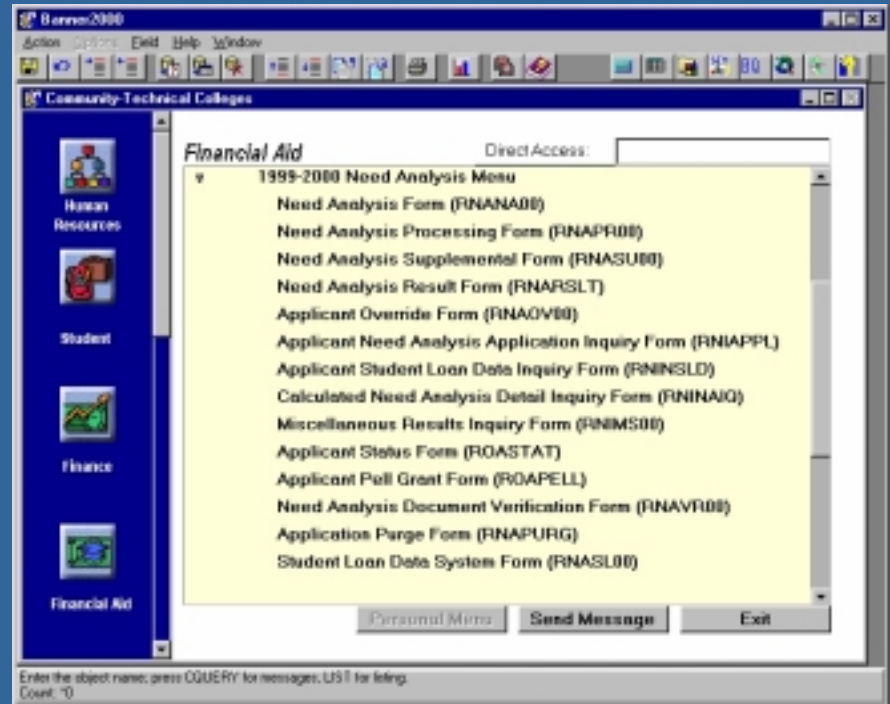


Need Analysis Module



Need Analysis

- Multiple application sources
- On-line or Batch calculations
- CSS I NAS for Calculations & Simulated Need Analysis
- FM, Pell and IM Methodologies
- Simultaneous EDE Correction File
- Transaction Log and anecdotal comments



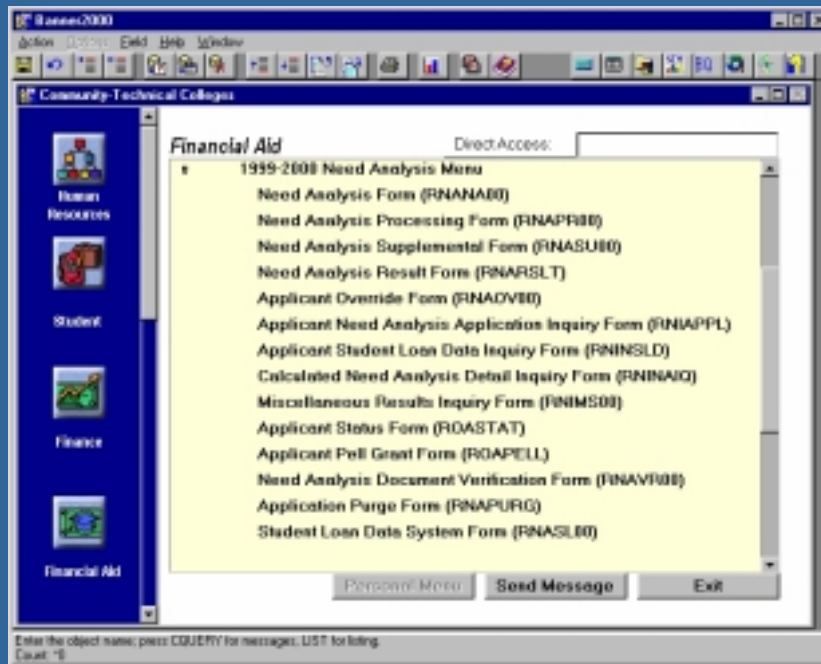
Need Analysis Module overview

- Enter/update records on Need Analysis, Supplemental, and Need Analysis Processing Forms
- Recalculations, overrides, and locking Need Analysis data
- Inquiring and verifying results of Need Analysis applications

Recalculations, overrides, and locking

- Updating data and recalculation using I NAS
- Exercising professional judgement
- Performing simulations using I NAS
- Saving I NAS results

Verification

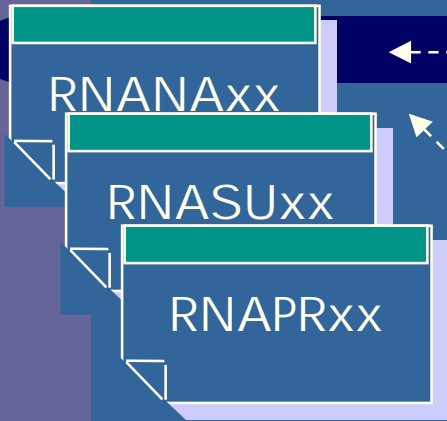


- On-line or batch processing
- User defined tolerances
- Automatic Data comparison and Update
- Simultaneous EDE correction file
- Transaction Log

Inquiring and verifying results

- Performing verification on an application
- Viewing calculation results and Need Analysis applications
- RCRAPP 1 - Application data
- RCRAPP 2 - Results
- RCRAPP 3 - Intermediate results
- RCRAPP 4 - Reject codes and assumptions

Banner2000 Financial Aid Need Analysis Overview

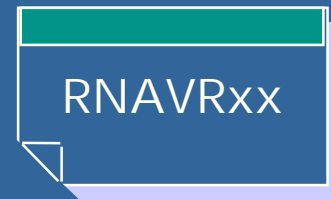


Application data is entered and maintained on:

- * Need Analysis Form
- * Need Analysis Supplemental Form
- * Need Analysis Processing Form

Need Analysis Document Verification Form:

- * enter tax data
- * displays application data
- * can automatically update application record



Banner2000 Financial Aid Need Analysis Overview (cont)



INAS

Institutional Need Analysis
performs the need
analysis calculations



RNAOVxx

Applicant Override Form:
* maintains student-specific
changes to data used by
INAS



RNARSLT



RNINAIQ



RNIMSxx

Calculation results are displayed on:

- * Need Analysis Results Form
- * Calculated Need Analysis Detailed Form
- * Miscellaneous Results Inquiry Form

PERFORMING A NEED ANALYSIS CALCULATION FROM THE NEED ANALYSIS (RNANA00) AND IMMEDIATE PROCESS (ROAIMMP) FORMS

EXERCISE 1

Student I SIR data has been loaded into BANNER. You may calculate the student's EFC through either one of the two methods shown below.

FORM	ACTION
	Access the Need Analysis Form (RNANA00)
RNANA00	Enter the Banner id for a student. Navigate to a field outside of the Key Block . Go to CALC INAS and click to run I NAS. You are automatically taken to the RNARSLT form to view I NAS calculation results.
RNARSLT	Exit and return to the RNANA00 form.
RNANA00	Navigate to the Key Block . Enter the Banner id for a student. Navigate to the Applicant Immediate Process Form (ROAIMMP).
ROAIMMP	Enter the type of Need Analysis Calculation you wish to be performed.

MODIFYING AND RE-CALCULATION OF A NEED ANALYSIS RECORD

EXERCISE 2

At your request, a student has submitted a copy of their Federal Tax Return. Several student data items need to be corrected.

FORM

ACTION

RNAVR00

Access the Need Analysis Form (**RNANA00**) or the Need Analysis Document Verification Form (**RNAVR00**).**RNANA00**

Enter the Banner id for a student.

Navigate to Family Members in College/# In College and revise the number (add 1 to the number reported).

Navigate to Adjusted Gross Income. Change the amount reported (add \$ 5500 to the reported amount).

Navigate to Income Taxes Paid. Change the amount reported (add \$ 856 to the reported amount).

Go to **CALC INAS** and click to run INAS.

MODIFY A NEED ANALYSIS RECORD, CALCULATE AN EFC AND LOCK THE RECORD FROM FURTHER UPDATES.

EXERCISE 3

You exercise professional judgement on behalf of a student whose parent has been permanently disabled for over one year. You will change the need analysis record for estimated 1999 income.

FORMS

ACTION

Access the Need Analysis Form (**RNANA00**).

RNANA00

Enter the Banner id for a dependent student.
Navigate to the Adjusted Gross Income, Income Taxes Paid, Wages and Other Untaxed Income.
Make changes to the student's Need Analysis record.

Calculate a new EFC using **RNANA00**, **CALC INAS** or **ROAIMMP**. You are automatically taken to **RNARSLT** to view the **INAS** calculation results.

RNARSLT

Navigate to the locks. Lock the Need Analysis results.
Save the data.
Navigate to the Applicant Comment Form (**RHACOMM**).

RHACOMM

Enter comments describing your exercise of professional Judgement.
Save the data.

MODIFY AN EXISTING NEED ANALYSIS RECORD AND SAVE THE RESULTS AS "SIMULATED".

EXERCISE 4

FORM

ACTION

Access the Need Analysis Processing Form
RNAPROO.

RNAPROO

Enter Banner id for student.
Change the Adjusted Gross Income, Federal Taxes Paid,
Wages and Other Untaxed Income.

RNANA00/ ROAIMMP

Using **RNANA00** or **ROAIMMP**, initiate Calc I NAS.
View the results and return to **RNARPOO**.

RNAPROO

Navigate to the **Keep FM Sim field**. Check to keep.
Save the data.

PROFESSIONAL JUDGEMENT OVERRIDES

EXERCISE 5

YOU ARE EXERCISING PROFESSIONAL JUDGEMENT, CHANGING A DEPENDENT STUDENT RECORD TO INDEPENDENT.

FORMS

ACTION

Access the Applicant Override Form (**RNAOV00**)

RNAOV00

Enter student Banner id.

Move to the Applicant Override block

Navigate to the Dependency field in the FM-s field

Enter an **I** to change the student's dependency from dependent to independent.

Save the data.