

eZ-Audit Release 2.0 Requirements Matrix

Name	Requirement text	R101 Tag	Release Schedule	Priority	Comments
CODE	The system will provide a Screener User a left nav option to access the "Code Findings" page when viewing a submission.	R101224	2	H	
CODE	The system will allow the Co-Team leader to view the "Code Findings" page for a submission in the "Pending Assignment" queue.		2	H	
INC	The system will allow users to retrieve Incomplete Submissions using the "Search" Functionality.		2	H	
INC	The system will display Incomplete Submissions as view-only and non-assignable.		2	H	
INC	The system will label Incomplete Submissions as "Incomplete" in the Search Results and on the Submission Summary page.		2	H	
INC	The system will create an "Incomplete Letter Report" for each submission marked Incomplete in QC that displays the items that were recorded as incompleteincorrect.	R101125	2	H	153 154
INC	The system will allow a school user to view an "Incomplete Letter Report" for their institution.		2	H	
INC	The system will post a Notification to school user telling them that an "Incomplete Letter Report" has been posted for their Institution.		2	H	
INC	The system will record when an "Incomplete Letter Report" is posted in the Correspondence Log.	R101171	2	H	
INC	The system will record when an "Incomplete Letter Report" is viewed by a School User in the Correspondence Log.		2	H	
INC	The system will provide a Preview Page that allows the Case User to view an Incomplete Letter before it is finalized.		2	H	Initial Design
INC	The system will allow Case Users to view an Incomplete Letter.		2	H	Initial Design
INC	The system will provide an "Incomplete" label in the Page Header of all incomplete submissions for Case view.		2	H	Initial Design
INC	The system will provide a Printer-Friendly Version of the Incomplete Submission Letter.		2	H	Initial Design
INC	The system will allow case users to access an incomplete letter directly from Submission Summary.		2	H	Design Session
INC	The system will provide a field on the QC page to allow the user to indicate if any attached PDFs are not viewable.		2	H	Initial Design. New field based on QC letter design.
INC	The system will provide a field on the QC page to allow the QC user to enter comments that they want to display on an Incomplete letter.		2	H	
INC	The system will display revised Listbox values for existing QC fields "Area all required documents attached?" and "Are all required attachments properly presented?"		2	H	See Design Doc for listbox details.
INC	The system will display "Resubmit" links to an Institution User for all incomplete submissions regardless of submission type.		2	H	Design Session
INC	The system will send an email to Institution users to notify them when an incomplete letter is posted for a submission.		2	H	Design Session
INS	A-133 Non-Profit Adjustments (SEE INS requirements for specific requirements)		2	H	LOE includes all "INS" requirements.

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INS	The system will provide fields on the Checklist page for the school to enter a Contact Name and Contact # Email for the Financial Statement.	R101188	2	H	Change to reference "Checklist" page.
INS	The system will provide fields on the Checklist page for the school to enter a Contact Name and Contact # Email for the Compliance Audit.	R101188	2	H	Change to reference "Checklist" page.
INS	The system will require Institution Users to enter values in the Contact Info items on the Checklist page.		2	H	Included as part of adding the fields.
INS	The system will provide a field to capture "Distribution to Shareholders" on the Income Statement for Proprietary Schools.		2	H	Formerly Enhancement SIR # 898. Add a line on the For-Profits Schools Income Statement after Gain(Loss)) from Correction of Error net of Tax that reads Distribution to Shareholders. The item should be subtracted in order to determine Retained Earnings End of Year.
INS	The system will provide a link to the Institution Profile page for Institution Users who are viewing submission pages (school name).		2	H	Initial Design
INS	Edit font on the Checklist page for text Report must include auditors signature.		2	H	Initial Design already in
INS	Add checklist text for field "Internal Controls."		2	H	Initial Design already in
INS	Change question 8 on the Annual Proprietary and Non-Profit FS page from "non-prorata" to "prorata."		2	H	Design Session already in Revenue Recognition is being removed from Non-Profit
INS - CA Info	The system will display the following page title on the CA Info Page: Compliance Audit Information.		2	H	The Left Nav link will continue to be labeled "Compliance Audit." The page title will change to read "Compliance Audit Information." The current page title reads Compliance Audit. School Type - All

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INS - CA Info	Question #1 - Eliminate column header "Audited"		2	H	No header needed. School Type - Non-Profit and Public
INS - CA Info	Question #1 - Eliminate entire "Closeout" column		2	H	Delete entire column header and checkboxes. School Type - Non-Profit and Public
INS - CA Info	Remove All Sub questions under question "Does this A-133 Report contain any findings related to the FSA Title IV programs?" (Pell Adjustment Student Eligibility Disbursement Refunds)		2	H	School Type - Non-Profit and Public
INS - CA Info	The system will provide a field to ask "Does the attached A-133 audit report indicate that this examination was conducted in accordance with:" on the Compliance Audit Information Page.		2	H	Current field label does not reference "A-133." School Type - Non-Profit and Public
INS - CA Info	The system will provide a sub-item for "OMB Circular A-133" to question "Does the attached A-133 audit report indicate that this examination was conducted in accordance with:" on the Compliance Audit Information Page.		2	H	Change current sub-item "OMB Standards" to "OMB Circular A-133." School Type - Non-Profit and Public
INS - CA Info	The system will provide a field to ask "Type of Auditor's Report Issued on Compliance for Major Programs (Title IV Only)" on the CA Info Page.		2	H	Change current field label "Opinion Type" to "Type of Auditor's Report Issued on Compliance for Major Programs." School Type - Non-Profit and Public
INS - CA Info	Question "Type of Auditor's Report" - Re-order dropdown list choices to the following: Unqualified Qualified Adverse Disclaimer		2	H	School Type - Non-Profit and Public
INS - CA Info	The system will provide the following field on the CA Information page: "Was the Student Financial Aid Cluster audited as a Major Program?"		2	H	New question. Add after "Type of Auditor's Report...." Yes No Answer. If yes proceed to question 8. If no question 8 is NA. School Type - Non-Profit and Public

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INS - CA Info	The system will provide the following field on the CA Information Page: "For Internal Control Over Major Programs: a) Were material weakness(es) identified? B) Were reportable condition(s) identified that are not considered to be material weaknesses?"		2	H	New question. Yes No answer for A, Yes and Not Reported for B. If either of these are answered "yes" then record should be flagged for case team review. School Type - Non-Profit and Public
INS - CA Info	The system will provide the following field on the CA Information Page: "Were there audit findings in the previous year's A-133 Report?"		2	H	Change current field to "Were there audit findings in the previous year's A-133 Report." School Type - Non-Profit and Public
INS - Cash Flow	Eliminate the Cash Flow Statement.		2	H	Remove link. Remove from Case View. School Type - Non-Profit
INS - Checklist	The system will provide a question on the Checklist page asking "Are the following items included in the attachment of you're A-133 Report?"		2	H	Change question 1 text to "Are the following items included in the attachment of you're a-133 report?" School Type - Non-Profit and Public
INS - Checklist	The system will provide a checklist item Statement of Financial Position.		2	H	Change "Balance Sheet" to "Statement of Financial Position" School Type - Non-Profit
INS - Checklist	Reorder checklist items to 1) Statement of FP 2) Statement of Activities 3) Cash Flow		2	H	School Type - Non-Profit
INS - Checklist	Eliminate item "Consolidated Statements"		2	H	School Type - Non-Profit and Public

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INS - Checklist	Change "Statement addressing prior year audit findings" to "Summary Schedule of prior year audit findings"		2	H	Change "Statement addressing prior year audit findings" to "Summary Schedule of prior year audit findings" School Type - Non-Profit and Public
INS - Checklist	Remove item "Servicer Information Sheet"		2	H	School Type - Non-Profit and Public
INS - FS Info	The system will display the following page title on the FS Info Page: Financial Statement Information.		2	H	The Left Nav link will continue to be labeled "Financial Statements." The page title will change to read "Financial Statement Information." The current page title reads "Financial Statement." School Type - All
INS - FS Info	The system will display the following question on the FS Info page "What type of auditor's report was issued on the financial statements?"		2	H	Replaces current question label "Opinion Type" School Type - Non-Profit and Public
INS - FS Info	The system will provide the following options in the Dropdown List for the question "What type of auditor's report was issued on the financial statements?": Unqualified Qualified Adverse Disclaimer		2	H	Remove "Going Concern" and "Other." School Type - Non-Profit and Public

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INS - FS Info	The system will provide a question asking "Is a going concern explanatory paragraph included in the audit report?"		2	H	New question. Add Below "What type of auditor's report was issued on the financial statements?" Possible choices are Yes No. Required field. If Yes should be flagged for case review. School Type - Non-Profit and Public
INS - FS Info	The system will provide a question asking "For internal control over financial reporting: a) were material weakness(es) identified? b) were reportable condition(s) identified that are not considered to be material weakness(es)?"		2	H	New question. Add below "Is a going concern explanatory paragraph included in the audit report?" Possible choices are Yes No for A and Yes None Reported for B. Required fields. If Yes should be flagged for case review. School Type - Non-Profit and Public
INS - FS Info	Delete sub questions for question "Do you have any of the following disclosures in your financial statement?"		2	H	Current question #7. Remove Ed Compliance Issues Income Recognition and Late Refunds School Type - Non-Profit and Public
INS - FS Info	The system will provide the following items as sub-questions to "Do you have any of the following disclosures in your financial statement?": Non-compliance Timely Return to Title IV Programs		2	H	School Type - Non-Profit and Public

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INS - FS Info	The system will provide a link to the "Statement of Financial Position" from the FS Information Page.		2	H	Currently titled "Balance Sheet." Needs to be incorporated into the Error Messages Link to Page Page Header etc School Type - Non-Profit
INS - FS Info	The system will provide a question asking "Were any instance(s) of noncompliance material to the financial statements noted?"		2	H	New question. Add below "For internal control over financial reporting:...?" Possible choices are Yes No. Required field. If Yes should be flagged for case review. School Type - Non-Profit and Public
INS - Ins Home Page	The system will allow Institution Users to access a "Create Waiver Exemption Request Submission" link from the Institution Home page.		2	H	The link is currently labeled "Exemption Waiver." Update link name to be consistent with textinfo on the page. School Type - All
INS - Statement of Activities	The system will display the following page title on the Statement of Activities Page: Statement of Activities Data.		2	H	Add "Data" to current title. School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Government Appropriations" on the Statement of Activities.		2	H	New field. Add under "Tuition." Add totals. School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Government Grants and Contracts" on the Statement of Financial Position.		2	H	New field. Add under "Federal Rents and Contracts." Add totals. School Type - Non-Profit

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INS - Statement of Activities	The system will provide a field to capture "Private Gifts Grants and Contracts" on the Statement of Financial Position.		2	H	Change current field "Contributions" to "Private Gifts Grants and Contracts." School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Hospital Revenue" on the Statement of Financial Position.		2	H	new field add below Investment Income. Add to revenue total. School Type - Non-Profit
INS - Statement of Activities	Remove field Depreciation and Amortization Expense.		2	H	Remove from Calculation as well. School Type - Non-Profit
INS - Statement of Activities	Remove field Interest Expense.		2	H	Remove from Calculation as well. School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Net Grant Aid to Students" on the Statement of Activities.		2	H	Change current field "Internal Scholarships" to "Net Grant Aid to Students." School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Hospital Services" on the Statement of Activities.		2	H	New Field under "Net Grant Aid to Students." Add totals. School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Extraordinary Gain (Loss)" on the Statement of Activities.		2	H	Add between current totals fields "Total Unrestricted Expenses" and "Change in Unrestricted Net Assets" Current field 21 = 20 + 3 new fields (see manual for #s) School Type - Non-Profit

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INS - Statement of Activities	The system will provide a field to capture "Gain (Loss) on Discontinued Operations" on the Statement of Activities.		2	H	Add between current totals fields "Total Unrestricted Expenses" and "Change in Unrestricted Net Assets" Current field 21 = 20 + 3 new fields (see manual for #s) School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture "Gain (Loss) from Change in Accounting Principle" on the Statement of Activities.		2	H	Add between current totals fields "Total Unrestricted Expenses" and "Change in Unrestricted Net Assets" Current field 21 = 20 + 3 new fields (see manual for #s) School Type - Non-Profit
INS - Statement of Activities	The system will provide a field to capture Gain (Loss) from Correction of Error.		2	H	Add after current field "unrestricted net assets at beginning of year" Current field 23 = 21 + 22 + new field School Type - Non-Profit

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INS - Statement of Activities	The system will provide a field to capture Unrestricted Net Assets at the Beginning of the Year.		2	H	Totals field = Gain (Loss) from Correction of Error + Unrestricted Net Assets at Beginning of Year Field "Unrestricted Net Assets at End of Year" should = Unrestricted Net Assets at Beginning of Year as Restated + Change in Unrestricted Net Assts
INS - Statement of Activities	The system will provide a "comment" field with all "Other" fields on all the Statement of Activities.		2	H	Field is not required. School Type - Non-Profit
INS - Statement of Financial Position	The system will display the following page title on the Statement of Financial Position Page: Statement of Financial Position Data.		2	H	Add "Data" to current title. School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Restricted Assets" on the Statement of Financial Position page.		2	H	New field add below "Cash and Cash Equivalents." School Type - Non-Profit
INS - Statement of Financial Position	Eliminate line "Pledges Receivable"		2	H	Remove from Calculation as well. School Type - Non-Profit
INS - Statement of Financial Position	Move current item "Contributions Receivable" above field Other Assets.		2	H	Do not include in subtotal for Accounts Receivable School Type - Non-Profit

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Name	Requirement text	R101 Tag	Release Schedule	Priority	Comments
INS - Statement of Financial Position	Change current item "Note Receivable" to "Notes Receivable"		2	H	Applies for fields "Note Receivable - Related Party - Secured Note Receivable - Related Party - Unsecured and Note Receivable - Other." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Deferred AdvertisingMarketingRecruiting Costs" on the Statement of Financial Position.		2	H	Current field label is "Deferred Advertising." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Long-term debt" on the Statement of Financial Position.		2	H	Combine existing fields for LTD Notes Bonds and Other to one field labeled "Long Term Debt" School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Student Loans Receivable" on the Statement of Financial Position.		2	H	New field. Add below "Contributions Receivable." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Interest In Trusts Held by Others" on the Statement of Financial Position.		2	H	New field. Add above "Other Assets." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Current Portion of Long-term Debt" on the Statement of Financial Position.		2	H	New field. Add below "Lines of Credit." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Government Advances for Student Loans" on the Statement of Financial Position.		2	H	Add below "Liability Under Split Interest Agreements." School Type - Non-Profit

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INS - Statement of Financial Position	The system will provide a field to capture "Minimum Pension Liability" on the Statement of Financial Position.		2	H	Add below "Post Employment & Post Retirement Benefits." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Liability Under Split Interest Agreements" on the Statement of Financial Position.		2	H	School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a field to capture "Split Interest Agreements and Term Endowments" on the Statement of Financial Position.		2	H	Replaces current field label "Annuities Life Income....." School Type - Non-Profit
INS - Statement of Financial Position	The system will provide a "comment" field with all "Other" fields on all the Statement of Financial Position.		2	H	Field is not required. School Type - All
INS - Statement of Financial Position	Remove "at historical values" from field Property, Plant, and Equipment, including capitalized lease assets - BOTH Data Entry Item and Total Field		2	H	Added by Bob Swab on 01/08
INS - Submit Page	Remove reference to "for review" in 1st paragraph.		2	H	School Type - Non-Profit and Public
INS - Submit Page	Add "as appropriate" in 2nd paragraph after "OMB Circular A-133"		2	H	School Type - Non-Profit and Public
INS - Upload	Upload instructions - change reference to "audited financial statements compliance audit" to "A-133 report"		2	H	School Type - Non-Profit and Public
NAV	The system will provide left navigation on the Manage Auditor Info page to provide access to other Resolution options.		2	H	
NEW	The system will provide a field on InitialReinstatement Submissions to allow a School User to indicate the Schools FYE.		2	H	REMOVE current process that requires a school with no FYE to submit a change in FYE submission.
NEW	The system will update a School's FYE when an InitialResubmission Submission is resolved.		2	H	In based on requirement to incorporate change in FYE with InitialResubmission.

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QC	The system will display separate areas in the QC queue to separate submissions where the QC needs to be completed and those where the QC needs to be submitted by an approver.		2	H	
RES	The system will display a "Resubmission Date" on the Submission Summary page.		2	H	Formerly Enhancement SIR # 924. Only populated if there was a resubmission.
SCH GRP	The system will set a CUC Group Submission to Resubmit when any of the Locator or Child records are marked "Incomplete" and after all are QC'd.	R101312	2	H	
SCH GRP	The system will allow Case Users to access all related attachments when viewing any portion of a CUC School Group submission.		2	H	
SCH GRP	The system will calculate the appropriate Due Date for school groups marked as "Two Year."	R101232	2	H	
SCH GRP	For both School Group types the system will provide required fields on the FS data entry page to capture the 9010 Revenue Attestation for all schools in the group by OPEID for Proprietary School Groups.	R101314	2	H	
SCH GRP	For both School Group types the system will display text on the FSCA submission pages to tell school to send an email to eZ-Audit Help Desk if school group information is incorrect.		2	H	
SCH GRP	The system will provide a ConsolidatedUnconsolidated (CUC) School Group Locator the ability to complete the FS Info Data Entry page for the group's Annual Financial Statement.		2	H	
SCH GRP	The system will provide each school in a CUC Group the ability to complete the CA Info Data entry page for their Annual Compliance Audit.		2	H	
SCH GRP	The system will allow a Locator School to complete Compliance Audits for all schools in a CUC Group.		2	H	Relies on previous requirement.
SCH GRP	The system will require the Locator School in a CUC group to complete Checklist items for the Consolidated Financial Statement.		2	H	
SCH GRP	The system will provide each school in a CUC Group the ability to complete Checklist items for their Compliance Audit.		2	H	
SCH GRP	The system will allow a Locator School to complete the Compliance Audit Checklist for all schools in a CUC Group.		2	H	
SCH GRP	The system will allow a Locator School in a CUC group to upload a Consolidated Financial Statement.		2	H	
SCH GRP	The system will allow a Locator School in a CUC group to upload a Compliance Audit for itself and for Children by OPEID.		2	H	
SCH GRP	The system will allow a Child School in a CUC group to upload a Compliance Audit for its OPEID.		2	H	
SCH GRP	The system will submit an Annual School Group CUC Submission to ED once the Locator Consolidated FS Locator Compliance Audit and all Child Compliance audits are submitted.		2	H	

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SCH GRP	The system will post a notification to a CUC Locator School Ins Home Page upon submit listing any Children who have not yet submitted a Compliance Audit.		2	H	
SCH GRP	The system will assign a separate ACN to each compliance audit record in a CUC Group.		2	H	
SCH GRP	The system will recognize an Institution School Group type upon login and display the appropriate submission pages for that type.		2	H	
SCH GRP	The system will route CUC Submission Financial Statements to a Co-team LeaderCase Team based on the Locator's team.		2	H	
SCH GRP	The system will route CUC Submission Compliance Audits to Case Teams based on the team of the School.		2	H	
SCH GRP	For non-SG users remove SG references on the Submission pages.		2	H	Initial Design already in
SCH GRP	Change text change on the submission pages for SG to say "Our records indicate that this group contains the following OPEIDs..."		2	H	Initial Design already in
SCH GRP	On Ins Profile add indicator for locator school (school group only).		2	H	Initial Design
SCH GRP	Display a grid on the Submit Page for a Locator user to allow them to indicate who they are submitting for.		2	H	Initial Design
SCH GRP	The system will display a "notification" or message on the CA info page to display to a School Group user Locator user which CA record is active.		2	H	Design Session
SCH GRP	The system will display City and State in the school group table grid on the CA and FS Information page.		2	H	Design Session
SCH GRP	The system will provide a "Select All" option on the Submit page for the Locator submit grid.		2	H	Design Session
SCH GRP	Display a "completed" notification for a member submitting for their own OPEID.		2	H	Initial Design
SCH GRP	Continue to display annual submission link to a locator until submission is submitted to ED.		2	H	Initial Design
SCH GRP - ADMIN	The system will allow an Ed AdminSchool Group Manager to set up a school group as a "Two Year" group.	R101232	2	H	
SCH GRP - ADMIN	The system will maintain historical School Group information including the following: End Dates Previous Locators Historical Group Name.		2	H	
SCH GRP - ADMIN	The system will provide an ED Admin User the ability to manage School Group Information.		2	H	
SCH GRP - ADMIN	The system will allow an ED Admin User to add institutions to a School Group.		2	H	
SCH GRP - ADMIN	The system will allow an ED Admin user to remove institutions from a School Group.		2	H	
SCH GRP - ADMIN	The system will allow an ED Admin user to enterupdate School Group Name.		2	H	
SCH GRP - ADMIN	The system will allow an ED Admin user to enterupdate a School Group Locator.		2	H	

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SCH GRP - ADMIN	The system will allow an ED Admin user to enter/update School Group Type.		2	H	
SCH GRP - ADMIN	The system will allow an ED Admin user to enter/update School Group Address.		2	H	Initial Design
SCH GRP - ADMIN	The system will allow an ED Admin user to enter/update School Group Phone Number.		2	H	Initial Design
SCH GRP - ADMIN	The system will require a name type address and phone number for all School Groups.		2	H	Initial Design
SCH GRP - ADMIN	The system will maintain the Begin Date for an institution in a School Group.		2	H	Initial Design
SCH GRP - ADMIN	The system will display the following information for all Institutions in a School Group: OPEID Institution Name Locator indicator Begin Date End Date and Fiscal Year End.		2	H	Initial Design
SCH GRP - ADMIN	The system will require that at least 2 institutions be in a group in order for the group to be saved.		2	H	Initial Design
SCH GRP - ADMIN	The system will require a locator institution to be selected in a School Group before the group can be saved.		2	H	Initial Design
SCH GRP - ADMIN	The system will require that a School Group Name must be unique.		2	H	Initial Design
SCH GRP - ADMIN	The system will not allow an OPEID to be in more than one group.		2	H	Initial Design
SCH GRP - ADMIN	The system will require a Begin Date when adding an institution to a School Group.		2	H	Initial Design
SCH GRP - ADMIN	The system will require an End Date when removing an institution from a School Group.		2	H	Initial Design
SCH GRP - ADMIN	The system will require End Dates for all institutions in a School Group when deleting the School Group.		2	H	Initial Design
SCH GRP - ADMIN	The system will provide an ED Admin User the ability to view School Groups that have been deleted.		2	H	Initial Design
SCH GRP - QC	The system will display one financial statement record and multiple Compliance Audit records in the QC Queue for a CUC Annual Submission.		2	H	
WORKFLOW	The system will move a Compliance Audit record from the QC Queue to the Screener queue as soon as the record is submitted as "Complete" in QC.		2	H	
WORKFLOW	The system will forward records to the Co-Team Leader when a Financial Statement is marked "Complete" in QC and a Compliance Audit (or related Compliance Audits) are screened complete and findings are Coded (when applicable).		2	H	