

## RID – EZ Audit Interview

### Attendance and Minutes

**Wednesday, May 21 8:30 – 9:30 pm, Room 64D1**

**I. Invitees/attendees are shown below:**

Name	Email	Phone	In Attendance?
Calvin Whitaker	calvin.whitaker@ed.gov	202.377.3045	N
Randy Wolff	randy.wolff@ed.gov	202.377.3151	Y
Matt Portalese	mathew.portalese@accenture.com		Y
Brad Wilson (IP - RID Team)	bradleyawilson@bearingpoint.net	703.747.3180	Y
Ryan Summers (IP - Access Management Team)	ryan.a.summers@accenture.com	202.962.0796	Y
Joakim Roumain (IP – RID Team)	jroumain@bearingpoint.net	202.962.0785	Y
Steve Jarboe (IP – RID Team)	steven.r.jarboe@accenture.com	202.962.0779	N
Bruce Bruning (IP - Access Management Team)	bruce.bruning@icsc1.com	202.962.0751	Y

**II. Agenda**

- A. Review EZ Audit Routing Identifiers (ID) and their relationships to other Partners responsible for routing schools, and others through the Enterprise.

**III. Outcomes**

1. EZ-Audit is a paperless single point of submission for financial statements and compliance audits through the web.
2. EZ Audit is for schools and the EZ Audit user materials contain detailed references (including instructions) on actions schools must take to do the following:
  - Seek initial participation in the Title IV Program
  - Undergo a change of ownership, merger or structure change
  - Be reinstated to participate in Title IV program(s)
  - “Close Out” connection to Title IV programs (due to loss of eligibility)
3. RID Team was able to establish contact with and understanding of the EZ Audit business owner needs as well as a basic understanding of the EZ Audit business process.
4. Matt Portalese, of the EZ Audit Production Team, said that the team “enforces key rules” with regard to Identifiers input by users of the EZ Audit system.
5. Matt said that if problems are identified with submissions to EZ Audit, the user needs to contact the “EZ Audit Team and correct the error in PEPS”.
6. The RID Team must follow-up to clarify what the result may be of a failure on the part of the school to notify EZ Audit, upon having made the correction in PEPS. The RID Team must determine if this is a potential source of data discrepancies.
7. Randy Wolff of the EZ Audit Team explained that the EZ Audit’s key identifier is the OPE-ID and that each school that passes through easy audit should have one associated OPE-ID.
8. EZ Audit also recognizes and utilizes the designation of “Locator Schools” (as defined/determined by PEPS). While locator schools are not identifiers, the RID team must understand the relationship of these non-identifiers categories and their relationship (if any) to the actual “Routing IDs” being routed through the enterprise.
9. PEPS maintains a list of 500 – 600 schools (showing their associated groupings)...EZ Audit has reduced that list to 171 (but uses the same Locator Schools).
10. Randy referred the RID team to Sherry Quade as a subject matter expert to whom some additional questions would be best addressees.
11. Terms: ACN = Audit Control Number; FAC = Federal Audit Clearinghouse

**IV Action Item**

Action Item	Appox. Effort	Owner	Date Due
1. RID team will follow-up with Matt Portalese to review the various IDs and their relationships.		Steve Jarboe	5/30
2. IP Team should reach out to Sherry Quade for additional		Steve Jarboe	5/30

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EZ Audit info			
3. IP Team will post Meeting Minutes and Kickoff Briefing to eProject		Steve Jarboe	5/27