Form 1 Record Release – DCAA Supervisor

Reference Guide

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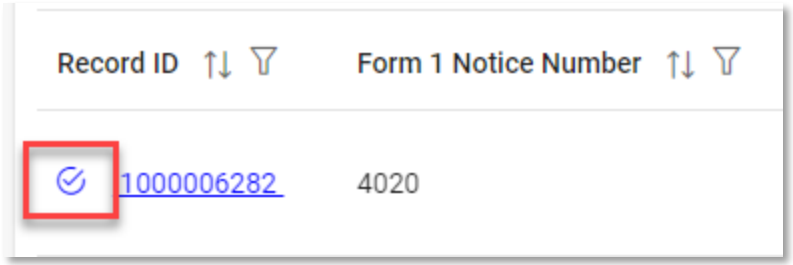
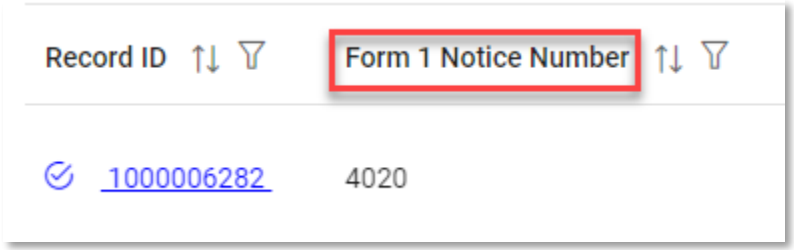
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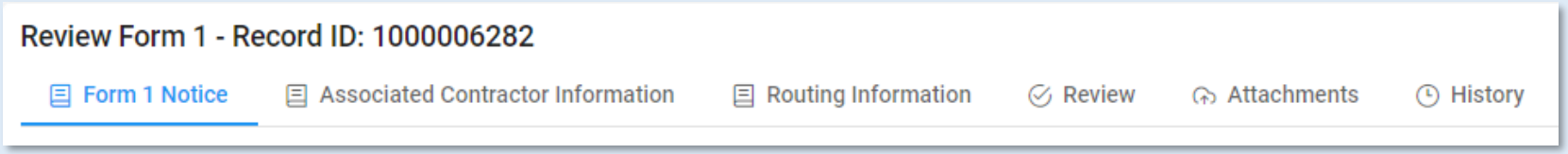
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Roles	The role(s) required to **Release** a AT-AT DCAA Form 1 Record: • AT-AT DCAA Supervisor
Releasing a Form 1 Record	This guide provides an overview of how a **AT-AT DCAA Supervisor** user **Releases** a **Form 1 Record** in the **Audit Tracking and Action Tool (AT-AT)** application. A Form 1 Record is released once the FAO Reviewer has wet signed the Form 1 Notice and it has been uploaded by the DCAA Supervisor. 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 released by that user. To release a Form 1 Record, locate the '**Review Record'** icon next to the Record ID number and click the icon to enter on the record on the Form 1 Notice tab.  **AT-AT – DCAA Supervisors** have access to the "My Work" table on the dashboard; sort the column by Form 1 Notice Number to help filter the assigned records.  For **AT-AT – DCAA Supervisors** looking for a Form 1 Record, use the Search Functionality. To release a record as a **DCMA Supervisor**, search for a record within your span of control of your location code.

Record Header	The AT-AT Form 1 Record Header information is available at the top of the Review screen. Records open on the Form 1 Notice tab. All tabs are accessible during the review process. Continue with the training or select a tab link below to skip ahead. **Form 1 Review Header Tab** • Form 1 Notice • Associated Contractor Information • Routing Information • Review • Attachments • History **Record Information:** • Record ID 
Form 1 Notice Tab	The Form 1 Notice Record screen displays and information for the Form 1 Record release is entered below. All tabs are accessible throughout the release process and not all fields display; changing the answers may change the displayed fields. *Section Name: Form 1 Notice Details* • Form 1 Notice Number (***Answer is auto populated with the information entered during the Form 1 creation***) • 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"***)

Section Name: Form 1 Notice Contract Details

Buttons:

- Add Contract

- Contract Number Type (***Field displays original contract information and the information of any added contracts***)
- Contract Number (***Field displays original contract information and the information of any added contracts***)
- Delivery Order (***Field displays original contract information and the information of any added contracts***)
- Action (***displays when contract is added***)
    - Edit Contract Detail
    - Delete Contract Detail

Fields are auto populated with the contract(s) added during the Form 1 creation. Additional contracts may be added, but it is an optional step.

Adding a Form 1 Contract

Section Name: Enter Contract Search Information

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

Buttons:

- Save
- Cancel

Section Name: DCAA Information

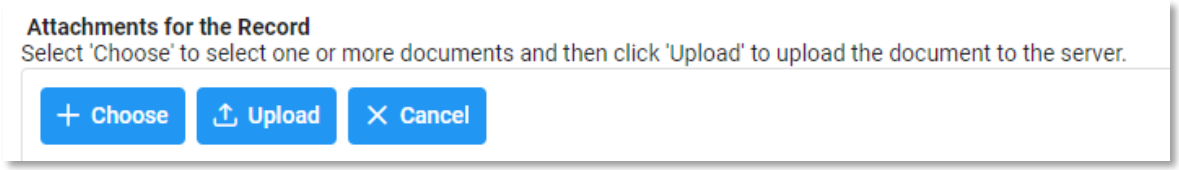
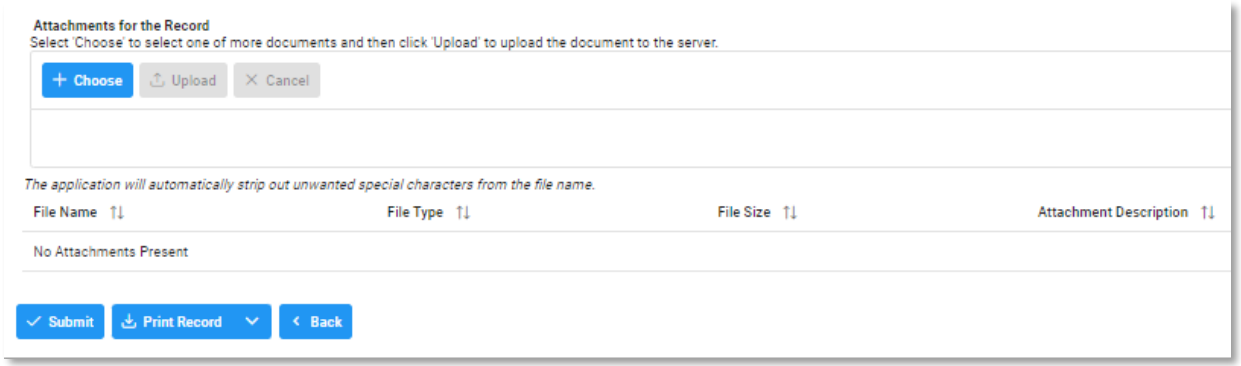
- DCAA FAO Code *
- Field Audit Office Name (***Field is auto populated***)
- Field Audit Office Address (***Field is auto populated***)
- Field Audit Office Phone Number (***Field is auto populated***)
- DCAA Region Code *
- DCAA Region Office Name *
- DCAA Region Office Address*
- DCAA Region Office Phone Number *
- Disbursing Office

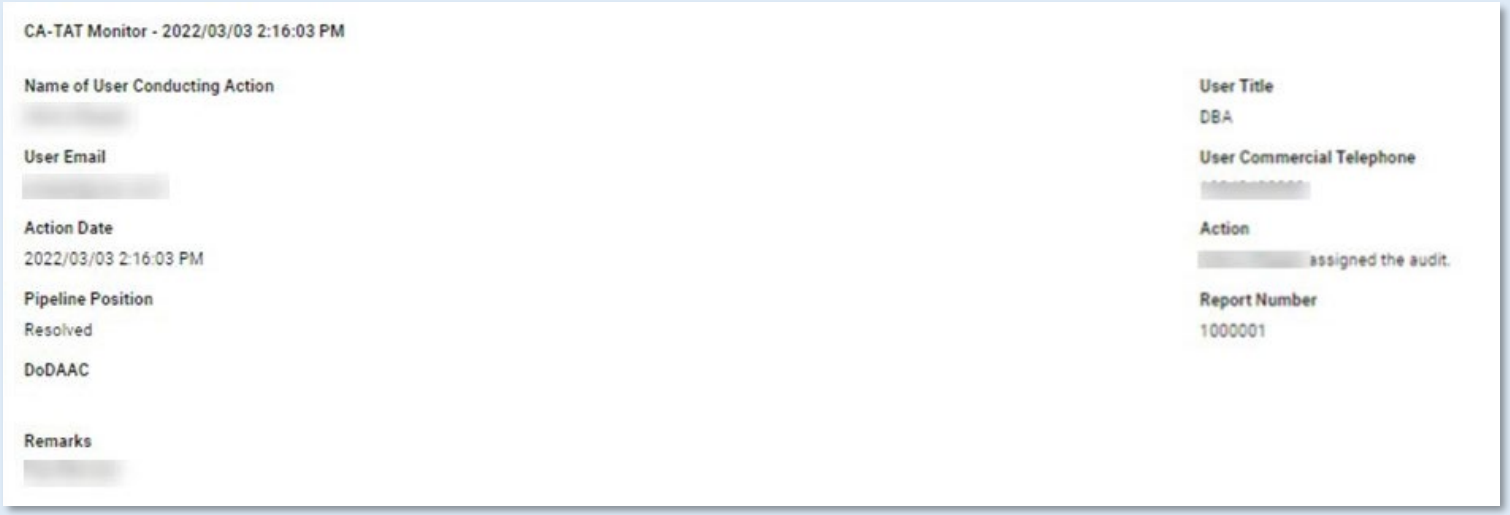
	Section Name: Items and Costs • Item Number (***Field displays when "Notice of Disapproved Amount" is selected in the 'Category of Form 1' field***) ○ Disapproved Amount * (***Field displays when "Notice of Suspended Amount" is selected in the 'Category of Form 1' field***) ○ Suspended Amount * • Description of Item and Reason for Action *Remarks* • Remarks (***One field across all tabs***) **Moving On** Click the **Release Form 1** button if all edits are completed and the Form 1 is ready for release. Otherwise, continue on by selecting the appropriate tab located in the record header.
Associated Contractor Information Tab	The Associated Contractor Information tab screen displays and information for the Form 1 Record release is entered below. All tabs are accessible throughout the release process and not all fields display; changing the answers may change the displayed fields. *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.

	Sub-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* Choose a Contractor from Search Results • Contractor Name • CAGE • UEI *Buttons:* • Back • X (***Close***) Click the **Contractor Name** hyperlink to choose a new contractor. *Remarks* • Remarks (***One field across all tabs***) **Moving On** Click the **Release Form 1** button if all edits are completed and the Form 1 is ready for release. Otherwise, continue on by selecting the appropriate tab located in the record header.
Routing Information Tab	The Routing Information screen displays and information for the Form 1 Record release is entered below. All tabs are accessible throughout the release process. **Routing Users Information** (***Answers are auto populated based on the information entered by the Form 1 Creator***) *Section Name: DCAA Auditor* • DCAA Auditor Name

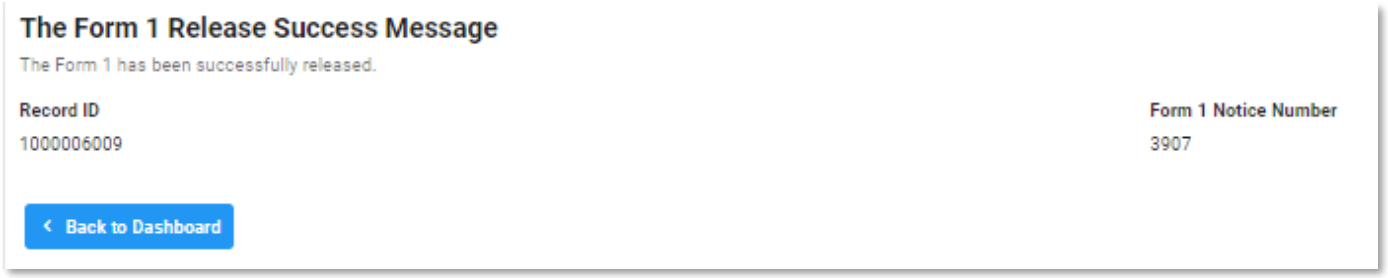
	• DCAA Auditor Email • DCAA Auditor Phone *Section Name: DCAA Supervisor* • DCAA Supervisor Name • DCAA Supervisor Email • DCAA Supervisor Phone *Section Name: FAO Reviewer* • FAO Reviewer Name • FAO Reviewer Email • FAO Reviewer Phone *Section Name: DCAA Regional Reviewer* • Is Region/HQ Monitor Review Required? • DCAA Regional Review Organizational Group *Section Name: Current DCMA Contracting Officer* • Contracting Officer Name • Contracting Officer Email • Contracting Officer Phone • Contracting Officer DoDAAC • Contracting Officer Remarks • Remarks (***One field across all tabs***) **Moving On** Click the **Release Form 1** button if all edits are completed and the Form 1 is ready for release. Otherwise, continue on by selecting the appropriate tab located in the record header.
Review Tab	The Review screen displays and information for the Form 1 Record release is entered below. All tabs are accessible throughout the release process.

	Section Name: Form 1 Review Details • Form 1 Current Action * (*options: Draft / Submitted / Under Review / Reviewed / Under Approval / Approved / Not Approved / Finalized / Release to CO*) • Form 1 Approval Status (*Answer is auto populated*) • Released For * (*options: Not Released / Released – Withhold on Current Billings / Released – Auditor Determined Rates / Released – No Future Billings*) • Form 1 Notice Date * • Contractor Acknowledgment (*options: On / Off*) *Remarks* • Remarks (*One field across all tabs*) **Moving On** Click the **Release Form 1** button if all edits are completed and the Form 1 is ready for release. Otherwise, continue on by selecting the appropriate tab located in the record header.
Adding Attachments Tab	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.  **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 release the record by selecting the **Release Form 1** button at the bottom of the page or move back to any of the previous pages by selecting the tab; refer to the Form 1 Release tabs located within the header for a reference on which tab should be selected.
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 Release the record by selecting the **Release Form 1** button at the bottom of the page or move back to any of the previous pages by selecting the tab.
Release Form 1 Tab	Selecting the **'Release Form 1'** button, successfully, displays a success screen with the with the record information. After the record is **Released**, the Form 1 Record is then assigned to the Contracting Officer selected in the Routing Tab. After being assigned to the new CO, the Form 1 record is editable. **Information provided on the Success Screen:** • Record ID

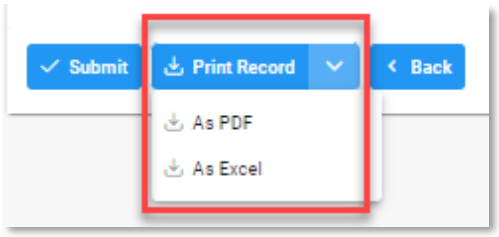
- Form 1 Notice Number



Additional Information

Print Record

The Print Records button allows the user to export a record in Excel or PDF format for import to a spreadsheet.



For additional information on Print, check the AT-AT WBT General Functions page

Dropdown Lists / Fields

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