

EZ-Audit Release 1.01 Functional Design Meeting

5/8/2003

Attendees: Ti Baker, Melanie Greiner, Brian Cannavan, Seth Sinclair

Requirements Reviewed:

Requirement	Use Case
ED Admin - Don't require a Case Team ID/OPEID when adding users where it does not apply (The request is to 1 - Remove required asterisk marks for the OPE_ID and Case team fields. Maybe add a note to state that one is required based on what type of user you are adding. 2 - Do not require a Case Team ID when adding a screener user (it is N/A))	1 - Manage Users
Display both eZ-Audit and FSA composite score. Composite Score - When Case recalculates the score, the new score should appear on the Submission Summary page below the school/eZ-Audit score. Both scores must be saved and retrievable. (We may already have this logged as a SIR)	15 - Select an Institution
The System will provide users from the Office of Chief Financial Officer (CFO) view access to the FAD Letter.	1 - Manage Users

Changes on Ed Admin Page:

- Remove asterisks next to OPEID and Case Team Fields
- Add text explanation for each field stating when they are required
- All school roles (Ins Admin, Data Entry, Submit) require an OPEID and no Case Team ID. All Case Roles do not require an OPEID. The following Case Team roles should not require a Case Team ID: Screener, Prescreener, Ed Admin, View Only, QC.
- Would like to move roles "Ed Admin" and "Ins Admin" away from each other to prevent entry error.

Composite Score on Submission Summary:

- System generated score to be called "eZ-Audit Composite Score"
- Analyst score from the worksheet that will be added from the Submission Summary page to be called "ED Composite Score"

View Only Role:

- Default Home Page will be the Search page
- Top Nav will not include Team Queue
- Would like to have a View only with Reports and a View only without Reports
- View only user will have the ability to see all pages applicable pages (based on submission type and state) in a read-only format

Design Questions:

- Does the Co-Team Leader have the ability to view coded findings when looking at a submission in their "assign" queue? (No - Ti to submit a request to the CCB)
- Does the composite score requirement include adding both composite scores to the Financial Reports (No - Ti to submit a request to the CCB)
- Does an institution admin have the ability to add another institution admin? (No - Only the ED Admin can add an institution administrator)
- Can the ED admin reset a password for a user that was added by an institution admin? (Yes - the ED Admin should have the ability to reset a password for any user)