Data Entry – Operation Audit and Operations Audits Follow-Up

Training Document

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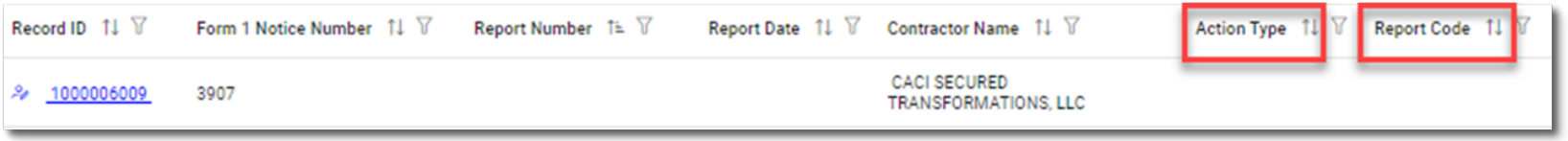
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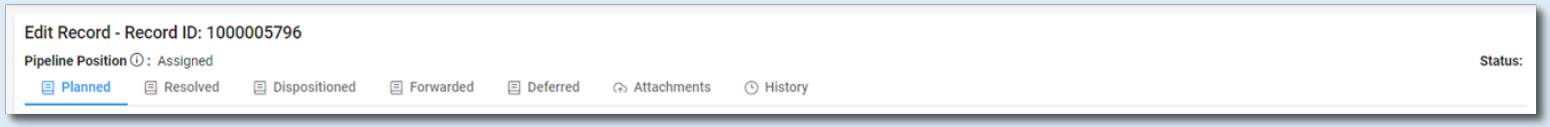
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Roles	The role(s) required to **Edit** an Operation Audit and Operations Audits Follow-Up: • AT-AT – Monitor • AT-AT – Contracting Officer • AT-AT – Region/HQ Monitor
Editing a AT-AT Operation Audit and Operations Audit Follow-Up	This training document provides an overview of how AT-AT users can **Edit** an **F - Operation Audit and Operations Audits Follow Up Report** in the Contract Audit Tracking and Action Tool (AT-AT) application that was created and assigned to them by the AT-AT Monitor. Log in to PIEE and access the AT-AT application. In the AT-AT application go to the AT-AT Dashboard and locate the '**My Work**' section. Only records assigned to the user may be edited by that user. To edit a Record, locate the '**Edit Record**' icon directly next to the Record ID number. Click the icon to enter the record.  **AT-AT – Contracting Officers** have access to the "My Work" table on the dashboard; sort the columns by Report Code "F" to help filter the assigned records.  For **AT-AT - Monitors** or **AT-AT - Region HQ Monitors** looking for a F – Operation Audit and Operations Audits Follow Up Report, use the Search Functionality.

	To edit as a **AT-AT Monitor** or **Region/HQ Monitor**, search for a record within your DoDAAC (as a Region/HQ Monitor it will be within span of control of the registered Group/DoDAAC). Click the Record ID Hyperlink to open the record in view only from Search Results The record displays; click the “Assigned to Self’ button at the bottom of the page. The record is available to be opened from the My Work Dashboard.
Record Header	The AT-AT Record Header information is available at the top of the Edit screen. Records open on the tab associated with its current pipeline position. All tabs are accessible during the data entry process. Continue with the training or select a tab link below to skip ahead. *EXAMPLE: A Record in the **Resolved** pipeline will open to the **Resolved** tab.* **Data Entry Header Tabs** • Planned • Resolved • Dispositioned • Forwarded • Deferred • History **Record Information:** • Record ID • Pipeline Position • Status • Overage Status 

	NOTE: "Overage Status" information tracks the records' age and displays when the record has a DCAA Audit Report Number. *NOTE: "Status" tracks the records status for reporting purposes. For more information refer to the "Additional Field Information" section below.*
Planned Tab	The Planned tab displays when the record is in the **Planned Pipeline** and the **Target Resolution Date** and **Target Disposition Date** fields have values. The Operation Audit and Operations Audits Follow Up Edit Record screen displays and information for the Operation Audit and Operations Audits Follow Up record is entered below. All tabs are accessible throughout the data entry process and not all fields display; changing the answers may change the displayed fields. *NOTE: To save current work click the "**Submit**" button. The record **does not** progress through the workflow until certain fields have been entered. For more information see the sections "Moving On' below.* **Record Return** If a Record requires changes from the AT-AT - Monitor, return it by moving it back to the Assigned pipeline position. To return the record, under the Record Details section remove the date(s) from the Target Resolution Date, Target Disposition Date, and Actual Resolution Date fields if entered and click the Submit button. *NOTE: A user may need to search for another record to assist with data entry.* *Section Name: Contractor Profile* • Contractor Name • CAGE Code • UEI • City • State *Buttons:* • Edit Contractor

Editing the Assigned Contractor

Review the information for the currently assigned Contractor and update, if necessary.

Section Name: Pop-up Page Name: Record Edit - Contractor Search

Enter Contractor Search Criteria

- Contractor Name (***parameters: Contain / Equals To / Starts With***)
- Contractor CAGE (***parameters: Contain / Equals To / Starts With***)

Search Results

Sub-Pop-up Page Name: Record Edit – Select Contractor

Table Name: Choose a Contractor from Search Results

- Contractor Name (***Hyperlink – click to select the new contractor***)
- CAGE
- UEI

Buttons:

- Back
- X (***Close***)

Click the Contractor Name hyperlink to choose a new contractor.

Data Entry Fields

Section Name: Record Type

- Agency/Organization Issuing Report * (***options: Select / DCAA / DCMA / Host Nation / Third Party / Other***)
- Report Type * (***options: Select / Audit / Report / Memo / DCMA Other / Other***)
- Report Code * (***options: Select / B – Business Systems / C – Claims and Equitable Adjustments / D – Post Award / E – CAS and DS / F – Operation Audits and Operation Audit Follow-Up / G – Incurred Costs and Settlement of Final Indirect Cost Rates / H – Pre-Award Contract / I – Other / J – Terminations / K – Earned VM System***) (***Users must select Report Code "F" for an Operation Audit and Operations Audits Follow-Up Record***)
- Status (***Field displays if 'DCAA Audit Report Number' is populated***)
- Report Number (***Field displays if 'Agency/Organization Issuing Report' is not "DCAA" or "Third-Party"***)
- DCAA Audit Report Number * (***Field displays when "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field***)

- Memo Number * (***Field displays when "Memo" is selected in the 'Report Type' field***)
- Report Class * (***options: Select / Reportable / Non-Reportable***) (***Field displays when "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field and Report Type "Audit" is selected in the 'Report Type' Field***)

Section Name: Record Issuer Point of Contact Information

- Issuer First Name *
- Issuer Last Name *
- Issuer Email *
- Issuer Address *
- Issuer Phone
- DCAA FAO code * (***Field displays when "DCAA" or "Third Party" is the selected Organization in the 'Agency/Organization Issuing Report' field***)

Section Name: Record Details

- Action/Report Title
- Report Date
- Original Audit Report Date (***Field displays if 'DCAA Audit Report Number' has an "S#" at the end - indicating it's a supplemental audit***)
- Date Report Received *
- Questioned Costs? (***options: Yes / No***)
  (***Fields display when "Yes" is selected in the 'Questioned Costs' field***)
  - Total Questioned Costs (***Only AT-AT Monitors and Region/HQ Monitors can edit this field when editing AT-AT records. Field displays as read-only for AT-AT Contracting Officers***)
  - Updated Total Questioned Costs
  - Questioned Costs Subject to Penalty? (***options: Yes / No***)
    (***Field displays when "Yes" is selected in the 'Questioned Costs Subject to Penalty' field***)
    - Questioned Costs Subject to Penalty Amount
- Qualifications (***options: Yes / No***)
- Audit Opinion (***options: Qualified / Unqualified / Disclaimed / Adverse / Not Applicable / Acceptable / Not Acceptable / Other***) (***Field displays when "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field***) (***Audit Opinion options vary depending on the Report Code selected***)
- Contract Number Associated with This Record? (***options: Yes / No / Not Applicable***)
- Reason Code
- Target Resolution Date (***Fields display when a date is entered in the 'Report Date' field***) (***Field is read only and can only be edited by Region/HQ or AT-AT Monitor***)
- Revised Target Resolution Date * (Field displays when the Target Resolution Date passed, and no Actual Resolution Date is entered)
- Target Disposition Date (***Field is read only and can only be edited by Region/HQ or AT-AT Monitor***)
- Revised Target Disposition Date * (***Field displays when the Target Disposition Date passed, and no Actual Disposition Date is entered***)

Section Name: Record Specifications

(***Fields display when "Yes" is selected in the 'Contract Number Associated with This Record?' field***)

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

- Delivery Order

Section Name: Management Review and Concurrence Fields

- Management Review and Concurrence of Resolution and Disposition Documents Required? (***Auto populates and read-only "Yes")***
- Date Resolution Documents Submitted for Management Review and Concurrence *
- Date Resolution Management Review and Concurrence Completed *

Section Name: Legal Review Fields

- Legal Review Required for Resolution Documents (***options: Select / Yes / No***)
  (***Fields display when a "Yes" is selected in the 'Legal Review Required for Resolution Documents' field***)
  - Resolution Documents Submitted for Legal Review Date *
  - Date Legal Review of Resolution Documents Completed *

Section Name: Actual Resolution Fields

- Actual Resolution Date

Other Record Details

Section Name: Board of Review Fields

- Board of Review Required/Requested (***options: Yes / No / Not Applicable***)
  (***Field displays when "Yes" is selected in the 'Board of Review Required/Requested' field***)
  - Board of Review Request Date
  - Board of Review Held? (***options: Yes / No / Not Applicable***)
    (***Fields display when "Yes" is selected in the 'Board of Review Held' field***)
    - Board of Review Date

    (***Fields display when "No" is selected in the 'Board of Review Held' field***)
    - Board of Review Waiver (***options: Yes / No / Not Applicable***)
      (***Field displays when "Yes" in the 'Board of Review Waiver' field***)
      - Board of Review Waiver Date

Section Name: Tolling Agreement Fields

- Tolling Agreement in Place * (***options: Yes / No***)
  (***Field displays when "Yes" is selected in the 'Tolling Agreement in Place' field***)
  - Tolling Agreement Expiration Date *

- Unresolved Costs? * (***options: Yes / No***)
  (***Field displays when "Yes" is selected in the 'Unresolved Costs' field***)

- Amount of Unresolved Costs *

Section Name: Record to Contracting Officer

(***Section auto populates and is not editable***)

- Assignment Comments
- Contracting Officer Name
- Contracting Officer Email
- Contracting Officer Phone
- Contracting Officer DoDAAC
- Contracting Office
- Assigner Email
- Assigner Name

Remarks

- Remarks (***One field across all tabs***)

Moving On

Click the **Submit** button to save/submit all edits made on the record. Otherwise, continue on by selecting the appropriate tab located in the record header. Moving the record through the pipeline positions requires specific fields to be entered; for more information refer to the "**How to Move from Planned to**" section below.

How to Move from Planned to

Resolved Pipeline Position

Under the **Tolling Agreement Fields** section enter the date into the **Actual Resolution Date** field and click the **Submit** button.

Back to Assigned Pipeline Position

Under the **Record Details** section remove the date(s) from the **Target Resolution Date**, **Target Disposition Date**, and **Actual Resolution Date** fields if entered and click the **Submit** button.

	Deferred Pipeline Position Under the **Record Details** section in the **Deferred** tab enter the response into the **In Litigation/Criminal Investigation Involvement** field and click the **Submit** button.
Resolved Tab	The Resolved tab displays when the record is in the **Resolved Pipeline and** the **Actual Resolution Date** field has a value. The Operation Audit and Operations Audits Follow Up Edit Record screen displays and information for the record is entered below. All tabs are accessible throughout the data entry process and not all fields display; changing the answers may change the displayed fields. *NOTE: To save current work, click the "**Submit**" button. The record **does not** progress through the workflow until certain fields have been entered. For more information see the section "Moving On" below.* **Other Record Details** *Section Name: Negotiation Fields* • Negotiation Held? * (***options: Yes / No / Not Applicable***) (***Fields display when "Yes" is selected in the 'Negotiation Held?' field***) ○ Negotiation Commenced Date * ○ Negotiation Completed Date * • CO Reached an Agreement (***options: Yes / No / Not Applicable***) (***Field displays when 'Yes' is selected in the CO Reached an Agreement field***) ○ Date Settlement Agreement Signed *Section Name: Negotiation Fields* • Percentage of Questioned Costs Sustained • Is Interest Applicable? (***options: Yes / No / Not applicable***) (***Field displays when 'Yes' is selected in the Is Interest Applicable? field***) ○ Interest *Section Name: Legal Review Fields* • Legal Review Required for Disposition Documents * (***options: Yes / No***) (***Field displays when "Yes" is selected in the 'Legal Review Required for Disposition Documents' field***) ○ Disposition Documents Submitted for Legal Review Date ○ Date Legal Review of Disposition Documents Completed • CLG Review Required? (***options: Yes / No***) (***Fields display when 'Yes' is entered in the CLG Review Required? field***) ○ Date Documents Submitted for CLG Review ○ Date CLG Review Completed

Section Name: Board of Review Fields

- Board of Review Required/Requested (***options: Yes / No / Not Applicable***)
  (***Field displays when "Yes" is selected in the 'Board of Review Required/Requested' field***)
  - Board of Review Request Date
  - Board of Review Held? (***options: Yes / No / Not Applicable***)
    (***Fields display when "Yes" is selected in the 'Board of Review Held' field***)
    - Board of Review Date

    (***Fields display when "No" is selected in the 'Board of Review Held' field***)
    - Board of Review Waiver (***options: Yes / No / Not Applicable***)
      (***Field displays when "Yes" in the 'Board of Review Waiver' field***)
      - Board of Review Waiver Date

Section Name: Management Review and Concurrence Fields

- Date Disposition Management Review and Concurrence Completed
- Date Disposition Documents Submitted for Management Review and Concurrence

Section Name: Actual Disposition Date

- Actual Disposition Date

Remarks

- Remarks (***One field across all tabs***)

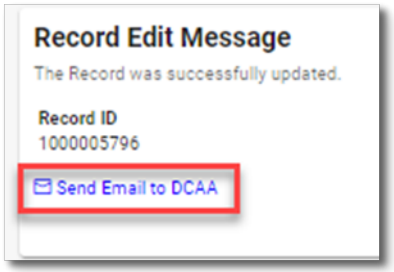
Moving On

Click the **Submit** button to save/submit all edits made on the record. Otherwise, continue on by selecting the appropriate tab located in the record header. Moving the record through the pipeline positions requires specific fields to be entered; for more information refer to the "**How to Move from Dispositioned to**" section below.

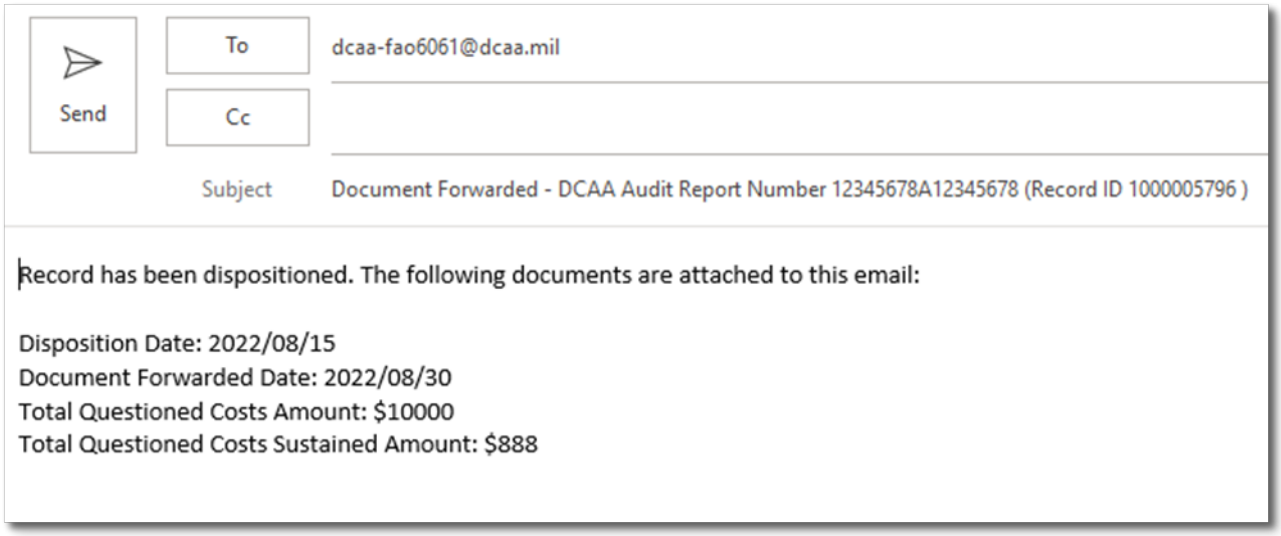
How to Move from Resolved to

Dispositioned Pipeline Position

Under the **Disposition Document Fields** section enter the date into the **Disposition Date** field and click the **Submit** button.

	Back to Planned Pipeline Position Under the **Tolling Agreement Fields** section remove the date from the **Actual Resolution Date** field and click the **Submit** button. *Deferred Pipeline Position* Under the **Record Details** section in the **Deferred** tab enter the response into the **In Litigation/Criminal Investigation Involvement** field and click the **Submit** button.
Dispositioned	The Dispositioned tab displays when the record is in the **Dispositioned Pipeline** and the **Disposition Date** field has values. The Operation Audit and Operations Audits Follow Up Edit Record screen displays and information for the record is entered below. All tabs are accessible throughout the data entry process and not all fields display; changing the answers may change the displayed fields. *NOTE: To save current work click the "**Submit**" button. The record **does not** progress through the workflow until certain fields have been entered. For more information see the sections "Moving On' below.* *Section Name: Record Details* • Document Forward Date *Remarks* • Remarks (***One field across all tabs***) **Email Notification to DCAA** If "DCAA" or "Third Party" is selected in the Agency/Organization Issuing Report field and the Document Forward Date is entered, then an email must be sent to DCAA. After clicking "Submit" a "Send Email to DCAA" link appears on the success page. 

Click the link and an email will auto populate addressed to the appropriate DCAA contact, which is based on the DCAA FAO Code entered. The email alerts the contact that the record has been dispositioned and will include the DCAA Audit Report Number and Record ID in the subject line and the Dispositioned Date, Document Forward Date, Total Questioned Costs, and Total Questioned Costs Sustained in the body.



Moving On

Click the **Submit** button to save/submit all edits made on the record. Otherwise, continue on by selecting the appropriate tab located in the record header. Moving the record through the pipeline positions requires specific fields to be entered; for more information refer to the "**How to Move from Dispositioned to**" section below.

How to Move from Dispositioned to

Forwarded Pipeline Position

Under the **Record Details** section enter the date into the **Document Forward Date** field and click the **Submit** button.

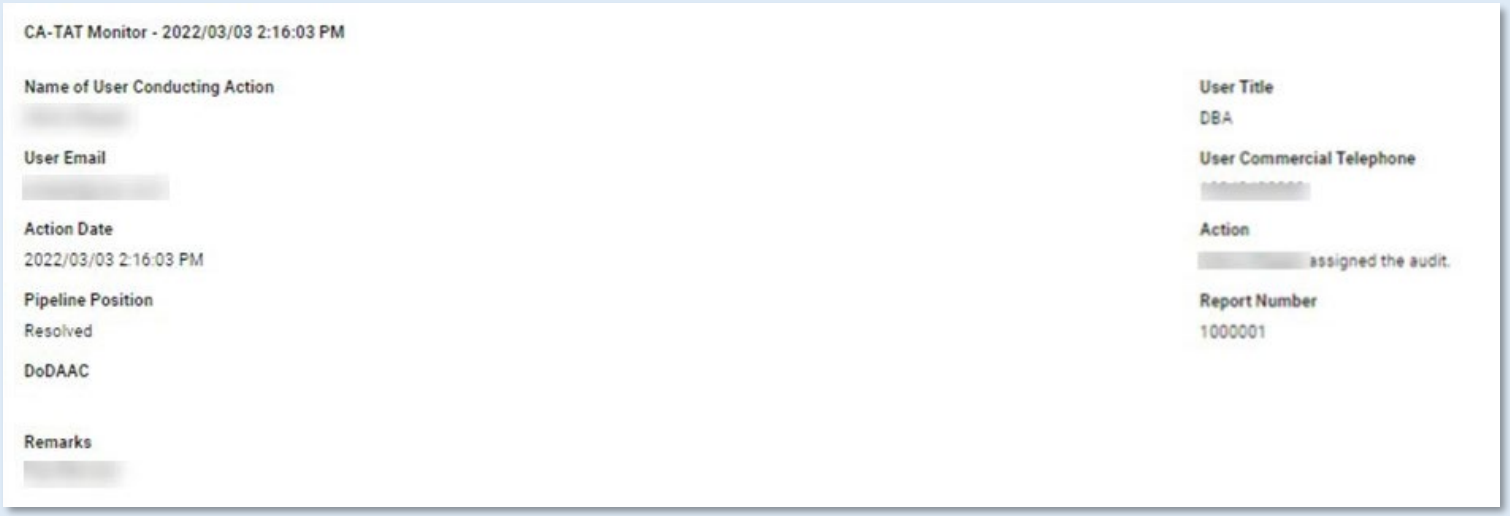
Back to Resolved Pipeline Position

Under the **Disposition Document Fields** section remove the date from the **Disposition Date** field and click the **Submit** button.

	Deferred Pipeline Position Under the **Record Details** section in the **Deferred** tab enter the response into the **In Litigation/Criminal Investigation Involvement** field and click the **Submit** button.
Forwarded Tab	The Forwarded tab displays when the record is in the **Forwarded Pipeline** and the **Document Forward Date** field has a value. The Operation Audit and Operations Audits Follow Up Edit Record screen displays and information for the record is entered below. All tabs are accessible throughout the data entry process and not all fields display; changing the answers may change the displayed fields. *NOTE: To save current work click the "**Submit**" button. The record **does not** progress through the workflow until certain fields have been entered. For more information see the sections "Moving On' below.* *Section Name: Record Details* • Method of Document Transmittal * (***options: Email / Fax / Automatically sent by email***) (***Field displays when the "Document Forward Date" is entered***) ○ All CO Actions Completed ▪ Action Completed Date * (***Field answer is auto populated with today's date***) ▪ Record Closed Date * (***Field answer is auto populated with today's date***) *Remarks* • Remarks (***One field across all tabs***) **Moving On** Click the **Submit** button to save/submit all edits made on the record. Otherwise, continue on by selecting the appropriate tab located in the record header. Moving the record through the pipeline positions requires specific fields to be entered; for more information refer to the "**How to Move from Forwarded to**" section below. **How to Move from Forwarded to** *Closed Pipeline Position* Under the **Record Fields** section enter "Yes" into the **All CO Actions Completed?** field and click the **Submit** button.

	Back to Disposition Pipeline Position Under the **Record Details** section remove the date from the **Document Forward Date** field and click the **Submit** button.
Deferred Tab	The Deferred tab displays when the record is in the **Deferred Pipeline** and the **In Litigation/Criminal Investigation Involvement** field has a value. The Operation Audit and Operations Audits Follow Up Edit Record screen displays and information for the record is entered below. All tabs are accessible throughout the data entry process and not all fields display; changing the answers may change the displayed fields. *NOTE: To save current work click the "Submit" button. The record does not progress through the workflow until certain fields have been entered. For more information see the sections "Moving On' below.* *Section Name: Record Details* • In Litigation (***options: Yes / No***) (***Field displays when "Yes" is selected in the 'In Litigation' field***) ○ Docket Number • Deferred Status Date • Deferred Status Removed Date *Section Name: Reopen Details* (***Section displays when the record is reopened***) • Record Reopened Due to Appeal (***options: Yes / No***) (***Field displays when "Yes" is selected in the 'Record Reopened Due to Appeal' field***) ○ Appealed Amount Recovered/Sustained (***Field displays when "No" is selected in the 'Record Reopened Due to Appeal' field***) ○ Other Reason Record Reopened * *Remarks* • Remarks (One field across all tabs) **Moving On** Click the **Submit** button to save/submit all edits made on the record. Otherwise, continue on by selecting the appropriate tab located in the record header. Moving the record through the pipeline positions requires specific fields to be entered; for more information refer to the **"How to Move from Deferred Back to"** section below.

	How to Move from Deferred Back to *Planned Pipeline Position* Under the **Record Details** section enter the date into the **Deferred Status Removed Date** field and click the **Submit** button. *Resolved Pipeline Position* Under the **Record Details** section enter the date into the **Deferred Status Removed Date** field and click the **Submit** button. *Dispositioned Pipeline Position* Under the **Record Details** section enter the date into the **Deferred Status Removed Date** field and click the **Submit** button.
History Tab	The History tab displays all actions taken on the record, separated by role and action. Select the History tab to view previous actions on the record. The History tab updates on submit. **History tab entries:** • Name of User Conducting Action • User Title • User Email • User Commercial Telephone • User DSN Telephone • Action Date • Action • Pipeline Position • Report Number • UEI • Remarks • Modifications



Once the user is finished within the History tab, they may either submit the record by selecting the "**Submit**" button at the bottom of the page or move back to any of the previous pages by selecting the tab; refer to the records pipeline position located within the header for a reference on which tab should be selected.

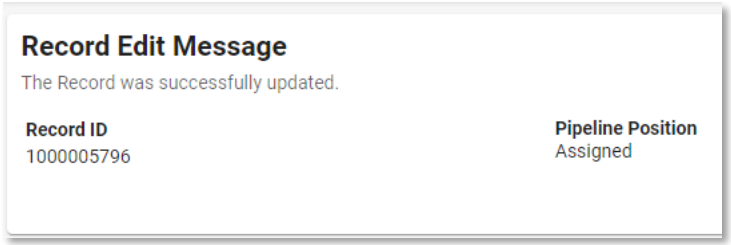
Record Submit

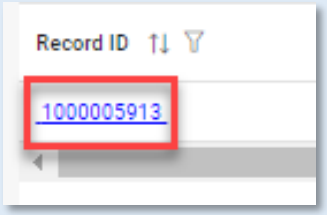
Selecting the **"Submit"** button, successfully, displays a success screen with the record information, useful for locating the record later for additional data entry. Submitting the document saves all edits. When the appropriate fields are filled out, the record is progressed to the next pipeline position.

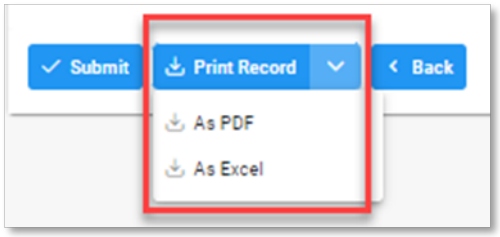
Refer to the **Moving On** sections for each pipeline tab for more information on the specific fields. The record is editable prior to **Closed**, if the record is closed it will need to be reopened for any additional edits to be made; refer to the **Closed** section for more information.

Information provided on the Success screen:

- Record ID
- Pipeline Position



Closed	Once a record has been completed and all the necessary actions have been taken, the record must be closed. **Closing a Record** To close a record, return to the **Forwarded pipeline** and indicate **"Yes"** in the '**All CO Actions Completed?'** Field and click the Submit button. The **Record Closed Date** will auto populate with the current date, and the record will **Close**. **Closed** Records may be searched for and reopened within the next four years of the **"Record Closed Date"** value; otherwise, the record is moved to **"Archived"** and cannot be reopened. **Reopening a Record** For **AT-AT – Monitors**, **Regions/HQ Monitors**, and **Contracting Officers** looking to reopen a record, use the search functionality to find the closed record. Click the Record ID number hyperlink to open the record.  Click the **Reopen and Assign to Self** button and a pop-up confirmation displays with the message, "Are you sure you want to reopen this record"? Select "Confirm" to proceed with the process. The record will be **Reopened,** and the **Edit Record** screen displays. The record status will update to "**Reopened**". **Reclose a Record** To close a reopened record, return to the **Forwarded pipeline** and indicate "**Yes**" in the **All CO Actions Completed?** field and click the **Submit** button. The **Record Closed Date** will auto populate with the current date, and the record will reclose. Reclosing a record restarts the four-year **Archive** timer.
Archived	Four years after the **Record Closed Date** has passed the record will automatically be archived by the system and the pipeline position updated to **Archived** from **Forwarded.**

	After being archived, the record is accessible to users as a “read-only” document and is no longer able to be reopened.
Additional Information	
Print Record	The Print Records button allows the user to export a record in Excel or PDF format.  For additional information on Print, check the AT-AT WBT General Function page.
Record Header	The **Status** field only displays for records that have a DCAA Audit Report Number. The **Status** reflects the age of the record and is auto calculated based on the scenarios outlined below. 1. The "Status" will reflect "OA" (Over Age) when: a. The "Target Resolution Date" has been missed (>-24:00 hours than today's 00:00 GMT); until the "Actual Resolution Date" is populated, OR b. The "Target Disposition Date" has been missed (>-24:00 hours than today's 00:00 GMT); until the "Disposition Date" is populated or the action hits the six months and one day mark. 2. The "Status" will reflect "OA 6" (Over Age Six Months) when the "Target Disposition Date" is missed by more than six months, until a. "Disposition Date" is populated, OR b. "Yes" is selected in the "All CO Actions Complete" data field. 3. The "Status" will reflect "OA 12" (Over Age Twelve Months) when the "Target Disposition Date" is missed by more than twelve months, until a. "Disposition Date" is populated, OR b. "Yes" is selected in the "All CO Actions Complete" data field. 4. The "Status" will reflect "OA 18" (Over Age Eighteen Months) when the "Target Disposition Date" is missed by more than eighteen months, until a. "Disposition Date" is populated, OR b. "Yes" is selected in the "All CO Actions Complete" data field. 5. The “Status” will continue to track the "Target Disposition Date" at 6-month intervals (e.g., OA 24, OA 30, OA 36, etc.) until the

	a. "Disposition Date" is populated, OR b. "Yes" is selected in the "All CO Actions Complete" data field.
Dropdown Fields/Lists	*Reason Code* • 01 – Fact-Finding/Preparing Official Records • 02 – Under Legal Review • 03 – Under Management Review • 04 – In Negotiations • 05 – Issued a COFD • 06 – Subject Action in Litigation/Investigation • 07 – Segment Level Complete-Awaiting Flow Down Allocations • 08 – Segment Level Complete-Flow Down Allocations in Litigation/Investigation • 09 – Indirect rates complete – Awaiting Direct Cost Settlement • 10 – Resource Constraints • 11 – Other
Additional Field Information	*Status* A record created manually or via the flat file upload the read-only "Status" field will be auto-populated on all standard Records and SubRecords. The "Status" values will be: “Less than 6 months”, “6 to 12 months”, “Over 12 months”, “Closed”, “Deferred Litigation”, or “Deferred Investigation” (designation depends on the following statements). Scenario 1: The record is not in a "Deferred Investigation", "Deferred Litigation", or "Closed" pipeline position. Then the read-only "Status" field will be auto-populated with an age category status and the age category status is calculated based on the "Report Date" field (“Less than 6 months”, “6 to 12 months”, “Over 12 months”) in comparison to the user's system date (current date). For example, Report Date is 09/1/2023 and today is 3/11/2024, the difference between the dates is 6 months and 11 days, so the status would show "6 to 12 months". Scenario 2: The record is in the Deferred pipeline position (designated by a date in the “Deferred Status Date” field, but not one in the “Deferred Status Removed Date” field). “Yes” is selected in the “In Litigation” field. Then the read-only "Status" field will be auto-populated with “Deferred Litigation” status.

Scenario 3:

The record is in the Deferred pipeline position (designated by a date in the “Deferred Status Date” field, but not one in the “Deferred Status Removed Date” field).

“Yes” is selected in the “Criminal Investigation Involvement” field.

Then the read-only "Status" field will be auto-populated with “Deferred Investigation” status.

Scenario 4:

"Record Closed Date" has been populated.

Then the read-only "Status" field will be auto-populated with “Closed" status.

DCAA Audit Report Number

The following 5-digit activity codes located in the "DCAA Audit Report Number" after the letter (Positions 10-14; ex. 12345678S*11010*123)

CAS and DS activity codes: "19100," "19200,” “19403,” “19404,” “19407,” “19408,” “19409,” “19410,” “19411,” “19412,” “19413,” “19414,” “19415,” “19416,” “19417,” “19418,” “19420,” and “19500”

The field allows for two formats:

Format 1 (Old):

Characters 1-4 (numeric) - DCAA FAO Code (e.g., 6311)

Characters 5-8 (numeric) - Year (e.g., 2023)

Character 9 (letter) - DCAA Office Team Code (e.g., K)

Characters 10-14 (numeric) - Activity Code (e.g., 19500)

Characters 15-17 (numeric) - Sequence (e.g., 005)

Characters 18-19 (S#) - Supplemental Audit Indicator (e.g., S1)

Characters 18-21 or Characters 20-23 (D#) - SubRecord Indicator (e.g., D999)

NOTE: the DCAA Audit Report Number must meet this format; however, the Supplemental Audit Indicator (S#) and the SubRecord Indicator (D#) are not always necessary and are therefore optional when we run validation.

Format 2 (New):

Characters 1-4 (numeric) - Year (e.g., 2023)
Characters 5-9 (numeric) - Activity Code (e.g., 19500)
Characters 10-14 (numeric) - Sequence (e.g., 00005)
Characters 15-16 (S#) - Supplemental Audit Indicator (e.g., S1)
Characters 15-18 or Characters 17-20 (D#) - SubRecord Indicator (e.g., D999)

NOTE: the DCAA Audit Report Number must meet this format; however, the Supplemental Audit Indicator (S#) and the SubRecord Indicator (D#) are not always necessary and are therefore optional when we run validation.

Memo Number

The field allows for two formats:

Format 1 (Old):
Characters 1-4 (numeric) - DCAA FAO Code (e.g., 6311)
Characters 5-8 (numeric) - Year (e.g., 2023)
Character 9 (letter) - DCAA Office Team Code (e.g., K)
Characters 10-14 (numeric) - Activity Code (e.g., 19500)
Characters 15-17 (numeric) - Sequence (e.g., 005)

Format 2 (New):
Characters 1-4 (numeric) - Year (e.g., 2023)
Characters 5-9 (numeric) - Activity Code (e.g., 19500)
Characters 10-14 (numeric) - Sequence (e.g., 00005)

Target Resolution Date
When ‘Type of CAS’ has "CAS Standard”, or "Noncompliance" selected then the Target Resolution Date will auto-calculate on record creation 15 calendar days from the date entered into the "Date Report Received" field.

	OR When Type of CAS has "Initial DS", "Revised DS", or "Cost Impact" selected then the Target Resolution Date will auto-calculate on record creation six months from the date entered into the "Date Report Received" data field. --- *Target Disposition Date* The Target Disposition Date will auto-calculate on record creation 12 months from the date entered in the "Date Report Received" field.