the financial aid award year and session, if desired, and select **Finish.**

> **Note:** Other access paths may exist. For example, you can access this screen from either of the following locations by selecting **Initialize**:
> - Any of the Student Need Analysis screens for the various forms (e.g., FAFSA).
> - The Need Analysis Information screen, if you accessed the screen from Financial Aid Entry.

Example

Following is an example of the Need Analysis Program Parameters screen.

Fields

The following list describes the fields that appear on the Need Analysis Program Parameters screen.

Form
　　The name of the need analysis form format you want to use. Defaults to FAFSA. A list of valid forms appear at the bottom of the screen.

Printer
　　The name of the printer on which to print output. Use **Table Lookup** for a list of valid printers.

Program
　　A code identifying the academic program for which you want to process need analysis information. Defaults to UNDG (Undergraduate).

Session
　　A code identifying the session for which you want to process need analysis information (e.g., FA96). Defaults to the session you entered in the Student Need Analysis screen.

Subsidiary
　　The subsidiary to which financial aid processing applies. Defaults to S/A (Student Accounts).

Year
　　The financial aid award year for which you want to process need analysis information (e.g., 9900). Defaults to the year you entered in the Student Need Analysis screen.

Commands

The following list describes the commands you can execute from the Need Analysis Program Parameters screen.

　　Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel
　　Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Finish
　　Saves your field entries when you have completed your data entry or selection and want to continue.

Lookup
　　Accesses a Table Lookup window listing valid codes or values from which you can choose.

Profile Information Window

Purpose

The Profile Information window enables you to view a student's demographic information.

Access

Access the Profile Information window by selecting the following, beginning at the Need Analysis Information screen:

1. **Options** from the Commands menu
2. **Profile Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Profile Information window.

Fields

The following list describes the fields that appear on the Profile Information window.

> **Note:** The system maintains all fields, which are display-only.

Birth Date
The student's birthdate (e.g., 01/01/1967).

Denomination
A code identifying the student's religious association.

Ethnic Code
A code identifying the student's racial background (e.g., BL for Black).

Marital Status
A code identifying the student's marital status (e.g., T for separated).

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

Resident Country
A code identifying the country in which the student maintains permanent residency.

Resident State
A code identifying the state in which the student maintains permanent residency.

Sex
A code indicating the student's sex. Valid codes are:
- F (Female)
- M (Male)

Commands

The following list defines the commands you can execute from the Profile Information window.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Program Enrollment Information Window

Purpose

The Program Enrollment Information window enables you to view a student's admissions and enrollment information.

Access

Access the Program Enrollment Information window by selecting the following, beginning at the Need Analysis Information screen:
1. **Options** from the Commands menu
2. **Program Enrollment Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Program Enrollment Information window.

Fields

The following list describes the fields that appear on the Program Enrollment Information window.

Academic Status
A code identifying the student's status as a current student (e.g., AC for accepted).

Admit Status
A code identifying the student's status as a prospective student (e.g., AC for accepted).

Class
A code identifying the student's admissions classification (e.g., FR for returning freshman).

Enrollment Date
The date upon which the student formally enrolled in your institution (e.g., 08/01/1995).

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

Site
The location where the student attends classes (e.g., Jenzabar).

> **Note:** Site records are generally used by institutions with more than one campus.

Commands

The following list describes the commands you can execute from the screen.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous
Enables you to move back one screen of data, if additional screens exist.

Residence Hall Window

Purpose

The Residence Hall window enables you to view information about the on-campus services a student uses (e.g., housing, meal plans, parking permits, etc.).

Access

Access the Residence Hall window by selecting the following, beginning at the Need Analysis Information screen:

1. **Options** from the Commands menu
2. **Student Services Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Residence Hall window.

Fields

The following list describes the fields that appear on the Residence Hall window.

ASB

A code indicating whether the student's requirement to pay the Associated Student Body (student government) fee has been waived (Y) or not (N).

Appr

A code indicating whether the student has approval to live off-campus (Y) or not (N).

Box

The student's on-campus mail address (e.g., 923).

Camp

The campus on which the student's housing is located (e.g., MAIN for main campus).

CONTACT NAME

This field is located on the second line. The name of someone to contact in case of emergency (e.g., Mrs. Helen Jones).

EXT

This field is located on the second line. The contact's telephone extension number.

Hall

A code identifying the name of the student's residence hall (e.g., WEDE).

Hsg

A code identifying the student's housing status. Valid codes are:
- C (Commuter)
- L (Local)
- R (Resident)

Ins

A code indicating whether the student's requirement to pay the student health insurance fee has been waived (Y) or not (N).

LICENSE

This field is located on the second line. The license number of the student's vehicle (e.g., XLS-9532).

Meal

A code identifying the student's type of meal plan. Valid codes are:
- F (Full)
- P (Partial)
- Blank (None)

No

The number of students who occupy the student's housing unit, such as the room or suite (e.g., 2).

PERMIT

This field is located on the second line. The number on the student's parking permit (Q12345).

PHONE

This field is located on the second line. The contact's telephone number (e.g., 219-555-6523).

RA

A code indicating whether the student is a resident assistant for the session (Y) or not (N).

Record

The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

Room

The student's residence hall room number (e.g., 101).

Rsv

A code identifying the student's housing reservation status. Valid codes are:
- D (Dropped)
- L (Wait listed)
- R (Reserved)

Sess

The session to which the services information relates (e.g., FA for fall).

Stat

A code identifying the student's enrollment status. Valid codes are:
- C (Confirmed)
- I (Interested)
- N (No show)
- W (Withdrew)

Suite

The student's suite number in the residence hall.

VEH
A code identifying the type of vehicle the student uses on campus. Valid codes are:
- AUTO (Automobile)
- BIKE (Bicycle)
- MCYC (Motorcycle)
- NONE (No vehicle)
- TRCK (Truck)

Wvd
A code indicating whether the student's meal plan has been waived (Y) or not (N).

Yr
The year to which the services information relates (e.g., 1996).

Commands

The following list describes the commands you can execute from the screen.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous
Enables you to move back one screen of data, if additional screens exist.

SAP Criteria Window

Purpose

The SAP Criteria window provides detailed information on the Satisfactory Academic Progress processed and the status the student has attained. This information may affect the student's financial aid.

Access
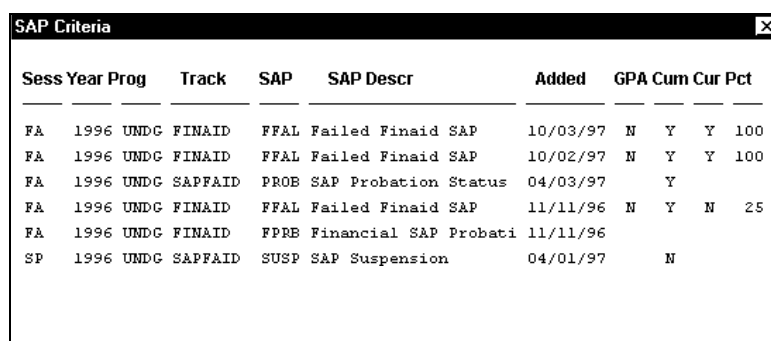
Access the SAP Criteria window by selecting the following, beginning at the Need Analysis Information screen:
1. **Options** from the Commands menu
2. **SAP Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the SAP Criteria window.

```
SAP Criteria                                                          [X]

Sess Year Prog    Track     SAP    SAP Descr              Added    GPA Cum Cur Pct
____ ____ ____    _____    ____    _____              _____    ___ ___ ___ ___

FA   1996 UNDG FINAID      FFAL Failed Finaid SAP         10/03/97  N   Y   Y  100
FA   1996 UNDG FINAID      FFAL Failed Finaid SAP         10/02/97  N   Y   Y  100
FA   1996 UNDG SAPFAID     PROB SAP Probation Status      04/03/97      Y
FA   1996 UNDG FINAID      FFAL Failed Finaid SAP         11/11/96  N   Y   N   25
FA   1996 UNDG FINAID      FPRB Financial SAP Probati     11/11/96
SP   1996 UNDG SAPFAID     SUSP SAP Suspension            04/01/97      N
```

Fields

The following list describes the fields that appear on the SAP Criteria window.

Added
The date (e.g., 10/03/97) the student's SAP information was added. A display-only field, if the information is being added, defaults to the current date.

Cum
A code indicating whether the student met the SAP cumulative hours criteria (Y) or not (N).

Cur
A code indicating whether the student met the SAP current hours criteria (Y) or not (N).

GPA
A code indicating whether the student met the GPA criteria (Y) or not (N).

Pct
If the student met the SAP current hours criteria (i.e., Y appears in the Cur field), the percentage of current hours in which the student is making satisfactory progress.

Prog

A code identifying the program in which the student is/was enrolled for the specified SAP information (e.g., UNDG for undergraduate). Use **Table Lookup** for a list of valid codes.

SAP
A code identifying the student's SAP status (e.g., FFAL). Use **Table Lookup** for a list of valid codes.

SAP Descr
The description of the student's SAP status (e.g., Failed Finaid SAP). A display-only field, the system enters this information.

Sess
A code identifying the session to which the SAP Information relates (e.g., FA). Use **Table Lookup** for a list of valid codes.

Track
A code identifying the SAP Track to which the SAP information is associated (e.g., FINAID). Use **Table Lookup** for a list of valid codes.

Year
The year to which the SAP Information relates (e.g., 1996).

Commands

The following list describes the commands you can execute from the screen.

> **Note:** You can use a specific command only when it appears on the current command line, toolbar, or menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add-line
In Update mode, creates a blank line enabling you to add another SAP record.

Back
Enables you to move back one screen of data, if additional screens exist.

Cancel
In Update mode, does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Close
Enables you to exit from the current screen or window.

Finish
In Update mode, saves your field entries when you have completed your data entry or selection and want to continue.

Forward
Enables you to move forward one screen of data, if additional screens exist.

Update/Add
Puts the window into Update mode enabling you to update the existing and/or add new SAP records.

Site Record Window

Purpose

The Site Record window enables you to view or manage a student's site information (i.e., the location where the student attends classes).

> **Note:** Site records are generally used by institutions with more than one campus.

Access

Access the Site Record window by selecting the following, beginning at the Financial Aid Main Menu:
1. Student Processing
2. Student Need Analysis
3. **Site**

Example

Following is an example of the Site Record window.

```
┌─────────────────────────────────────┐
│ Student Need Analysis            ⊠   │
│          Site Record                 │
│                                      │
│ Beginning Date:     07/29/1997       │
│          Site:      CARS             │
└─────────────────────────────────────┘
```
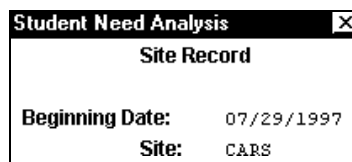
Fields

The following list describes the fields that appear on the Site Record window.

Beginning Date
The date on which the student started to attend classes at the site (e.g., 07/29/1997).

Site
The location where the student attends classes (e.g., Jenzabar).

Commands

The following list describes the commands you can execute from the screen.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add
Enables you to add another Site record.

Close
Enables you to exit from the current screen or window.

Finish
Saves your field entries when you have completed your data entry or selection and want to continue.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous

Enables you to move back one screen of data, if additional screens exist.

Student Academic Information Window

Purpose

The Student Academic Information window enables you to view a student's historical academic information including the sessions and number of credit hours for which he/she has been registered.
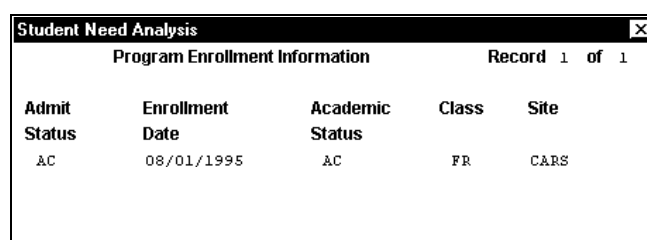
Access
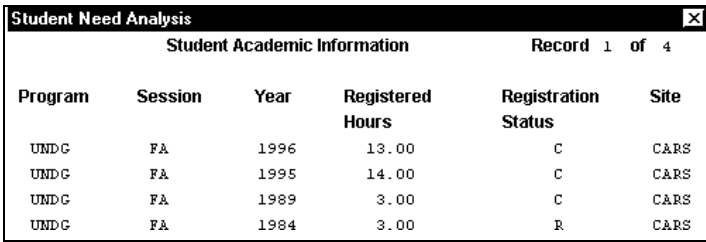
Access the Student Academic Information window by selecting the following, beginning at the Need Analysis Information screen:

1. **Options** from the Commands menu
2. **Student Academic Info** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Student Academic Information window.

```
Student Need Analysis                                              ☒
              Student Academic Information            Record  1  of  4

   Program     Session    Year    Registered       Registration    Site
                                  Hours            Status
     UNDG        FA       1996     13.00               C           CARS
     UNDG        FA       1995     14.00               C           CARS
     UNDG        FA       1989      3.00               C           CARS
     UNDG        FA       1984      3.00               R           CARS
```

Fields

The following list describes the fields that appear on the Student Academic Information window.

Program
A code identifying the program in which the student is/was enrolled (e.g., UNDG for undergraduate).

Registered Hours
The number of credit hours for which the student is or has been registered (e.g., 13.00).

Record
The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 4 indicates you are viewing the first of four total records).

Registration Status
A code identifying the student's enrollment status. Valid codes are:

- B (Boarder this sess)
- C (Confirmed)
- I (Intended)
- N (No show)
- R (Registered)
- W (Withdrawn)

Session
The session in which the student is/was registered (e.g., FA for fall).

Site

The location where the student attends/attended classes (e.g., Jenzabar).

> **Note:** Site records are generally used by institutions with more than one campus.

Year
The year in which the student is/was enrolled (e.g., 1996).

Commands

The following list describes the commands you can execute from the screen.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
Enables you to exit from the current screen or window.

Next
Enables you to move forward one screen of data, if additional screens exist.

Previous
Enables you to move back one screen of data, if additional screens exist.

Student ISIR Transaction Numbers Window

Purpose

The Student ISIR Transaction Numbers window enables you to view the list of Institutional Student Information Report (ISIR) transactions that have taken place for a student. The alternate results are based on transactions the Central Processing Service (CPS) previously processed and returned to your institution. For example, if your institution processed a student's information four times, CX maintains four transactions. You can also select any of the transactions that appear in the window and use the related ISIR record to compute financial aid need. If you select a different ISIR record for processing, the information in the record will overwrite the display of the current information. However, the current information is not permanently lost. You can access the current information using this window. No ISIR records will be created for manually entered FM Need Analysis Form records; you can get these from tape or EDE processes.

> **Note:** If you make manual changes to the current ISIR record, the changes will not be saved. Only the original transaction information is stored in the ISIR record.

> **CAUTION:** If you change the current Federal Methodology (FM) Need Analysis Form record and then use this window to copy a different transaction record, you will overwrite the changes in the FM Need Analysis Form record. For example, if you select the second of four transactions for a student, transaction 02 will appear every time you access the student's Need Analysis Form record.
>
> To restore the latest version, select the latest transaction number and overwrite the current display after you have finished viewing a previous transaction. For example, select transaction 04 for the student who has four transactions to display the most recent information.
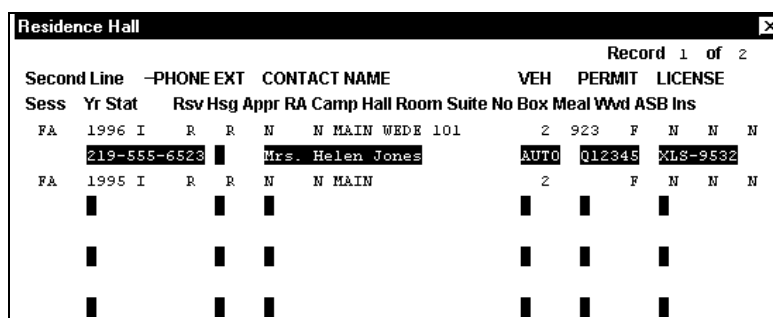
Access
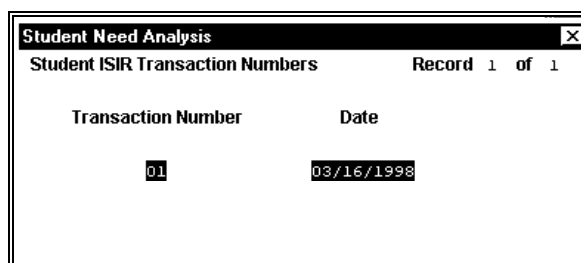
Access the Student ISIR Transaction Numbers window by selecting the following, beginning at the Need Analysis Information screen:

1. **Options** from the Commands menu
2. **Transaction Selection** from the Options submenu

For more information about accessing the Need Analysis Information screen, see *Need Analysis Information Screen* in this section.

Example

Following is an example of the Student ISIR Transaction Numbers window.

Fields

The following list describes the fields that appear on the Student ISIR Transaction Numbers window.

Note: The system maintains all fields, which are display-only.

Date
    The date the Central Processing Service processed the ISIR record (e.g., 03/16/1998).

Record
    The number of the record being viewed and the total number of records for the student (e.g., Record 1 of 1 indicates you are viewing the first of one total record).

Transaction Number
    A CPS-assigned sequence number identifying a specific ISIR record (e.g., 01).

Commands

The following list describes the commands you can execute from the screen.

Note: You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Close
    Enables you to exit from the current screen or window.

Next
    Enables you to move to the next ISIR record, if additional records exist.

Page Down
    Enables you to move forward one screen of data, if additional screens exist.

Page Up
    Enables you to move back one screen of data, if additional screens exist.

Previous
    Enables you to move to the previous ISIR record, if additional records exist.

Select
    Enables you to select the ISIR record which appears in reverse video.

Student Need Analysis Screens - FAF Form

Purpose

The FAF (Financial Aid Form) form of the Student Need Analysis screens enables you to capture, review, or update information on a student's FAF form.

> **Notes:**
> - This is the FAF supplemental data only. The core data is displayed on the FAFSA Form screens. The complete FAF form occupies five screens. An example of each screen and a description of the fields on each follows in the order in which they appear.
> - The FAF form is not available after the 9798 school year.

Access

Access the FAF form from Student Need Analysis screen by selecting the following, beginning with the Financial Aid Main Menu:

1. Student Processing.
2. Student Need Analysis.
3. At the Student Need Analysis screen, enter the desired financial aid award year and session and select **Finish**.
4. At the Need Analysis Program Parameters screen, enter **FAF** in the Form field and change any other desired parameters. Select **Finish**.
5. At the first page of a blank FAF form, enter the desired student's ID or social security number in the ID field, or select **Query** to find the student by name.
6. Select **Finished**. The first page of the FAF form appears, displaying information from the student's Federal Methodology (FM) record, if one exists.

> **Note:** Other access paths can exist.

Segments

Each Student Need Analysis screen of the FAF form is divided into two segments:

- The Header segment provides information about the selected student and the financial aid award year and record to which the information relates.
- The Sections segment provides information from the student's FAF Need Analysis Form record (naf_rec), if one exists.

Example (Sections A and B)

Following is an example of the FAF form (Sections A and B) of the Student Need Analysis screens.

Fields on the Header Segment (Sections A and B)

The following list describes the fields that appear on the Header segment of the FAF form (Sections A and B).

Allow Tape Update
A code indicating if the need analysis tape data should overwrite the need analysis information (Y) or not (N). This field is active in Update mode.

Export
A code identifying if and how the record is to be sent by EDE (Electronic Data Exchange) to the Department of Education. This field is active in Update mode. Valid codes are:
- C (Send as a correction)
- N (Do not send)
- O (Send as an original)

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM). This is a display-only field. To select another methodology, select **Method**.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., FMS or FM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

Id

The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right. This field is active in Query mode.

PIN
The student's personal identification number. This field is active in Update mode.

Rev Date
The date the need analysis information was entered or last revised (e.g., 03/13/1995). This field is active in Update mode.

SSNO
The student's social security number (e.g., 161-33-5820). This is a display-only field.

Transaction Number
The Student Aid Report (SAR) or Institutional Student Information Report (ISIR) transaction number. This field is active in Update mode.

Yr
The financial aid year to which the student's FAF Need Analysis Form record information relates (e.g., 9697). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Sections A and B)

The following list describes the fields that appear on the Sections segment of the FAF form (Sections A and B).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Financial Aid Form (FAF) and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

1. Number of Family Members
The total number of family members the student supports for the financial aid year (e.g., 5).

2. Number in College
The number of family members in college the student supports for the financial aid year (e.g., 1).

3. State of Legal Residence
The student's state of legal residence (e.g., RI).

4a. Citizenship Status
A code identifying the student's citizenship status. Valid codes are:
- 1 (US citizen)
- 2 (Permanent resident)
- 3 (Other)

(4)c. Visa Classification
If the student is other than a US citizen, a code identifying his/her Visa classification. Valid codes are:
- 1 (F1)
- 2 (F2)
- 3 (J1)
- 4 (J2)
- 5 (Other)

5. Student Tax Code

A code identifying the type of federal tax form the student filed the previous year. Valid
codes are:
- 1 (Will file 1040(EZ/A/TEL))
- 2 (Estimated 1040)
- 3 (1040(EZ/A/TEL))
- 4 (1040)
- 5 (None)

6. Total Number of Exemptions
>The total number of exemptions the student claimed on his/her federal tax form (e.g., 5).

7. Adjusted Gross Income
>The total dollar amount of the student's adjusted gross income.

8. Income Tax Paid
>The total dollar amount of US income tax the student paid.

10. Student Work Income
>The total dollar amount of income the student earned.

11. Spouse Work Income
>The total dollar amount of income the student's spouse earned.

12. Dividend Interest Income
>The total dollar amount of dividend interest income the student earned.

13a. Social Security Benefits
>The total dollar amount of social security benefits the student received.

(13)b. AFDC
>The total dollar amount of Aid to Families With Dependent Children (AFDC) benefits the
>student received.

(13)c. Child Support
>The total dollar amount of child support the student received.

(13)d. Earned Income Credit
>The total dollar amount of earned income credit for the student.

(13)e. Other
>The total dollar amount of other income and benefits the student received.

Addr
>The student's permanent street address.

City
>The city of the student's permanent address.

Date of Birth
>The student's birthday (e.g., 08/06/1959).

Name
>The student's full name. This consists of three fields in the following order: last, first,
>middle.

Phone
>The student's permanent home telephone number (e.g., 219-773-3513).

SSNO
>The student's social security number (e.g., 161-33-5820).

State

The state of the student's permanent address.

Title
A code identifying the student's title. Valid codes are:
- 1 (Mr.)
- 2 (Miss, Ms., Mrs.)

Zip
The Zip Code of the student's permanent address.

Example (Sections C, E, and F)

Following is an example of the FAF form (Sections C, E and F) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ 🖳 Student Need Analysis                                        _□×       │
│ File  Edit  Commands  Help                                                │
│         ┌──────────────────────────────┐                                  │
│         │ ⑦ ✳ ◢ 🗇 ▶ ◀ ▐EXIT▌           │                      FANEED    │
│         └──────────────────────────────┘                                  │
│ Id: 1245740   Warram, Tiberious A.            SSNO: 161-33-5820 Yr: 9798 ▐FM▌│
│                                                                           │
│ ─────────────────────── SECTION C: STUDENT ASSETS ──────────────────────  │
│                                            WORTH     OWED                  │
│ 15. Cash, Checking Accounts..........      859                            │
│ 17. Investments......................                                     │
│ 18. Home Equity......................                                     │
│ 19. Other Real Estate................                                     │
│ 20. Business and Farm................        0         0                  │
│                                                                           │
│ ──────────────── SECTION E: STUDENT'S 1996 EXPENSES ──────────────────    │
│ 25. Medical and Dental Expenses........                                   │
│                                                                           │
│ ─────────── SECTION F: STUDENT'S EXPECTED SUMMER/SCHOOL YEAR INCOME ────── │
│ 26. Student's Veterans Benefits............. 0          Months.. 0        │
│                                  ** Summer 1997 **  ** School Year 9798 ** │
│ 27a. Income earned from work by student.....                              │
│   b. Income earned from work by spouse......                              │
│   c. Other taxable income...................                             │
│   d. Nontaxable income and benefits........                              │
│ ┌───────────────────────────────────────────────────────────────────────┐│
│ └───────────────────────────────────────────────────────────────────────┘│
│ ┌───────────────────────────────────────────────────────────────────────┐│
│ └───────────────────────────────────────────────────────────────────────┘│
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Sections C, E, and F)

The following list describes the fields that appear on the Header segment of the FAF form (Sections C, E, and F).

> **Note:** All fields are display-only. These fields appear on each of the subsequent screens and do not change.

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM).

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., FMS or FM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and

controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

Id
The system-generated number identifying the student in the database (e.g., 1245740). The student's name appears to the right.

SSNO
The student's social security number (e.g., 161-33-5820).

Yr
The financial aid year to which the student's FAF Need Analysis Form record information relates (e.g., 9697). This should be the same as the financial aid award year for which you want to process need analysis information.

Fields on the Sections Segment (Sections C, E, and F)

The following list describes the fields that appear on the Sections segment of the FAF form (Sections C, E and F).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Financial Aid Form (FAF) and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

15. Cash, Checking Accounts
The total dollar amount of the student's cash, savings, and checking accounts (under WORTH).

> **Note:** This field does not appear below the OWED column.

17. Investments
This consists of two fields: The total dollar value of the student's other investments (under WORTH), and the total dollar amount he/she owes on them (under OWED).

18. Home Equity
This consists of two fields: The total dollar value of the student's home (under WORTH), and the total dollar amount he/she owes on it (under OWED).

19. Other Real Estate
This consists of two fields: The total dollar value of the student's other real estate (under WORTH), and the total dollar amount he/she owes on it (under OWED).

20. Business and Farm
This consists of two fields: The total dollar value of the student's business and/or farm (under WORTH), and the total dollar amount he/she owes on either/both (under OWED).

25. Medical and Dental Expenses
The total dollar amount of medical and dental expenses the student incurred.

26. Student's Veterans Benefits
The total dollar amount of veteran education benefits the student receives per month.

(26.) Months
The number of months (1 through 12) the student receives veteran education benefits.

27a. Income earned from work by student
This consists of two fields: The total dollar amount of income the student earned for the current summer (under Summer 1996), the total dollar amount he/she earned for the current school year (under School Year 9697).

(27)b. Income earned from work by spouse

This consists of two fields: The total dollar amount of income the student's spouse earned for the current summer (under Summer 1996), and the total dollar amount he/she earned for the current school year (under School Year 9697).

(27)c. Other taxable income

This consists of two fields: The total dollar amount of other taxable income the student earned for the current summer (under Summer 1996), and the total dollar amount he/she earned for the current school year (under School Year 9697).

(27)d. Nontaxable income and benefits

This consists of two fields: The total dollar amount of untaxable income and benefits the student earned for the current summer (under Summer 1996), and the total dollar amount he/she earned for the current school year (under School Year 9697).

Example (Sections G, H, and I)

Following is an example of the FAF form (Sections G, H, and I) of the Student Need Analysis screens.

Fields on the Header Segment (Sections G, H, and I)

For a list of fields that appear on the Header segment of the FAF form (Sections G, H, and I) and their descriptions, see *Fields on the Header Segment (Sections C, E, and F)*.

Fields on the Sections Segment (Sections G, H, and I)

The following list describes the fields that appear on the Sections segment of the FAF form (Sections G, H, and I).

Note:
- The fields and their numbers correspond with those on the hard copy of the Financial Aid Form (FAF) and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.

- All dollar fields are in whole dollars. All fields are active in Update mode.

28. Number in Family
The total number of family members the student's parents support for the financial aid year.

29. Number in College
The number of family members in college the student's parents support for the financial aid year.

31. Parents' Marital Status
A code identifying the student's parents' marital status. Valid codes are:
- D (Divorced)
- M (Married)
- S (Single)
- T (Separated)
- W (Widow/Widower)

32. State of Residence
A code identifying the student's parents' state of legal residence.

35. Medical & Dental Expenses
The total dollar amount of medical and dental expenses not covered by insurance the student's parents' incurred.

36a. Tuition paid for Dependent Children
The total dollar amount of the tuition the student's parents paid for dependent children.

36b. For how many dependent children
The number of dependent children for which the student's parents paid tuition.

37. Cash, Checking Accounts
The total dollar amount of the student's parents' cash and checking accounts.

38. Parents' monthly home mortgage/rental payment
The total dollar amount the student's parents pay monthly for their mortgage or in rent.

39. Investments and Savings
This consists of two fields: The total dollar value of the student's parents' investments and savings (under WORTH), and the total dollar amount they owe on them (under OWED).

40a. Home Equity
This consists of two fields: The total dollar value of the student's parents' home (under WORTH), and the total dollar amount they owe on it (under OWED).

(40)b. If parents own home
Consists of the following two fields:
- **Year purchased** - The year the student's parents purchased the home
- **Purchase price** - The amount the student's parents paid for the home

41. Business
This consists of two fields: The total dollar value of the student's parents' business (under WORTH), and the total dollar amount they owe on it (under OWED).

42. Farm
This consists of two fields: The total dollar value of the student's parents' farm (under WORTH), and the total dollar amount they owe on it (under OWED).

43. Other Real Estate Equity

This consists of two fields: The total dollar value of the student's parents' other real estate (under WORTH), and the total dollar amount the owe on it (under OWED).

Example (Section K)

Following is an example of the FAF form (Section K) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                          _ □ ×    │
│ File  Edit  Commands  Help                                                │
│        ┌──────────────────────────────────┐                              │
│        │ Ⓠ ╲╱ ◤ ⬙ ▶ ◀ EXIT │              FANEED       │
│ Id: 1245740  Warram, Tiberious A.          SSNO: 161-33-5820 Yr: 9798  FM │
│ ─────────────────── SECTION K: PARENTS' INCOME & EXPENSES ─────────────── │
│ 48.  Tax Code................ 4                                           │
│ 49.  Number of Exemptions..... 5                                         │
│ 50.  Adjusted Gross Income....   84131                                    │
│ 50a. Wages, Salaries, Tips....           d. Net Income (Loss) .......     │
│  b.  Interest Income.........            e. Other Taxable Income.....     │
│  c.  Dividend Income.........            f. Adjustments to Income....     │
│ 51.  US Tax Paid.............   13000                                     │
│ 53.  Father's Work Income.....   55300   54. Mother's Work Income.....  28241 │
│ 55a. Social Security Benenfits......................................   0  │
│  b.  Aid to families with Dependent Children........................   0  │
│  c.  Child Support..................................................   0  │
│  d.  Deductible IRA and/or Keogh Payments...........................     │
│  e.  Payments to Tax-Deferred Pension and Savings Plan..............     │
│  g.  Earned Income Credit...........................................   0  │
│  h.  Living Allowances for Military, Clergy and Others..............     │
│  i.  Tax-Exempt Interest Income.....................................     │
│  j.  Foreign Income Exclusion.......................................     │
│  k.  Any Other Untaxed Income and Benefits..........................   0  │
│ ┌───────────────────────────────────────────────────────────────────┐   │
│ └───────────────────────────────────────────────────────────────────┘   │
│ ┌───────────────────────────────────────────────────────────────────┐   │
│ └───────────────────────────────────────────────────────────────────┘   │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Section K)

For a list of fields that appear on the Header segment of the FAF form (Section K) and their descriptions, see *Fields on the Header Segment (Sections C, E, and F)*.

Fields on the Sections Segment (Section K)

The following list describes the fields that appear on the Sections segment of the FAF form (Section K).

Note:
- The fields and their numbers correspond with those on the hard copy of the Financial Aid Form (FAF) and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

48. Tax Code

A code identifying the type of federal tax form the student's parents filed the previous year. Valid codes are:
- 1 (Will file 1040(EZ/A/TEL))
- 2 (Estimated 1040)
- 3 (1040(EZ/A/TEL))
- 4 (1040)
- 5 (None)

49. Number of Exemptions

The total number of exemptions the student's parents declared on their federal tax form.

50. Adjusted Gross Income
The total dollar amount of the student's parents' adjusted gross income.

50a. Wages, Salaries, Tips
The total dollar amount of the wages, salaries, and tips the student's parents earned.

(50)b. Interest Income
The total dollar amount of the interest the student's parents received.

(50)c. Dividend Income
The total dollar amount of the dividend income the student's parents earned.

(50)d. Net Income (Loss)
The total dollar amount of the student's parents' adjusted net income or loss.

> **Note:** If they declared a loss, enter the amount as a negative (e.g., -2000).

(50)e. Other Taxable Income
The total dollar amount of other taxable income the student's parents earned.

(50)f. Adjustments to Income
The total dollar amount of any adjustments to the student's parents' income.

51. US Tax Paid
The total dollar amount of Federal Income Tax the student's parents paid.

53. Father's Work Income
The total dollar amount of income the student's father earned.

54. Mother's Work Income
The total dollar amount of income the student's mother earned.

55a. Social Security Benefits
The total dollar amount of social security benefits the student's parents received.

(55)b. Aid to families with Dependent Children
The total dollar amount of Aid to Families With Dependent Children (AFDC) benefits the student's parents received.

(55)c. Child Support
The total dollar amount of child support the student's parents received.

(55)d. Deductible IRA and/or Keogh Payments
The total dollar amount of IRA and/or Keogh payments the student's parents made.

(55)e. Payments to Tax-Deferred Pension and Savings Plan
The total dollar amount of payments the student's parents made to a tax-deferred pension and savings plan.

(55)g. Earned Income Credit
The total dollar amount of earned income credit for the student's parents.

(55)h. Living Allowances for Military, Clergy and Others
The total dollar amount of living allowances the student's parents received if one is a member of the military, clergy, or other.

(55)i. Tax-Exempt Interest Income
The total dollar amount of the tax-exempt interest the student's parents received.

(55)j. Foreign Income Exclusion
The total dollar amount of foreign income exclusion the student's parents earned.

(55)k. Any Other Untaxed Income and Benefits

The total dollar amount of any other untaxed income and/or benefits the student's parents earned and/or received.

Example (Sections L and P)

Following is an example of the FAF form (Sections L and P) of the Student Need Analysis screens.

Fields on the Header Segment (Sections L and P)

For a list of fields that appear on the Header segment of the FAF form (Sections L and P) and their descriptions, see *Fields on the Header Segment (Sections C, E, and F)*.

Fields on the Sections Segment (Sections L and P)

The following list describes the fields that appear on the Sections segment of the FAF form (Sections L and P).

Note:
- The fields and their numbers correspond with those on the hard copy of the Financial Aid Form (FAF) and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

56. Father 199 *Y* Work Income
The total dollar amount of income the student's father is expected to earn for the current year. The year (199 *Y*) will change to indicate the current year.

57. Mother 199 *Y* Work Income
The total dollar amount of income the student's mother is expected to earn for the current year. The year (199 *Y*) will change to indicate the current year.

58. 199 *Y* Other Taxable Income

The total dollar amount of other income the student's parents are expected to earn for the current year. The year (199 *Y*) will change to indicate the current year.

59. 199 *Y* Nontax Inc/Benefits
The total dollar amount of untaxable income and/or benefits the student's parents are expected to earn and/or receive for the current year. The year (199 *Y*) will change to indicate the current year.

Date Completed
The date (mm/dd/yyyy) the FAF form was completed.

Father Signature
A code indicating if the student's father signed the FAF form (Y) or not (N).

Mother Signature
A code indicating if the student's mother signed the FAF form (Y) or not (N).

Spouse Signature
A code indicating if the student's spouse signed the FAF form (Y) or not (N).

Student Signature
A code indicating if the student signed the FAF form (Y) or not (N).

Commands

For a list of the commands that you can execute from the FAF form of the Student Need Analysis screens, see *Student Need Analysis Screen Commands* in this section.

Student Need Analysis Screens - FAFSA Form

Purpose

The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens reflects the complete official FAFSA form and uses the following ten screens. The information maintained in these screens is the federal core data.

- The first four screens enable you to capture, review, or update information on a student's FAFSA form.
- The two FAA (Financial Aid Administrator) screens enable you to view and print federal transaction identification information and the intermediate values for the EFC (Expected Family Contribution).
- The four NSLDS (National Student Loan Data System) screens enable you to view and print information about the student's Financial Aid loan history.

   Note: An example of each screen and a description of the fields on each are provided in the order in which they appear on the FAFSA form.

Access

Access the FAFSA form of the Student Need Analysis screens from one of the following locations on the CX menu:

- Student Need Analysis
- Financial Aid Entry

   Note: For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

Follow these steps to access the FAFSA form from Student Need Analysis:
1. From the Financial Aid: Student Processing menu, select the menu option Student Need Analysis. The Student Need Analysis screen appears.
2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.
3. Enter **FAFSA** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of a blank FAFSA form appears.
4. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**. The first page of the FAFSA form appears displaying information from the student's FM (Federal Methodology) record, if one exists.

Follow these steps to access the FAFSA form from Financial Aid Entry:
1. From the Financial Aid: Student Processing menu, select the menu option Financial Aid Entry. Select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the parameters, if desired, and select **Finish**. The Financial Aid Entry screen appears.
3. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**.
4. Select **Need** from the Commands menu. The Need Analysis Information screen appears.
5. Select **Need Form** from the Commands menu. The first page of the FAFSA Form of the Student Need Analysis screens appears displaying the student's data.

Segments

Each Student Need Analysis screen of the FAFSA form is divided into two segments:
- The Header segment provides information about the selected student and the financial aid award year and record to which the information relates.

- The Sections segment provides information from the student's FAFSA Need Analysis Form record (naf_rec) and NSLDS record (nslds_rec), if the records exist.

Example (Step One)

Following is an example of the FAFSA form (Step One) of the Student Need Analysis screens.

```
 Student Need Analysis                                              _ ⊡ ✕
File  Edit  Commands  Help
           Q  ✲ ✐ 🗇 ▶ ◀ EXIT                                     FANEED
ID: 5061574  Bridges, Nash                 SSN: 956-34-2195  Yr: 0102   FM
Rev Date:  12/15/2000            Allow Tape Update: Y
Export:                          Transaction Number: 00       DRN: 2384

STEP ONE: For 1-35, Leave blank any questions that do not apply to the student.-
1-3. Name (Last, First, Middle).......... Bridges          , Nash
  4. Your Permanent Mailing Address...... 111 Eagle Cliffs Lane
5-7. City, State, Zip.................... Sacramento              CA   95814
  8. SSN.................. 956-34-2195  19. Winter 2002 Enrollment.......... 1
  9. Date of Birth.......... 06/23/1982  20. Spring 2002 Enrollment.......... 1
 10. Home Phone Number.... 916-528-6957  21. Summer 2002 Enrollment.......... 5
 11. DL Number.... CA159873265KJB        22. Father's Highest Grade Level.... 3
 12. Driver's License State Code.... CA  23. Mother's Highest Grade Level.... 3
 13. Citizenship..................... 1  24. State of Legal Residence....... CA
 14. Alien Regist No........A             25. Resident before 1/1/1996?....... Y
 15. Marital Status.................. S  26. Resident of St Since....... 061982
 16. Date of Marital Status.....         27. Male............................ Y
 17. Summer 2001 Enrollment.......... 5  28. Register for Selective Service.. N
 18. Fall 2001 Enrollment............ 1  29. Degree/Cert Code................ 1
                                         30. Grade in College in 2001-2002... 1
```

Fields on the Header Segment (Step One)

The following list describes the fields that appear on the Header segment of the FAFSA form (Step One).

Allow Tape Update
Y(es) or N(o) indicating whether the need analysis tape data should overwrite the need analysis information. This field is active in Update mode.

DRN
The student's data release number (formerly the PIN, or personal identification number). This field is active in Update mode.

Export
A code identifying if and how the record is to be sent by EDE (Electronic Data Exchange) to the Department of Education. This field is active in Update mode. Valid codes are:
- C (Send as a correction)
- N (Do not send)
- O (Send as an original)

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM). This is a display-only field.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record

shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID
The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

Rev Date
The date (mm/dd/yyyy) the need analysis information was entered or last revised. This field is active in Update mode.

SSN
The student's social security number (e.g., 956-34-2195). This is a display-only field.

Transaction Number
The Student Aid Report (SAR) or Institutional Student Information Report (ISIR) transaction number (e.g., 00). This field is active in Update mode.

Yr
The financial aid year to which the student's FAFSA Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Step One)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step One).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All fields are active in Update mode.

1-3. Name (Last, First, Middle)
The student's full name (e.g., Bridges, Nash). This consists of three fields in the following order: last, first, middle.

4. Your Permanent Mailing Address
The student's permanent street address (e.g., 111 Eagle Cliffs Lane).

5-7. City, State, Zip
The city, state, and Zip Code of the student's permanent address. This consists of three fields in the following order: city, state, and Zip Code (e.g., Sacramento, CA 95814).

8. SSN
The student's social security number (e.g., 956-34-2195).

9. Date of Birth
The student's birthday (e.g., 06/23/1982).

10. Home Phone Number
The student's permanent home telephone number (e.g., 916-528-6957).

11. DL Number
The student's driver's license number (e.g., CA159873265KJB).

12. Driver's License State Code

The State code for the state from which the student's driver's license was issued (e.g., CA for California).

13. Citizenship

A code identifying the student's citizenship status. Valid codes are:
- 1 (US citizen or US national)
- 2 (Eligible non-citizen)
- 3 (Not eligible)

14. Alien Regist No

If the student is other than a US citizen or US national, the student's nine-digit alien registration number.

15. Marital Status

A code identifying the student's marital status. Valid codes are:
- M (Married)
- S (Single/Divorced/Widowed)
- T (Separated)

16. Date of Marital Status

The date (mm/yyyy) the student's marital status became effective.

17. Summer 200 _Y_ Enrollment

A code identifying the student's enrollment status for the current summer session. The year (200 _Y_) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

18. Fall 200 _Y_ Enrollment

A code identifying the student's enrollment status for the current fall session. The year (200 _Y_) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

19. Winter 200 _Y_ Enrollment

A code identifying the student's enrollment status for the current winter session. The year (200 _Y_) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

20. Spring 200 _Y_ Enrollment

A code identifying the student's enrollment status for the current spring session. The year (200 _Y_) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)

- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

21. Summer 200 *Y* Enrollment
A code identifying the student's enrollment status for the next summer session. The year (200 *Y*) will change to indicate the next year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

22. Father's Highest Grade Level
A code identifying the highest grade level that the student's father achieved. Valid codes are:
- 1 (Middle school/Jr. high)
- 2 (High school)
- 3 (College or beyond)
- 4 (Other/Unknown)
- Blank (No response)

23. Mother's Highest Grade Level
A code identifying the highest grade level that the student's mother achieved. Valid codes are:
- 1 (Middle school/Jr. high)
- 2 (High school)
- 3 (College or beyond)
- 4 (Other/Unknown)
- Blank (No response)

24. State of Legal Residence
The State code for the student's state of legal residence (e.g., CA for California).

25. Resident before 1/1/1996?
Y(es) or N(o) indicating whether the student has been a resident of his/her state before 1/1/1996.

26. Resident of St Since
The date (mmyyyy) the student's parents became a resident of the state of legal residence.

27. Male
Y(es) or N(o) indicating whether the student is a male.

28. Register for Selective Service
Y(es) or N(o) indicating whether the student wishes to register for selective service.

29. Degree/Cert Code
A code identifying the student's degree or certification. Valid codes are:
- 1 (First bachelor's degree)
- 2 (Second bachelor's degree)
- 3 (Associates Degree, occupational or technical program)
- 4 (Associates Degree, general education or transfer program)
- 5 (Certificate or Diploma for completing an occupational, technical, or educational program of less than two years)
- 6 (Certificate or diploma for completing an occupational, technical, or educational program of at least two years)

- 7 (Teaching Credential Program, non-degree program)
- 8 (Graduate or professional degree)
- 9 (Other/Undecided)
- Blank (No response)

30. Grade in College in 200 Y-200 Y

A code identifying the student's grade level for the current year. The year (200 Y-200 Y) will change to indicate the current year. Valid codes are:
- 1 (1st year, never attended)
- 2 (1st year, attended before)
- 3 (2nd year, sophomore)
- 4 (3rd year, junior)
- 5 (4th year, senior)
- 6 (5th year or more, undergraduate)
- 7 (Graduate/professional or beyond)
- Blank (No response)

Example (Step One Continued, Steps Two and Three)

Following is an example of the FAFSA form (Step One Continued, Steps Two and Three) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                          _ ⊡ ✕   │
│ File  Edit  Commands  Help                                               │
│ ┌──────────────────────────────────────────────────────────┐            │
│ │       ⊗  ⚒ ✎ 🗗  ▶  ◀  EXIT                              FANEED      │
│ ├──────────────────────────────────────────────────────────┤            │
│ │ ID: 5061574  Bridges, Nash           SSN: 956-34-2195  Yr: 0102  FM    │
│ │ STEP ONE Continued... ─────────────────────────────────────            │
│ │ 31. Diploma/GED Before Enrollment.. Y  33. Interest in Student Loans......... Y │
│ │ 32. First Degree by July 1, 2001... N  34. Interest in Work-Study............ Y │
│ │                                        35. Convicted of drug offense......... E │
│ │ STEP TWO:(36-51) Report student (and spouse's) income and assets.─────────    │
│ │ 36. Student filed 2000 Tax Return.. 3  44. Total from 2000 Worksheet A.       │
│ │ 37. Student's Type of Tax Return...    45. Total from 2000 Worksheet B.       │
│ │ 38. Eligible for 1040A or 1040EZ...    46. 2000 Worksheet C Exclusions.       │
│ │ 39. Adjusted Gross Income....          47. Investments Net Worth......        │
│ │ 40. US Income Tax Paid.......          48. Business/Farm Net Worth....        │
│ │     Estimated US Income Tax..       O  49. Cash, Savings, Checking....        │
│ │ 41. Exemptions Claimed............     50. Months VA Benefits Received......  │
│ │ 42. Student's Work Income....          51. Monthly VA Benefits..............  │
│ │ 43. Spouse's Work Income.....                                                 │
│ │ STEP THREE: If "Yes" to any question (52-58) skip to STEP FIVE.─────────      │
│ │ 52. Born Before 1/1/1978.......... N  55. Have children to support........... N │
│ │ 53. Graduate/Professional Student. N  56. Dependents other than spouse/child. N │
│ │ 54. Are You Married............... N  57. Orphan or Ward of the Court........ N │
│ │                                        58. Veteran of US Armed Forces......... N │
│ └──────────────────────────────────────────────────────────┘            │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Step One Continued, Steps Two and Three)

The following list describes the fields that appear on the Header segment of the FAFSA form (Step One Continued, Steps Two and Three).

Note: All fields are display-only. These fields appear on each of the subsequent screens and do not change.

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM).

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID
The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

SSN
The student's social security number (e.g., 956-34-2195). This is a display-only field.

Yr
The financial aid year to which the student's FAFSA Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information.

Fields on the Sections Segment, (Step One Continued)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step One Continued).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

31. Diploma/GED Before Enrollment
Y(es) or N(o) indicating whether the student will receive his/her high school diploma or GED before he/she enrolls in your institution.

32. First degree by July 1, 200*Y*
Y(es) or N(o) indicating whether the student will have a bachelor's degree by July 1, 200*Y*. The year (200*Y*) will change to indicate the current year.

33. Interest in Student Loans
Y(es), N(o), or blank indicating whether the student is interested in receiving student loans.

34. Interest in Work-Study
Y(es), N(o), or blank indicating whether the student is interested in receiving work-study aid.

35. Convicted of drug offense
A code indicating whether the student has ever been convicted of a drug offense. Valid codes are:
- E (Eligible for aid, not convicted)
- I (Ineligible for aid, or don't know)

  > **Note:** This option can be corrected.

- P (Partially eligible for aid, will become eligible)
- Blank (No response)

Fields on the Sections Segment, (Step Two)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Two).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

36. Student filed 2000 Tax Return
A code identifying the student's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

37. Student's Type of Tax Return
A code identifying the type of federal tax form the student filed the previous year. The year (199Y) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual*.

38. Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the student is eligible to file for a 1040A/1040EZ.

39. Adjusted Gross Income
The total dollar amount of the student's adjusted gross income.

40. US Income Tax Paid
The total dollar amount of US income tax the student paid.

(40.) Estimated US Income Tax
The estimated US income tax the student paid the previous year. This is a display-only field that is calculated by CX.

41. Exemptions Claimed
The total number of exemptions the student claimed on his/her federal tax form.

42. Student's Work Income
The total dollar amount of income the student earned.

43. Spouse's Work Income
The total dollar amount of income the student's spouse earned.

44. Total from 200Y Worksheet A
The total dollar amount of the student's earned income credits from Worksheet A. The year (200Y) will change to indicate the previous year.

45. Total from 200Y Worksheet B
The total dollar amount of the student's untaxed income from Worksheet B. The year (200Y) will change to indicate the previous year.

46. 200Y Worksheet C Exclusions

The total dollar amount of the student's Worksheet C exclusions for the previous year. The year (200*Y*) will change to indicate the previous year.

47. Investments Net Worth
The total dollar amount of the net worth of the student's investments.

48. Business/Farm Net Worth
The total dollar amount of the net worth of the student's business and/or farm.

49. Cash, Savings, Checking
The total dollar amount of the student's cash, savings, and checking accounts.

50. Months VA Benefits Received
The number of months (01 through 12) the student receives veteran education benefits, or leave blank if none received.

51. Monthly VA Benefits
The total dollar amount of veteran education benefits the student receives per month.

Fields on the Sections Segment, (Step Three)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Three). If you answer "yes" to any question (52-58), ignore the questions in step four and continue at step five.

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

52. Born Before 1/1/19*YY*
Y(es) or N(o) indicating whether the student is at least 23 years old. The year (*YY*) changes annually to indicate 23 years.

53. Graduate/Professional Student
Y(es) or N(o) indicating whether the student is a graduate or professional student.

54. Are You Married
Y(es) or N(o) indicating whether the student is married.

55. Have Children To Support
Y(es) or N(o) indicating whether the student is responsible for children.

56. Dependents Other Than Spouse/Child
Y(es) or N(o) indicating whether the student is responsible for dependents other than a spouse or child.

57. Orphan or Ward of the Court
Y(es) or N(o) indicating whether the student is an orphan or ward of the court.

58. Veteran of US Armed Forces
Y(es) or N(o) indicating whether the student is a veteran.

Example (Steps Four and Five)

Following is an example of the FAFSA form (Steps Four and Five) the Student Need Analysis screens.

Fields on the Header Segment (Steps Four and Five)

For a list of fields that appear on the Header segment of the FAFSA form (Steps Four and Five) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Step Four)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Four). If you answer "no" to all questions (54-59) in step three, complete the questions in step four and ignore step five.

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

59. Parent's Marital Status

A code identifying the student's parents' marital status. Valid codes are:
- D (Divorced/Separated)
- M (Married)
- S (Single)
- W (Widow(er))
- Blank (No response)

60. Father SSN

The social security number of the student's father (e.g., 296-83-5042).

61. Father Last Name

The Last Name of the student's father (e.g., BRIDGES).

62. Mother Soc. Security

The social security number of the student's mother (e.g., 301-98-3574).

63. Mother Last Name

The Last Name of the student's mother (e.g., BRIDGES).

64. Number of Family Members
The total number of family members the student's parents support for the financial aid year (e.g., 03).

65. # in College Excluding Parents
The number of family members in college (excluding parents) the student's parents support for the financial aid year (e.g., 1).

66. State of Legal Residence
The State code identifying the student's parents' state of legal residence (e.g., CA for California).

67. Resident before 1/1/1996?
Y(es) or N(o) indicating whether the student's parents have been residents of their state before 1/1/1996.

68. Resident of St Since
The date (mmyyyy) the student's parents became a resident of the state of legal residence.

69. Age of Older Parent
The age (in whole years) of the student's older parent (e.g., 52).

70. Parent Filed 2000 Tax Return
A code identifying the parent's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

71. Parent's Type of Tax Return
A code identifying the type of federal tax form the parent filed the previous year. The year (200*Y*) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

   CAUTION: If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual.*

72. Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the parent is eligible to file for a 1040A/1040EZ.

73. Adjusted Gross Income
The total dollar amount of the parent's adjusted gross income (e.g., 40000).

74. US Income Tax Paid
The total dollar amount of US income tax the parent paid (e.g., 1125).

(74.) Estimated US Income Tax
The estimated US income tax the parent paid the previous year. This is a display-only field that is calculated by CX.

75. Exemptions Claimed
The total number of exemptions the parent claimed on his/her federal tax form (e.g., 03).

76. Father's Work Income
The total dollar amount of income the student's father earned (e.g., 40000).

77. Mother's Work Income

The total dollar amount of income the student's mother earned (e.g., 000).

78. Total from 200 Y Worksheet A
The total dollar amount of earned income credit for the parent from Worksheet A . The year (200 Y) will change to indicate the previous year.

79. Total from 200 Y Worksheet B
The total dollar amount of the parent's untaxed income from Worksheet B. The year (200 Y) will change to indicate the previous year.

80. 200 Y Worksheet C Exclusions
The total dollar amount of the parent's Worksheet C exclusions for the previous year. The year (2000 Y) will change to indicate the previous year.

81. Investments Net Worth
The total dollar amount of the net worth of the parent's investments.

82. Business/Farm Net Worth
The total dollar amount of the net worth of the parent's business and/or farm.

83. Cash, Savings, Checking
The total dollar amount of the parent's cash, savings, and checking accounts.

Fields on the Sections Segment (Step Five)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Five). Complete this section only if you answer "yes" to any of the questions (52-58) in step three and ignore step four.

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

84. Number of Family Members
The total number of family members the student's parents support for the financial aid year.

85. Number in College
The number of family members in college (excluding parents) the student's parents support for the financial aid year.

Example (Steps Six, Seven, Section A, and Office Information)

Following is an example of the FAFSA form (Steps Six, Seven, Section A, and Office Information) the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▄ Student Need Analysis                                          _ ▢ ✕    │
│ File  Edit  Commands  Help                                                │
│ ┌─────────────────────────────────────────────────────────────┐          │
│ │       Ⓠ  ⚒  ◼  🗗  ▶  ◀  EXIT                          FANEED │         │
│ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102  FM     │
│ STEP SIX: Schools────────────────── STEP SEVEN: Signatures and Dates───── │
│ 86. College 1. 010025  87. House 1.. 1   98. Date Completed....... 01/05/2001│
│ 88. College 2. 010740  89. House 2.. 1   99. Signed by..................... B│
│ 90. College 3.          91. House 3..                                     │
│ 92. College 4.          93. House 4..    100. Preparer's SSN...... 452-83-6471│
│ 94. College 5.          95. House 5..    101. Preparer's EIN........ 254632147│
│ 96. College 6.          97. House 6..    102. Preparer's Signature.......... Y│
│ SECTION A: AUXILIARY INFORMATION ─────────────────────────────           │
│ Orig. SSN.... 956342195     Name Code........... BR                       │
│                             EFC...             C-FLAG...                   │
│ OFFICE INFORMATION ──────────────────────────────────────                │
│ DRN.. 2384   Student Email.. nbridges@carsinfo.com                        │
│ Primary Formula Type.....           Reject Override Codes:                 │
│ Sec. Formula Type........           B:   N:   W:                           │
│ Processed Date....... 12/15/2000    Assumption Override Codes:             │
│ Application Source...........       1:   2:   3:   4:   5:   6:            │
│ Transaction Type..............                                            │
│ FAA Inst Number..........           Dependency Override......             │
│ FAA Adjustment..   Early Analysis Flag..    Trans. Receipt Date..         │
│ ┌─────────────────────────────────────────────────────────────┐          │
│ └─────────────────────────────────────────────────────────────┘          │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Steps Six, Seven, Section A, and Office Information)

For a list of fields that appear on the Header segment of the FAFSA form (Steps Four and Five) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Step Six)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Six).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All fields are active in Update mode.

86. College 1
A code identifying the first college the student plans to attend (e.g., 010025).

87. House 1
A code identifying the student's housing at the first college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

88. College 2
A code identifying the second college the student plans to attend (e.g., 010740).

89. House 2
A code identifying the student's housing at the second college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)

- Blank (No response)

90. College 3
   A code identifying the third college the student plans to attend.

91. House 3
   A code identifying the student's housing at the third college. Valid codes are:
   - 1 (On campus)
   - 2 (Off campus)
   - 3 (Parents)
   - Blank (No response)

92. College 4
   A code identifying the fourth college the student plans to attend.

93. House 4
   A code identifying the student's housing at the fourth college. Valid codes are:
   - 1 (On campus)
   - 2 (Off campus)
   - 3 (Parents)
   - Blank (No response)

94. College 5
   A code identifying the fifth college the student plans to attend.

95. House 5
   A code identifying the student's housing at the fifth college. Valid codes are:
   - 1 (On campus)
   - 2 (Off campus)
   - 3 (Parents)
   - Blank (No response)

96. College 6
   A code identifying the sixth college the student plans to attend.

97. House 6
   A code identifying the student's housing at the sixth college. Valid codes are:
   - 1 (On campus)
   - 2 (Off campus)
   - 3 (Parents)
   - Blank (No response)

Fields on the Sections Segment (Step Seven)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Step Seven).

Note:
   - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
   - All fields are active in Update mode.

98. Date Completed
   The date (mm/dd/yyyy) the form was completed.

99. Signed by
   A code indicating who signed the application. Valid codes are:
   - A (Signed by applicant)

- B (Applicant and parent)
- P (Parent only)
- Blank (No signature)

100. Preparer's SSN
The preparer's social security number (e.g., 452-83-6471).

101. Preparer's EIN
The preparer's employer identification number (e.g., 254632147).

102. Preparer's Signature
A code indicating whether the preparer signed the form (Y) or not (blank).

Fields on the Sections Segment (Section A: Auxiliary Information)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Auxiliary Information).

C-FLAG
Display only - Y(es) or N(o) indicating whether a "C" should print next to the EFC on Part 1 of the Student Aid Report and ISIR.

EFC
Display only - the total dollar amount of the Expected Family Contribution.

Name Code
Optional - the first two letters of the student's last name.

Orig SSN
Optional - the student's original social security number as initially processed by the CPS.

Fields on the Sections Segment (Office Information)

The following list describes the fields that appear on the Sections segment of the FAFSA form (Office Information).

Application Source
Display only - a code identifying the organization that entered the original application. A display-only field, valid codes are:
- 1 (Electronic application)
- 2 (Electronic renewal)
- 4 (Free Application for Federal Student Aid (FAFSA) Express)
- 5 (American College Testing program (ACT))
- 6 (FAFSA on the Web/Renewal App on the Web)
- 7 (National Communications System (NCS))

Assumption Override Codes
Optional - Y(es) or N(o) indicating whether you want to override the associated assumption. Consisting of six fields, the assumptions are listed in order of the fields with which they are associated. These fields are active in Update mode.
- 1 (Parents' number in college assumed to be 1; used when the parents' Number of Family Members and the Number in College do not equal, and the Number in College is 7 or more.)
- 2 (Parents' AGI equals the sum of the Father's Work Income and the Mother's Work Income.)
- 3 (Independent student's Number in College assumed to be 1.)
- 4 (Student's AGI equals the sum of the Student's Work Income and the Spouse's Work Income.)
- 5 (Parent's Social Security Benefits assumed to be 0.)
- 6 (Dependent student's Social Security Benefits assumed to be 0.)

Dependency Override
Optional - a code indicating whether this student's status should be set to that of an independent student (I), overriding any existing value, or not (blank). This field is active in Update mode.

> **Note:** You must enter your FAA institution number if you enter (I).

DRN
Optional - the student's data release number (formerly the PIN, or personal identification number)(e.g., 2384).

Early Analysis Flag
Optional - a code indicating whether the student is requesting early admission to your institution (Y) or not (blank).

FAA Adjustment
Optional - a code indicating whether an adjusted Expected Family Contribution (EFC) calculation was requested and if it was processed. Valid options are:
- Y (EFC adjustment processed)
- F (EFC adjustment request failed)
- Blank (No EFC adjustment requested)

FAA Inst Number
Optional - the FAA number for your institution. If you enter (I) in the Dependency Override field, you must enter your FAA institution number.

Primary Formula Type
Display only - a code identifying the type of needs test used to calculate the primary EFC on the application. A display-only field, valid codes are:
- 1 (Full needs test - dependent)
- 2 (Full needs test - independent without dependents other than a spouse)
- 3 (Full needs test - independent with dependents other than a spouse)
- 4 (Simplified needs test - dependent)
- 5 (Simplified needs test - independent without dependents other than a spouse)
- 6 (Simplified needs test - independent with dependents other than a spouse)
- Blank (Not Calculated)

Processed Date
Display only - the date (mm/dd/yyyy) the CPS processed the application.

Reject Override Codes
Optional - a code indicating whether you want to override the associated reject (Y) or not (N). Consisting of three fields, the rejects are listed in order of the fields with which they are associated.
- B (Independent status in question because of student's age)
- N (Student's first or last name blank)
- W (Parents' or independent student's number of family members in question because total is greater than 15)

Sec. Formula Type
Display only - a code identifying the type of needs test used to calculate the secondary EFC on the application. Valid codes are:
- 1 (Full needs test - dependent)
- 2 (Full needs test - independent without dependents other than a spouse)
- 3 (Full needs test - independent with dependents other than a spouse)
- 4 (Simplified needs test - dependent)
- 5 (Simplified needs test - independent without dependents other than a spouse)
- 6 (Simplified needs test - independent with dependents other than a spouse)
- Blank (Not Calculated)

Student Email

Optional - the student's email address (e.g., nbridges@carsinfo.com).

Trans. Receipt Date

Optional - the date (mm/dd/yyyy) the transaction was received by the MDE or school for paper transactions, or the date (mm/dd/yyyy) the student entered the record on the World Wide Web (Web). If blank, none has been calculated. This field is active in Update mode.

> **Note:** The date cannot be prior to 01/01/2000.

Transaction Type

Display only - a code identifying the type of transaction that generated the Institutional Student Information Report (ISIR). A display-only field, valid codes are:

- 0 (Electronic initial application)
- 1 (Automatic ISIR generated)
- 2 (Electronic correction)
- 3 (Electronic duplicate request)
- 5 (Electronic renewal application)

Example (Section B: FAA Information (1/2))

Following is an example of the FAFSA form, Section B: FAA Information (1/2) (Section B) of the Student Need Analysis screens.

Fields on the Header Segment (Section B: FAA Information (1/2))

For a list of fields that appear on the Header segment, Section B of the FAFSA form, FAA Information (1/2) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Section B: FAA Information (1/2))

The following list describes the fields that appear on the Sections segment, Section B of the FAFSA form, FAA Information (1/2).

Notes:
- The information in these sections are not part of the FAFSA form but are part of the ISIR data and form received by your institution from the Central Processing Service (CPS).
- All fields are display-only.

AAI Intermediate Values

The total dollar amount of the parents' or student's Adjusted Available Income. If blank, none has been calculated.

AI Intermediate Values

The total dollar amount of the Available Income. If blank, none has been calculated.

APA Intermediate Values

The total dollar amount of the Education and Savings Asset Protection Allowance. If blank, none has been calculated.

ATI Intermediate Values

The total dollar amount of the Allowances Against Total Income. If blank, none has been calculated.

Auto Zero EFC Flag

A code Indicating whether the EFC was set to zero based on income criteria (Y) or not (blank).

CAI Intermediate Values

The total dollar amount of the Contribution from Available Income. If blank, none has been calculated.

Cor. # Applied to

The transaction number to which the history correction was applied. Valid values are 01 to 99 or blank (for no correction transaction).

Date Application Received

The date (mm/dd/yyyy) the student aid application was received for processing by the CPS.

Date ISIR Recd

The date (mm/dd/yyyy) the Institutional Student Information Report (ISIR) was received by your institution.

Dependency Override

A code indicating whether this student's status should be set to that of an independent student (I), overriding any existing value, or not (blank).

DNW Intermediate Values

The total dollar amount of the Discretionary Net Worth. If blank, none has been calculated.

Duplicate Request

A code indicating whether a duplicate record was requested (D) or not (blank).

EA Intermediate Values

The total dollar amount of the Employment Allowance. If blank, none has been calculated.

Early Analysis Flag

A code indicating whether the student is requesting early admission to your institution (Y) or not (blank).

FAA EFC Adjustment Flag

Y(es), N(o), or blank indicating whether an adjusted Expected Family Contribution (EFC) calculation was requested. A blank implies the response is "No".

FTI Intermediate Values

The total dollar amount of the Family Total Income, which is used for FISAP reporting. If blank, none was calculated.

IPA Intermediate Values
The total dollar amount of the Income Protection Allowance. If blank, none has been calculated.

PC Intermediate Values
The total dollar amount of the Adjusted Parents' Contribution. If blank, none has been calculated.

PCA Intermediate Values
The total dollar amount of the Parents' Contribution from Assets. If blank, none has been calculated.

Pell Elig Flag
A code indicating whether the student is eligible for a Pell Grant (Y) or not (blank) as of this transaction.

Pell Paid EFC
A code identifying the type of Expected Family Contribution (EFC) that will appear on the Pell Grant payment voucher. Valid codes are:
- P (Primary EFC)
- S (Secondary EFC)
- Blank (None calculated)

Primary EFC
The dollar amount, calculated for each month (1 through 12), of the Primary Expected Family Contribution (EFC).

Rejects Met
Codes indicating why the student's application was rejected by the CPS. If blank, no rejection occurred.

> **Note:** For a list of valid codes, select the **Reject Help** command on the Need Analysis Information screen.

Reprocessing Code
A code indicating why the student's ISIR was reprocessed by the CPS. Valid values are 00 to 99, or leave blank if no reprocessing occurred.

SCA Intermediate Values
The total dollar amount of the Dependent Student's Contribution from Assets. If blank, none has been calculated.

Secondary EFC
The dollar amount calculated, for each month (1 through 12), of the Secondary Expected Family Contribution (EFC).

SIC Intermediate Values
The total dollar amount of the Dependent Student's Income Contribution. If blank, none has been calculated.

STI Intermediate Values
The total dollar amount of the Independent Student's Total Income. If blank, none has been calculated.

STX Intermediate Values
The total dollar amount of the State and Other Tax Allowance. If blank, none has been calculated.

System Generated Indicator

A code indicating the reason why the transaction was generated by the CPS. Valid codes are:

- A (Applicant released from Drug Enforcement hold)
- D (Duplicate request, hold status changed)
- H (Application released from hold)
- L (Duplicate request and NSLDS match data has changed)
- N (NSLDS postscreening transaction)
- S (Duplicate social security number and no activity)
- Z (Reprocessed transaction)
- Blank (Not a system-generated transaction)

TI Intermediate Values

The dollar amount of the Total Income. If blank, none has been calculated.

TPC Intermediate Values

The total dollar amount of the Total Parents' Contribution. If blank, none has been calculated.

Trans. Receipt Date

The date (mm/dd/yyyy) the transaction was received by the MDE or school for paper transactions, or the date (mm/dd/yyyy) the student entered the record on the World Wide Web (Web). If blank, none has been calculated.

> **Note:** The date cannot be prior to 01/01/2000.

TSC Intermediate Values

The total dollar amount of the Total Student's Contribution.

Verification Flag

A code indicating the reason why an applicant was selected for verification. Valid codes are:

- A, B, or C (Verification criteria met)
- 1 - 37 (Verification criteria met)
- Blank (Applicant not selected)

Example (Section B: FAA Information (2/2))

Following is an example of the FAFSA form, FAA Information (2/2) of the Student Need Analysis screens.

```
 ╒ Student Need Analysis                                          _ ╗ ×
  File  Edit  Commands  Help
 ┌──────────┬──────────────────────────────────────────────────────────┐
 │          │  🔍 │ ※ │ 🖰 │ 🗘 │ ▶ │ ◀ │ EXIT │                FANEED
 ├──────────┴──────────────────────────────────────────────────────────┤
 │ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102  FM │
 │ FAA INFORMATION (2/2) ─────────────────────────────────────────────── │
 │ SNT Flag:                         Subsequent App Flag:                 │
 │                                                                        │
 │ MATCH FLAGS                                                            │
 │   SSN:     SSA:     INS:     PRI:     SS:       NSLDS:      VA:         │
 │   INS Ver. No.:                    SS Registration Flag:               │
 │   NSLDS Transaction Number:        NSLDS Database Results Flag:        │
 │                                                                        │
 │                                                                        │
 │ COMMENTS:                                                              │
 │                                                                        │
 │                                                                        │
 │                                                                        │
 └────────────────────────────────────────────────────────────────────┘
```
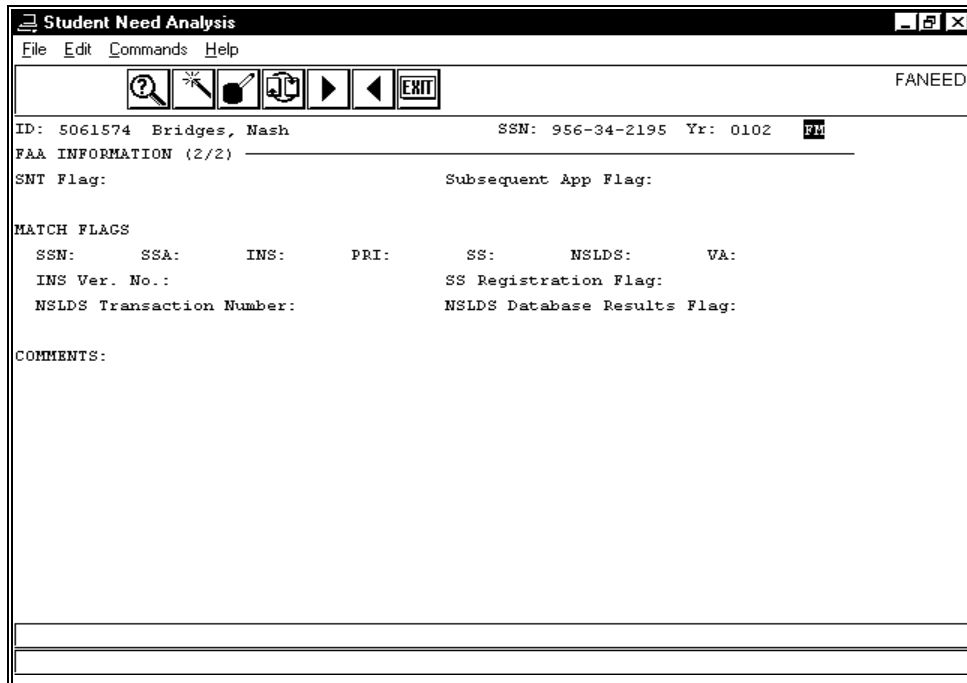
Fields on the Header Segment (Section B: FAA Information (2/2))

For a list of fields that appear on the Header segment of the FAFSA form, FAA Information (2/2) and their descriptions, see *Fields on the Header Segment (Step One Continued).*

Fields on the Sections Segment (Section B: FAA Information (2/2))

The following list describes the fields that appear on the Sections segment of the FAFSA form, FAA Information (2/2).

> **Notes:**
> - The information in these sections are not part of the FAFSA form but are part of the ISIR data and form received by your institution from the Central Processing Service (CPS).
> - All fields are display-only.

COMMENTS
Codes that refer to specific comments generated by the application processing system and printed on the paper application. This field contains up to 20 three-digit numeric comment codes. Unused positions will contain zeros.

INS Match Flag
A code indicating the results of an Immigration and Naturalization Service match, if one was performed. Valid codes are:
- N (Citizenship not confirmed)
- Y (Citizenship confirmed)
- Blank (Record not sent to INS)

INS Ver. No.
An ID number for the student that is provided by the Immigration and Naturalization Service, if applicable.

NSLDS Match Flag

A code indicating the National Student Loan Data System match, if one was performed. Valid codes are:
- 1 (Eligible for Title IV aid)
- 2 (Default)
- 3 (Overpayment)
- 4 (Default and overpayment)
- 7 (Match, but no data provided)
- 8 (Record not sent)

NSLDS Database Results Flag

A code indicating the results of a National Student Loan Data System match, if one was performed. Valid codes are:
- 1 (Match was found and NSLDS data sent to CPS)
- 2 (SSN match, but first name or date of birth did not match; no data sent to CPS)
- 3 (SSN not found in NSLDS)
- 4 (Match was found, but no NSLDS data sent to CPS)

NSLDS Transaction Number

A two-digit number from 01-99 indicating the latest transaction number for which the National Student Loan Data System updated information.

PRI Match Flag

A code indicating the results of a Prisoner match, if one was performed. Valid codes are:
- 1 (Not a prisoner)
- 2 (Prisoner in local facility)
- 3 (Prisoner in state or federal facility)
- 8 (Record not sent to match)
- 9 (Record sent, match not conducted)

SNT Flag

For Department of Education use only. This data is not supplied by the CPS.

SS Match Flag

A code identifying the status of the student's application with the Selective Service office. Valid codes are:
- N (Registration status not confirmed)
- T (Temporarily exempt)
- Y (Registration status confirmed)
- Blank (Record not sent to Selective Service)

SS Registration Flag

A code identifying the status of the student's Selective Service registration. Valid codes are:
- N (Registration status not confirmed)
- T (Temporarily exempt)
- Y (Registration status confirmed)
- Blank (Record not sent to Selective Service)

SSA Match Flag

A code indicating the results of a Social Security Administration citizenship match. Valid values are:
- A (US citizen)
- B (Legal alien, eligible to work)
- C (Legal alien, not eligible to work)
- D (Other)
- E (Alien, student restricted, work authorized)
- F (Conditionally legalized alien)
- N (Unable to verify citizenship due to no match on name or date of birth)

- * (Foreign born)
- Blank (Domestic born, US citizen)

SSN Match Flag

A code identifying additional information from the Social Security Administration about the student's social security number. Valid codes are:
- 1 (No match)
- 2 (SSN and name match, no date of birth match)
- 3 (SSN only match, no name match)
- 4 (SSN, name, and date of birth match)
- 5 (SSN, name, and date of birth match with date of death)
- 8 (Record not sent to SSA)

Subsequent App Flag

A code indicating whether this is a subsequent application (Y) or not (blank).

VA Match Flag

A code identifying additional information from the Veterans Affairs Administration about the student's veteran status. Valid codes are:
- 1 (veteran status confirmed)
- 2 (record found on VA database but not a qualifying veteran)
- 3 (record not found on VA database)
- 4 (record found on VA database but applicant on active duty)
- blank (record not sent to VA)

Example (Section C: NSLDS Financial Aid History (1/4))

Following is an example of the FAFSA form, Section C: NSLDS Financial Aid History (1/4) of the Student Need Analysis screens.

```
 Student Need Analysis                                                   _ □ ×
 File  Edit  Commands  Help
            ┌──┬──┬──┬──┬──┬──┬──┐                                      FANEED
            │ Q │ ⚲ │ ✎ │ ◱ │ ▶ │ ◀ │EXIT│
            └──┴──┴──┴──┴──┴──┴──┘
ID: 5061574  Bridges, Nash                  SSN: 956-34-2195  Yr: 0102    FM
SECTION C: NSLDS FINANCIAL AID HISTORY (1/4) ─────────────────────────────────

Overpayment Contact        Defaulted Loans:        Loan Sat Repayment:
─────────  ─────────       Discharged:            Active Bankruptcy:
Pell:                                              Post Screening Reason:
FSEOG:
Perkins:
_____

Aggregate Amount for FFELP/Direct Loans:
                    Outstanding Principal Bal   Pending Disbursements   Total
  Subsidized Loans:         $                         $                  $
  Unsubsidized Loans:       $                         $                  $
  Combined Loans:           $                         $                  $
  FFEL Consolidation Loans: $                                            $

Perkins Loans:
  Outstanding Principal Bal: $          Current Year Loan Amount: $


┌──────────────────────────────────────────────────────────────────────┐
└──────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Section C: NSLDS Financial Aid History (1/4))

For a list of fields that appear on the Header segment of the FAFSA form, Section C: NSLDS Financial Aid History (1/4) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Section C: NSLDS Financial Aid History (1/4))

The following list describes the fields that appear on the Sections segment of the FAFSA form, Section C: NSLDS Financial Aid History (1/4) of the Student Need Analysis screens.

Note: All fields are display-only.

Active Bankruptcy
Y(es) or N(o) indicating whether the student's account is in active bankruptcy.

Combined Loans:
The total dollar amount of all the student's subsidized and unsubsidized loans. This consists of three fields showing the outstanding principal balance, the pending disbursements, and the total amount, if applicable.

Defaulted Loans
A code indicating whether a student has defaulted loans (Y) or not (N or blank). This information is provided by NSLDS.

Discharged
Y(es) or N(o) indicating whether a student loan was discharged. This information is provided by NSLDS.

FFEL Consolidation Loans:
The total dollar amount of all the student's consolidated FFELP loans. This consists of three fields showing the outstanding principal balance, the pending disbursements (which should be zero), and the total amount, if applicable.

FSEOG Contact
The FSEOG Overpayment contact.

FSEOG Overpayment
Y(es) or N(o) indicating whether an overpayment was made for an FSEOG award.

Loan Sat Repayment
Y(es), N(o), or blank indicating whether a student repaid a loan satisfactorily. This information is provided by NSLDS.

Pell Contact
The Pell Overpayment contact.

Pell Overpayment
Y(es) or N(o) indicating whether an overpayment was made for a Pell award.

Perkins Contact
The Perkins Overpayment contact.

Perkins Loans
The total dollar amount of all the student's Perkins loans . This consists of two fields showing the outstanding principal balance and the current year loan amount, if applicable.

Perkins Overpayment
Y(es) or N(o) indicating whether an overpayment was made for a Perkins award.

Post Screening Reason
The NSLDS Post-Screening Reason code identifying the reason for a change in the student's eligibility since the last SAR/ISIR transaction. Valid codes are:
- 1 (Student went into default on a loan)

- 2 (Student owes a newly reported overpayment)
- 3 (Student is no longer in default)
- 4 (Student no longer owes an overpayment)
- 5 (Other)

Subsidized Loans

The total dollar amount of all the student's subsidized FFELP/Direct loans. This consists of three fields showing the outstanding principal balance, the pending disbursements, and the total amount, if applicable.

Unsubsidized Loans

The total dollar amount of all the student's unsubsidized FFELP/Direct loans. This consists of three fields showing the outstanding principal balance, the pending disbursements, and the total amount, if applicable.

Example (Section C: NSLDS Financial Aid History (2/4))

Following is an example of the FAFSA form, NSLDS Financial Aid History (2/4) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────────┐
│ ⬛ Student Need Analysis                                              _ ⬛ ✕  │
│  File  Edit  Commands  Help                                                   │
│        ┌──┬─┬─┬──┬─┬─┬────┐                                         FANEED     │
│        │�🔍│⚹│🖊│🗐│▶│◀│EXIT│                                                    │
│        └──┴─┴─┴──┴─┴─┴────┘                                                    │
│ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102  ⬛        │
│ NSLDS FINANCIAL AID HISTORY (2/4) ────────────────────────────────────        │
│ 2000-2001 Pell Payment Data:                                                  │
│ Sch.Code:          Tran.No:       Sch.Amt: $        Disb.Amt:$                 │
│                                   Rem.Amt: $        %Sch.Used:                 │
│ As of :            Ver.Flag:         EFC:                                      │
│ Sch.Code:          Tran.No:       Sch.Amt: $        Disb.Amt:$                 │
│                                   Rem.Amt: $        %Sch.Used:                 │
│ As of :            Ver.Flag:         EFC:                                      │
│                          Access NSLDS for Additional Pell Data                │
│                                                                               │
│                   Loan  Begin        End        GA  School  Grade Ctc   Ctc    │
│ Loan Detail (1-2)  Amt  Date        Date        Cd  Code    Lvl Cd    Type    │
│                                                                               │
│    Extra Unsub                    Capitalized Interest                         │
│    Status Code:   as of            Out. Bal: $     as of                       │
│                                                                               │
│    Extra Unsub                    Capitalized Interest                         │
│    Status Code:   as of            Out. Bal: $     as of                       │
│                                                                               │
└─────────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Section C: NSLDS Financial Aid History (2/4))

For a list of fields that appear on the Header segment of the FAFSA form, NSLDS Financial Aid History (2/4) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Section C: NSLDS Financial Aid History (2/4))

The following list describes the fields that appear on the Sections segment of the FAFSA form, NSLDS Financial Aid History (2/4) and their descriptions.

> **Note:** Information for up to twelve loans can be displayed. For additional loan records, access NSLDS. All fields are display-only.

% Sch. Used

The percentage of the applicable loan used by the student.

As of
The date (mm/dd/yyyy) the applicable loan information was effective.

Begin Date
The beginning date (mm/dd/yyyy) of the applicable loan.

CTC Cd
A code indicating whether a National Student Loan Data System (NSLDS) contact was performed (Y) or not (N or blank).

CTC Type
A code indicating the type of National Student Loan Data System (NSLDS) contact performed. If blank, none was performed.

Disb. Amt
The total dollar amount of the disbursement for the applicable loan.

EFC
The total dollar amount of the Expected Family Contribution.

End Date
The ending date (mm/dd/yyyy) of the applicable loan.

Extra Unsub
A code identifying the student's eligibility for increased unsubsidized loan amounts. Students are eligible if they are enrolled full-time in a health professions discipline and if the discipline was previously eligible under the HEAL program. Any dependent student is eligible for increased unsubsidized loan amounts if the student's parent has been denied a PLUS loan. Valid codes are:
- P (PLUS denial)
- H (Health Professional)
- B (Both)
- N (Neither)

GA Cd
A code indicating the guaranty agency for the applicable loan, if one exists.

Grade Lvl
The student's grade level for the current year.

Loan Amt
The total dollar amount of the applicable loan.

Out. Bal
The total dollar amount of the outstanding balance for the applicable loan.

Rem. Amt
The total dollar amount of the remaining balance for the applicable Pell loan.

Sch. Amt
The total dollar amount available for the applicable scholarship.

Sch. Code
A code identifying the type of applicable scholarship.

School Code
A code identifying the original school for which the applicable loan was taken.

Status Code

A code identifying the type of the applicable loan. The description of this code appears on the line just above the field.

Tran. No
A two-digit number from 01-99 indicating the latest transaction number for which the National Student Loan Data System updated information.

Ver. Flag
A code indicating the reason why an applicant was selected for verification. Valid codes are:
- A, B, or C (Verification criteria met)
- 1 - 37 (Verification criteria met)
- Blank (Applicant not selected)

Example (Section C: NSLDS Financial Aid History (3/4))

Following is an example of the FAFSA form, NSLDS Financial Aid History (3/4) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                              _ ⊡ ×    │
│ File  Edit  Commands  Help                                                    │
│              ┌──┐┌──┐┌──┐ ┌─┐ ┌─┐ ┌────┐                          FANEED      │
│              │🔍││✳\││♠/││⬚│ │▶│ │◀│ │EXIT│                                     │
│                                                                               │
│ ID: 5061574  Bridges, Nash                 SSN: 956-34-2195  Yr: 0102   FM     │
│ NSLDS FINANCIAL AID HISTORY (3/4) ─                                            │
│                       Loan     Begin     End       GA   School  Grade Ctc  Ctc │
│ Loan Detail (3-7)     Amt      Date      Date      Cd   Code    Lvl   Cd   Type│
│ ───────────────────   ─────    ─────     ─────     ──   ──────  ───── ────  ── │
│                                                                               │
│    Extra Unsub                       Capitalized Interest                     │
│    Status Code:    as of                Out. Bal: $       as of               │
│                                                                               │
│    Extra Unsub                       Capitalized Interest                     │
│    Status Code:    as of                Out. Bal: $       as of               │
│                                                                               │
│    Extra Unsub                       Capitalized Interest                     │
│    Status Code:    as of                Out. Bal: $       as of               │
│                                                                               │
│    Extra Unsub                       Capitalized Interest                     │
│    Status Code:    as of                Out. Bal: $       as of               │
│                                                                               │
│    Extra Unsub                       Capitalized Interest                     │
│    Status Code:    as of                Out. Bal: $       as of               │
│                                                                               │
└─────────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Section C: NSLDS Financial Aid History (3/4))

For a list of fields that appear on the Header segment of the FAFSA form, NSLDS Financial Aid History (3/4) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Section C: NSLDS Financial Aid History (3/4))

The following list describes the fields that appear on the Sections segment of the FAFSA form, NSLDS Financial Aid History (3/4) and their descriptions.

Note: Information for up to twelve loans can be displayed. For additional loan records, access NSLDS. All fields are display-only.

as of
The date (mm/dd/yyyy) the applicable loan information was effective.

Begin Date

The beginning date (mm/dd/yyyy) of the applicable loan.

CTC Cd
A code indicating whether a National Student Loan Data System (NSLDS) contact was performed (Y) or not (N or blank).

CTC Type
A code indicating the type of National Student Loan Data System (NSLDS) contact performed. If blank, none was performed.

End Date
The ending date (mm/dd/yyyy) of the applicable loan.

Extra Unsub
A code identifying the student's eligibility for increased unsubsidized loan amounts. Students are eligible if they are enrolled full-time in a health professions discipline and if the discipline was previously eligible under the HEAL program. Any dependent student is eligible for increased unsubsidized loan amounts if the student's parent has been denied a PLUS loan. Valid codes are:
- P (PLUS denial)
- H (Health Professional)
- B (Both)
- N (Neither)

GA Cd
A code indicating the guaranty agency for the loan, if one exists.

Grade Lvl
The student's grade level for the current year.

Loan Amt
The total dollar amount of the applicable loan.

Out. Bal
The total dollar amount remaining for the applicable loan.

School Code
A code indicating the original school for which the applicable loan was taken.
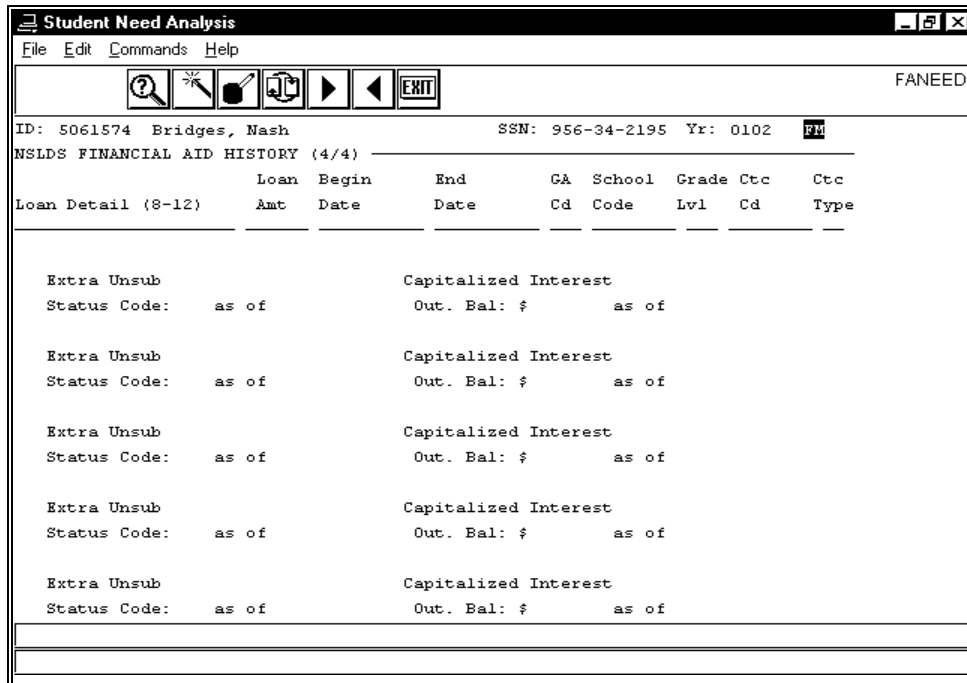
Status Code
A code identifying the type of the applicable loan. The description of this code appears on the line just above the field.

Example (Section C: NSLDS Financial Aid History (4/4))

Following is an example of the FAFSA form, NSLDS Financial Aid History (4/4) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                        _ 回 ✕    │
│ File  Edit  Commands  Help                                                │
│ ┌──────────────────────────────────────────────────────────────┐         │
│ │      │🔍│✳│▪│⬛│⬛│ ▶ │ ◀ │EXIT│                        FANEED         │
│ ├──────────────────────────────────────────────────────────────┤         │
│ │ ID: 5061574  Bridges, Nash            SSN: 956-34-2195  Yr: 0102  FM    │
│ │ NSLDS FINANCIAL AID HISTORY (4/4) ─────                                 │
│ │                       Loan  Begin      End       GA  School  Grade Ctc  Ctc   │
│ │ Loan Detail (8-12)    Amt   Date       Date      Cd  Code    Lvl  Cd    Type  │
│ │                                                                        │
│ │   Extra Unsub                    Capitalized Interest                  │
│ │   Status Code:    as of          Out. Bal: $      as of                │
│ │                                                                        │
│ │   Extra Unsub                    Capitalized Interest                  │
│ │   Status Code:    as of          Out. Bal: $      as of                │
│ │                                                                        │
│ │   Extra Unsub                    Capitalized Interest                  │
│ │   Status Code:    as of          Out. Bal: $      as of                │
│ │                                                                        │
│ │   Extra Unsub                    Capitalized Interest                  │
│ │   Status Code:    as of          Out. Bal: $      as of                │
│ │                                                                        │
│ │   Extra Unsub                    Capitalized Interest                  │
│ │   Status Code:    as of          Out. Bal: $      as of                │
│ └──────────────────────────────────────────────────────────────┘         │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Section C: NSLDS Financial Aid History (4/4))

For a list of fields that appear on the Header segment of the FAFSA form, NSLDS Financial Aid History (4/4) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Section C: NSLDS Financial Aid History (4/4))

The following list describes the fields that appear on the Sections segment of the FAFSA form, NSLDS Financial Aid History (4/4) and their descriptions.

> **Note:** Information for up to twelve loans can be displayed. For additional loan records, access NSLDS. All fields are display-only.

as of
The date (mm/dd/yyyy) the applicable loan information was effective.

Begin Date
The beginning date (mm/dd/yyyy) of the applicable loan.

CTC Cd
A code indicating whether a National Student Loan Data System (NSLDS) contact was performed (Y) or not (N or blank).

CTC Type
A code indicating the type of National Student Loan Data System (NSLDS) contact performed. If blank, none was performed.

End Date
The ending date (mm/dd/yyyy) of the applicable loan.

Extra Unsub
A code identifying the student's eligibility for increased unsubsidized loan amounts. Students are eligible if they are enrolled full-time in a health professions discipline and if the discipline was previously eligible under the HEAL program. Any dependent student is eligible for increased unsubsidized loan amounts if the student's parent has been denied a PLUS loan. Valid codes are:
- P (PLUS denial)

- H (Health Professional)
- B (Both)
- N (Neither)

GA Cd

A code indicating the guaranty agency for the loan, if one exists.

Grade Lvl

The student's grade level for the current year.

Loan Amt

The total dollar amount of the applicable loan.

Out. Bal

The total dollar amount remaining for the applicable loan.

School Code

A code indicating the original school for which the applicable loan was taken.

Status Code

A code identifying the type of the applicable loan. The description of this code appears on the line just above the field.

Commands

For a list of the commands that you can execute from the FAFSA form of the Student Need Analysis screens, see *Student Need Analysis Screen Commands* in this section.

Student Need Analysis Screens - IM Form

Purpose

The IM (Institutional Methodology) form of the Student Need Analysis screens enables you to capture, review, or update information on a student's IM form. This form stores the same data as the FAFSA (Free Application for Federal Student Aid) form in the same format in addition to several other fields that are used only for the IM methodology.

> **Note:**
> - If your institution does not modify the need analysis tables, the system will perform calculations using the Federal Methodology formulas and the results will be the same as EFM or EFMS.
> - The complete IM form occupies five screens. An example of each screen and a description of the fields on each follows in the order in which they appear.

Access

Access the IM form of the Student Need Analysis screens from one of the following locations on the CX menu:
- Student Need Analysis
- Financial Aid Entry

Note: For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

Follow these steps to access the IM form from Student Need Analysis:
1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.
2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.
3. Enter **IM** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of a blank IM form appears.
4. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**. The first page of the IM form appears displaying information from the student's FM (Federal Methodology) record, if one exists.

Follow these steps to access the IM form from Financial Aid Entry:
1. From the Financial Aid: Student Processing menu, select the menu option **Financial Aid Entry**. Select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the parameters, if desired, and select **Finish**. The Financial Aid Entry screen appears.
3. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**.
4. Select **Need** from the Commands menu. The Need Analysis Information screen appears.
5. Select **Need Form** from the Commands menu. The first page of the FAFSA Form of the Student Need Analysis screens appears displaying the student's data.
6. Select **Initialize**. The Need Analysis Program Parameters screen appears.
7. Enter **IM** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of the IM form appears displaying information from the student's FM (Federal Methodology) record, if one exists.

Segments

Each Student Need Analysis screen of the IM form is divided into two segments:

- The Header segment provides information about the selected student and the financial aid award year and record to which the information relates.
- The Sections segment provides information from the student's IM Need Analysis Form record (naf_rec), if one exists.

Example (Step One)

Following is an example of the IM form (Step One) of the Student Need Analysis screens.

```
┌─ Student Need Analysis ───────────────────────────────────────── _ ⊡ ✕ ┐
│ File  Edit  Commands  Help                                               │
│        ┌──┬──┬──┬──┬──┬──┬────┐                                  FANEED  │
│        │ ⊗ │ ✳ │ ◪ │ ⟨⟨ │ ▶ │ ◀ │EXIT│                                  │
│        └──┴──┴──┴──┴──┴──┴────┘                                          │
│ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102   FM  │
│ Rev Date:  12/15/2000        Allow Tape Update: Y                        │
│ Export:                      Transaction Number: 00       DRN: 2384      │
│                                                                          │
│ STEP ONE: For 1-35, Leave blank any questions that do not apply to the student.- │
│ 1-3. Name (Last, First, Middle).......... Bridges         , Nash         │
│   4. Your Permanent Mailing Address...... 111 Eagle Cliffs Lane          │
│ 5-7. City, State, Zip.................... Sacramento         CA   95814   │
│   8. SSN.................... 956-34-2195  19. Winter 2002 Enrollment.......... 1 │
│   9. Date of Birth.......... 06/23/1982   20. Spring 2002 Enrollment.......... 1 │
│  10. Home Phone Number.... 916-528-6957   21. Summer 2002 Enrollment.......... 5 │
│  11. DL Number.... CA159873265KJB         22. Father's Highest Grade Level.... 3 │
│  12. Driver's License State Code.... CA   23. Mother's Highest Grade Level.... 3 │
│  13. Citizenship.................... 1    24. State of Legal Residence....... CA │
│  14. Alien Regist No........A             25. Resident before 1/1/1996?....... Y │
│  15. Marital Status................. S    26. Resident of St Since....... 061982 │
│  16. Date of Marital Status.....          27. Male............................. Y │
│  17. Summer 2001 Enrollment.......... 5   28. Register for Selective Service.. N │
│  18. Fall 2001 Enrollment............ 1   29. Degree/Cert Code................. 1 │
│                                           30. Grade in College in 2001-2002... 1 │
│ ┌──────────────────────────────────────────────────────────────────────┐ │
│ └──────────────────────────────────────────────────────────────────────┘ │
└──────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Step One)

The following list describes the fields that appear on the Header segment of the IM form (Step One).

Allow Tape Update

Y(es) or N(o) indicating whether the need analysis tape data should overwrite the need analysis information. This field is active in Update mode.

DRN

The student's data release number (formerly the PIN, or personal identification number). This field is active in Update mode.

Export

A code identifying if and how the record is to be sent by EDE (Electronic Data Exchange) to the Department of Education. This field is active in Update mode. Valid codes are:
- C (Send as a correction)
- N (Do not send)
- O (Send as an original)

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM). This is a display-only field.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID
The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

Rev Date
The date (mm/dd/yyyy) the need analysis information was entered or last revised. This field is active in Update mode.

SSN
The student's social security number (e.g., 956-34-2195). This is a display-only field.

Transaction Number
The Student Aid Report (SAR) or Institutional Student Information Report (ISIR) transaction number (e.g., 00). This field is active in Update mode.

Yr
The financial aid year to which the student's FAFSA Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Step One)

The following list describes the fields that appear on the Sections segment of the IM form (Step One).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All fields are active in Update mode.

1-3. Name (Last, First, Middle)
The student's full name (e.g., Bridges, Nash). This consists of three fields in the following order: last, first, middle.

4. Your Permanent Mailing Address
The student's permanent street address (e.g., 111 Eagle Cliffs Lane).

5-7. City, State, Zip
The city, state, and Zip Code of the student's permanent address. This consists of three fields in the following order: city, state, and Zip Code (e.g., Sacramento, CA 95814).

8. SSN
The student's social security number (e.g., 956-34-2195).

9. Date of Birth
The student's birthday (e.g., 06/23/1982).

10. Home Phone Number

The student's permanent home telephone number (e.g., 916-528-6957).

11. DL Number
The student's driver's license number (e.g., CA159873265KJB).

12. Driver's License State Code
The State code for the state from which the student's driver's license was issued (e.g., CA for California).

13. Citizenship
A code identifying the student's citizenship status. Valid codes are:
- 1 (US citizen or US national)
- 2 (Eligible non-citizen)
- 3 (Not eligible)

14. Alien Regist No
If the student is other than a US citizen or US national, the student's nine-digit alien registration number.

15. Marital Status
A code identifying the student's marital status. Valid codes are:
- M (Married)
- S (Single/Divorced/Widowed)
- T (Separated)

16. Date of Marital Status
The date (mm/yyyy) the student's marital status became effective.

17. Summer 200 *Y* Enrollment
A code identifying the student's enrollment status for the current summer session. The year (200 *Y*) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

18. Fall 200 *Y* Enrollment
A code identifying the student's enrollment status for the current fall session. The year (200 *Y*) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

19. Winter 200 *Y* Enrollment
A code identifying the student's enrollment status for the current winter session. The year (200 *Y*) will change to indicate the current year. Valid codes are:
- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

20. Spring 200 *Y* Enrollment

A code identifying the student's enrollment status for the current spring session. The year (200 Y) will change to indicate the current year. Valid codes are:

- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

21. Summer 200 Y Enrollment

A code identifying the student's enrollment status for the next summer session. The year (200 Y) will change to indicate the next year. Valid codes are:

- 1 (Full-time)
- 2 (3/4-time)
- 3 (Half-time)
- 4 (Less than half-time)
- 5 (Not attending)
- Blank (No response)

22. Father's Highest Grade Level

A code identifying the highest grade level that the student's father achieved. Valid codes are:

- 1 (Middle school/Jr. high)
- 2 (High school)
- 3 (College or beyond)
- 4 (Other/Unknown)
- Blank (No response)

23. Mother's Highest Grade Level

A code identifying the highest grade level that the student's mother achieved. Valid codes are:

- 1 (Middle school/Jr. high)
- 2 (High school)
- 3 (College or beyond)
- 4 (Other/Unknown)
- Blank (No response)

24. State of Legal Residence

The State code for the student's state of legal residence (e.g., CA for California).

25. Resident before 1/1/1996?

Y(es) or N(o) indicating whether the student has been a resident of his/her state before 1/1/1996.

26. Resident of St Since

The date (mmyyyy) the student's parents became a resident of the state of legal residence.

27. Male

Y(es) or N(o) indicating whether the student is a male.

28. Register for Selective Service

Y(es) or N(o) indicating whether the student wishes to register for selective service.

29. Degree/Cert Code

A code identifying the student's degree or certification. Valid codes are:

- 1 (First bachelor's degree)
- 2 (Second bachelor's degree)
- 3 (Associates Degree, occupational or technical program)

- 4 (Associates Degree, general education or transfer program)
- 5 (Certificate or Diploma for completing an occupational, technical, or educational program of less than two years)
- 6 (Certificate or diploma for completing an occupational, technical, or educational program of at least two years)
- 7 (Teaching Credential Program, non-degree program)
- 8 (Graduate or professional degree)
- 9 (Other/Undecided)
- Blank (No response)

30. **Grade in College in 200 Y-200 Y**

A code identifying the student's grade level for the current year. The year (200 Y-200 Y) will change to indicate the current year. Valid codes are:
- 1 (1st year, never attended)
- 2 (1st year, attended before)
- 3 (2nd year, sophomore)
- 4 (3rd year, junior)
- 5 (4th year, senior)
- 6 (5th year or more, undergraduate)
- 7 (Graduate/professional or beyond)
- Blank (No response)

Example (Step One Continued and Step Two)

Following is an example of the IM form (Step One Continued, and Step Two) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────────┐
│ ≡ Student Need Analysis                                            _ ⊡ ☒     │
│  File  Edit  Commands  Help                                                  │
├─────────────────────────────────────────────────────────────────────────────┤
│          ┌──┬──┬──┬──┬──┬──┬──┐                                   FANEED     │
│          │ ⚲│ ✎│ ✐│ ▣│ ▶│ ◀│EXIT│                                           │
│          └──┴──┴──┴──┴──┴──┴──┘                                             │
│ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102   FM     │
│ STEP ONE Continued... ─────────────────                                      │
│ 31. Diploma/GED Before Enrollment... Y  33. Interest in Student Loans....... Y│
│ 32. First Degree by July 1, 2001.... N  34. Interest in Work-Study.......... Y│
│                                         35. Convicted of drug offense....... E│
│ STEP TWO:(36-51) Report student (and spouse's) income and assets.─────────── │
│                                         46. 2000 Worksheet C Exclusions       │
│ 36. Student filed 2000 Tax Return... 3     Student's Med/Dental Exp        0  │
│ 37. Student's Type of Tax Return....       Elem/Secondary Tuition          0  │
│ 38. Eligible for 1040A or 1040EZ....       Misc Adjustments                0  │
│ 39. Adjusted Gross Income.....          47. Investments Net Worth.....        │
│ 40. US Income Tax Paid........          48. Business/Farm Net Worth...        │
│     Estimated US Income Tax...     0       Student's Home Equity          0   │
│ 41. Exemptions Claimed.............        Misc Student Adjustments       0   │
│ 42. Student's Work Income.....             Other Misc                     0   │
│ 43. Spouse's Work Income......          49. Cash, Savings, Checking...        │
│ 44. 2000 Worksheet A total....          50. Months VA Benefits Received.....  │
│ 45. 2000 Worksheet B total....          51. Monthly VA Benefits............   │
│                                                                              │
│  ┌────────────────────────────────────────────────────────────────────────┐ │
│  └────────────────────────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Step One Continued and Step Two)

The following list describes the fields that appear on the Header segment of the IM form (Step One Continued, and Step Two).

Note: All fields are display-only. These fields appear on each of the subsequent screens and do not change.

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM).

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID

The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

SSN

The student's social security number (e.g., 956-34-2195). This is a display-only field.

Yr

The financial aid year to which the student's FAFSA Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Step One Continued)

The following list describes the fields that appear on the Sections segment of the IM form (Step One Continued).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All fields are active in Update mode.

31. Diploma/GED Before Enrollment

Y(es) or N(o) indicating whether the student will receive his/her high school diploma or GED before he/she enrolls in your institution.

32. First degree by July 1, 200_Y_

Y(es) or N(o) indicating whether the student will have a bachelor's degree by July 1, 200_Y_. The year (200_Y_) will change to indicate the current year.

33. Interest in Student Loans

Y(es), N(o), or blank indicating whether the student is interested in receiving student loans.

34. Interest in Work-Study

Y(es), N(o), or blank indicating whether the student is interested in receiving work-study aid.

35. Convicted of drug offense

A code indicating whether the student has ever been convicted of a drug offense. Valid codes are:
- E (Eligible for aid, not convicted)
- I (Ineligible for aid, or don't know)

> **Note:** This option can be corrected.

- P (Partially eligible for aid, will become eligible)
- Blank (No response)

Fields on the Sections Segment, (Step Two)

The following list describes the fields that appear on the Sections segment of the IM form (Step Two).

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

36. Student filed 2000 Tax Return
A code identifying the student's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

37. Student's Type of Tax Return
A code identifying the type of federal tax form the student filed the previous year. The year (199Y) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual*.

38. Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the student is eligible to file for a 1040A/1040EZ.

39. Adjusted Gross Income
The total dollar amount of the student's adjusted gross income.

40. US Income Tax Paid
The total dollar amount of US income tax the student paid.

(40.) Estimated US Income Tax
The estimated US income tax the student paid the previous year. This is a display-only field that is calculated by CX.

41. Exemptions Claimed
The total number of exemptions the student claimed on his/her federal tax form.

42. Student's Work Income
The total dollar amount of income the student earned.

43. Spouse's Work Income
The total dollar amount of income the student's spouse earned.

44. 200Y Worksheet A Total
The total dollar amount of the student's earned income credits from Worksheet A. The year (200Y) will change to indicate the previous year.

45. 200Y Worksheet B Total

The total dollar amount of the student's untaxed income from Worksheet B. The year (200 Y) will change to indicate the previous year.

46. 200 Y Worksheet C Exclusions
The total dollar amount of the student's Worksheet C exclusions for the previous year. The year (200 Y) will change to indicate the previous year.

47. Investments Net Worth
The total dollar amount of the net worth of the student's investments.

48. Business/Farm Net Worth
The total dollar amount of the net worth of the student's business and/or farm.

49. Cash, Savings, Checking
The total dollar amount of the student's cash, savings, and checking accounts.

50. Months VA Benefits Received
The number of months (01 through 12) the student receives veteran education benefits, or leave blank if none received.

51. Monthly VA Benefits
The total dollar amount of veteran education benefits the student receives per month.

Elem/Secondary Tuition `(User defined Student Income and Parent Income Fields)`
This consists of two fields: The total dollar amount the student paid for elementary or secondary tuition the previous year (under 200 Y STUDENT INCOME), and the total dollar amount the student's parents paid for elementary or secondary tuition the previous year (under 200 Y PARENTS' INCOME). The year (200 Y) will change to indicate the previous year.

> **Note:** You can customize the income fields (under 200 Y STUDENT INCOME and 200 Y PARENTS' INCOME) to reflect any criteria that your institution requires. Use Table Maintenance to define up to three parent income fields and three student income fields. For more information, see *Setting Up The Institutional Methodology* section in this manual.

Misc Adjustments `(User defined Student Income and Parent Income Fields)`
This consists of two fields: The total dollar amount of other adjustments made to the student's income the previous year (under 199 Y STUDENT INCOME), and the total dollar amount of other adjustments made to the student's parents' income the previous year (under 199 Y PARENTS' INCOME). The year (199 Y) will change to indicate the previous year.

Misc Student Adjustments `(User defined Student Asset Field)`
The total dollar amount of other adjustments made to the student's assets the previous year.

Other Misc `(User defined Student and Parent Asset Fields)`
This consists of two fields: The total dollar amount of other assets for the student for the previous year (under STUDENT ASSETS), and the total dollar amount of other assets for the student's parents for the previous year (under PARENT ASSETS).

Student's Med/Dental Exp `(User defined Student Income and Parent Income Fields)`
The total dollar amount the student paid for medical and/or dental expenses the previous year.

Student's Home Equity `(User defined Student Asset Field)`

The total dollar value of the equity in a student's home.

Example (Steps Three and Four)

Following is an example of the IM form (Steps Three and Four) the Student Need Analysis screens.

```
Student Need Analysis                                    _ 8 X
File  Edit  Commands  Help

       Q  *  ●  D  ▶  ◀  EXIT                           FANEED

ID: 5061574  Bridges, Nash              SSN: 956-34-2195 Yr: 0102  FM
STEP THREE: If "Yes" to any question (52-58) skip to STEP FIVE.-─────
52. Born Before 1/1/1978.......... N   55. Have children to support.......... N
53. Graduate/Professional Student. N   56. Dependents Other Than Spouse/child N
54. Are You Married............... N   57. Orphan or Ward of the Court....... N
                                       58. Veteran of US Armed Forces........ N
STEP FOUR: Parent Information. Complete only if all of (52-58) is "No".-──────
59. Parent's Marital Status......... M   72. Eligible for 1040A or 1040EZ.....
60. Father Soc. Security.. 296-83-5042   73. Adjusted Gross Income......    40000
61. Father Last Name... BRIDGES          74. US Income Tax Paid.........     1125
62. Mother Soc. Security.. 301-98-3574       Estimated US Income Tax....        0
63. Mother Last Name... BRIDGES          75. Exemptions Claimed.............. 03
64. Number of Family Members....... 03   76. Father's Work Income.......    40000
65. # in College excluding parents.. 1   77. Mother's Work Income.......      000
66. State of Legal Residence....... CA   78. 2000 Worksheet A total.....
67. Resident before 1/1/1996?....... Y   79. 2000 Worksheet B total.....
68. Resident of St Since....... 041979   80. 2000 Worksheet C Exclusions
69. Age of Older Parent............ 52       Parents' Med/Dental Exp        0
70. Parent filed 2000 Tax Return.... 1       Elem/Secondary Tuition         0
71. Parent's Type of Tax Return..... 2       Misc Adjustments               0
```

Fields on the Header Segment (Steps Three and Four)

For a list of fields that appear on the Header segment of the IM form (Steps Three and Four) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Step Three)

The following list describes the fields that appear on the Sections segment of the IM form (Step Three). If you answer "yes" to any question (54-59), ignore the questions in step four and continue at step five.

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All dollar fields are in whole dollars. All fields are active in Update mode.

52. Born Before 1/1/19 *YY*

Y(es) or N(o) indicating whether the student is at least 23 years old. The year (*YY*) changes annually to indicate 23 years.

53. Graduate/Professional Student

Y(es) or N(o) indicating whether the student is a graduate or professional student.

54. Are You Married

Y(es) or N(o) indicating whether the student is married.

55. Have Children To Support

Y(es) or N(o) indicating whether the student is responsible for children.

56. Dependents Other Than Spouse/Child
Y(es) or N(o) indicating whether the student is responsible for dependents other than a spouse or child.

57. Orphan or Ward of the Court
Y(es) or N(o) indicating whether the student is an orphan or ward of the court.

58. Veteran of US Armed Forces
Y(es) or N(o) indicating whether the student is a veteran.

Fields on the Sections Segment (Step Four)

The following list describes the fields that appear on the Sections segment of the IM form (Step Four). If you answer "no" to all questions (54-59) in step three, complete the questions in step four and ignore step five.

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

59. Parent's Marital Status
A code identifying the student's parents' marital status. Valid codes are:
- D (Divorced/Separated)
- M (Married)
- S (Single)
- W (Widow(er))
- Blank (No response)

60. Father SSN
The social security number of the student's father (e.g., 296-83-5042).

61. Father Last Name
The Last Name of the student's father (e.g., BRIDGES).

62. Mother Soc. Security
The social security number of the student's mother (e.g., 301-98-3574).

63. Mother Last Name
The Last Name of the student's mother (e.g., BRIDGES).

64. Number of Family Members
The total number of family members the student's parents support for the financial aid year (e.g., 03).

65. # in College Excluding Parents
The number of family members in college (excluding parents) the student's parents support for the financial aid year (e.g., 1).

66. State of Legal Residence
The State code identifying the student's parents' state of legal residence (e.g., CA for California).

67. Resident before 1/1/1996?
Y(es) or N(o) indicating whether the student's parents have been residents of their state before 1/1/1996.

68. Resident of St Since

The date (mmyyyy) the student's parents became a resident of the state of legal residence.

69. Age of Older Parent
The age (in whole years) of the student's older parent (e.g., 52).

70. Parent Filed 2000 Tax Return
A code identifying the parent's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

71. Parent's Type of Tax Return
A code identifying the type of federal tax form the parent filed the previous year. The year (200*Y*) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual*.

72. Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the parent is eligible to file for a 1040A/1040EZ.

73. Adjusted Gross Income
The total dollar amount of the parent's adjusted gross income (e.g., 40000).

74. US Income Tax Paid
The total dollar amount of US income tax the parent paid (e.g., 1125).

(74.) Estimated US Income Tax
The estimated US income tax the parent paid the previous year. This is a display-only field that is calculated by CX.

75. Exemptions Claimed
The total number of exemptions the parent claimed on his/her federal tax form (e.g., 03).

76. Father's Work Income
The total dollar amount of income the student's father earned (e.g., 40000).

77. Mother's Work Income
The total dollar amount of income the student's mother earned (e.g., 000).

78. 200*Y* Worksheet A Total
The total dollar amount of earned income credit for the parent from Worksheet A . The year (200*Y*) will change to indicate the previous year.

79. 200*Y* Worksheet B Total
The total dollar amount of the parent's untaxed income from Worksheet B. The year (200*Y*) will change to indicate the previous year.

80. 200*Y* Worksheet C Exclusions
The total dollar amount of the parent's Worksheet C exclusions for the previous year. The year (2000*Y*) will change to indicate the previous year.

Elem/Secondary Tuition (`User defined Student Income and Parent Income Fields`)
This consists of two fields: The total dollar amount the student paid for elementary or secondary tuition the previous year (under 200*Y* STUDENT INCOME), and the total dollar amount the student's parents paid for elementary or secondary tuition the previous year

(under 200 *Y* PARENTS' INCOME). The year (200 *Y*) will change to indicate the previous year.

> **Note:** You can customize the income fields (under 200 *Y* STUDENT INCOME and 200 *Y* PARENTS' INCOME) to reflect any criteria that your institution requires. Use Table Maintenance to define up to three parent income fields and three student income fields. For more information, see *Setting Up The Institutional Methodology* section in this manual.

Misc Adjustments `(User defined Student Income and Parent Income Fields)`
This consists of two fields: The total dollar amount of other adjustments made to the student's income the previous year (under 200 *Y* STUDENT INCOME), and the total dollar amount of other adjustments made to the student's parents' income the previous year (under 199 *Y* PARENTS' INCOME). The year (199 *Y*) will change to indicate the previous year.

Parents' Med/Dental Exp `(User defined Student Income and Parent Income Fields)`
The total dollar amount the student's parents paid for medical and/or dental expenses the previous year.

Example (Step Four Continued, Steps Five, Six, and Seven)

Following is an example of the IM form (Step Four Continued, Steps Five, Six, and Seven) the Student Need Analysis screens.

```
╒═ Student Need Analysis                                        _ ▢ ✕
 File  Edit  Commands  Help
                                                                    FANEED
        ⎙ ╱ ◖ ⧉ ▶ ◀ EXIT
 ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102  FM
 STEP FOUR: Continued... ─────────────────────────────────
 81. Investments Net Worth.....
 82. Business/Farm Net Worth...
       Parents' Home Equity          0
       Misc Parent Adjustments       0
       Other Misc                    0
 83. Cash,Savings,Checking.....
 STEP FIVE: Complete the section only if one of (54-59) is "Yes".─────
 84. Number of Family Members........    85. Number in College...............
 STEP SIX: Schools───────────────────────────────────────────
 86. College 1. 010025  87. House 1.. 1  88. College 2. 010740  89. House 2.. 1
 90. College 3.         91. House 3..    92. College 4.          93. House 4..
 94. College 5.         95. House 5..    96. College 6.          97. House 6..
 STEP SEVEN: Signatures and Dates───────────────────────────
   98. Date Completed... 01/05/2001 100. Preparer's SSN............ 452-83-6471
   99. Signed by................. B  101. Preparer's EIN.............. 254632147
                                     102. Preparer's Signature............... Y
```

Fields on the Header Segment (Step Four Continued, Steps Five, Six, and Seven)

For a list of fields that appear on the Header segment of the IM form (Step Four Continued, Steps Five, Six, and Seven) and their descriptions, see *Fields on the Header Segment (Step One Continued)*.

Fields on the Sections Segment (Step Four Continued)

The following list describes the fields that appear on the Sections segment of the IM form (Step Four Continued).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All fields are active in Update mode.

81. Investments Net Worth
The total dollar amount of the net worth of the parent's investments.

82. Business/Farm Net Worth
The total dollar amount of the net worth of the parent's business and/or farm.

83. Cash, Savings, Checking
The total dollar amount of the parent's cash, savings, and checking accounts.

Misc Parent Adjustments `(User defined Parent Asset Field)`
The total dollar amount of other adjustments made to the student's parents' assets the previous year.

Parents' Home Equity `(User defined Parent Asset Field)`
The total dollar value of the equity in the parents' home.

Other Misc `(User defined Student and Parent Asset Fields)`
This consists of two fields: The total dollar amount of other assets for the student for the previous year (under STUDENT ASSETS), and the total dollar amount of other assets for the student's parents for the previous year (under PARENT ASSETS).

Fields on the Sections Segment (Step Five)

The following list describes the fields that appear on the Sections segment of the IM form (Step Five). Complete this section only if you answer "yes" to any of the questions (54-59) in step three and ignore step four.

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars. All fields are active in Update mode.

84. Number of Family Members
The total number of family members the student's parents support for the financial aid year.

85. Number in College
The number of family members in college (excluding parents) the student's parents support for the financial aid year.

Fields on the Sections Segment (Step Six)

The following list describes the fields that appear on the Sections segment of the IM form (Step Six).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its

accompanying pamphlet. Your institution should have a copy of these publications for reference.

- All fields are active in Update mode.

86. College 1
A code identifying the first college the student plans to attend (e.g., 010025).

87. House 1
A code identifying the student's housing at the first college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

88. College 2
A code identifying the second college the student plans to attend (e.g., 010740).

89. House 2
A code identifying the student's housing at the second college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

90. College 3
A code identifying the third college the student plans to attend.

91. House 3
A code identifying the student's housing at the third college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

92. College 4
A code identifying the fourth college the student plans to attend.

93. House 4
A code identifying the student's housing at the fourth college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

94. College 5
A code identifying the fifth college the student plans to attend.

95. House 5
A code identifying the student's housing at the fifth college. Valid codes are:
- 1 (On campus)
- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

96. College 6
A code identifying the sixth college the student plans to attend.

97. House 6
A code identifying the student's housing at the sixth college. Valid codes are:
- 1 (On campus)

- 2 (Off campus)
- 3 (Parents)
- Blank (No response)

Fields on the Sections Segment (Step Seven)

The following list describes the fields that appear on the Sections segment of the IM form (Step Seven).

Note:
- The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All fields are active in Update mode.

98. Date Completed
The date (mm/dd/yyyy) the form was completed.

99. Signed by
A code indicating who signed the application. Valid codes are:
- A (Signed by applicant)
- B (Applicant and parent)
- P (Parent only)
- Blank (No signature)

100. Preparer's SSN
The preparer's social security number (e.g., 452-83-6471).

101. Preparer's EIN
The preparer's employer identification number (e.g., 254632147).

102. Preparer's Signature
A code indicating whether the preparer signed the form (Y) or not (blank).

Example (Section A and Office Information)

Following is an example of the IM form (Section A and Office Information) the Student Need Analysis screens.

```
 Student Need Analysis                                              _ 8 X
File  Edit  Commands  Help
        Q  *\  ▰  ◫  ▶  ◀  EXIT                                      FANEED

ID: 5061574  Bridges, Nash           SSN: 956-34-2195  Yr: 0102  FM

SECTION A: AUXILIARY INFORMATION ─────────────────────────────
Orig. SSN....            Name Code...........
OFFICE INFORMATION ──────────────────────────────────────────
DRN.......................        Reject Override Codes:
Primary Formula Type..........    B:   N:   W:
Secondary Formula Type........
Processed Date.......             Assumption Override Codes:
Application Source............    1:   2:   3:   4:   5:   6:
Transaction Type..............
FAA Inst Number..........         Dependency Override...............
```
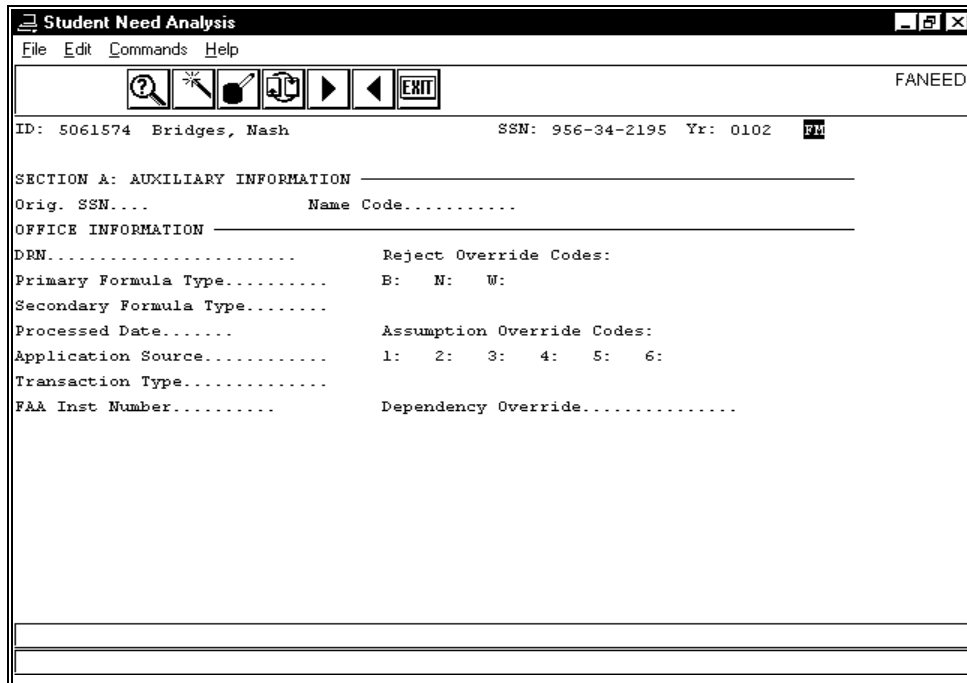
Fields on the Header Segment (Section A and Office Information)

For a list of fields that appear on the Header segment of the IM form (Section A and Office Information) and their descriptions, see *Fields on the Header Segment (Step One Continued).*

Fields on the Sections Segment (Section A: Auxiliary Information)

The following list describes the fields that appear on the Sections segment of the IM form (Auxiliary Information). All fields are display-only.

Name Code
The first two letters of the student's last name.

Orig SSN
The student's original social security number (e.g., 123456789) as initially processed by the CPS.

Fields on the Sections Segment (Office Information)

The following list describes the fields that appear on the Sections segment of the IM form (Office Information).

Application Source
A code identifying the organization that entered the original application. A display-only field, valid codes are:
- 1 (Electronic application)
- 2 (Electronic renewal)
- 4 (Free Application for Federal Student Aid (FAFSA) Express)
- 5 (American College Testing program (ACT))
- 6 (FAFSA on the Web/Renewal App on the Web)
- 7 (National Communications System (NCS))

Assumption Override Codes

Y(es) or N(o) indicating whether you want to override the associated assumption. Consisting of six fields, the assumptions are listed in order of the fields with which they are associated. These fields are active in Update mode.

- 1 (Parents' number in college assumed to be 1; used when the parents' Number of Family Members and the Number in College do not equal, and the Number in College is 7 or more.)
- 2 (Parents' AGI equals the sum of the Father's Work Income and the Mother's Work Income.)
- 3 (Independent student's Number in College assumed to be 1.)
- 4 (Student's AGI equals the sum of the Student's Work Income and the Spouse's Work Income.)
- 5 (Parent's Social Security Benefits assumed to be 0.)
- 6 (Dependent student's Social Security Benefits assumed to be 0.)

Dependency Override
A code indicating whether this student's status should be set to that of an independent student (I), overriding any existing value, or not (blank). This field is active in Update mode.

> **Note:** You must enter your FAA institution number if you enter (I).

DRN
The student's data release number (formerly the PIN, or personal identification number). This is a display-only field.

FAA Inst Number
Optional - the FAA Institution number.

Primary Formula Type
A code identifying the type of needs test used to calculate the primary EFC on the application. A display-only field, valid codes are:

- 1 (Full needs test - dependent)
- 2 (Full needs test - independent without dependents other than a spouse)
- 3 (Full needs test - independent with dependents other than a spouse)
- 4 (Simplified needs test - dependent)
- 5 (Simplified needs test - independent without dependents other than a spouse)
- 6 (Simplified needs test - independent with dependents other than a spouse)
- Blank (Not Calculated)

Processed Date
The date (mm/dd/yyyy) the CPS processed the application. This is a display-only field.

Reject Override Codes
A code indicating whether you want to override the associated reject (Y) or not (N). Consisting of three fields, the rejects are listed in order of the fields with which they are associated. These fields are active in Update mode.

- B (Independent status in question because of student's age)
- N (Student's first or last name blank)
- W (Parents' or independent student's number of family members in question because total is greater than 15)

Secondary Formula Type
A code identifying the type of needs test used to calculate the secondary EFC on the application. A display-only field, valid codes are:

- 1 (Full needs test - dependent)
- 2 (Full needs test - independent without dependents other than a spouse)
- 3 (Full needs test - independent with dependents other than a spouse)
- 4 (Simplified needs test - dependent)
- 5 (Simplified needs test - independent without dependents other than a spouse)

- 6 (Simplified needs test - independent with dependents other than a spouse)
- Blank (Not Calculated)

Transaction Type

A code identifying the type of transaction that generated the Institutional Student Information Report (ISIR). A display-only field, valid codes are:

- 0 (Electronic initial application)
- 1 (Automatic ISIR generated)
- 2 (Electronic correction)
- 3 (Electronic duplicate request)
- 5 (Electronic renewal application)

Student Need Analysis Screens - SIM Form

Purpose

The SIM (Simulation Form) form of the Student Need Analysis screens enables you to perform a quick Expected Family Contribution (EFC) calculation for a student. Use the SIM form when you want to calculate the EFC for a student who does not appear on the CX database, or if you want an approximate EFC for a student

> **Note:**
> - Use of the SIM screens does not result in completely accurate calculations because the screens do not contain all the information required for accuracy. Use the FAFSA screens and the SIM methodology to perform estimated EFC calculations.
> - The complete SIM form occupies two screens. An example of each screen and a description of the fields on each follows in the order in which they appear.

Access

Access the SIM form of the Student Need Analysis screens from one of the following locations on the CX menu:
- Student Need Analysis
- Financial Aid Entry

> **Note:** For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

Follow these steps to access the SIM form from Student Need Analysis:
1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.
2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.
3. Enter **SIM** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of a blank SIM form appears.
4. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**. The first page of the SIM form appears displaying information from the student's FM (Federal Methodology) record, if one exists.

Follow these steps to access the FAFSA form from Financial Aid Entry:
1. From the Financial Aid: Student Processing menu, select the menu option **Financial Aid Entry**. Select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the parameters, if desired, and select **Finish**. The Financial Aid Entry screen appears.
3. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**.
4. Select **Need** from the Commands menu. The Need Analysis Information screen appears.
5. Select **Need Form** from the Commands menu. The first page of the FAFSA Form of the Student Need Analysis screens appears displaying the student's data.
6. Select **Initialize**. The Need Analysis Program Parameters screen appears.
7. Enter **SIM** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of the SIM form appears displaying information from the student's FM (Federal Methodology) record, if one exists.

Segments

Each Student Need Analysis screen of the SIM form is divided into two segments:

- The Header segment provides information about the selected student and the financial aid award year and record to which the information relates.
- The Sections segment provides information from the student's SIM Need Analysis Form record (naf_rec), if one exists.

Example (Student Information)

Following is an example of the SIM form (Student Information) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────┐
│ ☰ Student Need Analysis                                    _ 🗗 ✖ │
│  File  Edit  Commands  Help                                         │
│        ┌──────────────────────────────────┐                        │
│        │ ⓠ  ⌇  ▱  ▣  ▶  ◀  ⌷EXIT│              FANEED   │
│ ID: 5061574  Bridges, Nash                    Yr: 0102    ▓▓        │
│ ───────────────────── STUDENT INFORMATION ─────────────────────    │
│ Dependency Status................ D     Grade in College in 2001-2002...... 1 │
│ Date of Birth............ 06/23/1982    Monthly VA Benefits...............  │
│ State of Legal Residence......... CA    Months VA Benefits Received.......  │
│ Citizenship...................... 1     Number of Family Members..........  │
│ Marital Status................... S     Number in College.................  │
│                                                                     │
│ Student filed 2000 Tax Return..... 3                                │
│ Type of 2000 Tax Form.............      Total from 2000 Worksheet A..      │
│ Eligible for 1040A or 1040EZ......      Total from 2000 Worksheet B..      │
│ Exemptions Claimed................      2000 Worksheet C Exclusions..      │
│ Adjusted Gross Income.......                                        │
│ US Income Tax Paid..........            Investments Net Worth.......       │
│ Estimated US Income Tax.....       0    Business and Farm Net Worth.       │
│ Student's Work Income.......            Cash, Savings, Checking.....       │
│ Spouse's Work Income........                                        │
└─────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Student Information)

The following list describes the fields that appear on the Header segment of the SIM form (Student Information).

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM). This is a display-only field. To select another methodology, select **Method**.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS, EFM, FMS, or FM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID
The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

Yr

The financial aid year to which the student's SIM Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Student Information)

The following list describes the fields that appear on the Sections segment of the SIM form (Student Information).

> **Note:** All fields are active in Update mode, unless otherwise noted.

200*Y* Worksheet C Exclusions
The total dollar amount of the student's Worksheet B exclusions for the previous year. The year (200*Y*) will change to indicate the previous year.

Adjusted Gross Income
The total dollar amount of the student's adjusted gross income.

Business/Farm Net Worth
The total dollar amount of the net worth of the student's business and/or farm.

Cash, Savings, Checking
The total dollar amount of the student's cash, savings, and checking accounts.

Citizenship
A code identifying the student's citizenship status. Valid codes are:
- 1 (US citizen or US national)
- 2 (Eligible non-citizen)
- 3 (Not eligible)

Date of Birth
The student's birthday (e.g., 06/23/1982).

Dependency Status
A code identifying the student's dependency status. Valid codes are:
- I (Independent student)
- D (Dependent student)

Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the student is eligible to file for a 1040A/1040EZ.

Estimated US Income Tax
The estimated US income tax the student paid. This is a display-only field that is calculated by CX.

Exemptions Claimed
The total number of exemptions the student claimed on his/her federal tax form.

Grade in College in 200*Y*-200*Y*
A code identifying the student's grade level for the current year. The year (200*Y*-200*Y*) will change to indicate the current year. Valid codes are:
- 1 (1st year, never attended)
- 2 (1st year, attended before)
- 3 (2nd year, sophomore)
- 4 (3rd year, junior)
- 5 (4th year, senior)
- 6 (5th year or more, undergraduate)
- 7 (Graduate/professional or beyond)
- Blank (No response)

Investments Net Worth

The total dollar amount of the net worth of the student's investments.

Marital Status

A code identifying the student's marital status. Valid codes are:
- M (Married)
- S (Single/Divorced/Widowed)
- T (Separated)

Monthly VA Benefits

The total dollar amount of veteran education benefits the student receives per month.

Months VA Benefits Received

The number of months (01 through 12) the student receives veteran education benefits, or leave blank if not received.

Number in College

The number of family members in college the student supports for the financial aid year.

Number of Family Members

The total number of family members the student supports for the financial aid year.

Spouse's Work Income

The total dollar amount of income the student's spouse earned.

State of Legal Residence

The State code for the student's state of legal residence (e.g., CA for California).

Student Filed 2000 Tax Return

A code identifying the student's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

Student's Work Income

The total dollar amount of income the student earned.

Total from 200*Y* Worksheet A

The total dollar amount of the student's untaxed income from Worksheet A (e.g., 24000). The year (9*Y*) will change to indicate the previous year.

Total from 200*Y* Worksheet B

The total dollar amount of the student's untaxed income from Worksheet B. The year (200*Y*) will change to indicate the previous year.

Type of 200*Y* Tax Form

A code identifying the type of federal tax form used by the student's parents for the previous year. The year (200*Y*) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the Financial Aid Technical Manual.

US Income Tax Paid

The total dollar amount of US income tax the student paid.

Example (Parents' Information)

Following is an example of the SIM form (Parents' Information) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                          _ ⟋ ✕   │
│  File  Edit  Commands  Help                                              │
│ ┌──────────────────────────────────────────────────────────────────────┐│
│ │        ⟨Q⟩⟨✳⟩⟨●⟩⟨🖸⟩⟨▶⟩⟨◀⟩⟨EXIT⟩                               FANEED  ││
│ │ ID: 5061574  Bridges, Nash                      Yr: 0102    FM         ││
│ │                                                                        ││
│ │ ─────────────────────── PARENTS' INFORMATION ──────────────────────── ││
│ │ State of Legal Residence....... CA      Number of Family Members......... 03 ││
│ │ Marital Status................. M       # in College excluding parents..... 1 ││
│ │                                                                        ││
│ │ Father SSN............ 296-83-5042      Mother SSN............... 301-98-3574 ││
│ │ Father Last Name... BRIDGES             Mother Last Name...... BRIDGES  ││
│ │                                                                        ││
│ │ Age of Older Parent............ 52                                     ││
│ │ Parent filed 2000 Tax Return.... 1      Total from 2000 Worksheet A..  ││
│ │ Type of 2000 Tax Form.......... 2       Total from 2000 Worksheet B..  ││
│ │ Eligible for 1040A or 1040EZ....        2000 Worksheet C Exclusions..  ││
│ │ Exemptions Claimed............. 03                                     ││
│ │ Adjusted Gross Income.....  40000       Investments Net Worth.......   ││
│ │ US Income Tax Paid........   1125        Business and Farm Net Worth.  ││
│ │ Estimated US Income Tax....     0       Cash, Savings, Checking.....   ││
│ │ Father's Work Income......  40000                                      ││
│ │ Mother's Work Income......    000                                      ││
│ │                                                                        ││
│ └──────────────────────────────────────────────────────────────────────┘│
│ ┌──────────────────────────────────────────────────────────────────────┐│
│ └──────────────────────────────────────────────────────────────────────┘│
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Parents' Information)

The following list describes the fields that appear on the Header segment of the SIM form (Parents' Information).

> **Note:** All fields are display-only.

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., FM).

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS, EFM, FMS, or FM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID

The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

Yr

The financial aid year to which the student's FAFSA Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Parents' Information)

The following list describes the fields that appear on the Sections segment of the SIM form (Parents' Information).

> **Note:** All fields are active in Update mode, unless otherwise noted.

 # in College Excluding Parents
The number of family members in college (excluding parents) the student's parents support for the financial aid year (e.g., 1).

200*Y* Worksheet C Exclusions
The total dollar amount of the parent's Worksheet C exclusions for the previous year. The year (2000*Y*) will change to indicate the previous year.

Adjusted Gross Income
The total dollar amount of the parents' adjusted gross income (e.g., 40000).

Age of Older Parent
The age (in whole years) of the student's older parent (e.g., 52).

Business and Farm Net Worth
The total dollar amount of the net worth of the parent's business and/or farm.

Cash, Savings, Checking
The total dollar amount of the student's parents' cash, savings, and checking accounts.

Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the student's parent is eligible to file for a 1040A/1040EZ.

Estimated US Income Tax
The estimated US income tax the student's parent paid (e.g., 0). This is a display-only field that is calculated by CX.

Exemptions Claimed
The total number of exemptions the student's parent claimed on his/her federal tax form (e.g., 03).

Father SSN
The social security number of the student's father (e.g., 296-83-5042).

Father Last Name
The Last Name of the student's father (e.g., BRIDGES).

Father's Work Income
The total dollar amount of income the student's father earned (e.g., 40000).

Investments Net Worth
The total dollar amount of the net worth of the student's parents' investments.

Marital Status
A code identifying the student's parents' marital status. Valid codes are:
- D   (Divorced/Separated)
- M   (Married)
- S   (Single)
- W   (Widow(er))

Mother Last Name

The Last Name of the student's mother (e.g., BRIDGES)

Mother SSN
The social security number of the student's mother (e.g., 301-98-3574)

Mother's Work Income
The total dollar amount of income the student's mother earned (e.g., 000).

Number of Family Members
The total number of family members the student's parents support for the financial aid year (e.g., 03).

Parent Filed 2000 Tax Return
A code identifying the parent's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

State of Legal Residence
The State code for the student's parents' state of legal residence (e.g., CA for California).

Total from 200*Y* Worksheet A
The total dollar amount of the parents' untaxed income from Worksheet A. The year (200*Y*) will change to indicate the previous year.

Total from 200*Y* Worksheet B
The total dollar amount of the parent's untaxed income from Worksheet B. The year (200*Y*) will change to indicate the previous year.

Type of 200*Y* Tax Form
A code identifying the type of federal tax form used by the student's parents for the previous year. The year (199*Y*) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the Financial Aid Technical Manual.

US Income Tax Paid
The total dollar amount of US income tax the student's parents paid (e.g., 1125).

Commands

For a list of the commands that you can execute from the SIM form of the Student Need Analysis screens, see *Student Need Analysis Screen Commands* in this section.

Student Need Analysis Screens - VER Form

Purpose

The VER (Verification form) of the Student Need Analysis screens enables you to verify that the financial information appearing in a student's VER Need Analysis Form record (naf_rec) corresponds with the information appearing in a student's Student Aid Report (SAR) or FM Need Analysis Form record, which CX considers to be the official record.

> **Note:** The screens include all required federal verification fields. The complete VER form occupies three screens. An example of each screen and a description of the fields on each follows in the order in which they appear.

Access

Access the VER form of the Student Need Analysis screens from one of the following locations on the CX menu:
- Student Need Analysis
- Financial Aid Entry

> **Note:**
> - The VER form of the Student Need Analysis screens is only available if the Verification macro (ENABLE_FEAT_FA_VERIF) is enabled.
> - For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

Follow these steps to access the VER form from Student Need Analysis:
1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.
2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.
3. Enter **VER** in the Form field and change the other parameters, if desired. Select **Finish**. The first page of a blank VER form appears.

   > **Note:** If Macro is enabled

4. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**. The first page of the VER form appears displaying information from the student's FM (Federal Methodology) record (if one exists) below the verification fields.
5. Select **Method**, and the Financial Aid Methodology Selection window appears.
6. Select the **VER methodology** to view the Verification record.

Follow these steps to access the VER form from Financial Aid Entry:
1. From the Financial Aid: Student Processing menu, select the menu option **Financial Aid Entry**. Select **Finish**. The Financial Aid Entry Program Parameters screen appears.
2. Change the parameters, if desired, and select **Finish**. The Financial Aid Entry screen appears.
3. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**.
4. Enter the student's ID or social security number in the ID field, or select **Query** to find the student. Select **Finished**.
5. Select **Need**. The Need Analysis Information screen appears.
6. Select **Need Form**. The first page of the FAFSA Form of the Student Need Analysis screens appears displaying the student's data, if one exists.
7. Select **Initialize**. The Need Analysis Program Parameters screen appears.
8. Enter **VER** in the Form field and change the other parameters, if desired. Select

Finish. The first page of the VER form appears displaying information from the student's FM (Federal Methodology) record below (if one exists) the verification fields.

9. Select **Method**, and the Financial Aid Methodology Selection window appears.
10. Select the **VER methodology** to view the Verification record.

Segments

Each Student Need Analysis screen of the VER form is divided into two segments:
- The Header segment provides information about the selected student and the financial aid award year and record to which the information relates.
- The Sections segment provides information from the student's VER Need Analysis Form record (naf_rec), if one exists, and Student Aid Report (SAR) or FM Need Analysis Form record, if one exists.

> **Note:** Each of the fields on the Sections segment includes data from two records: The information in the VER Need Analysis Form record appears to the left or on the top, and the information in the Student Aid Report (SAR) or FM Need Analysis Form record, which CX considers the official record, appears to the right or on the bottom. The information in each record should match.

Example (Steps Two and Three)

Following is an example of the VER form (Steps Two and Three) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⌐ Student Need Analysis                                        _ ⅋ ✕      │
│  File  Edit  Commands  Help                                               │
│                                                                   FANEED  │
│        ┌──┬──┬──┬──┬─┬─┬────┐                                             │
│        │ ◎ │ ※ │ ✎ │ ▣ │ ▶ │ ◀ │ EXIT │                                  │
│        └──┴──┴──┴──┴─┴─┴────┘                                             │
│ ID: 5061574  Bridges, Nash            SSN: 956-34-2195  Yr: 0102   FM     │
│ Rev Date:  12/15/2000        Allow Tape Update: Y                        │
│ Export:                      Transaction Number: 00        DRN: 2384      │
│ STEP TWO:─────────────────────────────────────────────────               │
│ 36. Student filed 2000 Tax Return. 3  3  46. 2000 Worksheet C Excls....   │
│ 37. Student's Type of Tax Return..                                        │
│ 38. Eligible for 1040A or 1040EZ..       47. Real Est/Invest Value....    │
│ 39. Adjusted Gross Income......                                           │
│                                          48. Business/Farm Value......    │
│ 40. US Income Tax Paid.........                                           │
│                                          49. Cash, Savings, Checking..    │
│ 42. Student's Work Income......                                           │
│                                          STEP THREE─────────────────      │
│ 43. Spouse's Work Income.......          52. Born Before 1/1/78?.......... N  N │
│                                          53. Graduate/Prof Student?....... N  N │
│ 44. Total from 2000 WorksheetA.          54. Are You Married?............. N  N │
│                                          55. Have children to support..... N  N │
│ 45. Total from 2000 WorksheetB.          56. Dependents(not spouse/child)? N  N │
│                                          57. Orphan or Ward of the Court?. N  N │
│                                          58. Veteran of US Armed Forces?.. N  N │
│                                                                           │
│ └─────────────────────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Steps Two and Three)

The following list describes the fields that appear on the Header segment of the VER form (Sections D, E, and F).

Allow Tape Update

A code indicating whether the need analysis tape data should overwrite the need analysis information (Y) or not (N). This field is active in Update mode.

DRN

The student's data release number (formerly the PIN, or personal identification number)(e.g., 2384). This field is active in Update mode.

Export

A code identifying if and how the record is to be sent by EDE (Electronic Data Exchange) to the Department of Education. This field is active in Update mode. Valid codes are:

- C (Send as a correction)
- N (Do not send)
- O (Send as an original)

(Financial Aid Need Analysis Form Record/Method)

This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., VER). This is a display-only field. To select another methodology, select **Method**.

> **CAUTION:** Must be VER if you make any changes to the record.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID

The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right. This field is active in Query mode.

Rev Date

The date (mm/dd/yyyy) the need analysis information was entered or last revised. This field is active in Update mode.

SSN

The student's social security number (e.g., 956-34-2195). This is a display-only field.

Transaction Number

The Student Aid Report (SAR) or Institutional Student Information Report (ISIR) transaction number. This field is active in Update mode.

Yr

The financial aid year to which the student's VER Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information. This is a display-only field.

Fields on the Sections Segment (Steps Two and Three)

The following list describes the fields that appear on the Sections segment (Steps Two and Three) the VER form.

> **Note:**
> - The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
> - All fields are active in Update mode.

36. Student Filed 2000 Tax Return

A code identifying the student's status for filing a 2000 tax return. Valid codes are:

- 1 (Already filed)

- 2 (Will file)
- 3 (Will not file)

37. Student's Type of Tax Return

A code identifying the type of federal tax form the student filed the previous year. The year (199 Y) will change to indicate the previous year. Valid codes are:

- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual*.

38. Eligible for 1040A or 1040EZ

Y(es) or N(o) indicating whether the student is eligible to file for a 1040A/1040EZ.

39. Adjusted Gross Income

The total dollar amount of the student's adjusted gross income.

40. US Income Tax Paid

The total dollar amount of US income tax the student paid.

42. Student's Work Income

The total dollar amount of income the student earned.

43. Spouse's Work Income

The total dollar amount of income the student's spouse earned.

44. Total from 200 Y Worksheet A

The total dollar amount of the student's earned income credits from Worksheet A. The year (200 Y) will change to indicate the previous year.

45. Total from 200 Y Worksheet B

The total dollar amount of the student's untaxed income from Worksheet B. The year (200 Y) will change to indicate the previous year.

46. 200 Y Worksheet C Exclusions

The total dollar amount of the student's Worksheet C exclusions for the previous year. The year (200 Y) will change to indicate the previous year.

47. Real Est/Invest Value

The total dollar amount of the net worth of the student's investments.

48. Business/Farm Value

The total dollar amount of the net worth of the student's business and/or farm.

49. Cash, Savings, Checking

The total dollar amount of the student's cash, savings, and checking accounts.

52. Born Before 1/1/19 YY?

Y(es) or N(o) indicating whether the student is at least 23 years old. The year (YY) changes annually to indicate 23 years.

53. Graduate/Prof Student?

Y(es) or N(o) indicating whether the student is a graduate or professional student.

54. Are You Married?

Y(es) or N(o) indicating whether the student is married.

55. Have Children To Support

Y(es) or N(o) indicating whether the student is responsible for children.

56. Dependents (not spouse/child)?
Y(es) or N(o) indicating whether the student is responsible for dependents other than a spouse.

57. Orphan or Ward of the Court?
Y(es) or N(o) indicating whether the student is an orphan or ward of the court.

58. Veteran of US Armed Forces?
Y(es) or N(o) indicating whether the student is a veteran.

Example (Steps Four and Five)

Following is an example of the VER form (Steps Four and Five) of the Student Need Analysis screens.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ⊒ Student Need Analysis                                       _ ⊡ ☒      │
│ File  Edit  Commands  Help                                               │
│        ┌──┬──┬──┬──┬──┬──┬───┐                                  FANEED   │
│        │🔍│ ⚹│ ✏│🗐│ ▶│ ◀│EXIT│                                          │
│ ID: 5061574  Bridges, Nash              SSN: 956-34-2195  Yr: 0102   FM  │
│                                                                          │
│ STEP FOUR:───────────────────────────────────────────────────────────── │
│ 64. Number of Family Members........ 03                                  │
│                                      03  78. Total from 2000 WorksheetA   │
│ 65. # in College excluding parents... 1                                  │
│                                       1  79. Total from 2000 WorksheetB   │
│ 70. Parent filed 2000 Tax Return.. 1  1                                  │
│ 71. Parents' Type of Tax Return... 2  2  80. 2000 Worksheet C Excls....   │
│ 72. Eligible for 1040A or 1040EZ.. D  D                                  │
│ 73. Adjusted Gross Income......   40000  81. Real Est/Invest Value....    │
│ 74. US Income Tax Paid.........    1125                                  │
│                                    1125  82. Business/Farm Value......    │
│ 76. Father's Work Income.......   40000                                  │
│                                   40000  83. Cash, Savings, Checking..    │
│ 77. Mother's Work Income.......     000                                  │
│                                     000                                  │
│ STEP FIVE:───────────────────────────────────────────────────────────── │
│ 84. Number of Family Members....         85. Number in College.......... │
│                                                                          │
│                                                                          │
└─────────────────────────────────────────────────────────────────────────┘
```

Fields on the Header Segment (Steps Four and Five)

The following list describes the fields that appear on the Header segment of the VER form (Steps Four and Five).

> **Note:** All fields are display-only. These fields appear on each of the subsequent screens and do not change.

(Financial Aid Need Analysis Form Record/Method)
This is an unlabeled field located to the right of the Yr field (upper right corner). A code identifying the displayed Need Analysis Form record or methodology to which the information is associated (e.g., VER).

> **CAUTION:** Must be VER if you make any changes to the record.

> **Note:** The simplified and regular methodologies use the same Need Analysis Form record (e.g., EFMS or EFM). Since the system uses the same data to perform the calculation, whether regular or simplified, the Need Analysis Form record shown is the same data. Selecting a methodology causes that method's information to be highlighted on the Need Analysis Information screen and

controls which set of Rejects or Assumptions can be displayed. It also determines what information appears in the Available Income screen.

ID
The system-generated number identifying the student in the database (e.g., 5061574). The student's name appears to the right.

SSN
The student's social security number (e.g., 956-34-2195).

Yr
The financial aid year to which the student's VER Need Analysis Form record information relates (e.g., 0102). This should be the same as the financial aid award year for which you want to process need analysis information.

Fields on the Sections Segment (Steps Four and Five)

The following list describes the fields that appear on the Sections segment of the VER Form (Steps Four and Five).

Note:
- The fields and their numbers correspond with those on the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.
- All dollar fields are in whole dollars.
- All fields are active in Update mode.

64. Number of Family Members
The total number of family members the student's parents support for the financial aid year (e.g., 03).

65. # in College Excluding Parents
The number of family members in college (excluding parents) the student's parents support for the financial aid year (e.g., 1).

70. Parent Filed 2000 Tax Return
A code identifying the parent's status for filing a 2000 tax return. Valid codes are:
- 1 (Already filed)
- 2 (Will file)
- 3 (Will not file)

71. Parents' Type of Tax Return
A code identifying the type of federal tax form the parent filed the previous year. The year (200*Y*) will change to indicate the previous year. Valid codes are:
- 1 (1040)
- 2 (1040A/1040EZ/1040 Telefile)
- 3 (Foreign)
- 4 (Puerto Rico/Guam/etc.)

> **CAUTION:** If you choose to leave this field blank, there is the potential that CX will create an assumption or reject code. For more information, see the *Financial Aid Technical Manual*.

72. Eligible for 1040A or 1040EZ
Y(es) or N(o) indicating whether the parent is eligible to file for a 1040A/1040EZ.

73. Adjusted Gross Income
The total dollar amount of the parent's adjusted gross income (e.g., 40000).

74. US Income Tax Paid

The total dollar amount of US income tax the parent paid (e.g., 1125).

76. Father's Work Income
The total dollar amount of income the student's father earned (e.g., 40000).

77. Mother's Work Income
The total dollar amount of income the student's mother earned (e.g., 000).

78. Total from 200*Y* Worksheet A
The total dollar amount of earned income credit for the parent from Worksheet A . The year (200*Y*) will change to indicate the previous year.

79. Total from 200*Y* Worksheet B
The total dollar amount of the parent's untaxed income from Worksheet B. The year (200*Y*) will change to indicate the previous year.

80. 200*Y* Worksheet C Exclusions
The total dollar amount of the parent's Worksheet C exclusions for the previous year. The year (200*Y*) will change to indicate the previous year.

81. Real Est/Invest Value
The total dollar amount of the net worth of the parent's investments.

82. Business/Farm Value
The total dollar amount of the net worth of the parent's business and/or farm.

83. Cash, Savings, Checking
The total dollar amount of the parent's cash, savings, and checking accounts.

84. Number of Family Members
The total number of family members the student will support for the financial aid year.

85. Number in College
The number of family members in college the student supports for the financial aid year.

Commands

For a list of the commands that you can execute from the VER form of the Student Need Analysis screens, see *Student Need Analysis Screen Commands* in this section.

Student Need Analysis Screen Commands

Purpose

The following is a list of the commands that you can execute from all forms (e.g., FAFSA) of the Student Need Analysis screens and their purposes.

> **Note:** You can use a specific command only when it appears on the current toolbar or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Add
Enables you add need analysis information for the student.

Back
In Add and Update modes, enables you to move back one screen of data, if additional screens exist.

Calculate
Enables you to calculate the student's need analysis for the methodology currently displayed.

Cancel
Does one or all of the following without saving any of the field entries you have made:
- Backs out of the current command
- Returns to the previous command
- Exits from the current screen or window

Copy
Enables you to copy need analysis information from one methodology to another.

Detail
Accesses the Available Income screen enabling you to view additional income information for the student.

Display ID-Type
Accesses the view-only ID Type/Associated Records window containing information about the student. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist in CX for the student. For example:
- If the student has a Donor record, the Donor field contains Y.
- If the student has a Financial Aid record, the Financial Aid field contains Y.

Exit
Enables you to leave the current screen or program.

Finish
In Add and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

Finished
In Query mode, saves your field entries when you have completed your data entry or selection and want to continue.

Forward
In Add and Update modes, enables you to move forward one screen of data, if additional screens exist.

Initialize

Accesses the Need Analysis Program Parameters screen enabling you to view and/or change the fields (e.g., select another form).

Locate

Enables you to locate a specific section of any of the Student Need Analysis screens for the various forms.

Method

Accesses the Financial Aid Methodology Selection window enabling you to select another methodology.

Need

Accesses the Need Analysis Information screen enabling you to view or update the information.

> **Note:** This command is only available when you access the Student Need Analysis screens from Student Need Analysis.

Next Page

Enables you to move forward one screen of data, if additional screens exist.

Previous Page

Enables you to move back one screen of data, if additional screens exist.

Print

Enables you to print an unofficial Institutional Student Information Report (ISIR) for the methodology currently displayed.

Query

In Query mode, does one of the following:
- Enables you to enter an ID or social security number to search for an ID record.
- Accesses the ID Query screen enabling you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Site

Accesses the Site Record window enabling you to view and/or add Site records.

> **Note:** Site records are generally used by institutions with more than one campus.

Text

Accesses the Comments window, enabling you to view, add, delete, and/or update any comments associated with the student and his/her financial aid record(s).

Update

Enables you to update need analysis information for the student.

Verify

Enables you to verify data from student documents with the corresponding data from the Student Aid Report (SAR) or FM Need Analysis Form record.

> **Note:** This command is only available if the verification macro (ENABLE_FEAT_FA_VERIF) is enabled. This command is only used in relation to verifying official Financial Aid Need Analysis Form records.

SECTION 3 - MANAGING FINANCIAL AID NEED ANALYSIS INFORMATION

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:
- Access the Financial Aid Need Analysis program from Financial Aid Entry
- Enter official financial aid need analysis information for a student
- Create additional Need Analysis Form records for a student
- Update a student's financial aid need analysis information
- Verify a student's official financial aid need analysis information
- Use the Institutional Methodology (IM)

Before You Begin

Before you begin to use the following procedures for managing a student's financial aid need analysis information, remember:
- An ID record for the student must already exist on the system.
- The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens is the primary need analysis information form for Financial Aid Need Analysis. Other forms (e.g., IM) provide supplemental or customized information.
- All the financial aid need analysis information that you enter on the Student Need Analysis screens resides in a Need Analysis Form record (naf_rec). A student may have Need Analysis Form records for each of the calculation methods that your institution uses.
- If a student qualifies for the simplified calculation method, the information used is the same as for the regular calculation method. For example, if the calculation results from the FM or FMS methods, the information is stored in the FM Need Analysis Form record.
- Financial aid need analysis information relates to the student's financial situation, including his/her income and assets, and the parents' and/or spouse's income and assets, if applicable.
- You can access Financial Aid Need Analysis from Financial Aid Entry or from the CX menu.
- You can use the field descriptions in the section *Using the Financial Aid Need Analysis Screens* of this guide when you complete the fields on the screens.

The Process

This list shows the general phases that take place before, during, and after adding and updating financial aid need analysis information.

1. Access Financial Aid Need Analysis.

2. Query to select the student.

3. Select the correct Need Analysis Form record that includes the information you want to add or update.

4. Enter or update the student's financial aid need analysis information.

5. Save all the information.

Accessing Financial Aid Need Analysis From Financial Aid Entry

Introduction

You can access the Financial Aid Need Analysis program from either the CX menu or from Financial Aid Entry. However, the commands that you can execute from the program will differ slightly, depending how you access it. You may prefer to do this so you can use commands to access either program as desired, rather than re-accessing the programs from the menus.

> **Note:** If completed, the Primary FC field on the Need Analysis Information screen determines the Need/Budget information displayed in the Financial Aid Entry screen. It also determines the Current Method and Need Analysis Form record displayed if you access the Financial Aid Need Analysis program from Financial Aid Entry. If the field is blank, the Current Method and Need Analysis Form record is determined by the Priority field on the Need Analysis Method table (fameth_table). For more information about Financial Aid Entry, see the *Financial Aid User Guide*.

How to Access Financial Aid Need Analysis From Financial Aid Entry

Follow these steps to access the Financial Aid Need Analysis program from Financial Aid Entry.

1. From the Financial Aid: Student Processing menu, select the menu option **Financial Aid Entry**, then select **Finish**. The Financial Aid Entry Program Parameters screen appears.

2. Change the fields, if necessary, and select **Finish**. The Financial Aid Entry screen appears in Query mode.

3. Do you know the student's ID or social security number?
    - If yes, enter the number in the ID field and select **Finished**.
    - If no, select **Query** to perform a query.

    The system loads the student's financial aid information and verifies compliance.

    > **Note:** You may get a warning message informing you if the student has been awarded aid in other sessions not displayed. Select **OK** for the message. The sessions displayed depend on the sessions displayed or entered in the Award Sessions(s) field on the Financial Aid Entry Program Parameters screen, to a maximum of four. These sessions should include all the primary awarding sessions in the award year and must be valid according to your institution's fiscal calendar in the Fiscal Calendar record (fscl_cal_rec).

    > The message "Program Enrollment record not found for this student" may also appear in the comment line if the student is not yet enrolled. This is a warning message only.

4. Select **Need**. The Need Analysis Information screen appears.

5. Select **Need Form**. The first page of the FAFSA Form of the Student Need Analysis screens appears displaying the student's data.

    > **Note:** The FAFSA form is the default form to appear. You can choose the form that will appear by first selecting the **Initialize** command.

    > The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens is the primary need analysis information form for Financial Aid Need Analysis. Other forms (e.g., IM) provide supplemental or customized information.

    > The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in

the form and its accompanying pamphlet. Your institution should have a copy
of these publications for reference.

Adding Official Financial Aid Need Analysis Information

How to Add Official Financial Aid Need Analysis Information

Follow these steps to add official financial aid need analysis information using the Student Aid Report (SAR) as the input document.

> **Note:** This procedure provides the steps to access the Financial Aid Need Analysis program from the CX menu. For more information about accessing the program from Financial Aid Entry, see *Accessing Financial Aid Need Analysis From Financial Aid Entry* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.

2. Change the financial aid award year and session, if desired, then select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired. Ensure that **FAFSA** appears in the Form field. Select **Finish**, and the first page of a blank FAFSA form of the Student Need Analysis screens appears in Query mode.

    > **Note:** The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens is the primary need analysis information form for Financial Aid Need Analysis. Other forms (e.g., IM) provide supplemental or customized information.
    >
    > The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.

4. Do you know the student's ID or social security number?
    *   If yes, enter the number in the ID field and select **Finished**.
    *   If no, select **Query** to perform a query.

    The system loads the student's Need Analysis Form record for the current calculation method, if one exists.

    > **Note:** The Priority field in the Need Analysis Method table (fameth_table) determines the Need Analysis Form record that appears when you first enter the Financial Aid Need Analysis program. The record that you access appears in the (Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen.
    >
    > If an FM Need Analysis Form record does not exist for the student, the message "FM naf form not available for id: ####. Cannot add or update." appears in the comment line. You create the record by executing the **Add** command.
    >
    > If an FM Need Analysis Form record does exist for the student, you cannot execute the **Add** command. If you want to change the existing record, you must use the **Update** command. For the procedure to update an existing record, see *Updating Financial Aid Need Analysis Information* is this section.

5. Have you accessed the FM Need Analysis Form record?

    > **Note:** Jenzabar recommends you use the FM record when you enter official SAR financial aid information. This record is designed to hold the official federal need analysis data. This also facilitates the FISAP reporting procedures.

- If <u>yes</u>, go to step 7.
- If <u>no</u> (or if you are unsure), select **Method**. The Financial Aid Methodology Selection window appears.

6. Does FM appear in the Current Method field?
   - If <u>yes</u>, press **<Enter>**.
   - If <u>no</u>, select the letter corresponding to FM.

   The student's FAFSA form reappears.

7. Select **Add**. The message "Warning: You are modifying the Official FM. Do you want to continue? (Y/N)" appears.

8. Select **Yes**. The following two processes occur:
   - Document tracking begins, and the system creates Contact records for all the contacts that your institution established during implementation as the default set of contacts. The types of Contact records the system creates varies according to your institution's requirements.
   - The system creates an FM Need Analysis Form record (naf_rec) for the student.

     Note: If an FM Need Analysis Form record does exist for the student, the message "This student already has an analysis form. Use 'U'pdate to update the form." appears. Select **OK**. For the procedure to update an existing record, see *Updating Financial Aid Need Analysis Information* is this section.

9. Enter the student's need analysis information from the SAR. Press **<Tab>** to move to each field, and the **Back** and **Forward** commands to move to each page of the form, if necessary.

10. Select **Finish** when you have entered all necessary/available information for the student. The code FM appears in the (Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen

11. Select **Need**. The Need Analysis Information screen appears.

12. Select **Student** to access the fields on the Need Analysis Information segment. The cursor appears in the Primary FC field.

13. Enter the student's primary need analysis calculation method (either FM or FMS). Press **<Tab>** to move the cursor to the Secondary FC field.

    Note: The federal formula determines if a student qualifies for FMS, the simplified calculation.

14. Enter the student's secondary need analysis calculation method. Press **<Tab>** to move the cursor to the next field.

    Note: If FM is the primary need analysis calculation method, no secondary calculation method is used. If FMS is the primary, the secondary is FM.

15. Enter the appropriate data in the following fields, if desired. Press **<Tab>** to move to each field, if necessary:
    - FM Dependent
    - Selected to Verify (If the student was chosen for verification by the Department of Education and the need analysis information is loaded to the database from the tape or EDE process, the system sets this to Y. If not, you can manually enter **Y** if your institution chooses the student for verification.)
    - Verify Compl (If the Selected to Verify field contains Y and if you have all compliance information.)
    - Allow Pkg, Pkg Group, and/or Category (If the automated Financial Aid Packaging product is available.)

16. Select **Finish**.

---

17. Select **Update Need** to add a budget for the student. The message "Enter letter of the method to be added" appears in the comment line, and a list of calculation methods appear in the line below.

18. Select the letter that corresponds to the method you want to use (either FM or FMS). The fields in the Budget/Need Summary segment become active, and the cursor appears in the Type field.

19. Enter the Budget Group or Budget code for the specified calculation method. The message "Add all session budget records for year 9*X*9*Y*? (Y/N)" appears.

> **Note:** If you want to add the budget one session at a time, leave the Type field blank, fill in the remaining fields necessary and select **Finish**. For more information about using the Budget screen, see How to Assign a Different Budget for Each Session in this guide.

20. Select **Yes**. The cursor appears in the SC field.

21. Enter whole dollar amounts in the following fields. Press **<Tab>** to move the cursor to each field, if necessary:
    - SC (Student's contribution)
    - PC (Parents' contribution)
    - EFC (Expected Family Contribution)

> **Note:** Do not enter a dollar sign ($). You can enter separate amounts in the SC and PC fields, and the system automatically calculates the amount in the EFC field; or you can enter a total amount in the EFC field only.

22. Press **<Tab>** to move the cursor to the Ofcl field and enter **O**. The message "End of data" appears in the comment line.

> **Note:** The FM/FMS data are the only official information. When you enter **O**, you should have an official need analysis document (e.g., the SAR) on file to support the data.

23. Do you want to add another budget?
    - If <u>yes</u>, select **Add-line**. The message "Enter letter of the method to be added" appears in the comment line, and a list of calculation methods appear in the line below. Go to step 18.
    - If <u>no</u>, select **Finish**. The budget(s) appear in the Budget/Need Summary segment.

24. Select **Exit** to return to the student's FAFSA form of the Student Need Analysis screens.

25. Do you want to enter financial aid information for another student?
    - If <u>yes</u>, select **Query** and go to step 4.
    - If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

26. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Creating Additional Need Analysis Form Records

Introduction

After you add one Need Analysis Form record for a student, you can use its information as the basis for creating other Need Analysis Form records for other calculation methods.

> **Note:** You can get the first Need Analysis Form record from need analysis tape processes, EDE processes, or from manual input.

> **CAUTION:** Jenzabar recommends that you only create the FM Need Analysis Form record when you receive official information, i.e., a Student Aid Report (SAR) from the Department of Education's Central Processing Service (CPS). However, you may create the EFM, IM, or SIM Need Analysis Form records at anytime. If you have not yet created an EFM, IM, or SIM Need Analysis Form record, you can copy the FM information and make the necessary changes. You can then send the changed EFM information to the CPS for reprocessing. For more information about creating a corrections file of EFM Need Analysis Form records and transmitting it to the CPS, see the *Financial Aid Electronic Data Exchange (EDE) User Guide*.

How to Create a Need Analysis Form Record Based on an Existing Record

Follow these steps to create a new Need Analysis Form record based on an existing record.

> **Note:**
> - Although this procedure is for creating an EFM Need Analysis Form record based on an FM Need Analysis Form record, you can use any existing record as the basis for any other record.
> - This procedure provides the steps to access the Financial Aid Need Analysis program from the CX menu. For more information about accessing the program from Financial Aid Entry, see *Accessing Financial Aid Need Analysis From Financial Aid Entry* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.

2. Change the financial aid award year and session, if desired, then select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired, then select **Finish**. If you did not change the code in the Form field, the first page of a blank FAFSA form of the Student Need Analysis screens appears in Query mode.

   > **Note:** The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens is the primary need analysis information form for Financial Aid Need Analysis. Other forms (e.g., IM) provide supplemental or customized information.
   >
   > The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.

4. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.

   The system loads the student's Need Analysis Form record for the current calculation

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method.

> **Note:** The Priority field in the Need Analysis Method table (fameth_table) determines the Need Analysis Form record that appears when you first enter the Financial Aid Need Analysis program. The record that you access appears in the (Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen.
>
> If an FM Need Analysis Form record does not exist for the student, the message "FM naf form not available for id: *####.* Cannot add or update." appears in the comment line. You must create the record by executing the **Add** command. For the procedure to add a record, see *Adding Official Financial Aid Need Analysis Information* in this section.

5. Select **Method**. The Financial Aid Methodology Selection window appears.

6. Does EFM appear in the Current Method field?
   - If <u>yes</u>, press **<Enter>**.
   - If <u>no</u>, select the letter corresponding to EFM.

   The student's FAFSA form reappears.

> **Note:** If an EFM Need Analysis Form record does not exist for the student, the message "No need analysis records for id: *####.* Use ADD command." appears in the comment line. You create the EFM record by executing the **Add** command.
>
> If an EFM Need Analysis Form record does exist for the student, you cannot execute the **Add** command. If you want to change the existing record, you must use the **Update** command. For the procedure to update an existing record, see *Updating Financial Aid Need Analysis Information* is this section.

7. Select **Add**. The message "Do you wish to use existing application data from the FM method?" appears. You can select one of the following buttons:
   - **Yes**
   - **No**
   - **Other**

> **Note:** If you want to use an existing Need Analysis Form record other than FM as a basis for the EFM Need Analysis Form record, select **Other**. A window appears listing the Need Analysis Form record(s) that exist for the student. Use the **<Arrow>** keys to select the method to copy from and select **Finish**. If you select **Cancel**, the system creates a blank EFM Need Analysis Form record, and you can manually enter the necessary information. Select **Finish** to accept the information you enter.
>
> If you select **No**, the system creates a blank EFM Need Analysis Form record, and you can manually enter the necessary information. Select **Finish** to accept the information you enter.

8. Select **Yes**. The message "Warning: This may overwrite existing data. Do you wish to continue?" appears.

9. Select **Yes**. The EFM Need Analysis Form record displays information obtained from the FM Need Analysis Form record.

10. Make the necessary changes and select **Finish**. The Student Analysis Form screens display the updated EFM Need Analysis Form record.

11. Do you wish to create another Need Analysis Form record for the student?
    - If <u>yes</u>, go to step 5.
    - If <u>no</u>, go to step 12.

12. Do you want to create another Need Analysis Form record for another student?
- If <u>yes</u>, select **Query** and go to step 4.
- If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

13. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Financial Aid Need Analysis Information

Introduction

You may need to update to financial aid need analysis information if the student previously provided you with mistaken information, or if a student's financial circumstances change during the year.

Note:
- When you change financial aid need analysis information, Jenzabar recommends that you only modify the official FM Need Analysis Form record when you receive officially corrected information, i.e., a new Student Aid Report (SAR) for the student. You can record unofficial changes in the EFM Need Analysis Form record. Unofficial means a correction not yet processed by the Central Processing Service (CPS). Jenzabar recognizes that some corrections are not required to be sent to the CPS.
- You cannot modify an EFM Need Analysis Form record and mark it for export using the EDE processes unless an FM Need Analysis Form record exists. For more information about EDE processing, see the *Financial Aid Electronic Data Exchange (EDE) User Guide.*
- If you are using EDE processes to submit corrections to the CPS, you must use the EFM Need Analysis Form record.

CAUTION: Jenzabar recommends that you only make changes to the FM Need Analysis Form record when you receive new official information, i.e., a new Student Aid Report from the Department of Education's Central Processing Service (CPS). However, you may make changes to the EFM, IM, or SIM Need Analysis Form records at anytime. If you have not yet created an EFM, IM, or SIM Need Analysis Form record, you can copy the FM information and make the necessary changes. You can then send the changed EFM information to the CPS for reprocessing. For more information about creating a corrections file of EFM Need Analysis Form records and transmitting it to the CPS, see the *Financial Aid Electronic Data Exchange (EDE) User Guide.*

How to Update Financial Aid Need Analysis Information

Follow these steps to update an existing Need Analysis Form record.

Note:
- Although this procedure is for updating an EFM Need Analysis Form record, you can use it to update any existing Need Analysis Form record. However, remember that IM and SIM Need Analysis Form records are never marked for export for EDE processing. You may also correct one record and use the **Copy** command to bring the corrected data into a different Need Analysis Form record.
- The EFM/EFMS and SIM/SIMS calculation methods are completed using the federal formulas. IM/IMS calculation methods will use the federal formulas unless you make changes to the Institutional Methodology table (immeth_table). For more information about making these changes, see *Setting Up the Institutional Methodology Calculation* in this guide.
- This procedure provides the steps to access the Financial Aid Need Analysis program from the CX menu. For more information about accessing the program from Financial Aid Entry, see *Accessing Financial Aid Need Analysis From Financial Aid Entry* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.

2. Change the financial aid award year and session, if desired, then select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired, then select **Finish**. If you did not change the code in the Form field, the first page of a blank FAFSA form of the Student Need Analysis screens appears in Query mode.

> **Note:** The FAFSA (Free Application for Federal Student Aid) form of the Student Need Analysis screens is the primary need analysis information form for Financial Aid Need Analysis. Other forms (e.g., IM) provide supplemental or customized information.
>
> The fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.

4. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.

The system loads the student's Need Analysis Form record for the current calculation method.

> **Note:** The Priority field in the Need Analysis Method table (fameth_table) determines the Need Analysis Form record that appears when you first enter the Financial Aid Need Analysis program. The record that you access appears in the (Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen.
>
> If an FM Need Analysis Form record does not exist for the student, the message "FM naf form not available for id: ####. Cannot add or update." appears in the comment line. You create the record by executing the **Add** command. For the procedure to add an FM record, see *Adding Official Financial Aid Need Analysis Information* in this section.

5. Select **Method**. The Financial Aid Methodology Selection window appears.

6. Does EFM appear in the Current Method field?
   - If <u>yes</u>, press **<Enter>**.
   - If <u>no</u>, select the letter corresponding to EFM.

The student's FAFSA form reappears.

> **Note:** If a EFM Need Analysis Form record does not exist for the student, the message "No need analysis records for id ####: Use ADD command." appears in the comment line. For the procedure to create the record, see *Creating Additional Need Analysis Form Records* in this section.

7. Select **Update**. The fields on the form become active.

8. Make the necessary changes to any of the fields. Press **<Tab>** to move to each field, and the **Back** and **Forward** commands to move to each page of the form, if necessary.

9. When you have completed making your changes, select **Finish**. The message "Do you want to mark this record for export? (Y/N)" appears.

> **Note:** This message appears only if the EDE processes are enabled. For more information, see *Financial Aid Electronic Data Exchange (EDE)*.

10. Are you creating a record to transmit to CPS?

- If <u>yes</u>, select **Yes**. The message "Is this an (O)riginal application or a (C)orrection? appears in the comment line. Enter **C**. The system marks it as a correction for export to the CPS.
- If <u>no</u>, select **No** to complete the update. The system does not mark it as a correction for export to the CPS.

11. Do you wish to update another Need Analysis Form record for the student?
- If <u>yes</u>, go to step 5.
- If <u>no</u>, go to step 12.

12. Do you want to create another Need Analysis Form record for another student?
- If <u>yes</u>, select **Query** and go to step 4.
- If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

13. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Verifying Official Financial Aid Need Analysis Form Records

Introduction

In order to verify a student's financial aid data, your Financial Aid office must periodically compare their official records with the actual financial data provided by that student. You can use CX to perform verification by entering data directly from student financial documents and comparing this data to what currently appears on the Student Aid Report (SAR) or FM Need Analysis Form record, which CX considers to be the official record.

How to Verify Official Financial Aid Need Analysis Information

Follow these steps to verify official financial aid need analysis information.

> **Note:**
> - This procedure assumes you have all verification data available. It provides the steps to access the Financial Aid Need Analysis program from the CX menu. For more information about accessing the program from Financial Aid Entry, see *Accessing Financial Aid Need Analysis From Financial Aid Entry* in this section.
> - If you want to update the Verification record based on the student's financial documents, see *Updating Financial Aid Need Analysis Information* in this section. You only need to enter data in those fields you want. You do not need to complete every field.

1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.

2. Change the financial aid award year and session, if desired, then select **Finish**. The Need Analysis Program Parameters screen appears.

3. Enter **VER** in the Form field, change any other parameters as desired, and select **Finish**. The first page of a blank VER form of the Student Need Analysis screens appears in Query mode.

   > **Note:** The Verification Need Analysis Form record is only available if the Verification macro (ENABLE_FEAT_FA_VERIF) is enabled.

4. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.

   The VER form of the Student Need Analysis screens appears displaying information from the student's FM Need Analysis Form record to the right of or below the verification fields. The verification fields will only display information that has been entered.

   > **Note:** The Priority field in the Need Analysis Method table (fameth_table) determines the Need Analysis Form record that appears when you first enter the Financial Aid Need Analysis program. The record that you access appears in the (Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen.

5. Select **Method**. The Financial Aid Methodology Selection window appears.

6. Select the letter corresponding to VER. The code VER appears highlighted in the (Financial Aid Need Analysis Form Record/Method) field in the upper right corner.

   > **Note:** You must use VER whenever you verify official financial aid need analysis information. If a Verification Need Analysis Form record does not exist for the student, the message "No need analysis records for id ####: Use ADD

command." appears in the comment line. For the procedure to create the
record, see *Creating Additional Need Analysis Form Records* in this section.

7. Select **Need**. The Need Analysis Information screen appears.

8. Is the Selected to Verify field set to Y?

> **Note:** If the student was chosen for verification by the Department of Education and
> the need analysis information is loaded to the database from tape or EDE
> process, this field will already be set to Y. The system adds a verification
> contact with an expected status to the student's Contact record.

- If <u>yes</u>, select **Return to previous screen**, and see Step 10.
- If <u>no</u>, select **Student** to access the Need Analysis Information segment and enter **Y** in
  the Selected to Verify field. If verification has already been performed for this ID, a
  message to that effect appears. Otherwise, the system adds a verification contact with
  an expected status to the student's Contact record.

9. Select **Finish**, then select **Exit**. The VER form of the Student Need Analysis screens
   reappears.

10. Select **Verify** to begin verifying that the student's financial information is within the
    tolerances set by the federal government.

> **Note:** The message "Do you wish to fill blank fields with FM data?" appears if you left
> any fields blank.

11. Select **Yes**. The system verifies the student's financial information and enters the data from
    the FM record into all blank fields. The message "Do you wish to complete the *XXXX*
    contact? appears.

> **Note:** The system displays this message for each document contact with an expected
> status that is created by the verification process.

12. Do you want to complete the contact(s)?
    - If <u>yes</u>, select **Yes** to update the status of each contact to completed.
    - If <u>no</u>, select **No** to not update the status(es).

> **Note:** You can choose to update some contacts and not others.

13. If the student did not pass verification, the following message appears: "Tolerance amount =
    $*XX.XX* and there are fields that do not match. Tolerance check was not passed. Please
    manually enter the appropriate tolerance code" Select **OK**. The VER form reappears with
    the mismatched fields highlighted. To update the highlighted fields, see *Updating Financial
    Aid Need Analysis Information* in this section.

> **Note:** Remember to review all pages of the VER form and update all fields. After you
> update the fields, you must copy the VER form to the EFM Form before you
> continue. If you update any fields, see *If You Make Corrections* in this section.

If the student did pass verification, the following message appears: "Tolerance Amount =
$*XX.XX* Verification Status Code = '*X*'". The Verification Status Code is an A if the
information is accurate or T if it is within tolerance. Go to step 14.

14. Select **OK**. The message "Do you wish to complete the verification contact?" appears. If
    you do not wish to complete the verification contact, select **No** to cancel. Otherwise, go to
    step 15.

15. Select **Yes**. The system enters the current date in the Verify Cmpl field, the appropriate
    code in the Verification Stat Code field, and updates the verification contact status to
    completed on the Need Analysis Information screen.

16. Do you want to verify official financial aid need analysis information for another student?

- If <u>yes</u>, select **Query** and go to step 4.
- If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

17. Select **Yes**. The Financial Aid: Student Processing menu reappears.

If You Make Corrections

If you make corrections to the student's Verification Need Analysis Form record in step 15 of the procedure *How to Verify Official Financial Aid Need Analysis Information*, you must copy the VER data to the EFM. Follow these steps to copy the verification data to the EFM.

1. After you update all highlighted fields on all pages of the student's VER form, select **Initialize**. The Need Analysis Program Parameters screen appears.

2. Enter **FAFSA** in the Form field and select **Finish**. The student's FAFSA form of the Student Need Analysis screen (Section A) appears. The Verification record use is indicated by VER appearing highlighted in the upper right corner of the screen.

3. Select **Method**. The Financial Aid Methodology Selection window appears.

4. Select the letter corresponding to EFM. The student's FAFSA form of the Student Need Analysis screens appears using the EFM record (i.e., EFM appears highlighted in the upper right corner).

5. Select **Copy** from the Commands menu. The message "Do you wish to use existing application data from the FM method?" appears with the following options:
    - **Yes**
    - **No**
    - **Other**

6. Select **Other**. A window appears listing the Need Analysis Form record(s) that exist for the student and the message "Select the Method to copy from." appears.

7. Use the **<Arrow>** keys to select **VER** as the method to copy from and select **Finish**. The message "Warning: This may overwrite existing data. Do you wish to continue?" appears.

8. Select **Yes**. The system copies the data, and the student's FAFSA form reappears in Update mode.

9. Select **Finish**.

    > **Note:** If the EDE processing is enabled, you will mark the record for export as a correction and follow the normal correction steps. For more information, see *Updating Financial Aid Need Analysis Information* in this section.

10. To return to verifying the student's official financial aid information, select **Initialize**. The Need Analysis Program Parameters screen appears.

11. Enter **VER** in the Form field and select **Finish**. The student's VER form of the Student Need Analysis screens appears using the EFM record (i.e., EFM appears highlighted in the upper right corner).

12. Go to step 5 of the procedure *How to Verify Official Financial Aid Need Analysis Information* and continue.

Using Customized Need Analysis Calculations

Introduction

CX enables you obtain a student's Expected Family Contribution (EFC) in several different ways. For example, you can enter a student's financial information in the FAFSA form of the Student Need Analysis screens using the EFM methodology and then transmit the information to the Central Processing Service (CPS) for official calculation. For more information about transmitting information to the CPS, see the *Financial Aid Electronic Data Exchange (EDE) User Guide*.

In addition, CX automatically calculates an estimate of the student's EFC when you use the EFM or SIM Need Analysis Form records, and you can view the calculated amount on the Need Analysis Information screen.

> **Note:** The fully-tested calculations in CX result in an EFC equal to the official EFC.

You also can use Institutional Methodology (IM) to calculate the student's EFC. Your institution can customize the IM to meet its specific needs. In addition, your institution can set up and run more than one IM, if necessary.

> **Note:** You can only store one IM Need Analysis Form record for each student. You can overwrite the record or recalculate the estimated EFC after you change the tables used for your institution's calculation. You can store multiple IM values for the EFC in the Budget/Need Summary segment of the Need Analysis Information screen. You would need to define any additional IM methods in the Institutional Methodology table (immeth_table).

How to Use Institutional Methodology

Follow these steps to use an Institutional Methodology.

> **Note:** This procedure provides the steps to access the Financial Aid Need Analysis program from the CX menu. For more information about accessing the program from Financial Aid Entry, see *Accessing Financial Aid Need Analysis From Financial Aid Entry* in this section.

1. From the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis screen appears.

2. Change the financial aid award year and session, if desired, then select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired. Enter **IM** in the Form field and select **Finish**. The first page of a blank IM form of the Student Need Analysis screens appears in Query mode.

   > **Note:** The majority of the fields and their numbers correspond with those on the hard copy of the Free Application for Federal Student Aid (FAFSA) form and are described in the form and its accompanying pamphlet. Your institution should have a copy of these publications for reference.

4. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.

   The system loads the student's Need Analysis Form record for the current calculation method.

   > **Note:** The Priority field in the Need Analysis Method table (fameth_table) determines the Need Analysis Form record that appears when you first enter the Financial Aid Need Analysis program. The record that you access appears in the

(Financial Aid Need Analysis Form Record/Method) field, located in the upper right corner of the screen.

If an FM Need Analysis Form record does not exist for the student, the message "FM naf form not available for id: ####. Cannot add or update." appears in the comment line. You must create the record by executing the **Add** command. For the procedure to add a record, see *Adding Official Financial Aid Need Analysis Information* in this section.

5. Select **Method**. The Financial Aid Methodology Selection window appears.

6. Does IM appear in the Current Method field?
    - If <u>yes</u>, press **<Enter>**.
    - If <u>no</u>, select the letter corresponding to IM.

The student's IM form reappears.

> **Note:** If an EFM Need Analysis Form record does not exist for the student, the message "No need analysis records for id: ####. Use ADD command." appears in the comment line. You create the EFM record by executing the **Add** command.
>
> If an EFM Need Analysis Form record does exist for the student, you cannot execute the **Add** command. If you want to change the existing record, you must use the **Update** command. For the procedure to update an existing record, see *Updating Financial Aid Need Analysis Information* is this section.

7. Select **Add**. The message "Do you wish to use existing application data from the FM method?" appears. You can select one of the following buttons:
    - **Yes**
    - **No**
    - **Other**

> **Note:** If you want to use an existing Need Analysis Form record other than FM as a basis for the IM Need Analysis Form record, select **Other**. A window appears listing the Need Analysis Form record(s) that exist for the student. Use the **<Arrow>** keys to select the method to copy from and select **Finish**. If you select **Cancel**, the system creates a blank IM Need Analysis Form record, and you can manually enter the necessary information. Select **Finish** to accept the information you enter.
>
> If you select **No**, the system creates a blank IM Need Analysis Form record, and you can manually enter the necessary information. Select **Finish** to accept the information you enter.

8. Select **Yes**. The message "Warning: This may overwrite existing data. Do you wish to continue?" appears.

9. Select **Yes**. The IM Need Analysis Form record appears in update mode, with information obtained from the FM Need Analysis Form record.

10. Make the necessary changes and select **Finish**. The IM form of the Student Analysis Form screens displays the updated IM Need Analysis Form record.

11. Select **Need** to view the results of the IM calculation. The Need Analysis Information screen appears.

Note About Blank Need Analysis Form Records

In the procedure described on the preceding pages of this section, you create a blank Need Analysis Form record when you select Add in step 4 and then enter N to respond to the

message, "Do you wish to use existing application data from the FM method?" If you create the blank record by mistake, follow these steps to copy information from an existing record:

1. Access the blank record.

2. Select **Copy** from the Commands menu.

3. Select the Need Analysis Form record from which to copy.

4. Select **Execute**.

SECTION 4 - ACCESSING BUDGETS IN FINANCIAL AID

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:
- Assign a financial aid budget for a student.
- Assign different financial aid budgets for a student for different sessions of the academic year.
- Update individual budget items for a student.

Before You Begin

Before you begin to use the procedures for assigning and updating financial aid budget information, remember the following:
- Financial aid budgets represent most of the costs of attending your institution. The following expenses are examples of the types of costs that might be included in a student's budget:
  - Tuition
  - Room
  - Board
  - Books
  - Fees
  - Miscellaneous expenses
  - Transportation
  - Child care
- You must create new budgets each financial aid year. The easiest way to create new budgets for a year is to copy and update the previous year's budgets.
- You can customize the budget for each student, and you can enter different budget information for each session.
- The procedures provide the steps to access Financial Aid Need Analysis from Student Need Analysis. For more information about accessing Financial Aid Need Analysis from Financial Aid Entry, refer to *Accessing Financial Aid Need Analysis From Financial Aid Entry* in the section *Entering Financial Aid Need Analysis Information* in this guide.
- You can use the field descriptions in the section *Using the Financial Aid Need Analysis Screens* of this guide when you complete these procedures.

The Process for Assigning Budgets for a Student

This list shows the general phases that take place before, during, and after you assign budgets for a student.

1. Access the Financial Aid Need Analysis Program.

2. Access the Financial Aid Need Analysis Information screen.

3. Enter the appropriate budget type.

The Process for Updating Budgets for a Student

This list shows the general phases that take place before, during, and after you add or update budgets by session for a student.

Note: If the Automatic Recalculation macro (ENABLE_FEAT_MULTIPKG) is enabled, it is very important to update all budgets for the student.

---

1. Access the Financial Aid Need Analysis Program.

2. Access the Financial Aid Need Analysis Information screen.

3. Access the Financial Aid Budget screen.

4. Enter new budget information for the student, or change existing budget information.

Assigning Budgets

Prerequisites to Assigning Budgets

Before you can assign budgets to students, you define the budgets in the Financial Aid Budget tables. Jenzabar recommends that you establish budgets based on average costs of attendance, then customize the budgets by item or session for individual students, if necessary.

The following list describes the three tables that contain the budget information for your institution. For more information about these tables, see the *Financial Aid Technical Manual*.

Fin Aid Budget Table (fabgt_table)
Contains the following important budget information:
- Budget code name (e.g., C/IND/FT for commuting, independent, full-time students)
- Budget duration (e.g., 9 months)
- Enrollment level (e.g., Full-time)

Fin Aid Bgt Assoc table (fabgtas_table)
Appears on the same screen as the Fin Aid Budget table (fabgt_table) and defines the items in the budget (e.g., books), and the allowance for each item, by session and by financial aid year (e.g., $300).

> **Note:** The Pell budget is a special budget. You enter all possible Pell Cost of Attendance budget items that may be used (e.g., Dorm Charges which are used by an on-campus student as well as Living Expenses which are used by a commuting student). For the Pell budget no session value is required and the amount entered is the annual amount not a session amount. The Pell budget is automatically added for a student using the Pell budget items that also appear in the regular budget assigned to the student. The Pell budget is used by the system to determine the cost of attendance in the Pell Payment record.

> **CAUTION:** If the Pell cost of attendance prorate macro is enabled but the setup for the Academic Calendar record (acad_cal_rec) is incorrect for the weeks/hours, the system will place incorrect amounts in the award sessions. If no budget is assigned, the system will apply the entire Pell award amount to the session that is designated by the Financial Aid Entry Program Parameters screen with an extra $1.00 added.

Financial Aid Item Table (fa_item_table)
Defines the financial aid expense budget components for each expense budget type defined in the Fin Aid Bgt Assoc table (fabgt_table) (e.g., BOOK as the code for books and supplies).

How to Assign Budgets to Students

Follow these steps to assign budgets to students:

1. At the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis Parameters screen appears.

2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired, and select **Finish**. A blank form of the Need Analysis screen appears.

4. Do you know the student's ID or social security number?
   - If <u>yes</u>, enter the number in the ID field and select **Finished**.
   - If <u>no</u>, select **Query** to perform a query.

The student's form of the Need Analysis screens appears.

5. Select **Need**. The Need Analysis Information screen appears.

6. Select **Update Need**. The message "Enter letter of the method to be added" appears in the comment line.

> **Note:** If the student already has budgets assigned, this message does not initially appear, and the cursor appears in the Type field. Select **Add-Line**, and the message appears.

7. Select the appropriate financial aid calculation method. The selected method appears in the first line of the Meth field of the Budget/Need Summary segment of the screen, and the cursor appears in the Type field. The message "Enter Budget Code." appears in the Comment line.

8. Enter the appropriate budget code. The system displays one of the following two messages:
   - "Need records with budget methods the same as current will be added." appears in the comment line.

   > **Note:** This message relates to the budget method(s) on the Financial Aid Methodology Selection window. All the methodologies that display the same Budget Method (e.g., FM) will use the same budget type, and will be added for all methods when you select a budget.

   - "Update all session budget records for 9X9Y? (Y/N)" appears in a dialog box.

9. Select **Yes**. The system does the following, and the cursor appears in the SC field.
   - Changes the Type field value for every session and every methodology that has the same budget method.
   - Enters the cost of attendance in the Budget field.

   > **Note:** If you enter **N**, no add occurs.

10. Enter dollar amounts in the SC (student's contribution) and the PC (parents' contribution) fields, if necessary. Press **<Tab>** to move to the next field.

   > **Note:** Enter this information if you are manually entering the FM/FMS information, if desired. The system calculates the EFC (Expected Family Contribution) field based on the amounts you enter. Otherwise, you can enter the total dollar amount in the EFC field only. If you enter only the EFC, the SC and the PC fields will contain zeroes.

11. Change the value in the Ofcl field, if necessary.

12. Do you want to add another method? You can assign additional budgets based on other methods.
   - If <u>yes</u>, select **Add-Line**, and go to step 7.
   - If <u>no</u>, select **Finish**.

13. Select **Exit**. The student's form of the Need Analysis screen reappears.

14. Do you want to assign budgets for another student?
   - If <u>yes</u>, select **Query**, and go to step 4.
   - If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

15. Select **Yes**. The Financial Aid: Student Processing menu reappears.

How to Assign a Different Budgets for Each Session

Follow these steps to assign a student a different budget for each session.

1. At the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis Parameters screen appears.

2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired, and select **Finish**. A blank form of the Need Analysis screen appears.

4. Do you know the student's ID or social security number?
   - If yes, enter the number in the ID field and select **Finished**.
   - If no, select **Query** to perform a query.

   The student's form of the Need Analysis screens appears.

5. Select **Need**. The Need Analysis Information screen appears.

6. Select **Method**, and the Financial Aid Methodology Selection window appears.

7. Select the method for the budget that you want to enter.

8. Does Budget/Need Summary information exist?
   - If yes, go to step 11.
   - If no, select **Update Need**, and the message "Enter letter of the method to be added" appears in the comment line.

9. Select the method for which you want to assign a budget. The selected method appears in the Meth field of the Budget/Need Summary segment of the screen, and the cursor appears in the Type field.

10. Complete the following fields, and select **Finish**. Press **<Tab>** to move to the next field. Do not complete the Type field.
    - SC (Student's contribution)
    - PC (Parents' contribution)
    - Ofcl

    Note: The system calculates the EFC (Expected Family Contribution) field based on the amounts you enter. Otherwise, you can enter the total dollar amount in the EFC field only. If you enter only the EFC, the SC and the PC fields will contain zeroes.

11. Select **Budget**. The Financial Aid Budget screen appears.

12. Select **Add**. The cursor appears in the Budget Code field.

13. Enter the appropriate budget code. The cursor advances to the Sess field.

14. Enter the session to which the budget applies, and select **Finish**. The message "Do you want to update the Pell cost of attendance? (Y/N)" appears.

    Note: If a budget exists for the session, the message "Budget for '*session*' already exists. Do you wish to overwrite? (Y/N)" appears. Select **Yes**, and the budget is overwritten. If you select **No**, the budget is not changed and the command is aborted. Budget detail records are automatically added and are used by the system to activate the correct record depending on the student's enrollment level.

15. Select **Yes**. The Financial Aid Budget screen reappears with the new budget information for the session.

16. Do you want to assign budgets for other sessions?
    - If yes, go to step 12.
    - If no, select **Close**. The student's Need Analysis Information screen reappears.

17. Do you want to assign another budget for other sessions?
    - If yes, go to step 6.

- If <u>no</u>, select **Exit**. The student's Need Analysis Information screen reappears.

18. Do you want to assign budgets for another student?
- If <u>yes</u>, select **Query**, and go to step 4.
- If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears.

19. Select **Yes**. The Financial Aid: Student Processing menu reappears.

Updating Budgets

How to Update Budgets

Follow these steps to update financial aid budgets.

> **Note:** When you update budgets, it is important to update all the student's budgets.

1. At the Financial Aid: Student Processing menu, select the menu option **Student Need Analysis**. The Student Need Analysis Parameters screen appears.

2. Change the financial aid award year and session, if desired, and select **Finish**. The Need Analysis Program Parameters screen appears.

3. Change the parameters, if desired, and select **Finish**. A blank form of the Need Analysis screen appears.

4. Do you know the student's ID or social security number?
    - If yes, enter the number in the ID field and select **Finished**.
    - If no, select **Query** to perform a query.

    The student's form of the Need Analysis screens appears.

5. Select **Need**. The Need Analysis Information screen appears.

6. Select **Method**, and the Financial Aid Methodology Selection window appears.

7. Select the method for the budget that you want to update.

8. Does Budget/Need Summary information exist?
    - If yes, go to step 11.
    - If no, select **Update Need**, and the message "Enter letter of the method to be added" appears in the comment line.

9. Press the letter associated with the method for which you want to assign a budget. The selected method appears in the Meth field of the Budget/Need Summary segment of the screen, and the cursor appears in the Type field.

10. Complete the following fields, and select **Finish**. Press **<Tab>** to move to the next field. Do not complete the Type field.
    - SC (Student's contribution)
    - PC (Parents' contribution)
    - Ofcl

    > **Note:** The system calculates the EFC (Expected Family Contribution) field based on the amounts you enter. Otherwise, you can enter the total dollar amount in the EFC field only. If you enter only the EFC, the SC and the PC fields will contain zeroes.

11. Select **Budget**. The Financial Aid Budget screen appears.

12. Does the budget for the method session you want to modify appear on the screen?
    - If yes, go to step 13.
    - If no, select **Next Session** or **Previous Session** until it appears.

13. Do you want to delete or update the budget?
    - If you want to delete, select **Delete**. The message "Delete budget record for 'session'? (Y/N)" appears. Go to step 14.
    - If you want to update, select **Update**. The screen goes into Update Budget mode, and the cursor appears in the Item field. Go to step 15.

14. Select **Yes**. The system deletes the budget. If a budget for another session exists, it appears on the screen. If not a blank Financial Aid Budget screen appears. Go to step 17.

15. Update any information in any field necessary. You can also add additional budget expense items if you desire by selecting **Add-Line** or delete existing items by selecting **Del-Line**. Press **<Tab>** to move the cursor to the appropriate fields.

> **Note:** If you add or delete budget expense items(s) for one session, you must perform the same action for every enrollment level.
>
> The information that you enter on the Financial Aid Budget screen for a specific student does not change any of the information in the Fin Aid Bgt Assoc table (fabgt_table). Your changes apply only to the student you selected.

16. Select **Finish** when you complete your updates.

17. Do you want to modify the budget for other sessions?

> **Note:** If you added or deleted budget expense items(s) for one session, you must perform the same action for every enrollment level.

- If <u>yes</u>, go to step 12.
- If <u>no</u>, select **Close**. The Need Information screen reappears.

18. Select **Return to Previous Screen**. The student's form of the Need Analysis screen reappears.

19. Do you want to assign budgets for another student?
- If <u>yes</u>, select **Query**, and go to step 4.
- If <u>no</u>, select **Exit**. The message "Are you sure you want to exit?" appears. Select **Yes** to return to the Financial Aid: Student Processing menu.

SECTION 5 - USING FINANCIAL AID SIMULATIONS

Overview

Introduction

Financial Aid personnel often use financial aid simulations to help them obtain estimated EFC values for prospective or current students, and to inform students about "what-if" financial aid situations. A financial aid simulation is the process of entering or changing a student's asset and income information to determine the effects of changes on his/her financial aid eligibility.

This section provides the step-by-step procedures to follow when you use the two methods for financial aid simulation.

Ways to Perform Simulations

CX supports the following two methods of simulating the calculation of the Expected Family Contribution:
- Using a predefined simulation ID number and entering financial information each time you perform a simulation.
- Using the SIM record for each current student for whom you want to perform a simulation.

The Process

This list shows the general phases that take place when you perform a financial aid simulation.

1. Access Financial Aid Need Analysis.

2. Select the desired Student Need Analysis screen (either SIM or FAFSA).

3. Select the desired ID number (either the simulation ID number or the ID number of the student for whom you want to use financial aid simulation).

4. Enter the financial aid information for the individual or student.

5. Review the calculated Expected Family Contribution.

Using the Predefined Simulation ID Number and Simulation Screens

When to Use the Predefined Simulation ID Number and Simulation Screens

When you use your institution's predefined simulation ID number and the simulation (SIM) screens, you can quickly estimate the financial aid eligibility of an individual who does not have an ID record in CX. You can also estimate the eligibility for any student as long as you do not require the complexity and accuracy of the Expected Family Contribution calculation.

Before You Begin

When you use the simulation ID number to estimate a student's eligibility for financial aid, remember the following:
- Because the same ID number is used for more than one student's estimate, you cannot store financial aid need analysis information for a student on the database. However, you can print the information and save a hard copy of the data.
- The calculation does not use the federal reject and assumption calculations.
- The simulation data only contains data elements for required calculation values, that is, it does not include any optional information.
- Know the simulation ID number and name set up during the installation process.

How to Use the Predefined Simulation ID Number

Follow these steps when you use the predefined ID number to use financial aid simulation.

1. If you do not know the simulation ID or name, obtain the simulation ID number from the Jenzabar coordinator at your institution.

    Note: The system defines the simulation ID number (FA_SIM_ID) in macros/custom/student. This keeps the simulation information from affecting the financial aid reports.

2. Access Financial Aid Need Analysis.

    Note: You can access Financial Aid Need Analysis from the menu or from Financial Aid Entry.

3. Did you access Financial Aid Need Analysis from the menu or from Financial Aid Entry?
    - If from the menu, follow these steps:
        - Select the SIM form on the Need Analysis Program Parameters screen.
        - Locate the ID record for the simulation ID number.
        - Go to step 5.
    - If from Financial Aid Entry, follow these steps:
        - Locate the ID record for the simulation ID number.
        - Select **Need**.
        - Go to step 4.

4. Follow these steps:
    - Select **Initialize**.
    - Select the SIM form on the Need Analysis Program Parameters screen.

5. Select **Execute**.

    The Student Need Analysis Screens - SIM Form screen appears.

6. Select **Method**.

    The Financial Aid Methodology Selection window appears.

7. Check the current method. Is it SIM?

If <u>yes</u>, press **<Enter>**.

If <u>no</u>, select the letter corresponding to SIM.

The Student Need Analysis Screens - SIM Form screen appears.

> **Note:** Jenzabar recommends you use the SIM simulation, method/record. The SIM method uses the federal formulas for calculating the EFC. You can use EFM or IM. These procedures assume the use of SIM.

8. Does a simulation Need Analysis form record exist?

    If <u>yes</u>, select **Update**. You enter Update mode.

    If <u>no</u>, select **Add**. You enter Add mode.

    > **Note:** Depending on whether you are adding or updating the record, the program may respond with messages. For more information about adding or updating Need Analysis Form records, refer to *How to Add Official Financial Aid Need Analysis Information* and *How to Change Financial Aid Need Analysis Information* in this section.

9. Follow these steps:
    - Enter the individual's information on the Student Need Analysis Screens - SIM Form screens beginning with the first field, assumed Dependency Status.
    - Select **Done**.
    - When you use the Simulation Form screens, you must specify the Dependency Status. Financial Aid Need Analysis will not determine the status when you are using the Simulation Form screens.
    - Before you select Done, be sure that you have reviewed the contents of *both* of the Student Need Analysis Screens - SIM Form screens. Any information left from a previous simulation calculation will affect the new calculation that you are performing. For example, if you are entering data for an independent student, make sure all parental fields are blank or zero.

    The program calculates the student's estimated need and the command line on the Student Need Analysis Screens - SIM Form screen changes.

10. Access the Need Analysis Information screen.

    You can view the estimated Expected Family Contribution for the individual.

11. Do you want to change the information on the Student Need Analysis Screens - SIM Form screen?

    If <u>yes</u>, repeat steps 8-10 above.

    If <u>no</u>, select **Exit**.

    You return to the Need Form screen, or to Financial Aid Entry.

12. Do you want to exit the program?

    If <u>yes</u>, select **Exit**. The message "Are you sure you want to exit" appears. Select **Y,** and the menu appears.

    If <u>no</u>, you may select a command to execute other processes within the program.

Using Financial Aid Simulation for a Current Student

When to Use Simulation for a Student

When you use simulation for a specific student's ID, you can store simulation or estimated amounts under the SIM method without affecting EFM information that might be required for corrections. You also can change the values in some of the required fields to perform an alternate EFC analysis. When you perform a simulation for a specific student's ID, the program performs a complete EFM calculation, determining all assumptions, rejects, and dependency statuses. The only difference between simulation and using the EFM methodology is that the information is stored under the SIM methodology to label it and separate it from the EFM and FM information.

> **Note:** This procedure assumes you are using the FAFSA Form screens rather than the SIM Form screens.

1. Access Financial Aid Need Analysis.

> **Note:** You can access Financial Aid Need Analysis from the menu or from Financial Aid Entry.

2. Did you access Financial Aid Need Analysis from the menu or from Financial Aid Entry?
   - If from the menu, follow these steps:
     - Select the **Student Need Analysis Screens - FAFSA Form screen** from the Need Analysis Program Parameters screen.
     - Locate the ID record for the specific student for whom you are performing a simulation.
     - Go to step 4.
   - If from Financial Aid Entry, follow these steps:
     - Locate the ID record for the specific student for whom you are performing a simulation.
     - Select **Need**.
     - Go to step 3.

3. Follow these steps:
   - Select **Initialize**.
   - Select the **FAFSA form** on the Need Analysis Program Parameters screen.

4. Select **Execute**. The Student Need Analysis screen appears.

   Select **Method**. The Financial Aid Methodology Selection window appears.

5. Check the current method. Is it SIM?

   If <u>yes</u>, press **<Enter>**.

   If <u>no</u>, select the letter corresponding to either SIM.

   The Student Need Analysis screen appears, and "SIM" appears in the upper right corner of the screen if the student already has a SIM Need Analysis Form record. If the student does not yet have a SIM Need Analysis Form record, "SIM" will appear when you select **Done**.

6. Does the Need Analysis form record exist?
   - If <u>yes</u>, select **Update**. You enter Update mode.
   - If <u>no</u>, select **Add**. You enter Add mode.

> **Note:** Depending on whether you are adding or updating the record, the program may respond with messages. For more information about adding or updating Need Analysis Form records, refer to refer to *How to Add Official Financial Aid Need*

Analysis Information and *How to Change Financial Aid Need Analysis Information* in this section.

7. Follow these steps:
    - Enter or update the student's financial aid information.
    - Select **Done**.

    The program calculates the student's estimated need, and the command line on the Student Need Analysis screen changes.

8. Access the Need Analysis Information screen. You can view the estimated Expected Family Contribution for the individual.

9. Do you want to change the simulation information on the Student Need Analysis screen?
    - If <u>yes</u>, repeat steps 6-7 above.
    - If <u>no</u>, go to step 10.

10. Do you want to perform simulations for other students?
    - If <u>yes</u>, select **Exit**. The Student Need Analysis screen or the Financial Aid Entry screen appears. Query on a new student and repeat steps 6-9 above.
    - If <u>no</u>, select **Exit**. The Need Form screen or the Financial Aid Entry screen appears. Select **Exit**. The message "Do you want to exit the program?" appears.
      - If <u>yes</u>, select **Y**. The menu appears.
      - If <u>no</u>, select a command for another process in the program.

    You return to the menu or to Financial Aid Entry.

SECTION 6 - SETTING UP THE INSTITUTIONAL METHODOLOGY CALCULATION

Overview

Introduction

The Jenzabar CX Institutional Methodology (IM) begins with the Federal Methodology (FM) formula for calculating the Expected Family Contribution for a student. Users can customize the components of the FM formula to meet the needs of their own institutions. Customizations occur primarily in the CX table immeth_table (the IM Method table), but other CX tables also affect the results of the IM calculation.

This section provides the following:
- A description of the features and screens for the IM calculation
- A list of the setup issues relating to IM
- A description of the IM Method table
- A list of the CX tables that affect the IM calculation

Prerequisite Task

Before you begin to customize the IM calculation for your institution, obtain a copy of the FM formula as provided by the Department of Education.

Customizations Users Can Make

You can make any of the following customizations for your institution's IM:
- Use estimated instead of reported U.S. income tax amounts
- Define up to three adjustment amounts in both parent and student income asset information
- Set a minimum student contribution based on the student's class

How to Access the Customized IM Calculation

To access the customized IM calculation, select **Financial Aid Need Analysis** from either the menu or from within Financial Aid Entry. Then, use the Financial Aid Methodology Selection window to select either the **IM** or **IMS** method.

Using the Correct Form Screen

You can use either the Free Application for Federal Student Aid (FAFSA) or the IM form to accumulate the information that the IM calculation uses. The forms are identical except that the IM form contains space for entering adjustments, and it does not contain the Institutional Student Information Report (ISIR) data fields. Therefore, if you want to enter student or parent adjustments to income and assets, you must use the IM form.

Implementing the IM Calculation

Setup Issues

You set up the IM calculation exclusively through tables that you can access from the Financial Aid: Table Maintenance menu. You do not have to add or change any macro or include values.

In order for your changes to be reflected, you must reload Financial Aid Need Analysis every time you change the IM Method table. However, if you change the other tables that affect the IM calculation, you are not required to reload Financial Aid Need Analysis in order for the changes to be reflected.

The Standard Jenzabar CX IM Setup

The Institutional Methodology feature is available for the 9495 award year only. As delivered, the IM calculation matches the EFM calculation. By modifying the tables that affect the IM calculation, you can cause the IM calculation to reflect any criteria that your institution requires.

The IM Method Table

The IM Method table sets the major options for the IM calculation. Your institution can have only one IM Method table for each financial aid award year. The contents of the IM Method table affect all students for whom you use the IM calculation for the specified award year.

How to Access

Access all the tables that customize the IM calculation from the Financial Aid: Main Menu by selecting **Table Maintenance**, then **Need Analysis Tables**.

Example of the IM Method Table

The following is an example of the IM Method table screen after it has been completed. The bracketed areas can contain any customizations that your institution requires. Note that the example screen includes adjustments for the EFM Student Need Analysis screen and additional IM form field descriptions. Note also that the title that appears on the screen is "IM USER DEFINED OPTIONS TABLE."

```
PERFORM:  Query  Next  Previous  View  Add  Update  Remove  Table  Screen  ...
Searches the active database table.         ** 1: immeth_table table**
                        IM USER DEFINED OPTIONS TABLE

Financial Aid Year........[9X9Y]    Min. 1st Yr Student Contrib...[700    ]
Use Estimated U.S. Tax.......[N]    Min. 2+ Yr Student Contrib....[1100   ]

Need Screen EFC Adjustment Options:
Column 1 Label..........[Loans ]    Column 1 Default Amount.......[     0]
Column 2 Label..........[Adj   ]    Column 2 Default Amount.......[   500]
Column 3 Label..........[      ]    Column 3 Default Amount.......[     0]

IM Form Field Descriptions:
               ------- STUDENT ---------        -------- PARENT ---------
Income Field 1...[Student's Med/Dental Exp ]    [Parents' Med/Dental Exp ]
Income Field 2...[Elem/Secondary Tuition   ]    [Elem/Secondary Tuition  ]
Income Field 3...[Misc Adjustments         ]    [Misc Adjustments        ]

Asset Field 1....[Student's Home Equity     ]   [Parents' Home Equity    ]
Asset Field 2....[Misc Student Adjustments ]    [Misc Parent Adjustments ]
Asset Field 3....[                          ]   [                        ]
```

Fields on the IM Method Table Screen

The following list describes the fields on the IM Method Table screen. Refer to this information when you customize the IM Method table to reflect your institution's IM calculation:

Financial Aid Year
Defines the award year for the table (e.g., 9X9Y).

IM Form Field Descriptions
Defines the customized Student Need Analysis Screens - IM Form screen fields. If you leave any of the field descriptions blank, you will not be able to enter information in the space on the screen that relates to the blank field.
You can define up to three of each of the following four types of field descriptions:
- Student income adjustments
- Student asset adjustments
- Parent income adjustments
- Parent asset adjustments

Users can enter either positive or negative amounts in the fields related to the descriptions.
- Financial Aid Need Analysis adds the contents of the income adjustment fields (subtracting negative amounts) to the student or parent total income in the EFM formula.
- Financial Aid Need Analysis also adds the contents of the asset adjustment fields (subtracting negative amounts) to the student or parent net worth in the EFM formula.

Min. 1st Yr Student Contrib
Sets the minimum student contribution amount for first year students. The IM calculation uses the contents of this field in place of the calculated student contribution if the calculated amount is less than the value in this field.
- If the field is blank or contains zero, Financial Aid Need Analysis will use the calculated student contribution.
- The contents of the FAFSA question 20, Year in College in 1994-95, determines the year for the student.

Min. 2+ Yr Student Contrib
Sets the minimum student contribution amount for students who are not in their first year of postsecondary education. The IM calculation uses the contents of this field in place of the calculated student contribution if the calculated amount is less than the value in this field.
- If the field is blank or contains zero, Financial Aid Need Analysis will use the calculated student contribution.
- The contents of the FAFSA question 20, Year in College in 1994-95, determines the year for the student.

Need Screen EFC Adjustment Options
Defines up to three column labels and up to three default amounts. Information contained in these fields appears on the Need screen. If you leave any of the column labels blank, you will not be able to enter information in the corresponding column on the Student Need Analysis screen. If you define a default dollar amount, the amount that you define will adjust the calculated IM EFC.
- If you define a default dollar amount, the IM calculation will overwrite any student value with the default amount.
- The EFC adjustment fields are used to determine need according to the following formula, where the adjustments (ADJ) can be either positive or negative numbers:

$$\text{Budget} - \text{EFC} - \text{ADJ1} - \text{ADJ2} - \text{ADJ3} = \text{Need}$$

Use Estimated U.S. Tax
Indicates whether or not Financial Aid Need Analysis uses a calculated estimated U.S. income tax or the reported U.S. income tax. "Y" is for yes; "N" is for no.

Other Jenzabar CX Tables That Affect IM

You can modify several other CX tables to further customize the IM calculation at your institution. The standard CX provides table entries that match the published Federal Methodology tables.

Jenzabar recommends that you print and save a copy of each of the table reports for the following reasons:

- To help you understand the structure of the table.
- To enable you to recreate the Federal Methodology tables in their original state, if desired.
- Changes to the tables take effect immediately. If a table changes after you calculate a student's IM EFC, you must select the student again and recalculate their EFC by selecting **Calculate** from the command line on the Student Need Analysis screen.
- You can change the following Federal Methodology tables to customize IM:
    - Asset Protection Allowance table (tapa_table)
    - Business and Farm Net Worth table (tbusfarm_table)
    - Estimated U.S. Tax table (tfatax_table)
    - Income Contribution table (tinccont_table)
    - Income Protection Allowance table (tipa_table)
    - State and Local Tax Allowance table (ttaxallow_table)

Note About the Income Protection Allowance Table

The Income Protection Allowance table contains the following two special purpose fields:

- Allowance for families with more than six members
- Allowance for families with more than five members in college

The IM calculation uses the special allowances only when the Student Need Analysis screen fields (fields 51 and 52 for independent students and fields 56 and 57 for dependent students) indicate that the family size or number of students exceeds six or five, respectively.

Using Financial Aid Simulation for a Student

When to Use Simulation for a Student

When you use simulation for a specific student's ID, you can store simulation or estimated amounts under the SIM method without affecting EFM information that might be required for corrections. You also can change the values in some of the required fields to perform an institutional analysis.

When you perform a simulation for a specific student's ID, the program performs a complete EFM calculation, determining all assumptions, rejects, and dependency statuses. The only difference between simulation and using the EFM methodology is that the information is stored under the SIM methodology to label it and separate it from the EFM and FM information.

1. Access Financial Aid Need Analysis.

   Note: You can access Financial Aid Need Analysis from the menu or from Financial Aid Entry.

2. Did you access Financial Aid Need Analysis from the menu or from Financial Aid Entry?
   - If <u>from the menu</u>, follow these steps:
     - Select the desired Student Need Analysis form from the Need Analysis Program Parameters screen.
     - Locate the ID record for the specific student for whom you are performing a simulation.
     - Go to step 4.
   - If <u>from Financial Aid Entry</u>, follow these steps:
     - Locate the ID record for the specific student for whom you are performing a simulation.
     - Select **Need**.
     - Go to step 3.

3. Follow these steps:
   - Select **Initialize**.
   - Select the SIM form on the Need Analysis Program Parameters screen.

4. Select **Finished**. The Student Need Analysis Screens - SIM Form screen appears.

5. Select **Method**. The Financial Aid Methodology Selection window appears.

6. Check the current method. Is it SIM?

   If <u>yes</u>, press **<Enter>**.

   If <u>no</u>, select the letter corresponding to either SIM.

   The Student Need Analysis Screens - SIM Form screen appears, and "SIM" appears in the upper right corner of the screen if the student already has a SIM Need Analysis Form record. If the student does not yet have a SIM Need Analysis Form record, "SIM" will appear when you select Done.

7. Does the Need Analysis form record exist?

   If <u>yes</u>, select **Update**. You enter Update mode.

   If <u>no</u>, select **Add**. You enter Add mode.

   Note: Depending on whether you are adding or updating the record, the program may respond with messages. For more information about adding or updating Need Analysis Form records, refer to *How to Add Official Financial Aid Need Analysis*

Information and How to Change Financial Aid Need Analysis Information in this section.

8. Follow these steps:
   - Enter or update the student's financial aid information.
   - Select **Finish**. The program calculates the student's estimated need, and the command line on the Student Need Analysis screen changes.

9. Access the Need Analysis Information screen. You can view the estimated Expected Family Contribution for the individual.

10. Do you want to change the simulation information on the Student Need Analysis screen?

    If <u>yes</u>, repeat steps 7-8 above.

    If <u>no</u>, go to step 11.

11. Do you want to perform simulations for other students?

    If <u>yes</u>, repeat steps 2-9 above.

    If <u>no</u>, select **Exit**.

    You return to the menu or to Financial Aid Entry.

SECTION 7 - USING THE FINANCIAL AID NEED REPORTS

Overview

Introduction

This section provides:
- The procedure to generate and print reports
- Information about the standard reports you can produce using Financial Aid Need

How to Generate and Print Reports

When you select a report from a CX menu, comments on a parameter screen prompt you to enter the following types of parameters:
- Report (e.g., dates, IDs, or document numbers)
- Output (e.g., filenames, printers, dates, and times)

These parameters control the contents of the report and the time and type of output produced.

Follow these steps to generate any of the standard CX reports.

1. Access the desired Reports menu, then select the report you want to generate. A screen containing the processing parameters for the report appears.

2. Enter the required or relevant parameters, then select **Finish**. The Output Parameters and Scheduling window appears.

3. Indicate the type of output you want to produce and the time and day you want to generate the report. Select **Finish** either to generate the report or to schedule it for production on the specified date and time.

   Notes:

   - If you route the output to a file and do not define a name for the file, CX places the output in a file called *filename.out*, where *filename* is the technical name of the report. See *Reports for Financial Aid Need* for the technical name for each report.

   - For more information about using the Output Parameters and Scheduling window, see *Performing Background Tasks* and *Scheduling Processes* in the *Getting Started User Guide*.

Reports for Financial Aid Need Analysis

Aid Reports

The following reports relate to Aid reports used in Financial Aid Need Analysis. You can produce each of these reports from the Reports: Aid Reports menu:

Students By Calculation Status
> *Menu option*: Need Analysis Status
> *Technical name*: needlist
> *Parameters*:
>> **Year:** Required - The school year (e.g., 9900 for 1999-2000) for which you wish to create the report.
>> **Status:** Optional - The Student Academic Status code (e.g., A for students with adjusted contributions) for which you wish to create the report.
> *Description*: Lists students with their financial aid need analysis results.
> *Special considerations*: None

Need Analysis Tape Conversion Reports

The following reports relate to Need Analysis Tape Conversion reports. You can produce each of these reports from the Financial Aid: Need Analysis Tape Conversion menu.

Leads From Need Analysis Tapes Or EDE
> *Menu option*: Leads From Applicant Info
>
>> **Note:** You can also access the Need Analysis Lead Information report from the Financial Aid: EDE Processing menu.
>
> *Technical name*: natplead
> *Parameters*:
>> **Year:** Required - The school year (e.g., 9899) for which you wish to create the report.
>> **Agency:** Optional - Enter the agency (e.g., ACT) that provided the need analysis tape.
>> **Format:** Optional - Enter the format (e.g., ACT) of the need analysis tape.
>> **Date:** Optional - Enter the selection date (mm/dd/yyyy).
>> **Omit:** Required - Y(es) or N(o) indicating whether you wish to omit students with and existing ID record.
> *Description*: Lists names from the natp_rec.
> *Special considerations*: None

SECTION 8 - RESPONDING TO SYSTEM MESSAGES

Overview

Introduction

This section provides the following:
- Descriptions of the status, warning, field error, and fatal error messages that can appear while you are using Financial Aid Need Analysis.
- Information you need to respond to the status, warning, and error messages.

Four Types of Messages

Four types of messages can appear in Financial Aid Need Analysis. The messages appear on the comment line, on the error line, in a dialog box, or in your e-mail. The types of messages are:
- Status message
- Field error message
- Warning message
- Fatal error message

Descriptions of Message Types

This list describes each of the four types of messages, by degree of severity.

Status

Assures you that the program is working properly when you select an option involving a long pause.

- Can appear after you select a command or option, type data, or press a key
- Appears on the comment line
- Requires no action by you

Example: "Opening files ..."

Field error

Tells you of an invalid field value entered, and provides valid field values from which to choose.

- Can appear after you enter an invalid code in a field.
- Appears on the error line.
- Requires you to select a valid code from those provided in the field error message, a table lookup, or a query, and enter it into the field.

Example: "Valid values: (A, I)"

Warning

Informs you of a condition of which you must be aware in order to continue.

- Can appear after you select a command or option, type data, or press a key to begin or end a process that requires a decision.
- Appears in a dialog box.
- Requires you to act or make a decision.
- Instructional; does not terminate processing.

Example: "Are you sure you want to exit? (Y/N)"

Fatal error

Informs you of a serious problem occurring within the system.

- Can appear when the system is missing information (such as a required table or record) needed to continue processing, or when there is a program error.
- Appears in a dialog box, or in your e-mail, and/or in your Jenzabar coordinator's e-mail.
- Requires you to contact the Jenzabar CX application coordinator immediately to resolve the problem.
- Terminates processing.

Example: "XXXX An unrecoverable error has occurred. Contact your Jenzabar coordinator."

E-mail Messages

Occasionally, CX programs send status or error messages to your e-mail, as well as to the comment or error line. Programs do not send messages about background processes to the comment or error line, but only to your e-mail. Such messages tell you any of the following information:

A process was completed successfully
You can delete or save them according to your preferences or established policy.

Errors have occurred while trying to complete a process
Tell your Jenzabar coordinator about the message to resolve the problem.

Information cannot be found
Try the process again with new field values.

Warning and Error Messages

Messages You Might Receive

The following is an alphabetical list of some of the field error, warning, and fatal error messages that can appear when you use Financial Aid Need Analysis.

Warning messages do not affect program processing, while field error messages indicate problems you can correct by following the directions in the message. However, fatal error messages stop the processing of a program; if you receive a fatal error, contact your Jenzabar coordinator immediately.

Analysis method 'XX' not implemented
> The need analysis method *XX* has not been implemented for the current year's Financial Aid Need Analysis program.

Budget association and item tables set up wrong, item code 'XX' not found
> The Financial Aid Budget Association table (fabgtas_table) contains the expense budget code XX, but the Financial Aid Item table (faitem_table) does not contain the code.

Budget code 'XXXX' not found in fabgtas_table: year 9X9Y, sess'XX9X'
> The Financial Aid Budget Association table (fabgtas_table) does not contain the budget code, year, and session specified. Update the Financial Aid Budget Association table.

Budget type 'XX' not found in financial aid budget table
> The Financial Aid Budget table (fabgt_table) does not contain the budget type code specified. Update the Financial Aid Budget table.

Calculations not implemented for years other than 9X and 9Y
> The ability to calculate the Expected Family Contribution is usually restricted to two years. Verify that you entered the correct year for using Financial Aid Need Analysis.

Cannot add stufa_rec for student XXXX, year 9X9Y, insert status ####
> An error, ####, occurred when Financial Aid Need Analysis attempted to add a Student Financial Aid record (stufa_rec) for the specified student and year. Contact your Jenzabar coordinator.

Cannot find budget code 'XX' in fabgtas_table. Table may be incorrect
> The Financial Aid Budget Association table (fabgtas_table) does not contain the budget code specified.

Cannot find period XXXX9X in fiscal calendar records
> You entered an invalid period code, and you must enter a valid code that exists in the Fiscal Calendar record.

Cannot find stufa_rec for student XXXX, year 9X9Y, select status ####
> An error, ####, occurred when Financial Aid Need Analysis attempted to locate and lock a Student Financial Aid record (stufa_rec) for the specified student and year. Contact your Jenzabar coordinator.

Could not find budget record for period '9X9Y', dbfind error ####
> An error, ####, occurred when Financial Aid Need Analysis attempted to locate a Financial Aid Budget record (fabgt_rec) for the budget period (fabgt_prd) 9X9Y. Note the student ID for whom the error occurred, and contact your Jenzabar coordinator.

DELETE error #### on fabgt_rec. File XXXX Line XXXX.

An error, ####, occurred when Financial Aid Need Analysis attempted to delete a Financial Aid Budget record (fabgt_rec) for the budget period (fabgt_prd) 9X9Y. Note the student ID for whom the error occurred, and contact your Jenzabar coordinator.

FANEED parameter error: No form specified
The "-f" parameter was passed to the program with no form code specified. Ensure that you are entering the correct parameter, and rerun the program.

FANEED parameter error: No period specified
The "-s" parameter was passed to the program with no session code specified. Ensure that you are entering the correct parameter, and rerun the program.

FANEED parameter error: No program specified
The "-p" parameter was passed to the program with no program code specified. Ensure that you are entering the correct parameter, and rerun the program.

FANEED parameter error: No subsidiary specified
The "-s" parameter was passed to the program with no subsidiary code specified. Ensure that you are entering the correct parameter, and rerun the program.

FANEED parameter error: Period 'XXXX9X' not associated with year '9X'
The period 'XXXX9X' is not associated with the year '9X,' according to the Fiscal Calendar record (fscl_cal_rec).

ID #### not found in id file
The CX database does not contain the student ID number #### that you entered on the screen.

>   **Note:** This message will only appear when you query on an ID in Financial Aid Need Analysis for the year 89/90 or before.

ID #### not found in profile file
The CX database does not contain a Profile record (profile_rec) for the ID number #### that you entered on the screen. Financial Aid Need Analysis requires some of the information contained in the Profile record.

>   **Note:** This message will only appear when you query on an ID in Financial Aid Need Analysis for the year 89/90 or before.

INSERT error #### on fabgt_rec. File XXXX Line XXXX.
An error, ####, occurred when Financial Aid Need Analysis attempted to insert a Financial Aid Budget record (fabgt_rec) for the budget period (fabgt_prd) 9X9Y. Note the student ID for whom the error occurred, and contact your Jenzabar coordinator.

Invalid budget code 'XX' in fabgt_rec: ID ####, yr 9X9Y, sess ####
The Financial Aid Budget record (fabgt_rec) for the specified student and session #### contains a code that does not appear in the Financial Aid Budget table (fabgt_table).

Invalid default ctc code XXXX defined in the 'finaid' custom file.
Contact your Jenzabar coordinator to update the set of default contacts in the include/custom/finaid file.

Invalid form specified, must be 'XX' or 'YY'
You entered an invalid Need Analysis form. Enter the correct value, and continue.

No budget records to delete
You selected the **Delete** command on the Budget screen, and there are no records for the current student.

No current budget record to update

You selected the **Update** command on the Budget screen, and no Budget record appears on the screen. Add a budget, if desired, or use the Next or Previous command to update another session's Budget record.

No current student. Query on a student first
Use Query to retrieve a student's records before using the current command option.

No financial aid computation methods for year '9X9Y'
The Financial Aid Method table (fameth_table) does not contain the valid need analysis computation methods for the specified year.

No need record for method 'XX'
The CX database does not contain a Financial Aid Need record (faneed_rec) for the specified method. Select **Add** on the Student Need Analysis screen to add a Financial Aid Need record, or enter the need analysis form information and calculate the need.

No need records for this ID
The CX database does not contain Financial Aid Need records (faneed_rec) for the specified ID. Select **Add** to add or perform the need analysis calculations.

Parameter error: Invalid command line argument 'XX'
You passed an invalid parameter to Financial Aid Need Analysis.

Period 'XX' is in the fabgtas_table but not in the fiscal calendar
The period 'XX' appears in the Financial Aid Budget Association table but not in the Fiscal Calendar record (fscl_cal_rec). The two tables must contain the same periods.

Program 'XXXX' not found in program table
The Program table (prog_table) does not contain the program specified. Enter the correct program and rerun.

PTP_ACCEPT error: Ptp connection to FAENTRY could not be established
The program to connect the Financial Aid Entry program and the Financial Aid Need Analysis program was unsuccessful. Contact your Jenzabar coordinator.

PTP_WRITE error, status = XX, ptp_errno = ####
Financial Aid Need Analysis cannot send information to Financial Aid Entry when Financial Aid Entry calls Financial Aid Need Analysis. Contact your Jenzabar coordinator.

PTP_ WRITEDMM error, status = %d, ptp_errno = %d
Financial Aid Need Analysis cannot send information to Financial Aid Entry when Financial Aid Entry calls Financial Aid Need Analysis. Contact your Jenzabar coordinator.

SELECT error #### on fabgt_rec. File XXXX Line XXXX.
An error, ####, occurred when Financial Aid Need Analysis attempted to select a Financial Aid Budget record (fabgt_rec) for the budget period (fabgt_prd) 9X9Y. Note the student ID for whom the error occurred, and contact your Jenzabar coordinator.

Student #### is currently locked by another user.
Another user is currently using the Student Financial Aid record (stufa_rec) specified. Until the other user unlocks the record, you cannot access it. Locking records protects them from being updated by two different processes at the same time.

Subsidiary 'XX' not found in subsidiary table
The Subsidiary table (subs_table) does not contain the specified subsidiary code.

The budget records must be added from the Need screen or the Budget screen
If you enter "N" in response to the prompt, "Default budget records for #### under method 'XX' for '9X9Y' (Y/N)?", this message informs you that you must add Budget records from the Financial Aid Student Need Analysis screens or the Budget screens.

There are no records for academic year '9X9Y' in [a specified table]

The table indicated in the error message does not contain any entries for the specified year. Add the necessary records, and rerun the program.

There are no records for academic year '9X9Y', subs 'XX' in the fscl calendar
The Fiscal Calendar record (fscl_cal_rec) does not contain an entry for the specified year and subsidiary. Add the necessary records and rerun the program.

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