Form 1 Record Review – DCAA Regional Reviewer

Reference Guide

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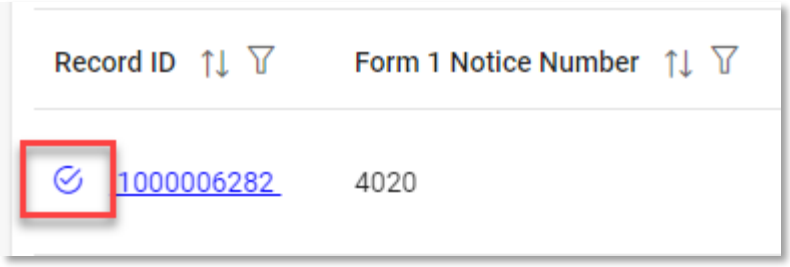
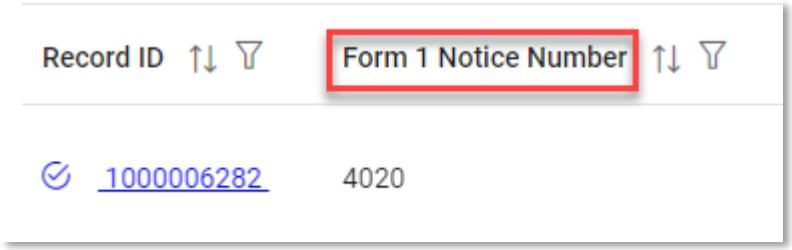
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Roles	The role(s) required to **Review** a DCAA Form 1 Record: • AT-AT DCAA Regional Reviewer
Reviewing a AT-AT Form 1 Record	This guide provides an overview of how a AT-AT DCAA Regional Reviewer **Reviews** a **Form 1 Record** sent to them by the FAO Reviewer in the **Audit Tracking and Action Tool** (AT-AT) application. 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 reviewed by that user. To review a Form 1 Record, locate the '**Review Record**' icon directly next to the Record ID number. Click the icon to enter the record on the Form 1 Notice tab.  **AT-AT – Regional Reviewers** 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 Regional Reviewers** looking for a Form 1 Record, use the Search Functionality. To review as a **DCAA Regional Reviewer**, search for a record within your DoDAAC. Click the Record ID Hyperlink to open the record in view only from Search Results.
Record Header	The AT-AT Form 1 Record Header information is available at the top of the Review screen.

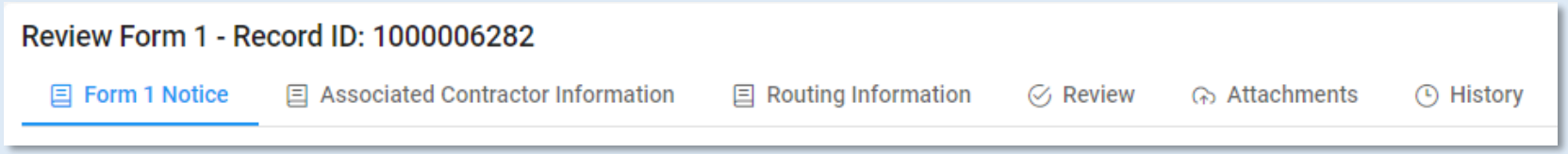
Records open on the Form 1 Notice tab. All tabs are accessible during the review process. Continue with the training or select a tab link below to skip ahead.

Form 1 Review Header Tabs

- 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 Review is entered below. All tabs are accessible throughout the review 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

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 (***Answer is pre-populated***)
- Field Audit Office Address (***Answer is pre-populated***)
- Field Audit Office Phone Number (***Answer is pre-populated***)
- DCAA Region Code *
  (*Fields display when a response is selected in the 'DCAA Region Code' field*)
    - DCAA Region Office Name * (***Answer auto populates based on the selected 'DCAA Region Code'***)
    - DCAA region Office Address * (***Answer auto populates based on the selected 'DCAA Region Code'***)
    - DCAA Region Office Phone Number * (***Answer auto populates based on the selected 'DCAA Region Code'***)
- 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 **Submit** or **Withdraw** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.
Associated Contractor Information Tab	The Associated Contractor Information screen displays and information for the Form 1 Record review is entered below. All tabs are accessible throughout the review 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 **Submit** or **Withdraw** button if all data has been entered. 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 Review is entered below. All tabs are accessible throughout the review 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

Section Name: 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** or **Withdraw** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.

Review Tab

The Review Record screen displays and information for all the Form 1 Record Review is entered below. All tabs are accessible throughout the review 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 (***options: Draft / Submitted / Under Review / Reviewed / Under Approval / Approved / Not Approved / Finalized***)

Remarks

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

Moving On

Click the **Submit** or **Withdraw** button if all data has been entered. 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	

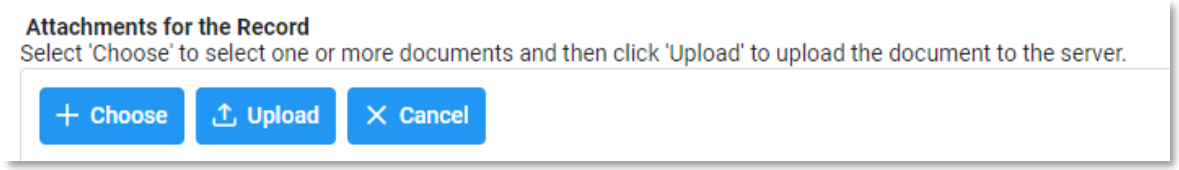
To begin adding attachments, select the Attachments tab and click the **Choose** button. Select all necessary attachments.

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.

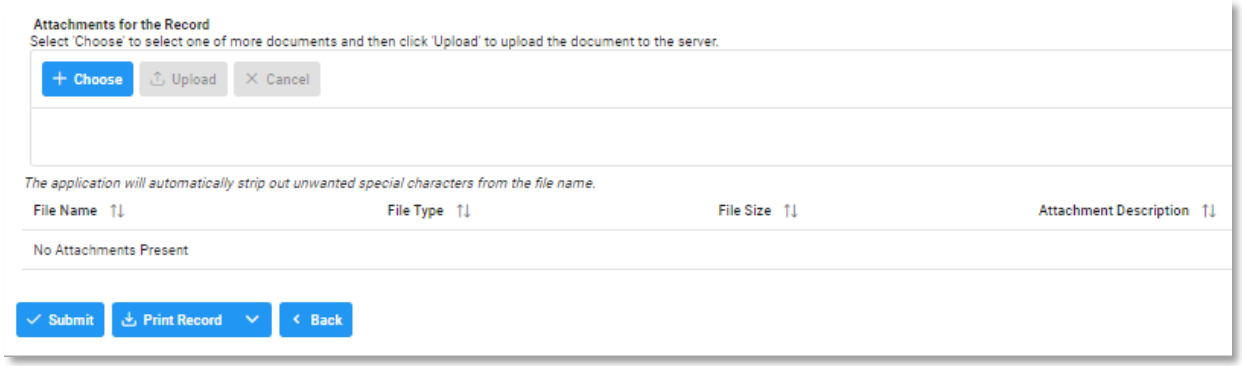


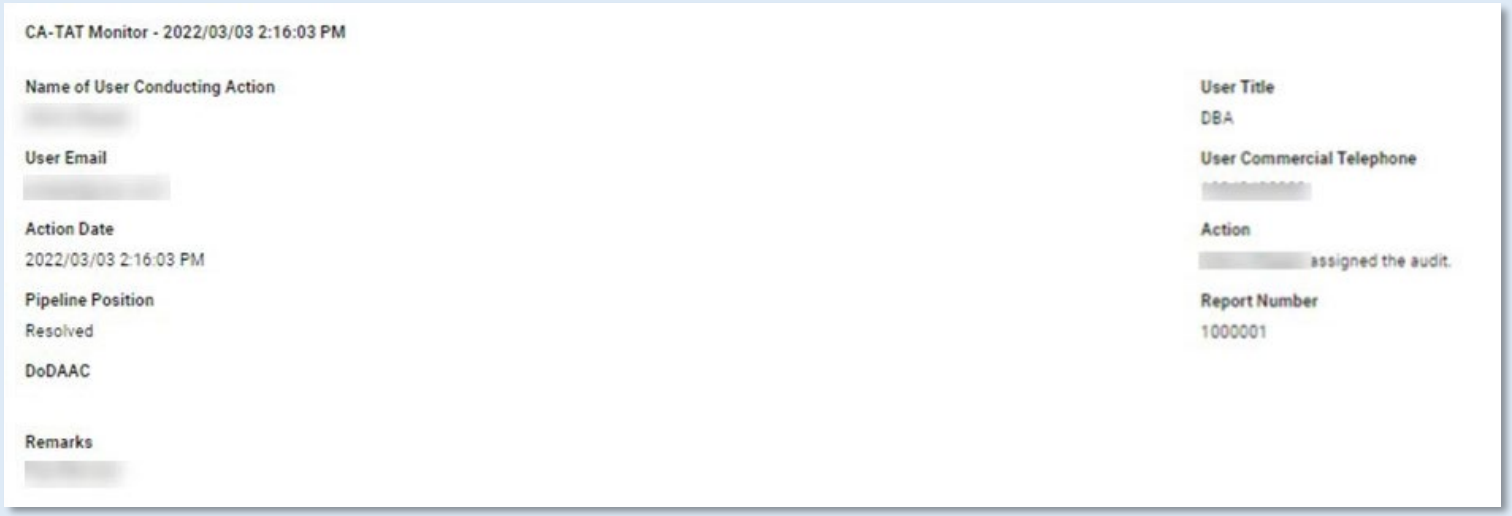
Button Options:

- 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 either submit Approval, Rejection, or Withdrawal for the record by selecting one of the buttons at the bottom of the page or move back to any of the previous pages by selecting the tab; refer to the Record Review 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



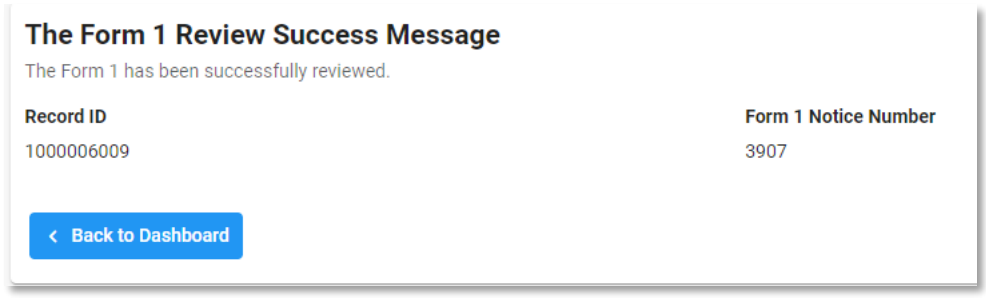
Once the user is finished within the History tab, they may either submit the record by selecting the “Submit” or “Withdraw” button at the bottom of the page or move back to any of the previous pages by selecting the tab.

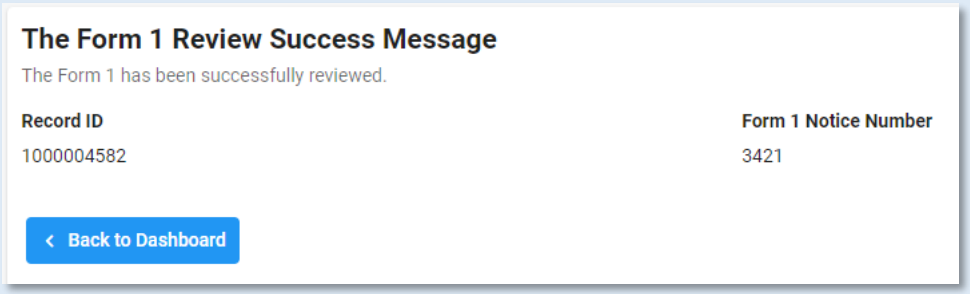
Submit Approval of Form 1 Review

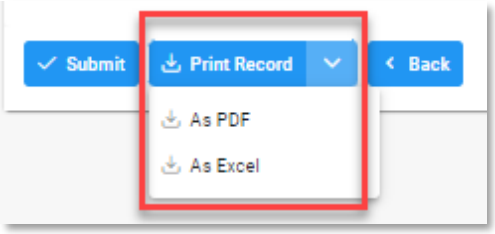
Selecting the ‘**Submit Approval for Form 1 Review’** button, successfully, displays a success screen with the record information, useful for locating the record later. After approval the record goes back to the FAO Reviewer who must print and wet sign the NIDC. The Form 1 Review is then assigned to the DCAA Supervisor.

Information provided on the Success Screen:

- Record ID
- Form 1 Notice Number



Submit Rejection of Form 1 Review	Selecting the '**Submit Rejection for Form 1 Review'** button, successfully, displays a success screen with the record information, useful for locating the record later. After rejection, the Form 1 Record is then sent back to the FAO Reviewer. **Information provided on the success Screen:** • Record ID • Form 1 Notice Number 
Submit Withdrawal of Form 1 Review	Selecting the '**Submit Withdrawal of Form 1 Review'** button, successfully, displays a success screen with the record information.The record is still searchable in the system. The withdrawal is noted on the record **History** tab under '**Action**'. 
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 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