Create Form 1 Record - DCAA

Reference Guide

Homepage > AT-AT Module > AT-AT > Create Form 1 Notice

Table of Contents

Roles **1**

Creating a Form 1 Record **1**

Record Header **1**

Form 1 Notice Create Header Tabs 1

Step 1 - Contractor Search **1**

Section Name: Contractor Search *1*

Step 2 - Select Contractor **2**

Section Name: Select Contractor *2*

Step 3 - Form 1 Notice Tab **2**

Section Name: Form 1 Notice Details *2*

Section Name: Form 1 Notice Contract Details *3*

Adding a Form 1 Contract *3*

Section Name: DCAA Information *3*

Section Name: Items and Costs *3*

Moving On 4

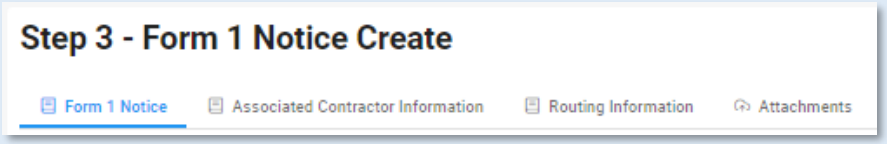
Step 3 - Associated Contractor Information Tab **4**

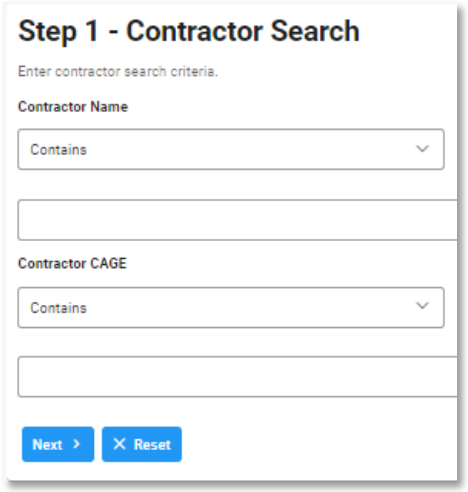
Section Name: Contractor Profile *4*

Moving On 4

Step 3 - Routing Information Tab **4**

Routing Users Information 5
Section Name: DCAA Auditor 5
Section Name: DCAA Supervisor 5
Section Name: FAO Reviewer 5
Section Name: DCAA Regional Reviewer 5
Current DCMA Contracting Officer 5
Moving On 6
Attachments **6**
Button Options: 6
Files that have been Uploaded section: 7
Record Submit **7**
Information provided on the Success Screen 7
Additional Information **7**
Dropdown Fields/Lists **8**
DCAA Information 8

Roles	The role(s) required to **Create** a Form 1 DCAA Record: • AT-AT DCAA Auditor
Creating a Form 1 Record	This guide provides an overview of how a AT-AT DCAA Auditor **Creates** a **Form 1 Record** in the **Audit Tracking and Action Tool** (AT-AT) application. Log in to PIEE as a **AT-AT – DCAA Auditor** and access the AT-AT module. In the AT-AT module go to **AT-AT > Create Form 1 Notice** To create a Record or SubRecord, refer to the separate Create guides, located in the AT-AT WBT.
Record Header	The AT-AT Form 1 Notice Create Steps display at the top of the to provide a visualization of the Form 1 Record Create workflow. Continue to the first step of the Create process via the **Contractor Search**. **Form 1 Notice Create Header Tabs** • Form 1 Notice • Associated Contractor Information • Routing Information • Attachments 
Step 1 - Contractor Search	To Create a Form 1 Record, a contractor is selected to create the record against. Enter the **Contractor** search criteria and click the Next button. The search results display on the following page. *Section Name: Contractor Search* • Contractor Name (***parameters: Contains / Equal to / Starts With***) • Contractor CAGE (***parameters: Contains / Equal to / Starts With***) *Buttons:* • Next • Reset



NOTE: At least one search criterion is required to perform a search.

Step 2 - Select Contractor

A list of contractors that match the entered search criteria is returned. From the results, select the applicable contractor for the record by clicking their hyperlinked name.

If the applicable contractor is not returned in the search results, select the back button to return to the search screen.

Selecting the Record Contractor moves the Form 1 Notice Create process to Step 3 – Form 1 Notice Create.

Section Name: Select Contractor

- Contractor Name
- CAGE
- UEI

Step 3 - Form 1 Notice Tab

Select the Contractor and the Form 1 Notice page displays and allows for data entry in the fields listed below. All tabs are accessible throughout the Create process and not all fields display; changing the answers may change the displayed fields.

This section determines the majority of the Record data.

Section Name: Form 1 Notice Details

- Type of Form 1 * (***options: DCAA / NASA Form 456***)
- Kind of Form 1 * (***options: Regular / Blanket***)
- Type of Costs * (***options: Direct / Indirect / Both***)
- Category for Form 1 (***options: Notice of Disapproved Costs / Notice of Suspended Costs***)
- Supplement to Form 1 Number
- Action Type (***Auto populated and read-only "Form 1"***)(***(Region/HQ Monitors are able to edit this field)***)

Section Name: Form 1 Notice Contract Details

Buttons:

- Add Contract

- Contract Number Type * (***options: DoD Contract (FAR) / Other Agreement***)
- Contract Number
- Delivery Order
- Action (***Displays when contract is added***)
    - Edit Contract Detail
    - Delete Contract Detail

Adding a Form 1 Contract

Enter Contract Search Information

- Contract Number Type * (***options: DoD Contract (FAR) / Other Agreement***)
- Contract Number *
- Delivery Order

Buttons:

- Save
- Cancel

Section Name: DCAA Information

- DCAA FAO Code *
  (*Field auto populates based on the 'DCAA FAO Code' field response given*)
    - Field Audit Office Name
    - Field Audit Office Address
    - Field Audit Office Phone Number
- DCAA Region Code *
  (*Field auto populates based on the 'DCAA Region Code' field response given*)
    - DCAA Region Office Name *
    - DCAA Region Office Address *
    - DCAA Region Office Phone Number *
- Disbursing Office

Section Name: Items and Costs

- Item Number
- Disapproved Amount * (***Field displays when 'Notice of Disapproved Costs' is selected in the 'Category of Form 1' field***)
- Suspended Amount * (***Field displays when 'Notice of Suspended Costs' is selected in the 'Category of Form 1' field***)

	• Description of Item and Reason for Action *Remarks* • Remarks (***One field across all tabs***) **Moving On** Click the **Submit** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.
Step 3 - Associated Contractor Information Tab	The Associated Contractor Information screen displays and information for the Form 1 Record is entered below. All tabs are accessible throughout the create process. *Section Name: Contractor Profile* (***Contractor Profile information is auto populated based off of the contractor selected in Step 1***) • Contractor Profile • CAGE Code • UEI • City • State *Remarks* • Remarks (***One field across all tabs***) **Moving On** Click the **Submit** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.
Step 3 - Routing Information Tab	The Routing Information screen displays and information or the Form 1 Record Create is entered below. All tabs are accessible throughout the Create process and not all fields display; changing the answers may change the displayed fields.

Routing Users Information

Section Name: DCAA Auditor

- Lookup DCAA Auditor *
    - User Email *
    - User Name * (***(First Name Last Name): Phone Number***)

Section Name: DCAA Supervisor

- Lookup DCAA Supervisor *
    - User Email *
    - User Name * (***(First Name Last Name): Phone Number***)

Section Name: FAO Reviewer

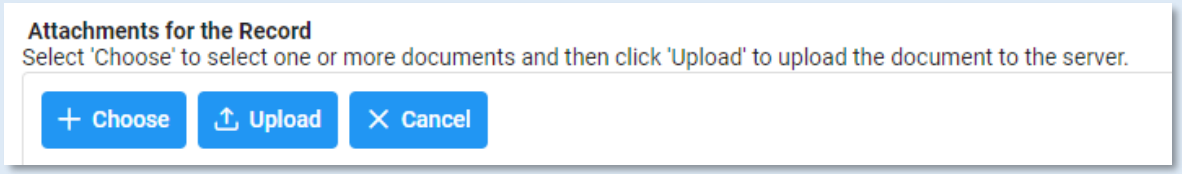
- Lookup FAO Reviewer *
    - User Email *
    - User Name * (***(First Name Last Name): Phone Number***)

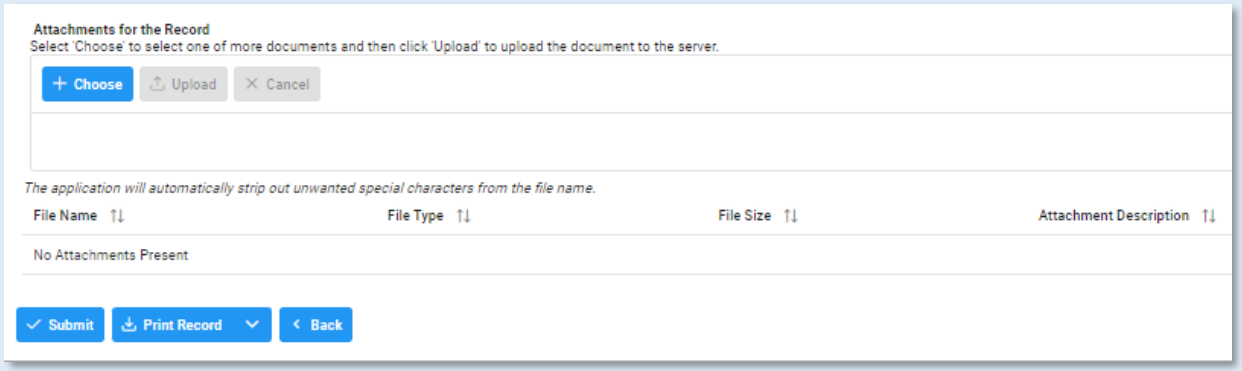
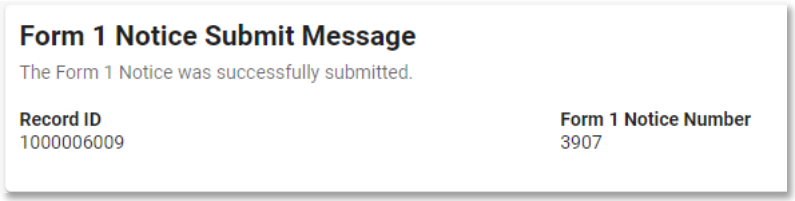
Section Name: DCAA Regional Reviewer

- Is Regional Review Required? (***options: Off / On***)
- DCAA Regional Review Organizational Group
    - Find Group
        - DCAA Regional Reviewer Find Organizational Group by Group Name
        - DCAA Regional Reviewer PIEE Level 2

Current DCMA Contracting Officer

- Lookup DCMA Contracting Officer *
    - User Email *
    - User Name * (***(First Name Last Name): Phone Number***)

	Remarks • Remarks (***One field across all tabs***) **Moving On** Click the **Submit** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.
Attachments	Users may attach relevant documents to the record within the **Attachments** tab. Accepted File Formats .bmp .docx .html .mpp .msg .ppt .tif .vsd .doc .htm .jpg .mppx .pdf .rtf .txt .vdx .xlsx To begin adding attachments, select the Attachments tab and click the **Choose** button. Select all necessary attachments. All selected attachments display below where they may be removed before upload. After confirming all attachments are correct click the **Upload** button. After a successful upload, attachments display below on the document. Uploaded attachments may be deleted. The **Cancel** button next to the Upload button cancels the uploading of chosen attachments.  **Attachments for the Record** Select 'Choose' to select one or more documents and then click 'Upload' to upload the document to the server. + Choose Upload Cancel **Button Options:** • Choose • Upload • Cancel

	Files that have been Uploaded section: • File Name (*special characters are removed*) • File Type • File Size (*MB*) • Attachment Description • Upload Date • Name (*Uploader's First/Last Name*) • Actions  Once the user is finished uploading attachments within the Attachments tab, they may either submit the record by selecting the "**Submit**" button at the bottom of the page or move on to the next page by selecting the tab; refer to the records pipeline position located within the header for a reference on which tab should be selected.
Record Submit	Successfully **Submitting** a AT-AT Form 1 Record via the **Submit** button directs the user to a Success Screen with the information for the document. The document is assigned to the selected **AT-AT DCAA Supervisor** for review. **Information provided on the Success Screen**: • Record ID • Form 1 Notice Number 
Additional Information	

Dropdown Fields/Lists

DCAA Information

- DCAA FAO Code

05511	05611	05711
05921	05931	05941
06061	06421	06711
06821	06831	06841
06851	06861	06871
06881	07011	07181
07221	07281	07421
07611	07621	07631
07821	08101	08121
08131	08141	08511
08601	08701	08711
08721	08731	08801
08811	08821	09011
09311	09321	09511
09521	09531	09711
09721	09731	09741
09821	09841	09851
09871	09881	10201
10401	10411	11101
11201	01011	01101
01161	01191	01221
01281	01331	01341
01361	01431	01451
01661	01721	01881
02021	02331	02351
02361	02391	02801
02811	02821	02851
02861	02871	03011
03211	03241	03311

	03441	03451	03521
	03531	03941	03951
	03961	03971	03981
	03991	04011	04151
	04181	04231	04261
	04281	04371	04441
	04531	04561	04581
	04591	04631	04671
	04901	04981	05011
	05111	05211	05311
	05411		

- DCAA Region Code
  - 01
  - 02
  - 03
  - 04
  - 05
  - 06
  - 07
  - 08
  - 09
  - 10
  - 11