

EZ-Audit Release 1.01 Functional Design Meeting
5/13/2003

Attendees: Ti Baker, Dyon Toney, Sherry Quade, Melanie Greiner, Brian Cannavan, Seth Sinclair

Requirements Reviewed:

Requirement	Use Case
<p>The system will provide a Screener User the ability calculate the deficiency indicator on the Code Findings page and will redisplay the page when selected.</p> <p>The system will display the results of the Deficiency Calculation on the Code Findings page.</p> <p>The system will provide a Screener user a submit option on the Code Findings page.</p>	UC 10 – Code Findings
<p>The system will display a "Program Area" input field on the Code Findings page.</p>	UC 10 – Code Findings
<p>The system shall allow an ARS to Submit to a Co-Team leader without having to complete an ACD, DDIF, and FAD when the only reason for referral is Change in Auditor.</p> <p>The system will allow an FA to Submit to a Co-Team leader without having to select a determination when the only reason for referral is Change in Auditor.</p>	UC 17 – Send to Co-Team Leader for Approval
<p>The system shall calculate the resolution due date for a Financial Statement submission based on the date the record is assigned to a Financial Analyst.</p>	UC 13 – Assign Submissions

Changes on Code Findings Page:

- The system will automatically calculate and display deficiency status as findings are added or modified
- The results “Deficient” or “Non-Deficient” will be displayed in a field labeled “Deficiency Status.” The field will be located below the “Add Finding” button and above the findings added grid
- User will be given the option to submit findings using a “Submit” button at the bottom of the page

“Program Area” Input Field:

- Need to confirm the details of this requirement; may consider removing from R1.01 (if this should be deleted, it will be handled through the CCB)

Suppress ARS Edit Checks:

- An ARS will not have to complete an ACD, DDIF, and FAD when the only reason for flagging is “Change in Auditor” before being able to Submit to a Co-Team leader
- A FA will not have to select a determination when the only reason for flagging is “Change in Auditor” before being able to Submit to a Co-Team leader

Calculate Resolution Due Date Upon Assignment

- The system will start the resolution clock for a Financial Statement upon assignment to a Financial Analyst
- If a Financial Statement is reassigned, the clock will not be reset

Review of Previous Design Session (5/8/2003) Materials

- Submission Summary page changes accepted
- Ed Admin page changes accepted, with the following additions:
 - Move View-Only above Institution Admin role
 - Change to “Ed View-Only”
 - Add “Access to Reports” checkbox option for View-Only role

Design Questions/Comments:

- Does the presence of a refund finding with an error rate of more than 5% and more than one error flag a submission but not make it deficient? (findings 2375, 2385) (Ans – eZ-Audit is currently flagging a submission when this condition is present. The potential issue is that eZ-Audit sets the reason for referral to “Deficient.” We will need to discuss further if this is incorrect.)