



Detailed Requirements Traceability
Matrix
FSA Financial Partners Portal -
Release 1
8/4/2004

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High-level Functions – Detailed Design Traceability Matrix

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|---------------------|---------------------------|-------------------------|
| Project Name: | Financial Partners Portal | Date: February 28, 2002 |
| Last Revision Date: | February 28, 2002 | |
| Completed by: | Teale Taggart | |



1.1 Requirements Traceability Matrix

| High-level Function | Requirement Number | Requirement Title | How function is Satisfied | Detailed Requirements Reference Section |
|---|--------------------|-------------------------------|---|---|
| 1. General Application Functionality (applies to every page within FP Portal) | 1.1 | 508 Compliance | All pages will be compliant with Section 508 of the Americans with Disabilities Act. | 2.1.1.5 |
| | 1.2 | Search capability | User will be able to search all content within the Students Portal. | 2.1.1.7 |
| | 1.3 | Ability to update content. | Portal administrators will be able to update content within the Portal. | 2.1.1.8 |
| | 1.4 | Technical Help Link | Link to Technical Help page. Contains technical support contact information. | 2.1.1.11 |
| 2. General Content (applies to every page within FP Portal) | 2.1 | Consistent look and feel | Formatting, navigation, graphics, colors, and fonts will be consistent throughout the Portal. | 2.1.1.1 |
| | 2.2 | Privacy link | Link to Privacy information page. | 2.1.1.11 |
| | 2.3 | Security link | Link to Security information page. | 2.1.1.11 |
| | 2.4 | Notices link | Link to Notices information page. | 2.1.1.11 |
| | 2.6 | Available Languages | Portal will be available in English and Spanish. | 2.1.1.6 |
| | 2.7 | FSA Branding | FSA logo must be prominently displayed. | 2.1.1.2 |
| | 2.8 | Department of Education, seal | The Department of Education seal must be prominently displayed. | 2.1.1.3 |
| | 2.9 | Department of Education, text | “U.S. Department of Education” must be displayed next to the Dept. of Ed. Logo. | 2.1.1.4 |



| High-level Function | Requirement Number | Requirement Title | How function is Satisfied | Detailed Requirements Reference Section |
|---|--------------------|-------------------------|---|---|
| | 2.11 | About Us link | Link to About Us page. Contains general information about Financial Partners channel. | 2.1.1.11 |
| | 2.12 | Site Map link | Link to Site Map. Contains a listing of all links included within the Financial Partners Portal. | 2.1.1.11 |
| | 2.13 | Survey link | Link to Survey page. Contains a list of survey questions about the FP Portal. It also contains a link to the Feedback form. This form automatically generates a form whereby the user can fill out their comments in the text area and submit it to the content manager or designated person. | 2.1.1.11 |
| | 2.14 | Home | Link to the Home page. | 2.1.1.11 |
| 3. General Content, FP Helpful Links (Seen on every page within FP Portal in left navigation bar) | 3.1 | Community Members link | Link to Community Members page. Provides searchable list of guarantors, lenders, trade associations, servicers, state grant agencies and FFEL schools. | 2.1.1.9 |
| | 3.2 | Current Activities link | Link to Current Activities page. Lists all recent presentations and current projects. Next to each listing is a notification of when the listing was posted and when it was last modified. | 2.1.1.9 |
| | 3.3 | Contact Resources link | Link to Contact Resources page. Provides organizational charts and a map of the US that is colored by region and separated by state. Information on regional and headquarters contact information is contained within these resources. | 2.1.1.9 |
| | 3.4 | Publications | Link to Publications page. | 2.1.1.9 |



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|--|--------------------|---|--|---|
| | | link | Lists all publications frequently accessed by FP community. | |
| | 3.5 | Interest Rates link | Link to Interest Rate Information page. Provides current interest rate information to user. | 2.1.1.9 |
| 4. General Content, FSA Links (Seen on every page within FP Portal in left navigation bar) | 4.1 | Schools Portal link | Link to Schools Portal. (http://www.sfa4schools.sfa.ed.gov/) | 2.1.1.10 |
| | 4.2 | Students Portal link | Link to Students Portal. URL to be determined. | 2.1.1.10 |
| | 4.3 | Loan & Grant Resources link | Link to Loan & Grant Resources page. Gives user quick access to the following resources PEPS, LEAP/SLEAP, and Direct Loans Servicing Online, Mapping Your Future, eCampus, Gear Up, and Trio. | 2.1.1.10 |
| | 4.4 | Community Calendar link | Link to Calendar page. Displays monthly calendar and links to current information on training, conferences/meetings/forums, and deadlines. | 2.1.1.10 |
| | 4.5 | SFA University Conference Registration link | Link to SFA University Conference Registration site. (http://edeworkshop.ncspearson.com/welcomepicture2_newlogo.htm) | 2.1.1.10 |
| | 4.6 | FMS link | Link to FMS quick access page. | 2.1.1.10 |
| | 4.7 | Data Mart link | Link to Financial Partners Data Mart quick access page. | 2.1.1.10 |
| | 4.8 | NSLDS link | Link to NSLDS quick access page. | 2.1.1.10 |
| | 4.9 | OPE link | Link to Office of Postsecondary Education http://www.ed.gov/offices/OPE/ | 2.1.1.10 |
| | 4.10 | Dept. of Education link | Link to Department of Education http://www.ed.gov | 2.1.1.10 |
| | 4.11 | Counseling | Link to Counseling | 2.1.1.10 |



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|-----------------------------|--------------------|-------------------------|--|---|
| | | Resources link | Resources page. This page will provide a list of counselling agencies for the FP Community. This list includes EOC, Trio, and Mapping your Future. | |
| | 4.12 | Advisory Committee link | Link to Advisory Committee http://www.ed.gov/offices/AC/ACSFA/ | 2.1.1.10 |
| | 4.13 | Inspector General link | Link to the Office of the Inspector General http://www.ed.gov/offices/OIG/ | 2.1.1.10 |
| | 4.14 | IFAP link | Link to IFAP http://www.ifap.ed.gov/IFAPWebApp/index.jsp | 2.1.1.10 |
| 5. Home Page Content | 5.1 | FP Portal Overview | Home page of Financial Partners Portal includes description of the portal. This is the default page that will appear when the user first comes to the site or when the Home link is clicked. | 2.1.2, paragraph 1 |
| | 5.2 | FMS link | Link to FMS quick access page. | 2.1.2, paragraph 1 |
| | 5.3 | Data Mart link | Link to Financial Partners Data Mart quick access page. | 2.1.2, paragraph 1 |
| | 5.4 | NSLDS link | Link to NSLDS quick access page. | 2.1.2, paragraph 1 |
| | 5.5 | News Information box | Box containing links to Headline news stories. Displays headlines of latest FP News information. | 2.1.2, paragraph 5 |
| | 5.6 | Publications box | Box containing link to Publications page. Lists all publications frequently accessed by FP community. | 2.1.2, paragraph 4 |
| | 5.7 | Interest Rates box | Box containing link to Interest Rates page. Provides current interest rate information to user. | 2.1.2, paragraph 3 |
| | 5.8 | What's New box | Box containing link to Current Activities page. | 2.1.2, paragraph 6 |



| High-level Function | Requirement Number | Requirement Title | How function is Satisfied | Detailed Requirements Reference Section |
|--|--------------------|-------------------------------------|--|---|
| | 5.9 | Tell Us How We Are Doing box | Box containing links to the site survey and the feedback form. | 2.1.2, paragraph 2 |
| 6. Community Members, Application Functionality | 6.1 | Categorical Search | Search by category function. Allows users to search categorically for guarantors, lenders, servicers, trade associations, state grant agencies, and FFEL schools. | 2.1.3, paragraph 1 |
| | 6.2 | Alphabetical Search | Alphabetical search function. This search function will be on every Community Members sub page. Allows users to search alphabetically for guarantors, lenders, servicers, trade associations, state grant agencies, and FFEL schools. | 2.1.3, paragraph 2 |
| | 6.3 | Community Locator Search | Search by acronym function. Allows users to search by acronym for guarantors, lenders, servicers, trade associations, state grant agencies, and FFEL schools. | 2.1.3, paragraph 3 |
| 7. Current Activities, Content | 7.1 | FP Current Activities Listings | A listing of FP Current Projects including project name and a link for more information. | 2.1.4, paragraph 1 |
| | 7.2 | Recent Presentations link | Link will take user to listing of all recent presentations. The Recent Presentations page will contain word documents, power point presentations, videos, and pdfs of all the most recent presentations relevant to FP channel and FP community. | 2.1.4, paragraph 1 |
| 8.1 Contact Resources, Content | 8.1.1 | Northern Region Contact Information | Link to northern region contact information including regional director, phone number, email, responsibilities/projects, and other states in that | 2.1.5, paragraph 1 |



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|---|--------------------|---|---|---|
| | | | region. | |
| | 8.1.2 | Eastern Region Contact Information | Link to eastern region contact information including regional director, phone number, email, responsibilities/projects and other states in that region. | 2.1.5, paragraph 1 |
| | 8.1.3 | Southern Region Contact Information | Link to southern region contact information including regional director, phone number, email, responsibilities/projects and other states in that region. | 2.1.5, paragraph 1 |
| | 8.1.4 | Western Region Contact Information | Link to western region contact information including regional director, phone number, email, responsibilities/projects and other states in that region. | 2.1.5, paragraph 1 |
| | 8.1.5 | Dept. of Education's employee locator system link | Link to Department of Education's Employee Locator System http://web99.ed.gov/edlocator | 2.1.5, paragraph 1 |
| 8.2 Contact Resources, Application Functionality | 8.2.1 | Regionally colored US Map with link | US Map with links. Map of USA with hyperlinks on each state to the regional office contact information. Map is regionally divided by color and individual states are divided by a small space between each of them. | 2.1.5, paragraph 1 |
| | 8.2.2 | FP Organizational Chart link | Link to FP Organizational Chart. Contains overall FP Channel organization information including names of general manager, regional directors, staff assistant, deputy general manager, program development lead, state agency liaison, partner services lead, partner systems liaison, and financial management lead and all of their contact | 2.1.5, paragraph 1 |



| High-level Function | Requirement Number | Requirement Title | How function is Satisfied | Detailed Requirements Reference Section |
|---------------------|--------------------|-------------------------------------|--|---|
| | | | information (name, email, telephone, responsibilities). | |
| | 8.2.3 | Schools Channel Organization Chart | Link to Schools Organizational Chart. Contains overall Schools Channel organization information including names of general manager, regional directors, staff assistant, deputy general manager, and program development lead and all of their contact information (name, email, telephone, responsibilities). | 2.1.5, paragraph 1 |
| | 8.2.4 | Students Channel Organization Chart | Link to Students Organizational Chart. Contains overall Students Channel organization information including names of general manager, regional directors, staff assistant, deputy general manager, and program development lead and all of their contact information (name, email, telephone, responsibilities). | 2.1.5, paragraph 1 |
| | 8.2.5 | CFO Organization Chart | Link to CFO Organizational Chart. Contains overall CFO Channel organization information including names of general manager, regional directors, staff assistant, deputy general manager, program development lead, and all of their contact information (name, email, telephone, responsibilities). | 2.1.5, paragraph 1 |
| | 8.2.6 | CIO Organization Chart | Link to CIO Organizational Chart. Contains overall CIO organization information including names of general | 2.1.5, paragraph 1 |



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| | | | manager, regional directors, staff assistant, deputy general manager, program development lead and all of their contact information (name, email, telephone, responsibilities). | |
| 9. Publications, Content | 9.1 | Action Letters link | Link to Action Letters (http://www.ifap.ed.gov/IFAPWebApp/currentALetersPag.jsp) | 2.1.9, paragraph 1 |
| | 9.2 | Dear Partner (Colleague) Letters link | Link to Dear Partner (Colleague) Letters (http://www.ifap.ed.gov/IFAPWebApp/currentDPCLettersPag.jsp) | 2.1.9, paragraph 1 |
| | 9.3 | Electronic Announcements link | Link to Electronic Announcements (http://www.ifap.ed.gov/IFAPWebApp/currentEAnnouncementsPag.jsp) | 2.1.9, paragraph 1 |
| | 9.4 | New Federal Registers link | Link to New Federal Registers. (http://www.ifap.ed.gov/IFAPWebApp/currentFRegistersPag.jsp) | 2.1.9, paragraph 1 |
| | 9.5 | Regulations Compilations link | Link to Regulations Compilations. (http://www.ifap.ed.gov/IFAPWebApp/currentFRegistersPag.jsp) | 2.1.9, paragraph 1 |
| | 9.6 | SFA Handbooks link | Link to SFA Handbooks. (http://www.ifap.ed.gov/IFAPWebApp/currentSFAHandbooksPag.jsp) | 2.1.9, paragraph 1 |
| | 9.7 | Law link | Link to ed.gov Legislation and Laws page (http://www.ed.gov/topics/topicsTier2.jsp?top=Policy&type=T&subtop=Legislation+%26+laws) | 2.1.9, paragraph 1 |
| 10.1 Interest Rates, Content | 10.1.1 | Current Interest Rates link | Link to Current Interest Information page. Displays different FFEL rates. | 2.1.8, paragraph 1 |
| | 10.1.2 | Calendar-Year Rate for PLUS/SLS Loans link | Link to http://www.ed.gov/offices/OSFAP/IGAL/rates/plus2002.pdf | 2.1.8, paragraph 1 |



| High-level Function | Requirement Number | Requirement Title | How function is Satisfied | Detailed Requirements Reference Section |
|---|--------------------|---|--|---|
| | 10.1.3 | Current Special Allowance Rates link | Link to Current Special Allowance Rates. (http://www.ed.gov/offices/OSFAP/IGAL/rates/sa093001.pdf) | 2.1.8, paragraph 1 |
| | 10.1.4 | Memo link | Link to memo. Details the current special allowance categories, formulas, and calculations. (http://www.ed.gov/offices/OSFAP/IGAL/SAPmemo-10-2001.wrd2.PDF) | 2.1.8, paragraph 1 |
| | 10.1.5 | Link to Legislation that impacts rates | | 2.1.8, paragraph 3 |
| 10.2 Interest Rates- Current Interest Rates, Content | 10.2.1 | FFEL Regular Variable-rate Stafford Interest Rates link | Link to table displaying FFEL Regular Variable-rate Stafford Interest | 2.1.8, paragraph 2 |
| | 10.2.2 | FFEL Variable-Rate PLUS and SLS Loan Interest Rate link | Link to table displaying FFEL Variable-Rate PLUS and SLS Loan Interest Rate link | 2.1.8, paragraph 2 |
| | 10.2.3 | FFEL Variable-rate and Fixed-rate Consolidation Loan Interest Rate link | Link to table displaying FFEL Variable-rate and Fixed-rate Consolidation Loan Interest Rate link | 2.1.8, paragraph 2 |
| 11. Loan & Grant Resources, Content | 11.1 | Direct Loan Servicing Online Link | Link to Direct Loan Servicing Online. (http://www.dlsonline.com/index.asp) | 2.1.6, paragraph 1 |
| | 11.2 | PEPS link | Link to Postsecondary Education Participants System Information Gateway (PEPS) (http://www.ed.gov/offices/OSFAP/PEPS/) | 2.1.6, paragraph 1 |
| | 11.3 | LEAP/SLEAP link | Link to LEAP SLEAP information in .pdf format. (http://198.77.163.160.sfahandbooks/attachments/0102VoI9Ch1LEAPSLEAP.pdf) | 2.1.6, paragraph 1 |
| | 11.4 | FFEL information link | http://www.mapping-your-future.org | 2.1.6, paragraph 1 |



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| | 11.5 | eCampus based system link | http://cbfisap.sfa.ed.gov/CSWebApp/welcome.jsp | 2.1.6, paragraph 1 |
| | 11.6 | Gear up (Gaining Early Awareness for Undergraduate Programs) link | http://www.ed.gov/gearup/ | 2.1.6, paragraph 1 |
| | 11.7 | Federal Trio Programs-Educational Opportunity Centers link | http://www.ed.gov/offices/OPE/HEP/trio/eoc.html | 2.1.6, paragraph 1 |
| 12. Community Calendar, Application Functionality | 12.1 | Monthly Calendar | Monthly calendar with links to each specific date. User can click on date and find current information on either Conferences/Meetings/ Forums, Deadlines, or Training. | 2.1.7, paragraph 2 |
| | 12.2 | Conferences/ Meetings/ Forums link | Link to Conferences/Meetings/ Forums posted for any specific date. | 2.1.7, paragraph 1 |
| | 12.3 | Deadlines link | Link Deadlines that have been posted for any specific date. | 2.1.7, paragraph 1 |
| | 12.4 | Training link | Link Training information that has been posted for any specific date. | 2.1.7, paragraph 1 |
| 13.1 FMS, Content | 13.1.1 | Description of FMS | Brief description of FMS. | 2.1.10, paragraph 1 |
| | 13.1.2 | Description of Form200 | Brief description of GA's Form2000. | 2.1.10, paragraph 1 |
| | 13.1.3 | Description of LEAP/SLEAP | Brief description of LEAP/SLEAP. | 2.1.10, paragraph 1 |
| | 13.1.4 | Description of LaRS | Brief description of lenders' LaRS (formerly Form799). | 2.1.10, paragraph 1 |
| 13.2 FMS, Application Functionality | 13.2.1 | New users link | Link next to each form to the registration page where new Gas, Lenders, and State Grant Agencies or new users of FMS can download the appropriate registration forms. | 2.1.10, paragraph 1 |
| | 13.2.2 | Current users | Link to login site for | 2.1.10, paragraph 1 |



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| | | link | current users of FMS. (http://fms.sfa.ed.gov:8000/PROD_j.htm/) | |
| 14.1 Financial Partners Data Mart, Content | 14.1.1 | Description of Financial Partners Data Mart | Brief description of Financial Partners Data Mart. | 2.1.11, paragraph 1 |
| 14.2 Financial Partners Data Mart, Application Functionality | 14.2.1 | New users link | Link next to Financial Partners Data Mart description to registration page for new users of Financial Partners Data Mart. Takes new users to a page containing downloadable Financial Partners Data Mart registration forms. | 2.1.11, paragraph 1 |
| | 14.2.2 | Current users link | Link to login site for current users of Financial Partners Data Mart. (URL to be determined) | 2.1.11, paragraph 1 |
| 15.1 NSLDS, Content | 15.1.1 | Description of NSLDS | Brief description of NSLDS. | 2.1.12, paragraph 1 |
| 15.2 NSLDS, Application Functionality | 15.2.1 | New users link | Link to registration site for new users of NSLDS. Takes new users of NSLDS to Student Aid Internet Gateway Enrollment Site. (https://sfawebenroll.ed.gov/T4Enroll/index.htm) | 2.1.12, paragraph 1 |
| | 15.2.2 | Current users link | Link to login site for current users of NSLDS. (https://www.nslsdfap.ed.gov/secure/logon.asp) | 2.1.12, paragraph 1 |
| 16.1 Counseling Resources, Content | 16.1.1 | EOC link | Link to Equal Opportunity Commission http://www.eoc.org | 2.1.13, paragraph 1 |
| | 16.1.2 | Federal Trio Programs-Educational Opportunity Centers link | http://www.ed.gov/offices/OPE/HEP/trio/eoc.html | 2.1.13, paragraph 1 |
| | 16.1.3 | Mapping Your Future link | www.mapping-your-future.org | 2.1.13, paragraph 1 |
| 16.2 Counseling Resources, Application Functionality | 16.2.1 | Email link to content manager | Link to content manager. This link will allow organizations to request (via email) for their organization's website to | 2.1.13, paragraph 1 |



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| | | | be displayed on the page. Once the content manager approves this request, then their link will be displayed. | |