CHAPTER 1

Processing INAS

The College Board Institutional Needs Analysis System (INAS) is the source for policy options used by Campus Solutions.

To set up federal methodology (FM) and institutional methodology (IM), use the INAS Global Options component (LOCAL_POLICY_PT_nn). This component defines the global policy options for both FM and IM. As you define your policy options, select the options for the majority of your student population. You can override global policy options on a student-by-student basis using extensions.

This chapter describes how to:
- Define federal and institutional methodologies (FM and IM).
- Use FM and IM extensions to override options.
- Override estimated FM expected family contribution (EFC).
- Use EFC values.
- Use INAS simulation.
- Use INAS batch calculations.
- View federal EFC information.
- View institutional EFC information.
- Review need summary.
- Review INAS assumption codes.

Defining Federal and Institutional Methodologies

This section provides an overview of IM and FM and discusses how to:
- Define global and federal options.
- Use EFC proration options.
- Define FM budget durations.
- Define IM budget durations.
- Define IM tax and assessment parameters.
- Define EFM yes and no options.
- Define IM value parameters 1.
- Define IM value parameters 2.
- Define IM yes and no options.
• Define minimum student contribution.
• Define asset options.
• Define home and asset projections.
• Define minimum parental contribution.
• Define budget options.

**Understanding IM and FM**

IM is based on The College Scholarship Service—Institutional Methodology formula. Refer to the *College Board INAS Users Manual* provided with this application for details regarding the setup and use of the fields in the INAS Global Policy Option component.

**Note.** With the exception of the first page, all pages in this component are related to IM specific processing.

For federal methodology, you use this component to set EFC proration options and budget durations.

**Pages Used to Define FM and IM**

**Bundle 15 / Bundle 22**

The INAS 2007–2008 Global Options component is removed. The INAS 2010–2011 Global Options component is added.

**Note.** The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global and Federal Options</td>
<td>INAS_LCL_PLCY1_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Global and Federal Options</td>
<td>Define your global policy options for the majority of your student population. You can override these options on a student-by-student basis. The options affect your INAS calculations. The system sets the CSS Base Rules/Values by default. You can enter values for additional INAS rule sets developed by your institution.</td>
</tr>
<tr>
<td>EFC Proration Options (expected family contribution proration option)</td>
<td>INAS_FM_PRORTN_SEC</td>
<td>Click the EFC Proration Options link on the Global and Federal Options page.</td>
<td>Define your proration parameters.</td>
</tr>
<tr>
<td>FM Budget Durations</td>
<td>INAS_FM_DUR_SEC</td>
<td>Click the FM Budget Durations link on the Global and Federal Options page.</td>
<td>Define global options for federal academic and nonstandard budget durations.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>IM Budget Durations</td>
<td>INAS_IM_DUR_SEC</td>
<td>Click the IM Budget Durations link on the Global and Federal Options page.</td>
<td>Define global options for institutional academic and nonstandard budget durations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, IM Tax/AssessParms</td>
<td></td>
</tr>
<tr>
<td>EFM Yes/No Options</td>
<td>INAS_LCL_PLCY3_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing,</td>
<td>Define EFM INAS calculation options for parents and students.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, EFM Yes/No Options</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, IM ValueParms 1</td>
<td></td>
</tr>
<tr>
<td>IM ValueParms 2</td>
<td>INAS_LCL_PLCY11_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing,</td>
<td>Define value parameters for multi-college enrollment to define treatment for more than one student in college.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, IM ValueParms 2</td>
<td></td>
</tr>
<tr>
<td>IM Yes/No Options</td>
<td>INAS_LCL_PLCY10_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing,</td>
<td>Define IM INAS calculation options for parents and students.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, IM Yes/No Options</td>
<td></td>
</tr>
<tr>
<td>Minimum SC Income</td>
<td>INAS_LCL_PLCY5_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing,</td>
<td>Define the minimum institutional student contribution values for dependent students and independent students.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, Minimum SC Income</td>
<td></td>
</tr>
<tr>
<td>Asset Options</td>
<td>INAS_LCL_PLCY6_nn</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing,</td>
<td>Define options and limitations for assessing parent and student assets other than the home.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, Asset Options</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM 20nn−20nn Global Options, Home/Asset Projections</td>
<td></td>
</tr>
</tbody>
</table>
Defining Global and Federal Options

**Bundle 15 / Bundle 22**
The INAS 2007–2008 Global Options component is removed. The INAS 2010–2011 Global Options component is added.


![Global and Federal Options page](image)

Global and Federal Options page

Use this page to set INAS calculation options for ISIR records or Profile records.

With the delivery of IM each year, the INAS Data Source and INAS Calc Type values are limited to Institutional and IM. After FM is delivered, the values of Federal, Both F/I, FM and FM & IM are available as additional processing options.

**INAS Rule Set**

Select the INAS rule set.

The INAS rule set value enables full flexibility to determine how need analysis is processed for different academic careers or academic programs; it is linked...
to a specific academic career or program through the valid careers for aid year and valid programs for aid year tables. Your institution can create additional INAS rule sets. The INAS rule set refers to the INAS base rules delivered with the Financial Aid system. Values are: CSS Rules/Values, Health Professional, and Undergraduate/Graduate.

Global

Use the Global group box to define the parameters that control general processing options related to methodologies used.

INAS Data Source

Select the INAS data source for the INAS process to use to retrieve student information. Select:

- Both F/I (both federal and institutional) to use both sets of data to calculate INAS for either Profile or ISIR records.
- Federal to use only federal data to calculate INAS for ISIR records only.
- Institutional (institutional) to use only institutional data to calculate INAS for PROFILE records only.

INAS Calc Type (INAS calculation type)

Select the INAS calculation type:

- FM (federal methodology) to calculate INAS for ISIR records only.
- FM & IM (federal methodology and institutional methodology) to calculate INAS for either PROFILE or ISIR records.
- IM (institutional methodology) to calculate INAS for PROFILE records only.

Federal

Use the Federal group box to define how INAS processes federal ISIR data.

Calc Fed Tax - Student

Select to calculate and display federal tax for the student as defined by INAS.

Calc Fed Tax - Parent

Select to calculate and display federal tax for the parent as defined by INAS.

Calc PC For Independent

Select to calculate a parental contribution for independent students if parental data is available. Parental contribution is calculated but not added to the EFC. For more information, see the College Board INAS User Manual.

FM Budget Durations

Click this link to access the FM Budget Durations page, which shows academic and non-standard durations for both dependent and independent students.

EFC Prorations Options

Click this link to access the EFC Proration Options page.

Institutional

Use the Institutional group box to define how INAS computes your IM.

Use Which EFC

Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Values are:


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**Est Fed** (estimated federal methodology): Select to display and use the EFM-EFC.

**Greatest**: Select to compare base, IM with options, and estimated federal EFC, and then use the greatest EFC value of the three.

**Inst W/Opt**: Select to use the IM-EFC as a result of the calculation of IM with options.

**Inst**: Select to use the IM-EFC as a result of the base IM calculations.

**Application Source**

Select an application source. Values are:

- **FT CSL** (full-time Canada Student Loan): Used in Canadian Need Analysis.
- **Inst App** (institutional application).
- **NA** (Need Access).
- **PT CSL** (part-time Canada Student Loan): Used in Canadian Need Analysis.

**Profile**

**State**

Select the state in which your institution is located. INAS uses this field to determine a student’s budget requirements.

### Using EFC Proration Options

Access the EFC Proration Options page (click the EFC Proration Options link on the Global and Federal Options page).

<table>
<thead>
<tr>
<th>EFC Proration Options</th>
<th>INAS Local Policy Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INAS Rule Set</strong></td>
<td>CSS Rules/Values</td>
</tr>
<tr>
<td><strong>FM EFC Proration Options</strong></td>
<td></td>
</tr>
<tr>
<td><strong>EFC Proration Method</strong>: Adjust Based on Total EFC</td>
<td>Non-Standard Months: FA Term Based</td>
</tr>
</tbody>
</table>

**EFC Proration Options page**

**EFC Proration Method**

Select one of the following:

- **Adjust Based on Total EFC**: If you select this option, the system displays the Non-Standard Months field. The system adjusts the EFC based on the total number of budget duration months for the academic and nonstandard award periods. You can use the default functionality by selecting FA Term Based for Non-Standard Months or force the use of leading or trailing months to determine the nonstandard award period contribution regardless if the nonstandard term leads or trails.

- **Proportion Monthly Share**: If you select this option, the system uses the total EFC based on the total number of budget duration months for academic and nonstandard and distributes the EFC proportionally between the award periods.

- **Use Monthly EFC**: If you select this option, the system uses the actual monthly EFC based on the total number of budget duration months for each award.
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period. For example, if academic budget duration is set to 9 and nonstandard is set to 2, then the system uses the actual 9-month EFC for academic and the actual 2-month EFC for nonstandard. No calculations are performed to subtract one or the other from the total EFC.

Note. Using this method might cause your total EFC to exceed the 12-month EFC.

Non-Standard Months

The system uses this field in conjunction with the EFC Proration Method, Adjust Based on Total EFC. Select from:

FA Term Based: Determines which award period leads based on terms set in FA Term and award period designation in Valid Terms for Careers.

Leading Months: Treats the nonstandard term as leading regardless of nonstandard term designation in FA Term.

Trailing Months: Treats the nonstandard term as trailing regardless of nonstandard term designation in FA Term.

Defining FM Budget Durations

Access the FM Budget Durations page (click the FM Budget Durations link on the Global and Federal Options page).

<table>
<thead>
<tr>
<th>INAS Local Policy Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>FM Budget Durations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INAS Rule Set:</th>
<th>CSS Rules/Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>FM Budget Durations</td>
<td></td>
</tr>
<tr>
<td>Dependent Students</td>
<td></td>
</tr>
<tr>
<td>Academic: 9</td>
<td>Non-Standard: 0</td>
</tr>
<tr>
<td>Independent Students</td>
<td></td>
</tr>
<tr>
<td>Academic: 9</td>
<td>Non-Standard: 0</td>
</tr>
</tbody>
</table>

Defining FM Budget Durations page

Dependent Students

Academic

Enter the number of months for the academic term to be considered during need analysis for dependent students.

Non-Standard

Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.
Independent Students

**Academic**
Enter the number of months for the academic term to be considered during need analysis for independent students.

**Non-Standard**
Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

**Defining IM Budget Durations**
Access the IM Budget Durations page (click the IM Budget Durations link on the Global and Federal Options page).

**Dependent Students**

**Academic**
Enter the number of months for the academic term to be considered during need analysis for dependent students.

**Non-Standard**
Enter the number of months for the nonstandard term to be considered during need analysis for dependent students.

**Independent Students**

**Academic**
Enter the number of months for the academic term to be considered during need analysis for independent students.

**Non-Standard**
Enter the number of months for the nonstandard term to be considered during need analysis for independent students.

**Defining IM Tax and Assessment Parameters**
IM Tax/Assess & Parms page

The system displays the aid year and institution.

**Institutional**

**Use Parent AGI** (use parent adjusted gross income)  
Select how the parent AGI is represented. Values are:  
- **CSS Deflt** (CSS default)  
- **Use Cmptd** (use computed)  
- **Use Rptd** (use reported)  
- **Use TaxRtrn** (use tax return)

**Adjust IPA/MMA Regional COL** (adjust income protection allowance/monthly maintenance allowance regional cost of living)  
Select to adjust the cost of living calculation based on regional COL differences for an independent student or for the parent of a dependent student. Values are:  
- **No**  
- **Stu/Par** (student/parent)  
- **Yes Par** (yes parent)  
- **Yes Stu** (yes student)

**Adjust ERA Regional COL** (adjust emergency reserve allowance regional cost of living)  
Select to adjust the emergency reserve allowance for both students and parents, for independent students, or for parents only. Values are:  
- **No**  
- **Yes-Both**  
- **Yes-Indep** (yes independent)  
- **Yes-Parent**

**Bundle 15 / Bundle 22**

The ASG Total Income Percentage default value is unchanged. Alternate values in the table are updated.
ASG Total Income Percentage (annual savings goal total income percentage)

Select a value for the ASG total income percentage. This percentage is used as an allowance against income.

The default value is 1.52%. Selecting one of the other values (1.14% or 1.35%) changes the minimum value used for cumulative education savings allowance (CESA).

This table lists the ASG of total income percentages, the corresponding maximum allowance caps, and CESA minimum values that are current as of aid year 2010–2011.

<table>
<thead>
<tr>
<th>ASG Total Income Percentage</th>
<th>Maximum Allowance Cap</th>
<th>CESA Minimum Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.52%</td>
<td>2,770 USD</td>
<td>23,130 USD</td>
</tr>
<tr>
<td>1.14%</td>
<td>1,360 USD</td>
<td>17,300 USD</td>
</tr>
<tr>
<td>1.35%</td>
<td>1,800 USD</td>
<td>20,590 USD</td>
</tr>
</tbody>
</table>

Select Available Income Table

Optionally select the old Available Income Assessment Rate table. Values are New or Old.

Restrict # Household - Max Age (restrict number in household - maximum age)

Enter the value. You can restrict the family size used in the calculation by establishing an age threshold for siblings or dependents. For example, the calculation would not include an allowance for a member in the household over the maximum age set by the institution.

Restrict # in College - Max Age (restrict number in college - maximum age)

Enter the value. You can restrict the number in college used in the calculation by establishing an age threshold for family members in college. For example, the calculation would not include an allowance for a member of the household in college over the maximum age set by the institution.

Student Assets as Family Assets (student assets as family assets)

Select 5%-25% to have the EFC calculation process assess student assets at 5 percent and the student’s trust funds at 25 percent when calculating the student contribution portion of the EFC.

Select All Assets to have all of the student’s assets count as parent assets. Student assets are summed in the parent column. These calculation adjustments occur:

1. Family Total Net Worth (FTNW) FTNW = Parents’ Total Net Worth (NW) + Student’s Total NW.
2. Family Discretionary Net Worth (FDNW) FDNW = FTNW - Asset Protection Allowances.
3. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where PC (parental contribution) = PCI (parent contribution from income) + FCA, and TFC (total family contribution) = PC + SCI (student contribution from income).
4. In the student column, student assets equal zero and student contribution (SC) = SCI, because all student assets have been moved to the parent column.
Select Not Trusts to have all of the student’s assets except for the value of trust funds count as parent assets. The only student assets summed in the student column are trust funds. These calculation adjustments occur:

1. Family Total Net Worth (FTNW) \( FTNW = \text{Parents’ Total Net Worth (NW)} + (\text{Student’s Total NW} - \text{Student’s Value of Trusts}) \).

2. Student Contribution From Assets (SCA) \( SCA = \text{Student’s Value of Trusts} \times \text{Asset Conversion rate} \).

3. Family Discretionary Net Worth (FDNW) \( FDNW = \text{FTNW} - \text{Asset Protection Allowances} \).

4. The Asset Conversion rate is then applied to the FDNW to produce the family contribution from assets (FCA) where: \( PC (\text{parental contribution}) = PCI (\text{parent contribution from income}) + FCA, \) \( SC (\text{student contribution}) = SCI (\text{student contribution from income}) + SCA, \) and \( TFC (\text{total family contribution}) = PC + SC \).

Select Separate to use the default calculation. Parent assets are summed in the parent column and student assets are summed in the student column. If you leave this field blank, the system automatically enters Separate and uses the default calculation.

**Important!** If you selected the Calc PC for Independent check box on the Global and Federal Options page or the IM Yes/No Options page, then the system ignores the value in the Student Assets as Family Assets field, and instead uses the default calculation.

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**STUDENT**

**Fed Tax Allwnc Against Income** *(federal tax allowance against income)*

Select from these values to calculate federal tax allowance against income: 

**CSS Rules**: According to CSS Rules, if a student’s tax filing status is Completed Tax Return, reported tax is used to calculate federal tax allowance against income. If the student’s tax filing status is Will File, the lower amount of reported tax or calculated tax is used to calculate the allowance. If reported tax is blank, negative, or invalid, the calculated tax amount is used to calculate the allowance.

**Calc Tax**: Select to use the calculated tax amount if a student’s tax filing status is Will File; otherwise, CSS Rules apply.

**Reptd Tax** *(reported tax)*: If a student’s tax filing status is Will File, the reported tax is used to calculate the federal tax allowance against income.

**Use 70% Income Assmnt for Ind** *(use 70 percent income assessment for independent)*

This field refers to the available income assessment rate for independent students. Select from these values:

**Yes**: Uses 70 percent for income assessment. This is the default.

**No**: Select if you elect not to use the 70 percent income assessment; the Alt Income Assessment Rate field appears on the page.

**Income Assmnt Rate for Dep** *(income assessment rate for dependent)*

Enter an income assessment rate for dependent students. The default is 50 percent.
Alt Income Assessment Rate (alternate income assessment rate)

Enter an alternate rate for assessing the student’s income. This field appears on the page when you select No in the Use 70% Income Assmnt for Ind field.

PARENT

Fed Tax Allowance Against Income (federal tax allowance against income)

Select from these values to calculate federal tax allowance against income:

**CSS Rules:** According to CSS Rules, if a parent’s tax filing status is completed tax return, reported tax is used to calculate federal tax allowance against income. If the student’s tax filing status is Will File, the lower amount of reported tax or calculated tax is used to calculate the allowance. If reported tax is blank, negative, or invalid, the calculated tax amount is used to calculate the allowance.

**Calc Tax:** Select to use the calculated tax amount if a parent’s tax filing status is Will File; otherwise, CSS Rules apply.

**Reptd Tax:** If a parent’s tax filing status is Will File, the reported tax is used to calculate the federal tax allowance against income.

See Also

College Board INAS User Manual

Defining EFM Yes and No Options

Access the EFM Yes/No Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, EFM Yes/No Options).

EFM Yes/No Options page

Select the EFM options for the aid year, institution, and selected INAS rule set.
STUDENT

Use IM Imputed Asset Value
Select to impute the value of EFM assets based on the interest and dividend income reported on the PROFILE form.

Use Projected Year Income
Select to use the student’s expected year earnings instead of base year for EFM.

Use IM Income Override
Select to use the IM adjusted gross income and untaxed income overrides for the EFM student contribution.

PARENT

Use IM Imputed Asset Value
Select to impute the value of EFM assets based on the interest and dividend income reported on the PROFILE form.

Use Projected Year Income
Select to use the parent’s expected year earnings instead of base year for EFM.

Use IM Income Override
Select to use the IM’s adjusted gross income and untaxed income overrides for the EFM parent contribution.

EFM-Profile

Use Profile Assumptions
Select to enable the system to perform calculations using assumptions made by the system. For example, if the father reports income of 50,000.00 USD, and the mother reports income of 50,000.00 USD, and the adjusted gross income is left blank, the system assumes the total income to be 100,000.00 USD. The calculation then uses an assumed adjusted gross income of 100,000.00 USD.

See Also
College Board INAS User Manual

Defining IM Value Parameters 1

Enter the IM values for the aid year, institution, and selected INAS rule set. Use the default values or enter the percentages and values set by your institution for students and parents.

**See Also**

College Board *INAS User Manual*

**Defining IM Value Parameters 2**


Select the IM options and enter the IM values for the aid year, institution, and selected INAS rule set.
### Percentages

The system determines which set of allocation percentages to use (Standard, Alternate-1, or Alternate-2) based on the Allocation Percentages field value, the Minimum Year in School for Alternate Percentages field value, and the student’s year in school.

This table illustrates when the system uses each set of allocation percentages:

<table>
<thead>
<tr>
<th>Percentage Allocation Option</th>
<th>Minimum Year in School for Alternate Percentages</th>
<th>Student's Year in School</th>
<th>Standard Allocation Percentages</th>
<th>Alternate-1 Percentages</th>
<th>Alternate-2 Percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Table</td>
<td>If blank</td>
<td>NA</td>
<td>This percentage is used.</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Standard Table</td>
<td>If not blank</td>
<td>Is less than Minimum Year in School</td>
<td>This percentage is used.</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Standard Table</td>
<td>If not blank</td>
<td>Is greater than or equal to Minimum Year in School</td>
<td>NA</td>
<td>NA</td>
<td>This percentage is used.</td>
</tr>
<tr>
<td>Optional Table</td>
<td>If blank</td>
<td>NA</td>
<td>NA</td>
<td>This percentage is used.</td>
<td>NA</td>
</tr>
<tr>
<td>Optional Table</td>
<td>If not blank</td>
<td>Is less than Minimum Year in School</td>
<td>NA</td>
<td>This percentage is used.</td>
<td>NA</td>
</tr>
<tr>
<td>Optional Table</td>
<td>If not blank</td>
<td>Is greater than or equal to Minimum Year in School</td>
<td>NA</td>
<td>NA</td>
<td>This percentage is used.</td>
</tr>
</tbody>
</table>
The system displays the aid year and institution.

**STUDENT**

- **Use Projected Year Income**
  - Select to calculate a projected estimated annual income if it is lower than the reported base year income.

- **Use FM Tx (use federal methodology tax)**
  - Select to use the FM state and local income tax computation table in the calculation. When this check box is selected in conjunction with the Ind Use Par St Tax Alwnc check box, Use FM Tx takes priority for independent students.

- **Calc PC For Independent**
  - (calculate parental contribution for independent)
  - Select to use the parents’ information in the calculation for an independent student.

- **Add Non Cust PC to PC**
  - (add noncustodial parent contribution to parent contribution)
  - Select to combine the noncustodial parent’s contribution to the parent contribution.

- **Add Hope/LTL (add Hope/Lifetime Learning Credit)**
  - Select to let the system determine whether to add this value to taxes, based on federal tax allowance against income and tax filing status, as shown in the following table. The column headings represent the value of the Fed Tax Allwnc Against Income field from the IM Tax/Assess Parameters page.
When the INAS calculates taxes, it compares the values for reported taxes and calculated taxes and uses the lower value in subsequent calculations. This table demonstrates how the system processes the Hope value when reported taxes are lower than calculated taxes:

<table>
<thead>
<tr>
<th>For this Tax Filing Status:</th>
<th>CSS Rules will:</th>
<th>Calc Tax will:</th>
<th>Rptd Tax will:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed Return</td>
<td>Add Hope to taxes.</td>
<td>Not add Hope to calculate taxes.</td>
<td>Add Hope to taxes.</td>
</tr>
<tr>
<td>Will File Return</td>
<td>Not add Hope to calculate taxes.</td>
<td>Not add Hope to calculate taxes.</td>
<td>Add Hope to taxes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>For this Tax Filing Status:</th>
<th>CSS Rules will:</th>
<th>Calc Tax will:</th>
<th>Rptd Tax will:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed Return</td>
<td>Add Hope to taxes.</td>
<td>Add Hope to taxes only if reported is lower than calculated.</td>
<td>Add Hope to taxes.</td>
</tr>
<tr>
<td>Will File Return</td>
<td>Add Hope to taxes only if reported is lower than calculated.</td>
<td>Add Hope to taxes only if reported is lower than calculated.</td>
<td>Add Hope to taxes.</td>
</tr>
</tbody>
</table>

**Note.** Reported tax amounts are generally higher than calculated tax amounts.

**Alt Min SCI (alternate minimum student contribution from income)**

Select to indicate Yes (default), clear to indicate No for this Yes/No option. If the check box is selected, the application performs the Alternate Minimum Student Contribution from Income calculation using the following calculations:

1. Multiply the Student’s Available Income by the Available Income Assessment Rate (Parent’s Marginal Rate from Income Band). For example, 10,000 USD x .22 = 2,200 USD.

2. Compare the result (2,200 USD) to the Student Standard Contribution from Income. For example, 2,150 (Non-First Year Dependent Students) and take the higher of the two amounts. In this case, 2,200.

3. To obtain the Student Contribution Cap multiply the Total Parent Contribution by .50. For example, 6,000 USD x .50 = 3,000 USD.

4. The Minimum Student Contribution from Income is the lesser of the value in Step 2 (2,200 USD) or the Student Contribution Cap (3,000). In this case it is 2,200 USD.

**IM < FM (institutional methodology is less than federal methodology)**

Select to allow the calculated IM EFC to be below the calculated FM.

**Ind Use Par St Tax Alwnc (independent use parent state tax allowance)**

Select if the student is independent with dependents but you want to use the parent’s state tax allowance table in the calculation. When this check box is selected in conjunction with the Use FM Tx check box, Use FM Tx takes priority for independent students.
### PARENT

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use Projected Year Income</strong></td>
<td>Select to calculate a projected estimated annual income, if it is lower than the reported base year income.</td>
</tr>
<tr>
<td><strong>Use FM Tx (use federal methodology tax)</strong></td>
<td>Select to use the FM state and local income tax computation table in the calculation.</td>
</tr>
<tr>
<td><strong>Allow Parent Other Loss</strong></td>
<td>Select to allow losses taken on a parent’s income tax. This results in a lower EFC.</td>
</tr>
<tr>
<td><strong>Allow Parent Bus/Farm Loss</strong></td>
<td>Select to allow losses taken on a parent’s income tax, such as depreciation in a business. This results in a lower EFC.</td>
</tr>
<tr>
<td><strong>Note.</strong></td>
<td>By default, the system disallows losses on business, farm, or other. By selecting Allow Parent Other Loss or Allow Parent Bus/Farm Loss, you allow the loss to be included in the calculation.</td>
</tr>
<tr>
<td><strong>Add Hope/LTL (add Hope/Lifetime Learning Credit)</strong></td>
<td>Select to have the system determine whether to add this value to taxes based on federal tax allowance against income and tax filing status, as shown in the previous table. The column headings in the table represent the value of the Fed Tax Allwnc Against Income field from the IM Tax/Assess Parameters page.</td>
</tr>
<tr>
<td><strong>Disallow Low Inc Asset Alwnc (disallow low income asset allowance)</strong></td>
<td>Select to calculate without using the low income asset allowance.</td>
</tr>
<tr>
<td><strong>Exclude Tuition/Fee Deduction</strong></td>
<td>Use this check box to determine whether the tuition and fee deductions reported by the parents of dependent students are excluded from parental income:</td>
</tr>
<tr>
<td></td>
<td>• Select to disallow tuition and fee deductions from untaxed income.</td>
</tr>
<tr>
<td></td>
<td>• Clear to allow tuition and fee deductions from untaxed income.</td>
</tr>
<tr>
<td><strong>IM &lt; FM</strong></td>
<td>Select to allow the calculated IM EFC to be less than the calculated FM.</td>
</tr>
<tr>
<td><strong>Use Rpt PC (use reported parent contribution)</strong></td>
<td>Select to enforce the amount that the parents volunteered to contribute, if that amount is higher than the amount calculated by the system.</td>
</tr>
</tbody>
</table>

### See Also

College Board *INAS User Manual*

### Defining Minimum Student Contribution

Chapter 1 Processing INAS

Minimum SC Income page

Enter the minimum institutional student contribution values set by your institution for dependent and independent students for the selected INAS rule set. IM uses a minimum student contribution from income, which you can adjust. The system uses these values to determine whether the calculated or minimum contribution is used.

**Institutional**

**Use Default Minimum Student Contribution Amounts**

<table>
<thead>
<tr>
<th>Min SC Income - Dependents</th>
<th>Min SC Income - Independents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad</td>
<td>Undergrad</td>
</tr>
<tr>
<td>1YR: 1750</td>
<td>1YR: 3300</td>
</tr>
<tr>
<td>3YR: 2360</td>
<td>4YR: 2360</td>
</tr>
<tr>
<td>5+YR: 2360</td>
<td>5+YR: 3300</td>
</tr>
<tr>
<td>Professional</td>
<td>Professional</td>
</tr>
<tr>
<td>1YR: 2360</td>
<td>1YR: 2360</td>
</tr>
<tr>
<td>2YR: 2360</td>
<td>2YR: 2360</td>
</tr>
<tr>
<td>3YR: 2360</td>
<td>3YR: 2360</td>
</tr>
<tr>
<td>4YR: 2360</td>
<td>4YR: 2360</td>
</tr>
</tbody>
</table>

Select from these values:

- **Yes**: Use the defaults.
- **No**: Make manual changes to the minimum student contribution amounts.

**See Also**

College Board *INAS User Manual*

**Defining Asset Options**

The system displays the aid year and institution.

**Institutional**

**Asset Options**

Select asset options. Values are:

*No Asset Projection*: INAS does not impute a value for assets, reported amounts are used.

*Combined Projection*: INAS combines Cash/Int (cash and interest) and Inv/Dvd (investment and dividends) imputed values in the calculation. The entire amount is reported as cash savings.

*Individual Projection*: INAS calculates Cash/Int and Inv/Dvd imputed values individually. Cash/Int and Inv/Dvd can have a different yield and tolerance.

You can compare income with reported cash, savings, checking, and investments to identify cases where the asset value appears to be under-reported. Specify both an expected rate of return (yield) and a tolerance level for both Cash/Int and Inv/Dvd. Based on the interest reported, you can impute a value of the parents’ or student’s cash savings, using the specified yield. This helps you to determine whether the reported savings are under-reported. You can also impute a value for the parents’ or student’s investments and dividends.

**Limit and Tolerance**

Enter the limit and tolerance values for Cash/Int.

You can set a limit for cash and interest. For example, you can enter a value of 10,000.00 USD. You can set up the system to assess the first 10,000.00 USD (Limit) at 3.8% (Yield% 1) and any portion greater than 10,000.00 USD at 5.6% (Yield% 2). Based on the reported interest from the tax return, if the value is less than 10,000.00 USD, the system uses the percentage that appears in Yield% 1 in calculation. The system uses the percentage in Yield% 2 in the calculation for the amount above 10,000.00 USD. If the tolerance is set to 500.00 USD, and the imputed value when compared to the reported value is within the specified tolerance, you can decide to use the reported value.
Chapter 1 Processing INAS

INAS uses the reported income and the expected rate of return to project the asset value required to produce that income. If the projected value is greater than the reported asset value by more than the tolerance level, the projected value is substituted for the reported asset value.

**Inv/Dvd** (investment and dividend)  
Set up the appropriate limit and tolerance to compare the reported value to the imputed value, as described previously.

**Note.** The Asset Option Ind Proj (asset option individual projection) field is not available for students.

**See Also**
College Board *INAS User Manual*

## Defining Home and Asset Projections


### Home/Asset Projections page

The system displays the aid year and institution.

### Institutional

#### Home Option

Select the home option for parents and independent students. Values are:

1: Reported. INAS uses the value of the home reported on the application, to calculate equity.  

2: Projected. The system calculates the value of the home based on the purchase price of the home and the date on which it was purchased, using the Federal Housing Multiplier table.
3: Projected if Significant Difference. The system uses the value set for home
tolerance to determine whether reported or projected home values are used
to determine home equity.

4: Highest. INAS compares the calculated and reported home value. The
system uses the higher value to determine equity.

5: Alt Home Value Calculation. INAS compares projected value to capped
value and uses the lower value.

**Home Tolerance**
Enter a home tolerance value. INAS uses the reported value of the home, unless
it exceeds the tolerance when the difference is compared to the calculated
home value. If it exceeds the tolerance, the value is adjusted accordingly.

**Home Cap**
Enter a multiplier if you do not want the reported value or the computed value
to exceed a certain multiple of the family’s income. The system multiplies this
value with total income to adjust the value of the home.

**Home Equity Cap Factor**
Enter a cap factor from 0.0 to 9.9. Home equity is then capped using the
factor times the computed income.

**Asset Assessment Rate**

- **Asset % Dep** (asset percentage dependent)
Enter a value to use as an allowance against assets.

- **Asset % Ind No Dep-Married** (asset percentage independent no
dependents married)
Enter a value to use as an allowance against assets.

- **Asset % Ind No Dep-Single** (asset percentage independent no dependents single)
Enter a value to use as an allowance against assets.

- **Asset % Parent** (asset percentage parent)
Enter a value to use as an allowance against assets. Leave this field and the
Asset % Ind W/Dep field blank to invoke standard IM rules.

- **Asset % Ind W/Dep** (asset percentage independent with dependents)
Enter a value to use as an allowance against assets. Leave this field and the
Asset % Parent field blank to invoke standard IM rules.

**See Also**

College Board *INAS User Manual*

**Defining Minimum Parental Contribution**

Access the Minimum PC Range page (Set Up SACR, Product Related, Financial Aid, Application Processing,
INAS 20nn–20nn Global Options, Minimum PC Range).
Use this page to select the minimum parental contribution for the aid year, institution, and selected INAS rule set.

**MINIMUM PC BASED ON INCOME RANGE**

Enter the values set by your institution’s policy.

**See Also**

College Board *INAS User Manual*

**Defining Budget Options**

Access the Budget Options page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Budget Options).
The system displays the aid year and institution.

**Institutional**

- **% of Total Budget for 1/2 time (percentage of total budget for half-time)**
  
Enter a percentage of the total budget that you want to use for a student attending an institution half-time.

- **Limit PC (limit parental contribution)**
  
  Select a parental contribution limit. Values are:
  
  - **% Tot Bdgt** (percentage of total budget): Select to have the parental contribution limited to the percentage (calculated as follows: budget total for other children divided by budget total for all children) that their total budget compared to the total budget including the applicant.
  
  - **Lowest**: Compare the parental contribution limits set by % Tot Bdgt and Sum Bdgt, and set the limit to the higher value.
  
  - **No**: Indicate that no parental contribution limit is set.

  - **Sum Bdgt** (sum budget): Limit the parental contribution to the sum of the budgets for all other children in the family.

  Enter the values that your institution set for each type of institution.

**See Also**

College Board *INAS User Manual*
Using FM and IM Extensions to Override Options

This section reviews overriding global policy options at the student level. FM and IM extensions can be accessed from ISIR corrections, INAS simulation, or the Maintain Institutional Application component. This section discusses how to:

- Override INAS federal extension options.
- Override INAS institutional extension options 1.
- Override INAS institutional extension options 2.
- Override INAS institutional extension options 3.
- Override INAS institutional extension options 4.
- Override INAS institutional extension options 5.

See Isfa, Processing INAS, Using FM and IM Extensions to Override Options.


Pages Used to Override Options in ISIR Corrections

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAFSA Information</td>
<td>ISIR_PIA_CS1_nn</td>
<td>Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records, FAFSA Information</td>
<td>Correct information on the FAFSA Information page and access FM and IM extension pages.</td>
</tr>
<tr>
<td>INAS Federal Extension</td>
<td>INAS_FED_EXTnn_SEC</td>
<td>Click the FM link on the FAFSA Information page.</td>
<td>Override INAS global policy options.</td>
</tr>
<tr>
<td>INAS Federal Extension Budget Durations</td>
<td>INAS_FEDEX_DUR_SEC</td>
<td>Click the Budget Durations link on the INAS Federal Extension page.</td>
<td>Override INAS global policy options for federal academic and non-standard budget duration.</td>
</tr>
<tr>
<td>INAS Federal Extension EFC Proration Options</td>
<td>INAS_FEDEX_PRO_SEC</td>
<td>Click the EFC Proration Options link on the INAS Federal Extension page.</td>
<td>Override EFC proration options for academic and non-standard months.</td>
</tr>
<tr>
<td>INAS Federal Extension EFC Override</td>
<td>INAS_FEDEX_EFC_SEC</td>
<td>Click the Override Federal EFC link on the INAS Federal Extension page.</td>
<td>Override EFC components for academic and non-standard award periods.</td>
</tr>
<tr>
<td>INAS Institutional Extension 1</td>
<td>INAS_PROF_EXT1_Snn</td>
<td>Click the IM link on the FAFSA Information page.</td>
<td>Override INAS global policy options.</td>
</tr>
<tr>
<td>Institutional Budget Durations</td>
<td>INAS_PRFEX_DUR_SEC</td>
<td>Click the Budget Durations link or the Override Institutional EFC link on the INAS Institutional Extension 1 page.</td>
<td>Override INAS global policy options for institutional academic and non-standard budget duration.</td>
</tr>
</tbody>
</table>
### Overriding INAS Federal Extension Options

Access the INAS Federal Extension page (click the FM link on the FAFSA Information page).
# INAS Federal Extension

## Federal

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INAS Rule Set</strong></td>
<td>Select a rule set.</td>
</tr>
<tr>
<td><strong>INAS Calc Type</strong></td>
<td>Select a calculation type from <em>FM, IM, or FM &amp; IM</em>.</td>
</tr>
<tr>
<td><strong>INAS Data Source</strong></td>
<td>Select <em>FM, IM, or Both F/I</em>.</td>
</tr>
<tr>
<td><strong>Dependency Override</strong></td>
<td>Select either <em>Ind Prof J</em> (individual professional judgement) or <em>No</em> (no override).</td>
</tr>
<tr>
<td><strong>Calc a PC for Independent</strong></td>
<td>Select to calculate a parental contribution for independent students if parental data is available. The parental contribution is calculated but not added to the EFC.</td>
</tr>
<tr>
<td><strong>Override Federal EFC</strong></td>
<td>See Isfa, Processing INAS, Overriding Expected Family Contribution (EFC).</td>
</tr>
<tr>
<td><strong>Budget Durations</strong></td>
<td>Click this link to access the INAS Federal Extension Budget Durations page.</td>
</tr>
</tbody>
</table>

## Allowances

<table>
<thead>
<tr>
<th>Allowance</th>
<th>Student</th>
<th>Parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculate Federal Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical/Dental</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Allowance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Assumption Overrides

<table>
<thead>
<tr>
<th>Override</th>
<th>Student</th>
<th>Parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number in College</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Reject Overrides

<table>
<thead>
<tr>
<th>Override</th>
<th>Student</th>
<th>Parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td></td>
<td></td>
</tr>
<tr>
<td>R</td>
<td></td>
<td></td>
</tr>
<tr>
<td>S</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Notes

- **Calc Type**: Select a calculation type from *FM, IM, or FM & IM*.
- **Data Source**: Select *FM, IM, or Both F/I*.
- **Override Federal EFC**: See Isfa, Processing INAS, Overriding Expected Family Contribution (EFC).
- **Budget Durations**: Click this link to access the INAS Federal Extension Budget Durations page. You can enter any value for FM budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9-month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period.
Allowances

**Calculate Federal Tax**
Select to calculate federal tax as defined by INAS.

**Tuition**
Enter a value to offset tuition expenses.

**Medical/Dental**
Enter a value to offset medical/dental expenses.

**Other**
Enter a value to offset total allowances.

**Asset Allowance**
Enter a value to include in net worth calculations.

Assets

**Other**
Enter a value to include in net worth calculations.

Assumption Overrides

**Number in College**
Select one of the following:

- *Ovrd Asmpt* (override assumption) to override the number in college assumption when calculating the parent contribution.
- *Don’t Ovr* (don’t override) to accept the number in college assumption when calculating the parent contribution.

Reject Overrides

**Reject D Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject D.
Select *Supp Rej D* (suppress reject D) to override Reject D.

**Reject E Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject E.
Select *Supp Rej E* (suppress reject E) to override Reject E.

**Reject F Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject F.
Select *Supp Rej F* (suppress reject F) to override Reject F.

**Reject R Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject R.
Select *Supp Rej R* (suppress reject R) to override Reject R.

**Reject S Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject S.
Select: *Supp Rej S* (suppress reject S) to override Reject S.

**Reject T Override**
Select *Don’t Supp* (Do not suppress) to enforce Reject T.
Select *Supp Rej T* (suppress reject T) to override Reject T.

See the College Board *INAS User Manual*.

**Overriding INAS Institutional Extension Options 1**

**Bundle 15 / Bundle 22**
Work Study Income Exclusion, Limit Intl Student’s IPA, and Country Coefficient TCA fields are added as of the 2010–2011 aid year.
Access the INAS Institutional Extension 1 page (click the IM link on the FAFSA Information page).

<table>
<thead>
<tr>
<th>INAS Institutional Extension 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INAS Rule Set:</strong></td>
</tr>
<tr>
<td><strong>Application Source:</strong></td>
</tr>
<tr>
<td><strong>Budget Durations</strong></td>
</tr>
<tr>
<td><strong>Override Institutional EFC</strong></td>
</tr>
<tr>
<td><strong>Alt Min SC from Income Calc</strong></td>
</tr>
<tr>
<td><strong>Ignore Losses</strong></td>
</tr>
<tr>
<td><strong>Work Study Income Exclusion</strong></td>
</tr>
<tr>
<td><strong>Limit Intl Student’s IPA</strong></td>
</tr>
<tr>
<td><strong>Country Coefficient TCA</strong></td>
</tr>
</tbody>
</table>

**INAS Institutional Extension 1 page**

Use the INAS Institutional Extension 1 page to set your basic overrides. From this page, access other extension pages, budget duration or EFC overrides.

**INAS Rule Set**
Select an INAS rule set value to determine which global policy option rule to use as a base.

**Application Source**
Select an application source from:
- **FT CSL** (full-time Canada Student Loan): Used in Canadian Need Analysis.
- **Inst App** (institutional application).
- **NA** (Need Access).
- **PT CSL** (part-time Canada Student Loan): Used in Canadian Need Analysis.

**Budget Durations**
Click this link to access the Institutional Budget Durations page. You can enter any value for IM budget duration. Institutional rules allow whole numbers with one decimal place.

**Override Institutional EFC**
Click this link to access the Override Institutional EFC page, where you can override the institutional EFC amount, as described later in this chapter.

**Alt Min SC from Income Calc** (alternate minimum student contribution from income calculation)
Select this check box to override the Alt Min SCI option set for the student on the IM Yes/No Options page.
### Calc PC For Independent
(select parental contribution for independent)

Select this check box to override the Calc PC For Independent option set for the student on the IM Yes/No Options page.

### Skip Family Member Exclusion

Select to override the Rstrct # Household - Max Age and Rstrct # in College - Max Age options set on the IM Tax/Assess & Parms options page.

### IGNORE LOSSES—Business/Farm

Select to override the Allow Parent Bus/Farm Loss option set on the IM Yes/No Options page.

### IGNORE LOSSES—Other

Select to override the Allow Parent Other Loss option set on the IM Yes/No Options page.

### Work Study Income Exclusion

**Bundle 15 / Bundle 22**

This field is added as of the 2010–2011 aid year.

Select to exclude the student’s work-study earnings from the income exclusion calculation. This option allows (includes) federal workstudy income back into regular income by excluding it from the income exclusion calculation.

- **Selected**
  - Include work-study earnings in regular income.

- **Unselected**
  - Do not include work-study earnings in regular income.

### Limit Intl Student’s IPA
(Limit International Student’s Income Protection Allowance)

**Bundle 15 / Bundle 22**

This field is added as of the 2010–2011 aid year.

Select to limit an international student’s Income Protection Allowance (IPA) to an amount greater than or equal to 25% of the parental income.

- **Selected**
  - Limit student’s IPA to an amount not less than 25% of parents’ income.

- **Unselected**
  - Do not limit student’s IPA amount, normal processing.

**Note.** This is a local-only option applicable to international (non-domestic) students only.

### Country Coefficient TCA
(Country Coefficient Total Contribution from Assets)

**Bundle 15 / Bundle 22**

This field is added as of the 2010–2011 aid year.

Select to calculate an optional contribution from assets by applying the country coefficient to the percentage used to calculate the step increment.

- **Selected**
  - Calculate contribution from assets applying the country coefficient to the step increment percentage.

- **Unselected**
  - Calculate contribution from assets for international student using default step increase percentage.
Chapter 1 Processing INAS

Note. This is a local-only option applicable to international (non-domestic) students only.

Use Projected Year Income
Select to override the Use Projected Year Income option set on the IM Yes/No Options page.

Can IM Contribution Fall Below FM
Select to override the IM < FM option set on the IM Yes/No Options page.

Hope/Lifetime Add Back
Select to override the Add Hope/LTL option set on the IM Yes/No Options page.

Parent Tax Table — Independent
Select to override the Ind Use Par St Tax Alwnc (independent use parent state tax allowance) option set on the IM Yes/No Options page.

Exclude Tuition/Fee Deduction
Select to override the Exclude Tuition/Fee Deduction option set on the IM Yes/No Options page.

See the College Board INAS User Manual.

Overriding INAS Institutional Extension Options 2

Access the INAS Institutional Extension 2 page (click the IM Extension 2 link on the INAS Institutional Extension 1 page).

![INAS Institutional Extension 2 page](image)

Use the INAS Institutional Extension 2 page to override options used to determine the student’s total budget.

**Use Which EFC**
Select a value to determine the institutional EFC displayed on the Need Summary page and used in the Award Entry component. Your selection overrides the value selected on the Global and Federal Options page.
### Dependency Override
Select either *Ind Prof J* (individual professional judgement) or *No* (no override). INAS calculates a dependent student as independent when *Ind Prof J* is selected.

### Limit Share of PC
Select from *Lowest*, *No*, *Ratio Bdg* (ratio budget), or *Sum of Bdg* (sum of budget). Your selection overrides the value selected on the Minimum PC Range page and the Budget Options page.

### Calculate U.S. Tax
Select to override the value selected for the Fed Tax Allwnc Against Income field on the IM Tax/Assess & Parms page.

### Override Imputation of Home
Select from *Alt Calc*, *Highest*, *Proj/Diff*, *Projected*, or *Reported* to override the value on the Home/Asset Projections page.

### Override Imputation of Assets
Select Combined or No Projctn to override the value on the Asset Options page.

### Use Parent AGI (use parent adjusted gross income)
Select a value to override the value selected for the Use Parent AGI field on the IM Tax/Assess & Parms page. Select how the parent AGI is represented from:
- *CSS Deflt* (CSS default)
- *Use Cmptd* (use computed)
- *Use Rptd* (use reported)
- *Use TaxRtrn* (use tax return)

### Student Assets as Family Assets (student assets as family assets)
Select a value to override the value selected for the Studnt Assets as Family Assets field on the IM Tax/Assess & Parms page.

### Overriding INAS Institutional Extension Options 3
Access the INAS Institutional Extension 3 page (click the Extension 3 link on the INAS Institutional Extension 1 page).
Use the INAS Institutional Extension 3 page to override INAS global policy options for the given income, tax, and allowances.

**Adjusted Gross Income**
Enter an amount to override the student or parent adjusted gross income.

**Untaxed Income**
Enter an amount to override the student or parent untaxed income.

**Tax Paid**
Enter an amount to override the value used in the Fed Tax Allwnc Against Income (federal tax allowance against income) on the IM Tax/Assess &_parms page.

**Estimated Tax**
Enter an amount to override the estimated tax calculated by the IM method.

**Cost of Living Allowance Index**
Enter an amount to override the Adjust IPA/MMA Regional COL (Income Protection Allowance/Monthly Maintenance Allowance Regional Cost of Living) value based on options set on the IM Tax/Assess &_Parms page.

**Income Protection Allowance**
Enter an amount to override the Adjust IPA/MMA Regional COL calculated based on options set on the IM Tax/Assess &_Parms page.

**Allowances**

**Tuition**
Enter an amount to override the Max Tuition Allowance (maximum tuition allowance) per child on the IM Value Parms 1 page.

**Medical/Dental**
Enter an amount to override the % Unreimbursed Med/Dent Expense (percent unreimbursed medical/dental expense) on the IM Value Parms 1 page.

**Employment**
Enter an amount to override % Employment Allowance (percent employment allowance) and Max Employment Allowance (maximum employment allowance) on the IM Value Parms 1 page.
Federal Insurance Compensation
Enter an amount to override the allowance calculated by IM.

Income
Enter an amount to override allowance against income calculated by IM.

**Overriding INAS Institutional Extension Options 4**
Access the INAS Institutional Extension 4 page (click the Extension 4 link on the INAS Institutional Extension 1 page).

<table>
<thead>
<tr>
<th>INAS Institutional Extension 4</th>
<th>STUDENT</th>
<th>PARENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Tax - Percent:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cap Housing Value:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Equity Cap Factor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Assessment Percent:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Tax:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Asset:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minimum Asset:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Allowance:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minimum Income:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number In College:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Parents In College:</td>
<td></td>
<td>☐</td>
</tr>
</tbody>
</table>

Use the INAS Institutional Extension 4 page to override global policy options.

- **Local Tax — Percent**
  Enter an amount to override the amount calculated by IM.

- **Cap Housing Value**
  Enter an amount to override the value selected for the Home Cap field on the Home/Asset Projections page.

- **Home Equity Cap Factor**
  Enter an amount to override the value selected for the Home Equity Cap Factor field on the Home/Asset Projections page.

- **Asset Assessment Percent**
  Enter an amount to override the value selected for the Asset Assessment Rate field on the Home/Asset Projections page.

- **Local Tax**
  Enter an amount to override amount calculated by IM.

- **Other Asset**
  Enter an amount to add to calculated assets.

- **Minimum Asset**
  Enter an amount to override Minimum Contribution from Asset on the IM Value Parms 1 page.

- **Asset Allowance**
  Enter an amount to offset discretionary net worth calculated by IM.

- **Minimum Income**
  Enter an amount to override the Minimum SC or PC values from the Minimum SC Income and Minimum PC Range pages.
Number in College  Enter a number to override the number of students in college.
Allow Parents in College Enter an amount to allow parents in college.

**Overriding INAS Institutional Extension Options 5**

Access the INAS Institutional Extension 5 page (click the Extension 5 link on the INAS Institutional Extension 1 page).

<table>
<thead>
<tr>
<th>INAS Institutional Extension 5</th>
<th>STUDENT</th>
<th>PARENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Institutional</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent to Increase Prior Year’s Contribution:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Year’s Contribution:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income Assessment Percent:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Percent of IRA/KEOGH:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non Custodial Parent Contribution:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Estimated Federal Methodology</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number In Household:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number In College:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Parents In College:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use Projected Year Income:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use the INAS Institutional Extension 5 page to override INAS global policy options for family factors such as past contributions.

**Institutional**

- **Percent to Increase Prior Year’s Contribution:** Enter an amount to override increase last year SC (or PC) on the IM Value Parms 1 page.
- **Prior Year’s Contribution:** Enter the prior year’s contribution for use with the Percent to Increase Prior Year’s Contribution option.
- **Income Assessment Percent:** Enter an amount to override Use 70% Income Assmnt for Ind or Income Assmnt Rate for Dep from the IM Tax/Assess & Parms page.
- **Add Percent of IRA/KEOGH:** Enter an amount to override the value in the % Of Stdnt IRA Include In NW field from the IM Value Parms 1 page.
- **Non Custodial Parent Contribution:** Enter an amount to override Add Non Cust PC to PC from the IM Yes/No page.

**Estimated Federal Methodology**

- **Number In Household:** Enter an amount to override amount calculated by EFM.
Overriding Expected Family Contribution (EFC)

The system displays the override at the parent and student contribution level. Overriding EFC is the same for both FM and IM.

This section discusses how to:

• Access federal EFC overrides.
• Use the federal EFC override function.
• Access institutional EFC overrides.
• Use the institutional EFC override function.
## Pages Used to Override and View EFC

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>INAS Federal Extension</td>
<td>INAS_FED_EXTnn_SEC</td>
<td>Click the FM link on the FAFSA Information, Assumptions\School Codes, or EFC\DB Matches\Corr page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records). Click the FM link on the Student Data, Parent Data, Miscellaneous Data, or Computation Data page (Financial Aid, Institutional Application 20nn-20nn, Maintain Application 20nn–20nn). Click the Federal Extension link on the Student Income/Assets, Student Information, Parent Income/Assets, Parent Information, or Overrides page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS).</td>
<td>Override INAS global policy options.</td>
</tr>
<tr>
<td>EFC Override</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INAS Institutional Extension 1</td>
<td>INAS_PROF_EXT1_Snn</td>
<td>Click the IM link on the FAFSA Information, Assumptions\School Codes, or EFC\DB Matches\Corr page (Financial Aid, Federal Application Data, Correct 20nn-20nn ISIR records). Click the IM link on the Student Data, Parent Data, Miscellaneous Data, or Computation Data page (Financial Aid, Institutional Application 20nn-20nn, Maintain Application 20nn–20nn).</td>
<td>Override INAS global policy options.</td>
</tr>
<tr>
<td>Institutional EFC Override</td>
<td>INAS_PROF_EFC_SEC</td>
<td>Click the Override Institutional EFC link on the INAS Institutional Extension 1 page.</td>
<td>Override EFC components for academic and non-standard award periods.</td>
</tr>
</tbody>
</table>

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Accessing Federal EFC Overrides

Access the INAS Federal Extension page (click the FM link on the EFC=DB Matches\Corr page).

INAS Federal Extension

<table>
<thead>
<tr>
<th></th>
<th>STUDENT</th>
<th>PARENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INAS Rule Set:</td>
<td>CSS Rules</td>
<td></td>
</tr>
<tr>
<td>INAS Calc Type:</td>
<td>FM &amp; IM</td>
<td></td>
</tr>
<tr>
<td>INAS Data Source:</td>
<td>Both F/A</td>
<td></td>
</tr>
<tr>
<td>Dependency Override:</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allowances</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculate Federal Tax:</td>
<td></td>
</tr>
<tr>
<td>Tuition:</td>
<td></td>
</tr>
<tr>
<td>Medical/Dental:</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
<tr>
<td>Asset Allowance:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

| Assumption Overrides |          |
| Number in College: |        |

| Reject Overrides |          |
| Reject D Override |        |
| Reject E Override |        |
| Reject F Override |        |
| Reject R Override: |        |
| Reject S Override: |        |
| Reject T Override: |        |

Note. You must select an INAS Rule Set before setting the budget duration and overriding the EFC. When creating an extension record, you must always select an INAS Rule Set. Failing to do so affects your expected results.

Using the Federal EFC Override Function

Access the INAS Federal Extension EFC Override page (click the Override Federal EFC link on the INAS Federal Extension page).
Enter the actual positive value for the parent contribution and/or student contribution for each award period. The system displays an override indicator when you override the student contribution, the parent contribution or both. It appears as an O next to the affected contributions.

**Use EFC Override Values** Select this check box and call INAS for the system to use your override values. If you want to use actual calculated values, clear the check box and call INAS.

**Defaults** Click the Defaults button to reset the student contribution and parent contribution to current values from STD_AWD_PER. If you have already calculated INAS using overridden values, those same values are returned when you click the Defaults button. To retrieve calculated values as the default, clear the Use EFC Override Values check box, call INAS, return to this page, and click the Defaults button.

**Note.** Ensure that the budget duration set in global policy options or at the extension level supports the EFC overrides being established for the award period. Warning messages appear if you create overrides for an award period that is not supported by the budget duration.

**Accessing Institutional EFC Overrides**

Access the INAS Institutional Extension 1 page.
Use the Override Institutional EFC link on this page to override the academic or non-standard parent contribution or student contribution.

Note. You must select an INAS Rule Set before setting the budget duration and overriding the EFC. When creating an extension record, you must always select an INAS Rule Set. Failing to do so affects your expected results.

Using the Institutional EFC Override Function

Access the Institutional EFC Override page (click the Override Institutional EFC link on the INAS Institutional Extension 1 page).
Chapter 1 Processing INAS

Institutional EFC Override

Select this check box and call INAS for the system to use your override values. If you want to use actual calculated values, clear the check box and call INAS.

Using Estimated FM EFC Values

The Financial Aid system stores the estimated FM EFC, which is calculated using institutional application data, for awarding federal funds when only institutional data is available. The system stores and displays the estimated FM EFC only when no ISIR exists for the student. As soon as you load an ISIR for the student and call INAS, the estimated FM EFC is replaced by the EFC from the ISIR.

Note. The system does not consider the status of the ISIR before replacing the estimated FM EFC; it replaces the estimated values with the EFC value from the ISIR after INAS is called.

When in use, the estimated FM EFC populates all FM EFC fields on all pages in the system. The system does not display any visual cue to indicate that the value is an estimate. You need to know whether a student has an ISIR loaded to determine whether the value that appears is an estimated FM EFC or an actual FM EFC.

Using INAS Simulation

The INAS simulation functions as a worksheet for financial aid staff to create different need analysis scenarios before submitting the changes to ISIR Corrections. The INAS Simulation process retrieves information from the ISIR Correction pages and INAS Federal Extension page. You can create or change existing federal extension data or global policy option data in simulation depending on your processing requirements.

This section provides an overview of the steps for INAS simulation and discusses how to:

• Work with student income and assets.
• Override the INAS global policy options at the student level.
• Work with student information.
• Work with parent income and assets.
• Work with parent information.
• Work with assumption overrides.

Understanding the Steps for INAS Simulation

Use the INAS Simulation process to select records with an ISIR to simulate INAS calculations. Then commit changes to ISIR tables when complete.

1. Click the Get Fed Data button on the page you are using.
   The latest ISIR information is retrieved and placed in the INAS Simulation tables. You should refresh the INAS Simulation table with the latest data because data from a prior session might remain in the table.

2. Modify fields to affect the INAS calculation, invoke overrides, or both.
   You can also override global policy options at the student level, by clicking the Fed Ext button from any page in this component. Unless an extension record already exists in ISIR, the default values that you defined in the INAS Local Global Options page display on the Federal Extension page when you select a Rule Set.

3. When you complete your changes, click the INAS calculate button. The system displays the results of the EFC after a successful completion of INAS simulation.

4. Repeat steps 2 and 3 as needed. To refresh the worksheet, repeat Step 1.

5. Click the Use Simulated Data button to use the calculated data for Need Analysis.
   If you confirm that you want to perform the operation, the system inserts a new row in all of the ISIR Tables and any field that was changed is processed as follows:
   a. Sent to the Audit Table for history.
   b. Included in the ISIR Correction process.
   c. Used to recalculate need.

Note. You cannot apply changes to any student whose ISIR is rejected.

Pages Used for INAS Simulation

Bundle 15 / Bundle 22
The Simulate 2007 – 2008 FM INAS component is removed.
Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Income/Assets</td>
<td>INAS_SIM_STU1_nn</td>
<td>Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Income/Assets</td>
<td>View or update fields from ISIR Corrections to perform an INAS calculation.</td>
</tr>
<tr>
<td>INAS Simulation Federal Extension</td>
<td>INAS_SIM_FEDEX_Snn</td>
<td>Click the Federal Extension link on the Student Income/Assets page.</td>
<td>Override the INAS global policy options at the student level.</td>
</tr>
<tr>
<td>INAS Simulation Budget Durations</td>
<td>INAS_SIMEX_DUR_SEC</td>
<td>Click the Budget Durations link on the INAS Simulation Federal Extension page.</td>
<td>Override INAS global policy options for federal academic and non-standard budget duration.</td>
</tr>
<tr>
<td>INAS Simulation EFC Proration Options</td>
<td>INAS_SIMEX_PRO_SEC</td>
<td>Click the EFC Proration Options link on the INAS Simulation Federal Extension page.</td>
<td>Override proration options for academic and non-standard months.</td>
</tr>
<tr>
<td>INAS Simulation EFC Override</td>
<td>INAS_SIMEX_EFC_SEC</td>
<td>Click the EFC Override link on the INAS Simulation Federal Extension page.</td>
<td>Override EFC components for academic and non-standard award periods.</td>
</tr>
<tr>
<td>Student Information</td>
<td>INAS_SIM_STU2_nn</td>
<td>Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Information</td>
<td>View or update fields from ISIR Corrections to perform an INAS calculation.</td>
</tr>
<tr>
<td>Parent Income/Assets</td>
<td>INAS_SIM_PAR1_nn</td>
<td>Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Income/Assets</td>
<td>View or update fields from ISIR Corrections to perform an INAS calculation.</td>
</tr>
<tr>
<td>Parent Information</td>
<td>INAS_SIM_PAR2_nn</td>
<td>Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Information</td>
<td>View or update fields from ISIR Corrections to perform an INAS calculation.</td>
</tr>
<tr>
<td>Overrides</td>
<td>INAS_SIM_OVRD_nn</td>
<td>Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Overrides</td>
<td>View or update fields from ISIR Corrections to perform an INAS calculation. Set Dependency Override and Correction Status.</td>
</tr>
</tbody>
</table>

**Common Page Elements for the INAS Simulation Component**

The following elements appear on the Student/Income Assets page, Student Information page, Parent Income/Assets page and Overrides page.

**Get Federal Data**

Click this button to copy the student’s latest ISIR data from the Federal Extension record to this page.

**INAS**

Click this button to invoke a Remote Function Call of the INAS calculation.
Use Simulated Data  Click this button to move the simulated data into production.

Federal Extension  Click this link to access the INAS Simulation Federal Extension page and make changes to an existing extension or override the INAS Global Policy Options at the student level.

Need Summary  Click this link to view a student’s need summary. Need summary information reflects only current values. New data that you have calculated is not reflected on Need Summary pages until you click the Use Simulated Data button, refresh the page and click Get Fed Data again.

Monthly EFC  Click this link to access the INAS Simulation Monthly EFC page to view the INAS calculated monthly EFC for months 1-8 and 10-12.

Formula Type  Displays the formula type used in the INAS calculation. When you click the Get Federal Data button, the system populates the ISIR formula type on record and updates the formula type when INAS is called.

Primary EFC:  Displays the 9-month EFC. When you click the Get Fed Data button, the system populates the ISIR Primary EFC on record and updates the Primary EFC when INAS is called.

Prorated EFC:  Displays the 9-month or other than 9-month EFC. When you click the Get Fed Data button, the system populates the ISIR Prorated EFC on record and updates the Prorated EFC when INAS is called.

Working with Student Income and Assets

Access the Student Income/Assets page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Income/Assets).
### Overriding the INAS global policy Options at the Student Level

Access the INAS Simulation Federal Extension page (click the Federal Extension link on the Student Income/Assets page).
INAS Simulation Federal Extension

Budget Durations

Click this link to access the INAS Simulation Budget Durations page. You can enter any value for FM budget duration. Federal rules allow whole numbers only for budget duration. If the total allocation for the budget duration is greater than 12 months, a 9–month EFC is calculated and used in the academic award period, and no EFC is calculated for the non-standard award period.

EFC Proration Options

Click this link to access the INAS Simulation EFC Proration Options page to determine how to prorate EFC.

Override Federal EFC

Click this link to access the INAS Simulation EFC Override page to override the academic or non-standard parent contribution or student contribution.

Working with Student Information

Access the Student Information page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Student Information).
### Student Information

<table>
<thead>
<tr>
<th>Chad Harper</th>
<th>ID: FA0635</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>2010</th>
<th>Financial Aid Year 2009 - 2010</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Institution</th>
<th>PSUNY</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Get Federal Data</th>
<th>Federal Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>InA6</td>
<td>Need Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Use Simulated Data</th>
<th>Monthly EFC</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Formula Type</th>
<th>4 Simp Dep</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Primary EFC</th>
<th>440</th>
</tr>
</thead>
</table>

| Prorated EFC | 440 |

#### Dependency Status

- **Dependent w/Primary EFC**

#### Veterans

- **Veterans Benefits:** No
- **Veteran Benefit Type:** No
- **On Active Duty:** No
- **Graduate Student:** No
- **Selective Service:** No
- **1st Degree:** No
- **Enroll Status:** Full Time
- **Drug Offense:** No

#### Orphan

- **Orphan:** No

#### Children

- **Children:** No

#### Legal Guardianship

- **Legal Guardianship:** No

#### Risk of Homelessness

- **Risk of Homelessness:** No

#### Dislocated Worker

- **Dislocated Worker:** No

#### Unaccompanied Youth

- **Unaccompanied Youth (School):** No
- **Unaccompanied Youth (HUD):** No

## Field Name Abbreviations and Explanations

- **On Active Duty** (active duty status for US Armed Forces)
- **School Lunch** (free or reduced price lunch)
- **SSI** (Supplemental Security Income)
- **TANF** (Temporary Assistance for Needy Families)
- **WIC** (Women, Infants and Children)

## Grade Level

Select from:

- **1st yr AB** (attended before)
- **1st yr GP** (graduate professional)
- **1st yr NA** (never attended)
- **2nd yr Sph** (sophomore)
- **3rd yr Jnr** (junior)
- **4th yr Snr** (senior)
- **5th yr UG** (undergraduate)
- **Grad/Prof +** (graduate/professional beyond 1st year)
Unaccompanied Youth(HUD) (Unaccompanied Youth(Housing and Urban Development))

**Working with Parent Income and Assets**

Access the Parent Income/Assets page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Income/Assets).

![Parent Income/Assets page](Image)

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>AGI</th>
<th>U.S. Tax Paid</th>
<th>Father's Earnings</th>
<th>Mother's Earnings</th>
<th>Cash</th>
<th>Bus Net Worth</th>
<th>Tax Exempt Interest Income</th>
<th>Veterans Non-Ed Benefits</th>
<th>Other Untaxed Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status Date</td>
<td>18,345</td>
<td>15,378</td>
<td>15,500</td>
<td>30,000</td>
<td>55,200</td>
<td>230,000</td>
<td>225</td>
<td>245</td>
<td>4300</td>
</tr>
<tr>
<td>Legal Res State</td>
<td>Legal Res Date</td>
<td>Inv Net Worth</td>
<td>Tax Deferred Pension</td>
<td>Self Employment Payment</td>
<td>Child Support Received</td>
<td>Unpaid IRA Distributions</td>
<td>Unpaid Pensions</td>
<td>Military Allowance</td>
<td>Add Fin Total</td>
</tr>
<tr>
<td>OH</td>
<td>01/01/1996</td>
<td>140,437</td>
<td>210</td>
<td>215</td>
<td>220</td>
<td>230</td>
<td>235</td>
<td>240</td>
<td>760</td>
</tr>
<tr>
<td>In Family</td>
<td>Exemptions</td>
<td>Res Prior 2004</td>
<td>Tax Form</td>
<td>Tax Return Filed?</td>
<td>Elig 1040AEZ?</td>
<td>Father Birth Date</td>
<td>Mother Birth Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>04</td>
<td>No</td>
<td>1040</td>
<td>Filed/Crns</td>
<td>Yes</td>
<td>01/01/1954</td>
<td>01/01/1962</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Working with Parent Information**

Access the Parent Information page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Parent Information).
### Field Name Abbreviations and Explanations

- **School Lunch** (free or reduced price lunch)
- **SSI** (Supplemental Security Income)
- **TANF** (Temporary Assistance for Needy Families)
- **WIC** (Women, Infants and Children)

### Working with Assumption Overrides

Access the Overrides page (Financial Aid, Federal Application Data, Simulate 20nn-20nn FM INAS, Overrides).
Overrides page

### STATUS OVERRIDES

**Dependency Override:** Values include:

1: Dependent to Independent. You can select this value.

2: Cancel Dep Override – Corr Only. You can select this value.

3: Override Failed. The correction process sets this value.

**Correction Status:** Values include:

1: Correction(s) Pending. You can select this value.

2: Send Correction(s). You can select this value.

3: Correction(s) Sent. The correction process sets this value.

4: Correction(s) Accepted. The correction process sets this value.

5: Corrections Rejected. The correction process sets this value.

6: Do Not Send Correction(s). You can select this value.

### ASSUMPTION OVERRIDES

**Parent Number In College**

Select 1: Yes.

**Parent AGI**

Select 1: Yes.

**Parent W2C Assumed Zero**

Select 1: Yes.

**Student Number In College**

Select 1: Yes.

**Student AGI**

Select 1: Yes.

**Student W2C Assumed Zero**

Select 1: Yes.
**Using INAS Batch Calculations**

This section discusses how to calculate INAS in batch based on the policy options at your institution.

**Page Used to Make INAS Batch Calculations**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch INAS Calculation</td>
<td>RUNCTL_FAPINCLC</td>
<td>Financial Aid, File Management, INAS Batch Calculation, Batch INAS Calculation</td>
<td>Calculate INAS in batch based on policy options.</td>
</tr>
</tbody>
</table>

**Calculating the INAS in Batch**

Access the Batch INAS Calculation page (Financial Aid, File Management, INAS Batch Calculation, Batch INAS Calculation).
Batch INAS Calculation

Run Control ID: FMINAS

Process Name: FAPINCLC

Parameters

- Institution: [PSUNV] PeopleSoft University
- Aid Year: 2010 Financial Aid Year 2009 - 2010
- Application Type: B Both Federal & Profile
- Clear Calc Requests?: N No

The FAPINCLC batch calculation process is the same process as the online calculation. You can run INAS batch calculations automatically after each ISIR data load or as a separate use controlled process. Records loaded into the INAS_CALC_RECS table are selected for processing.

With the delivery of IM each year, the Application Type value is limited to Profile. After FM is delivered, values of Both Federal & Profile and Federal are available as additional processing options.

Application Type

Select the application type to run INAS batch calculations from these options:

- B: Both Federal and Profile
- F: Federal
- P: Profile

Clear Calc Requests (clear calculation requests)

If you select Y, the files are removed from the table after the batch calculation. You cannot run batch INAS on these files again unless they are added to INAS_CALC_RECS by loading new ISIR files with the appropriate data load parameters, or by using population update.

Viewing Federal EFC Information

This section discusses how to review Federal EFC summary information.

Pages Used to Review Federal EFC Information

Bundle 15 / Bundle 22

The View 2007–2008 FM EFC Detail component is removed, and the data is available in Financial Aid History.
**Note.** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal EFC Summary</td>
<td>ISIR_FM_SUMRY_nn</td>
<td>Financial Aid, Federal Application Data, View 20nn-20nn FM EFC Detail, Federal EFC Summary</td>
<td>Review information about a student’s federal EFC (expected family contribution).</td>
</tr>
<tr>
<td>ISIR Information</td>
<td>ISIR_INFO_SMRY_SEC</td>
<td>Click the ISIR Information Summary link on the Federal EFC Summary inquiry page.</td>
<td>View ISIR summary information for this student.</td>
</tr>
<tr>
<td>Assumption Detail</td>
<td>STDNT_FM_ASMP_SEC</td>
<td>Click the Assumption Detail link on the Federal EFC Summary inquiry page.</td>
<td>View a long description of any assumption the system is using in the INAS calculation.</td>
</tr>
<tr>
<td>Total Income Detail</td>
<td>ISIR_TI_SEC</td>
<td>Click the Total Income Detail link on the Federal EFC Summary inquiry page.</td>
<td>View total income information. Total income is the difference between taxable income, untaxed income, and adjustments to income.</td>
</tr>
<tr>
<td>Total Allowances Detail</td>
<td>ISIR_TA_SEC</td>
<td>Click the Total Allowances Detail link on the Federal EFC Summary inquiry page.</td>
<td>View allowances to income. Taxes paid, Income Protection and Employment allowances are displayed.</td>
</tr>
<tr>
<td>Available Income Detail</td>
<td>ISIR_AI_SEC</td>
<td>Click the Available Income Detail link on the Federal EFC Summary inquiry page.</td>
<td>View available income information for the student. Available income is total income less total allowances.</td>
</tr>
<tr>
<td>Total Parent Contribution Detail</td>
<td>ISIR_PC_SEC_nn</td>
<td>Click the Total Parent Contribution Detail link on the Federal EFC Summary inquiry page.</td>
<td>View total parent contribution information for this student, including Available Income, Contribution from Assets, Adjustments to Available Income, the Total Parent Contribution, Number in College, and Calculated Parent Contribution. This page is available only if the student is a dependent and provides parent income and asset information.</td>
</tr>
<tr>
<td>Total Student Contribution Detail</td>
<td>ISIR_SC_SEC_nn</td>
<td>Click the Total Student Contribution Detail link on the Federal EFC Summary inquiry page.</td>
<td>View total student contribution. This page displays the Total Student Contribution, Number in College, Student Income Contribution, Student Asset Contribution, and Calculated Student Contribution.</td>
</tr>
</tbody>
</table>
## Prorated EFC Detail

**Definition Name:** ISIR_EFC_SEC_nn

**Navigation:** Click the Prorated EFC Detail link on the Federal EFC Summary inquiry page.

**Usage:** View information about the prorated EFC for the student. The page displays Parent Contribution (if applicable), Student Income Contribution, Student Asset Contribution, the Prorated EFC, and the Calculated EFC. The prorated EFC reflects enrollment for 9 months or other than 9 months depending on the budget duration.

---

### Reviewing Federal EFC Summary Information

Access the Federal EFC Summary page (Financial Aid, Federal Application Data, View 20nn-20nn FM EFC Detail, Federal EFC Summary).

#### Federal EFC Summary

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Total Student Contribution</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>N/A</td>
<td>PSUUNV</td>
</tr>
</tbody>
</table>

**Source:** ISIR Information Summary

**Details:**
- **Total Income:** 41,573
- **Total Allowances:** 27,443
- **Available Income:** 14,130
- **Total Parent Contribution:** 12,833
- **Total Student Contribution:** 983
- **Prorated EFC:** 13,622
- **Primary EFC:** 13,622

---

**Federal EFC Summary page**

From this page, select links to all detail pages for the students’ EFC for a specified aid year. The system supports three active aid years.

For Total Student Contribution, N/A is displayed to more closely align interim calculation results with Software Developer Specifications for Independent Students without Dependents (formula 2 and 5 students).
Viewing Institutional EFC Information

This section provides an overview of institutional EFC calculations and discusses how to review an institutional EFC summary.

Understanding Institutional EFC Calculations

The following methodologies are used to calculate both parent and student contributions shown on the Institutional EFC Summary page:

- Estimated federal methodology (EFM) uses the federal methodology provided by the College Board to calculate an estimated federal contribution.
- Base Institutional Methodology (IM) uses the institutional methodology provided by the College Board.
- IM with Options uses the IM provided by the College Board and can reflect override options that you set up.

Student contributions are also calculated by IM Estimated, which uses the IM estimated summer and academic year data. All computations are nine-month calculations, regardless of the student’s dependency status.

Pages Used to View Institutional EFC

**Note.** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional EFC Summary</td>
<td>INST_INAS_SMRY_nn</td>
<td>Financial Aid, Institutional Application Data, View 20nn-20nn IM EFC Detail, Institutional EFC Summary</td>
<td>Review information about a student's Institutional EFC (expected family contribution). From this page, access detailed information for each calculated amount.</td>
</tr>
<tr>
<td>Institutional Assumption</td>
<td>STDNT_IM_ASMP_SEC</td>
<td>Click the IM Assumptions link on the Institutional EFC Summary Detail page.</td>
<td>View the institutional assumptions that apply to a student. INAS IM Assumption Codes are defined by the College Board and are delivered with the Financial Aid system. An assumption is an assumed response to a question that is left blank or to a response that was inconsistent with the guidelines.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------------------------</td>
<td>------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Income Detail Parent Contribution IM and IM w/ Options</td>
<td>INST_PIM_TI_SEC_nn, INST_PIM_TIO_SECnn</td>
<td>Click the Total Income Detail link on the Institutional EFC Summary Detail page.</td>
<td>View total income information for parents calculated using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income and adjustments to income on earned income.</td>
</tr>
<tr>
<td>Total Income Detail Parent Contribution - EFM</td>
<td>INST_PFM_TI_SEC_nn</td>
<td>Click the Total Income Detail link on the Institutional EFC Summary Detail page.</td>
<td>View total income information for parents using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.</td>
</tr>
<tr>
<td>Total Income Detail Student Contribution IM, IM w/Options, IM Estimated</td>
<td>INST_SIM_TI_SEC_nn, INST_SIM_TIO_SECnn, INST_SIM_TIE_SECnn</td>
<td>Click the Total Income Detail link on the Institutional EFC Summary Detail page.</td>
<td>View total income information for the student using institutional methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.</td>
</tr>
<tr>
<td>Total Income Detail Student Contribution – EFM</td>
<td>INST_SFM_TI_SEC_nn</td>
<td>Click the Total Income Detail link on the Institutional EFC Summary Detail page.</td>
<td>View total income information for the student using estimated federal methodology. Total Income is the difference between the combination of taxable income, untaxed income, and income adjustments on earned income.</td>
</tr>
<tr>
<td>Available Income Detail Parent Contribution – IM, IM w/Options</td>
<td>INST_PIM_AI_SEC_nn, INST_PIM_AIO_nn</td>
<td>Click the Available Income Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about parents’ contribution using institutional methodology. The system displays allowances for taxes, medical/dental expenses, tuition, and other allowances, such as income protection allowance (IPA). Total Allowances is the sum of these allowances. Available Income is the Total Income, shown on the Total Income page, less the Total Allowances.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------</td>
<td>------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Available Income Detail</td>
<td>INST_PFM_AI_SEC_nn</td>
<td>Click the Available Income Detail link on the</td>
<td>View information about parent’s contribution using estimated federal</td>
</tr>
<tr>
<td>Parent Contribution - EFM</td>
<td></td>
<td>Institutional EFC Summary Detail page.</td>
<td>methodology. The system displays allowances for taxes, medical/dental</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>expenses, tuition, and other allowances, such as income protection</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>allowance (IPA). Total Allowances is the sum of these allowances.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Available Income is the Total Income, shown on the Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Income page, less the Total Allowances.</td>
</tr>
<tr>
<td>Available Income Detail</td>
<td>INST_SIM_AI_SEC_nn,</td>
<td>Click the Available Income Detail link on the</td>
<td>View information about student contribution using your institutional</td>
</tr>
<tr>
<td>Student Contribution – IM, IM w/Options, IM Estimated</td>
<td>INST_SIM_AIO_SECnn,</td>
<td>Institutional EFC Summary Detail page.</td>
<td>methodology. The system displays allowances for taxes, medical/dental</td>
</tr>
<tr>
<td></td>
<td>INST_SIM_AIE_SECnn</td>
<td></td>
<td>expenses, tuition, and other allowances, such as income protection</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>allowance/monthly maintenance allowance (IPA/MMA). Total Allowances</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>is the sum of these allowances. Available Income is the Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Income, shown on the Total Income page, less the Total Allowances.</td>
</tr>
<tr>
<td>Available Income Detail</td>
<td>INST_SFM_AI_SEC_nn</td>
<td>Click the Available Income Detail link on the</td>
<td>View information about student contribution using estimated federal</td>
</tr>
<tr>
<td>Student EFM</td>
<td></td>
<td>Institutional EFC Summary Detail page.</td>
<td>methodology. The system displays allowances for taxes, medical/dental</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>expenses, tuition, and other allowances, such as income protection</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>allowance (IPA). Total Allowances is the sum of these allowances.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Available Income is the Total Income, shown on the Total Income page,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>less the Total Allowances.</td>
</tr>
<tr>
<td>Net Worth Detail Parent Contribution IM, IM w/Options</td>
<td>INST_PIM_NW_SECnn,</td>
<td>Click the Net Worth Detail link for Parent</td>
<td>View detail information about the parents’ net worth, the total</td>
</tr>
<tr>
<td></td>
<td>INST_PIM_NWO_SEC_nn</td>
<td>Contribution, on the Institutional EFC Summary</td>
<td>assets calculated by IM.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Detail page.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Net Worth Detail Parent Contribution – EFM</td>
<td>INST_PFM_NW_SEC_nn</td>
<td>Click the Net Worth Detail link for Parent Contribution, on the Institutional EFC Summary Detail page.</td>
<td>View detail information about parent’s net worth, the total assets calculated by EFM.</td>
</tr>
<tr>
<td>Net Worth Detail Student Contribution - IM, IM w/Options, IM Estimated</td>
<td>INST_SIM_NW_SEC_nn, INST_SIM_NWO_SECnn, INST_SIM_NWE_SECnn</td>
<td>Click the Net Worth Detail link for Student Contribution, on the Institutional EFC Summary Detail page.</td>
<td>View detail information about student’s net worth, the total assets calculated by IM.</td>
</tr>
<tr>
<td>Net Worth Student Contribution – EFM</td>
<td>INST_SFM_NW_SEC_nn</td>
<td>Click the Net Worth Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about student’s net worth, the total assets calculated by EFM.</td>
</tr>
<tr>
<td>Discretionary Net Worth Income Supplement Detail Parent Contribution - IM, IM w/Options</td>
<td>INST_PIM_DN_SEC_nn, INST_PIM_DNO_SECnn</td>
<td>Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information on calculated allowances to offset net worth for the parent using institutional methodology.</td>
</tr>
<tr>
<td>Discretionary Net Worth Income Supplement Detail Parent Contribution – EFM</td>
<td>INST_PFM_IS_SEC_nn</td>
<td>Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information on calculated allowances to offset net worth for the parent using estimated federal methodology.</td>
</tr>
<tr>
<td>Discretionary Net Worth Income Supplement Detail Student Contribution – IM, IM w/Options, IM Estimated</td>
<td>INST_SIM_DN_SEC_nn, INST_SIM_DNO_SECnn, INST_SIM_DNE_SECnn</td>
<td>Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information on calculated allowances to offset net worth for the student using institutional methodology.</td>
</tr>
<tr>
<td>Discretionary Net Worth Income Supplement Detail Student Contribution – EFM</td>
<td>INST_SFM_IS_SEC_nn</td>
<td>Click the Discretionary Net Worth/Income Supplement Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information on calculated allowances to offset net worth for the student using estimated federal methodology.</td>
</tr>
<tr>
<td>Contribution for Student Detail Parent Contribution – IM, IM w/Options</td>
<td>INST_PIM_TC_SEC_nn, INST_PIM_TCO_SECnn</td>
<td>Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about the parent contribution for the student using institutional methodology.</td>
</tr>
<tr>
<td>Contribution for Student Detail Parent Contribution – EFM</td>
<td>INST_PFM_TC_SEC_nn</td>
<td>Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about the parent contribution for the student using federal methodology.</td>
</tr>
<tr>
<td>Contribution for Student Detail Student Contribution – IM, IM w/Options, IM Estimated</td>
<td>INST_SIM_TC_SEC_nn, INST_SIM_TCO_SECnn, INST_SIM_TCE_SECnn</td>
<td>Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about student contribution using institutional methodology.</td>
</tr>
</tbody>
</table>
### Reviewing an Institutional EFC Summary

Access the Institutional EFC Summary page (Financial Aid, Institutional Application Data, View 20nn-20nn IM EFC Detail, Institutional EFC Summary).

#### Institutional EFC Summary

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribution for Student Detail</td>
<td>INST_SFM_TC_SEC_nn</td>
<td>Click the Contribution for Student Detail link on the Institutional EFC Summary Detail page.</td>
<td>View information about student contribution using estimated federal methodology.</td>
</tr>
<tr>
<td>Contribution – EFM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The system displays the Total Income, Available Income, Net Worth, DNW/Inc Supp (Discretionary Net Worth/Income Supplement), and Contribution for Student for both parent and student contribution for the selected student, application source, and aid year.

Click the IM Assumptions link to access the Institutional Assumption Detail page, which describes any INAS assumptions that apply to the student.

Click the Detail links to access detailed information for each displayed amount.

See Isfa, Processing INAS, Reviewing INAS Assumption Codes.

#### Parent Contribution

EFM totals are always displayed. Select either basic IM or IM with options.

- **Base IM**
  - Uses the institutional methodology provided by the College Board.

- **IM w/Options**
  - Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.

- **EFM (estimated federal methodology)**
  - Uses the federal methodology formula provided by the College Board to calculate an estimated federal parent contribution.
**Student Contribution**

EFM totals are always displayed. Select Base IM, IM Estimated, or IM with Options.

**Base IM**
- Uses the institutional methodology provided by the College Board.

**IM Estimated**
- Uses the institutional methodology estimated summer and academic year data.
- All computations in this section are nine-month calculations.

**IM w/Options**
- Uses the institutional methodology provided by the College Board and reflects override options set up by your institution.

**EFM (estimated federal methodology)**
- Uses the federal methodology formula provided by the College Board to calculate an estimated federal student contribution.

---

**Reviewing Need Summary**

This section discusses how to view need summary information.

**Pages to View Need Summary**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need Summary</td>
<td>NEED_SUMMARY_SEC</td>
<td>Click the Need Summary link on the FAFSA Information page.</td>
<td>View the award period and EFC status for both the Federal and Institutional cost of attendance, expected family contribution, need, GI bill, total aid, unmet need, and aid overaward.</td>
</tr>
</tbody>
</table>

**Viewing Need Summary Information**

Access the Need Summary page (click the Need Summary link on the FAFSA Information page).
Reviewing INAS Assumption Codes

To set up INAS Assumptions Codes, use the INAS Assumption Codes component (INAS_ASMPTN_CODES).

This section discusses how to:

- Review INAS FM assumption codes.
- Review INAS IM assumption codes.
### Pages Used to Review INAS Assumption Codes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>INAS FM Assumption Codes</td>
<td>INAS_FM_ASMPTN</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS FM Assumption Codes</td>
<td>Review assumption codes regarding federal application information. INAS FM assumption codes are provided by the College Board and are based on CPS (central processing system) and delivered with the Financial Aid system.</td>
</tr>
<tr>
<td>INAS IM Assumption Codes</td>
<td>INAS_IM_ASMPTN</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS IM Assumption Codes</td>
<td>Review assumption codes regarding institutional application information. INAS IM assumption codes are provided by the College Board and are delivered with the Financial Aid system.</td>
</tr>
</tbody>
</table>

### Reviewing INAS FM Assumption Codes

Access the INAS FM Assumption Codes page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS FM Assumption Codes).
Chapter 1 Processing INAS

NAS FM Assumption Codes page

Use this page to review the FM assumption code defined by INAS for the aid year.

With the delivery of IM each year, the IM Assumption Code values are available. After FM is delivered, the FM Assumption Code values are available.

**Reviewing INAS IM Assumption Codes**

Access the INAS IM Assumption Codes page (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS Assumption Codes, INAS IM Assumption Codes).
<table>
<thead>
<tr>
<th>Code</th>
<th>Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P0</td>
<td>Parents' EFM number in college overridden by local policy option</td>
</tr>
<tr>
<td>P03A</td>
<td>Parents assumed to be married</td>
</tr>
<tr>
<td>P03C</td>
<td>Parents assumed to be married</td>
</tr>
<tr>
<td>P03D</td>
<td>Parents assumed to be unmarried</td>
</tr>
<tr>
<td>P04A</td>
<td>Parents' reported household size overridden by family matrix</td>
</tr>
<tr>
<td>P04C</td>
<td>Parents' reported household size overridden by family matrix</td>
</tr>
<tr>
<td>P05B</td>
<td>Parents' total number in college assumed from family matrix</td>
</tr>
</tbody>
</table>

Use this page to review the IM assumption code defined by INAS for the aid year.