Create AT-AT Record

Training Document

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Roles	The role(s) required to **Create** an AT-AT Record: • AT-AT – Monitor • AT-AT – Region/HQ Monitor
Creating a AT-AT Record	AT-AT has two processes to create records in the system: • Flat File Upload • Manual Record Create This training document provides an overview of how an AT-AT – Monitor or AT-AT Region/HQ Monitor **Creates** a **Record** in the **Audit Tracking and Action Tool (AT-AT**) application. Log in to PIEE as an **AT-AT – Monitor** or **AT-AT Region/HQ Monitor** and access the AT-AT module. *Flat File Upload* In the AT-AT module go to **AT-AT > Flat File Upload.** *Manual Record Create* In the AT-AT module go to **AT-AT > Create Record.** To create a Form 1/NIDC or SubRecord, refer to the separate Create Training Documents, located in the AT-AT WBT.
Flat File Upload Record Create	
Flat File Upload Process	The Flat File Upload process allows users to upload one or more records at once using a **.csv** file. Each row in the file represents a single record.

	Create Records via the Flat File Upload Process 1. Log in to Procurement Integrated Enterprise Environment (PIEE) Application (https://piee.eb.mil/) as either an **AT-AT Monitor** or **AT-AT Region/HQ Monitor**. 2. Open the Audit Tracking and Action Tool (AT-AT) by clicking the **'AT-AT'** icon. 3. Select **Upload File** under the AT-AT navigation section 4. Click "**Upload**" the button. 5. Select a **.csv** file to upload. 6. A list of successfully created records will be present in the "**Successful Upload Items**" table. 7. Successfully created records will be auto-assigned to the appropriate AT-AT Contracting Officer. 8. Any failures will be listed in the "**Failed Upload Items**" table which contains an error message explaining why the record could not be created. 9. If another file needs to be uploaded, click the "**Upload**" button and repeat steps 3-7.
Flat File Auto-Assignment	Records created via the AT-AT Upload Flat File functionality are automatically assigned to users based on **AMT Mapping** assignments. This section explains how the system performs these automatic assignments. *Scenario 1:* The Disposition Office DoDAAC is within DCMA and the Disposition Office DoDAAC is not S5113A. The system will search AMT mappings via the CAGE Code search and assign the record to the first ACO with an active AT-AT Contracting Officer role found (i.e., if a CAGE Code happens to have two or more ACOs assigned, the records will be assigned to the first ACO located) (checking every mapping level that comes back on the CAGE Code search from the lowest level to the highest). If there is no ACO with an active AT-AT Contracting Officer role on the AMT Mappings, then **assign the record to** the first active AT-AT Monitor registered in PIEE under that DoDAAC. If there is no active AT-AT Monitor registered in PIEE under that DoDAAC, then **assign the record to** assign the record to the first active DCMA AT-AT Region/HQ Monitor registered at Level 3 in PIEE.

If there is no active DCMA AT-AT Region/HQ Monitor registered at Level 3, then **assign the record to** assign the record to the active DCMA AT-AT Region/HQ Monitor registered at Level 2 in PIEE.

Scenario 2:

The Disposition Office DoDAAC = S5113A.

The system will search for AMT mappings via the CAGE Code search and assign the record to the first CACO/DACO listed with an active AT-AT Contracting Officer role (checking every mapping level that comes back on the CAGE Code search from the lowest level to the highest).

If there is no CACO/DACO with an active AT-AT Contracting Officer role, then **assign the record to** the first active AT-AT Monitor registered in PIEE under that DoDAAC.

If there is no active AT-AT Monitor registered in PIEE under that DoDAAC, then **assign the record to** the first active DCMA AT-AT Region/HQ Monitor registered at Level 3 in PIEE.

If there is no active DCMA AT-AT Region/HQ Monitor registered at Level 3, then **assign the record to** the first active DCMA AT-AT Region/HQ Monitor registered at Level 2 in PIEE.

Scenario 3:

The Disposition Office DoDAAC is not DCMA.

The system will assign the record to the first active AT-AT Monitor registered in PIEE under that DoDAAC.

If there is no active AT-AT Monitor registered in PIEE under that DoDAAC, then **assign the record to** the first non-DCMA AT-AT Region/HQ Monitor registered in PIEE at Level 3 at that agency.

If there is no active non-DCMA AT-AT Region/HQ Monitor registered in PIEE at Level 3 at that agency, then **assign the record to** the first active non-DCMA AT-AT Region/HQ Monitor registered in PIEE at Level 2 at that agency.

If there is no active non-DCMA AT-AT Region/HQ Monitor Registered in PIEE at Level 2 at that agency, then **assign the record to** the first active DCMA AT-AT Region/HQ Monitor registered in PIEE at Level 2.

Auto-Disposition Utility	**Supplemental Record Utility Updates**
	
	An AT-AT auto-disposition utility runs every 5 minutes, processing new records that are either manually created or uploaded using the 'Upload Flat File' option. This utility targets records with a 'DCAA Audit Report Number' or 'Memo Number' containing an "S#" (indicating it's a supplemental record).
	
	The utility performs the following operations:
	
	Record Identification:
	
	The system queries all AT-AT standard records (excluding CAS Workflow or Form 1) to identify:
	• **For records with DCAA Audit Report Numbers containing "S#" (indicating a supplemental record):**
	  ○ The original record by matching the DCAA Audit Report Number without the "S#" suffix.
	  ○ Any previous supplemental records by matching the DCAA Audit Report Number with earlier "S#" suffixes.
	  ○ All matching records are automatically dispositioned regardless of Report Code.
	• **For records with Memo Numbers containing "S#" (indicating a supplemental record):**
	  ○ The system performs the same matching process as with DCAA Audit Report Numbers, locating:
	  ○ The original record by matching the Memo Number without the "S#" suffix.
	  ○ Any previous supplemental records by matching the Memo Number with earlier "S#" suffixes.
	  ○ Auto-disposition only occurs if the 'Report Code' is "G - Incurred Costs and Settlement of Final Indirect Cost Rates" (FICR).
	
	Auto-Disposition Process
	
	Records located through this matching process are automatically closed, and the system updates the following:
	• Populates the 'All CO Actions Completed' field to "Yes."
	• Populates the 'Actual Resolution Date', 'Actual Disposition Date', 'Document Forward Date', and 'Record Closed Date' (if not already populated) fields with the date the supplemental record was created.
	• Populates the 'Questioned Costs Sustained' field to $0.
	• Adds a remark to the beginning of the 'Remarks Section' of the original record and any related SubRecords stating:
	  ○ **For Memo Numbers (FICR records only):** "Automatically Dispositioned due to Supplemental Memo being issued."
	  ○ **For DCAA Audit Report Numbers (all Report Codes):** "Automatically Dispositioned due to Supplemental Audit being issued."

- Creates a new entry in the ‘History tab’ on the original record and any related SubRecords indicating the record was automatically closed.
- Updates the record ‘Pipeline Position’ to "Forwarded."
- **For FICR records only:** Closes any related SubRecords (if not already closed).
- **For FICR records only:** Populates the 'Direct Cost SubRecord Sustained Amount' field to $0.

Exception Handling

If the record is already closed, no changes are made.

Audit Determined Rates Memo Utility Updates

An AT-AT auto-disposition utility runs every 5 minutes, processing new memo records that are either manually created with "Audit Determined Rates" selected in the 'ACO or Audit Determined Rates' field or uploaded using the 'Upload Flat File' option with "D" in the 'Audit Determined' column. This utility targets memos that have a ‘Report Code’ of “G - Incurred Costs and Settlement of Final Indirect Cost Rates” (FICR).

Auto-Disposition Process

- Records located through this matching process are automatically closed, and the system updates the following:
- Populates the 'All CO Actions Completed' field to "Yes."
- Populates the 'Actual Resolution Date', 'Actual Disposition Date', 'Document Forward Date', and 'Record Closed Date' (if not already populated) fields to the date the record was closed.
- Populates the 'Qualifications' field to "No."
- Populates the 'Memo Type' field to "Low Risk Memo."
- Populates the 'CO FICR Memo Action' field to "No CO Action Required."
- Adds a remark stating: "Auto Dispositioned due to DCAA Memo coming with signed indirect rate agreement and no ACO action needed."
- Creates a new entry in the ‘History Tab’ on the original record indicating the record was automatically closed.
- Updates the record ‘Pipeline Position’ to "Forwarded."

Exception Handling

If the record is already closed, no changes are made.

Manual Record Create

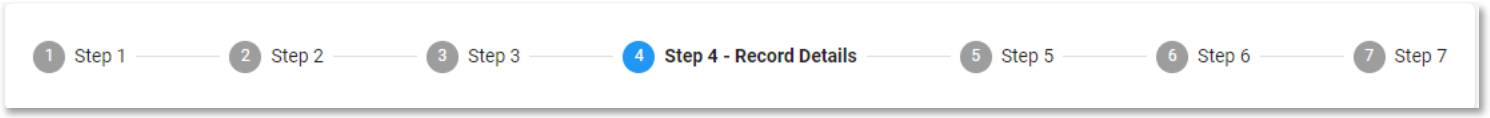
Record Header

The AT-AT Create Steps display at the top of the page that provide a visualization of the Record Create workflow.

Continue to the first step of the Create process via the **Contractor Search**.

Create Header Tabs

- Step 1 – Contractor Search
- Step 2 – Select Contractor
- Step 3 – Record Type Selection
- Step 4 – Record Details
- BusSys (Displays if “B - Business Systems” is selected in the ‘Report Code’ field)
- CAS and DS Records (Displays if “E - CAS and DS” is selected in the ‘Report Code’ field)
- FICR (Displays if “G - Incurred Costs and Settlement of Final Indirect Cost Rates” is selected in the ‘Report Code’ field)
- Step 5 – Record to Contracting Officer
- Step 6 – Record Submit



Step 1 - Contractor Search

When creating a record, a contractor is selected to create the record against.

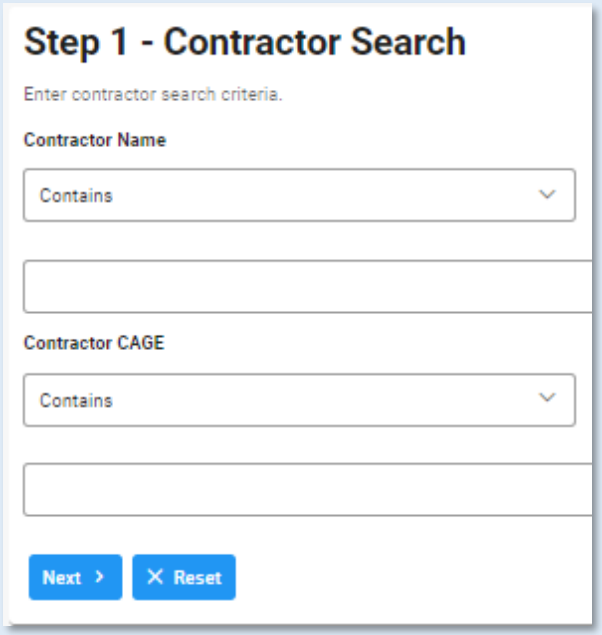
Enter the **Contractor** search criteria and click the **Next** button. The search results display on the following page.

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 Create process to Step 3 – Record Type Selection. **Select Contractor** • Contractor Name • CAGE • UEI
Step 3 – Record Type Selection	Select the Contractor and the Record Type Selection page displays and allows for data entry in the fields listed below. Not all fields display; changing the answers may change the displayed fields. This section determines the majority of the Record data and changes the displayed steps, depending on the selected answers.

	Fill out the applicable fields and select the **Next** button to continue to Step 4 – Record Details. **Contractor Profile** (***Section populates based on the selected contractor***) • Contractor Name • CAGE Code • UEI • City • State **Record Type** • Agency/Organization Issuing Report * • Report Type * • Report Code * (***Field displays if "E - CAS and DS" is selected in the 'Report Code' field***) ○ Type of CAS Record * • Action Type * (***Auto-populated based off the Report Type and Report Code. Field is read only***) (Region/HQ Monitors are able to edit this field)) (***Field displays if any Report Code is selected, except for E – CAS and DS***) ○ Reason Code (***Fields display when "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field***) ○ DCAA Audit Report Number * (***NOTE: When entering a 'DCAA Audit Report Number' with an "S#" (indicating it's a supplemental record) then the original record, proceeding supplemental records, and their subrecords will be automatically closed when this record is created***) ○ Audit Opinion * (***Field displays if "Memo" is selected in the 'Report Type' field***) ○ Memo Number * (***NOTE: When entering a 'Memo Number' with an "S#" (indicating it's a supplemental record), then the original record, proceeding supplemental records, and their subrecords will be automatically closed when this record is created***) *NOTE: When the 'Report Code' is "G - Incurred Costs and Settlement of Final Indirect Cost Rates," the 'Memo Number' field can include optional additional characters:* • *For "DCAA" or "Third Party" selected in the 'Agency/Organization Issuing Report' field: If adding characters, exactly two alphanumeric characters must be provided (not one).* • *For all other agency/organization selections: Either one or two alphanumeric characters may be added.*
Step 4 – Record Details	Complete the fields in the Record Type Selection page and select the "**Next**" button. The Record Details page displays and allows for data entry in the fields below. Not all fields display; changing the answers may change the displayed fields.

Fill out the applicable fields and select the **Next** button to continue to Step 5 – Record to Contracting Officer, B - Business System Audits/Reports, E - CAS and DS Records, or G - Incurred Costs and Settlement of Final Indirect Cost Rates.

Record Issuer Point of Contact Information

(*Field answers are based on the person and agency issuing the report*)

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

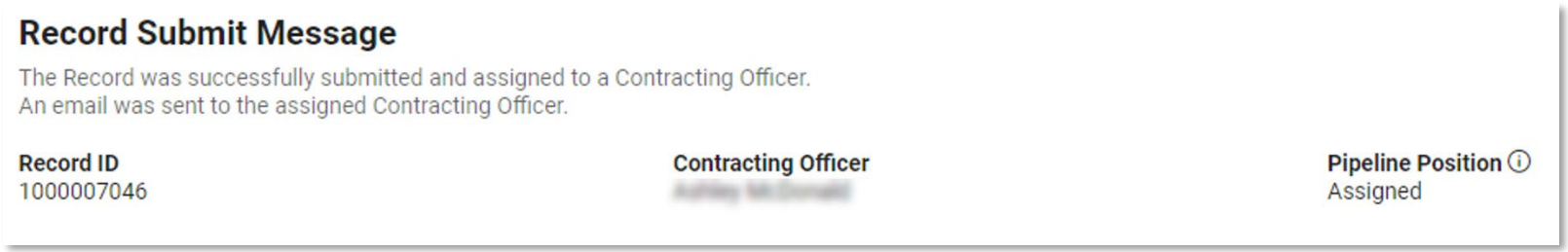
Record Details

- Action/Report Title
  (*Field displays if the DCAA Audit Report Number entered in the Record Type section ends in "S#" (# can be any number from 1-9)*)
  - Original Audit Report Date *
  (*Field displays if "DCAA Audit Report Number" is not displayed*)
  - Report Number *
- Date Report Received (** Mandatory when "E – CAS and DS", "B – Business Systems", "H – Pre-Award Contract", or "K – Earned VM System" is selected for 'Report Code'*)
- Report Date *
  (*Fields display when 'Report Date' is entered, unless the Report Code is B, K, or H in which case the field displays if the 'Date Report Received' is entered*) (*Answer auto populates based off the Report Date entered*)
  - Target Resolution Date (*Calculated 6-months from the Report Date entered*) (*Field is read only and can only be edited by Region/HQ or AT-AT Monitor*)
  - Target Disposition Date (*Calculated one year from the Report Date entered*) (*Field is read only and can only be edited by Region/HQ or AT-AT Monitor*)
  (*Field displays if 'Report Date' is entered, unless the Report Code is B, K, or H in which case the field displays if the 'Date Report Received' is entered*)
  - Actual Resolution Date
  (*Field displays if "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field in the Record Type section)* (*Field auto-calculates based off of the "Date Report Received" field*)
  - Status
- Questioned Costs (*options: Yes / No*)
  (*Field displays if "Yes" is selected in the 'Questioned Costs' field*)
  - Total Questioned Costs
- Updated Total Questioned Costs
  (*Field displays if "G – Incurred Costs and Settlement of Final Indirect Cost Rates" is selected in the 'Report Code' field in the Record Type section*)

	○ Questioned Costs Subject to Penalty? (*options: Yes / No*) (*Field displays if "Yes" is selected in the 'Questioned Costs Subject to Penalty?' field*) ▪ Questioned Costs Subject to Penalty Amount • Unresolved Costs (*options: Yes / No*) (*Field displays if "Yes" is selected in the 'Unresolved Costs' field*) ○ Amount of Unresolved Costs • Qualifications * (*options: Yes / No*) • Remarks *NOTE: Additional information on the Record Details is available at the end of the training document.*
Report Codes: Unique Fields	If you select Report Code B, E, or G, additional sections will be added in between Step - 4 and Step - 5. Otherwise, continue to Step - 5. During the Create process, only one of these additional sections are relevant. Otherwise, if a different report code is selected, none of those sections are relevant. Fill out the applicable fields and select the **Next** button to move to the following step. The following sections in the training document are not relevant, continue to Step 5. **Report Codes that Populate Additional Fields** • B – Business System Audits/Reports • E – CAS and DS • G - Incurred Costs and Settlement of Final Indirect Cost Rates
Business System Audits/Reports	If "B - Business Systems Audits/Reports" is selected in the 'Report Code' field, the BusSys Record Details screen displays and allows for data entry for the fields below. **Type of CBS** (Contractor Business System) • Type of CBS * (*options: Accounting System / Estimating System / Material Management Account System / Property System / Purchasing System*)
CAS and DS Records	If "E – CAS and DS Records" is selected in the 'Report Code' field, the CAS Record Details screen displays and allows for data entry for the fields below. Fill out the applicable fields and select the **Next** button to move to the following step. The following section in the training document are not relevant, continue to Step 5.

	CAS Record Details (*Fields display when "Revised Disclosure Statement" is selected in the 'Type of CAS Record' field*) • Disclosure Statement Revision Number *
Incurred Costs and Settlement of Final Indirect Cost Rates	If "G – Incurred Costs and Settlement of Final Indirect Cost Rates" is selected in the 'Report Code' field, the FICR Record Details screen displays and allows for data entry for the fields below. Fill out the applicable fields and select the **Next** button to move to the following step. **FICR Record Details** (*Field displays if a non-zero amount is entered in the Total Questioned Costs or Updated Total Questioned Costs field*) • Amount of Questioned Direct Costs (*Field displays if a non-zero amount is entered in the Total Questioned Costs or Updated Total Questioned Costs field*) • Amount of Questioned Indirect Costs • Memo Type

Step 5 – Record to Contracting Officer	The Record Details page displays and allows for the data entry of the fields below. Not all fields display; changing the answers may change the displayed fields.
	
	Fill out the applicable fields and select the **Next** button to move to the following step.
	
	Record to Contracting Officer
	
	(*Field answers are based on the Record Creator's information*)
	• Assigner Name
	• Assigner Email
	
	Contracting Officer Search
	
	• Lookup Contracting Officer * (*Record Creator must denote the Contracting Officer the record will be assigned to*)
	  ○ Contracting Officer Name (First Name Last Name): Email (*Enter the applicable CO's information*) (*NOTE: The field uses the "Contains" parameter for searching*)
	  ○ Buttons
	  ▪ Save
	  ▪ Cancel

	Contracting Officer Information (*Field answers display based on the Contracting Officer selected*) • Contracting Officer Name • Contracting Officer Email • Contracting Officer Phone • Contracting Officer DoDAAC • Contracting Office *Additional Fields* • Assignment Comments *
Step 6 - Record Submit	Successfully **Submitting** a AT-AT 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 Contracting Officer**. An email is sent to the selected Contracting Officer, informing them of the record creation. **Information provided on the Success Screen** • Record ID • DCAA Audit Report Number (*Field displays if "DCAA" or "Third Party" is selected in the 'Agency/Organization Issuing Report' field*) • Report Number (*Field displays if DCAA Audit Number does not*) • Contracting Officer • Pipeline Position 
Additional Information	

Dropdown Fields/Lists	**Record Type**
	
	• Agency/Organization Issuing Report
	  ○ DCMA
	  ○ DCAA
	  ○ Host Nation
	  ○ Third Party
	  ○ Other
	• Report Type
	  ○ Audit
	  ○ Report
	  ○ Memo
	  ○ DCMA Other (*Option displays if "DCMA" is selected in the 'Agency/Organization Issuing Report' field*)
	  ○ Other
	• Report Class
	  ○ Reportable
	  ○ Non-Reportable
	• Report Code
	  ○ B - Business System Reports
	  ○ C - Claims and Equitable Adjustments
	  ○ D - Post Award Audits
	  ○ E - CAS and DS Audits
	  ○ F - Operation Audits and Operations Audits Follow-Up
	  ○ G - Incurred Costs and Settlement of Final Indirect Cost Rates
	  ○ H - Pre-Award Contract Audits
	  ○ I – Other
	  ○ J – Terminations
	  ○ K - Earned VM System Audits
	• Type of CAS Record (*Field displays if "E – CAS and DS" is selected in the 'Report Code' field*)
	  ○ Initial Disclosure Statement
	  ○ Revised Disclosure Statement
	  ○ CAS Noncompliance
	  ○ CAS Standard
	  ○ Cost Impact
	• Action Type
	  ○ CAS (*Option should only be selected if "E – CAS and DS" is selected in the 'Report Code' field*)
	  ○ CBS (*Option should only be selected if "B – Business System Reports" is selected in the 'Report Code' field*)
	  ○ FICR (*Option should only be selected if "G – Incurred Costs and Settlement of Final Indirect Cost Rates" is selected in the 'Report Code' field*)
	  ○ SubRecord
	  ○ Form 1

	○ Terminations (*Option should only be selected if "J – Terminations" is selected in the 'Report Code' field*) ○ Other (*i.e., Defective Pricing, External Restructuring, etc*) • Audit Opinion ○ Qualified ○ Unqualified ○ Disclaimed ○ Adverse ○ Not Applicable ○ Acceptable (*Option displays if "B – Business System Reports" or "K – Earned VM System Audits" are selected in the 'Report Code' field*) ○ Not Acceptable (*Option displays if "B – Business System Reports" or "K – Earned VM System Audits" are selected in the 'Report Code' field*) ○ Other **Record Details** • The "Status" will reflect "OA" (Over Age) when: ○ The "Target Resolution Date" has been missed (>-24:00 hours than today's 00:00 GMT); until the "Actual Resolution Date" is populated, OR ○ 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. • The "Status" will reflect "OA 6" (Over Age Six Months) when the "Target Disposition Date" is missed by more than six months, until ○ "Disposition Date" is populated, OR ○ "Yes" is selected in the "All CO Actions Complete" data field. • The "Status" will reflect "OA 12" (Over Age Twelve Months) when the "Target Disposition Date" is missed by more than twelve months, until ○ "Disposition Date" is populated, OR ○ "Yes" is selected in the "All CO Actions Complete" data field. • The "Status" will reflect "OA 18" (Over Age Eighteen Months) when the "Target Disposition Date" is missed by more than eighteen months, until ○ "Disposition Date" is populated, OR ○ "Yes" is selected in the "All CO Actions Complete" data field. • 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 ○ "Disposition Date" is populated, OR ○ "Yes" is selected in the "All CO Actions Complete" data field.
Additional Field Information	*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 for 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.

Supplemental Record Info

When entering a 'DCAA Audit Report Number' with an "S#" (indicating it's a supplemental record) then the original record, proceeding supplemental records, and their subrecords will be automatically closed when this record is created.

AND the Actual Resolution Date (if not already populated), Actual Disposition Date (if not already populated), Document Forward Date (if not already populated), and Record Closed Date will be populated with the same date the supplemental record was created.

AND the Questioned Costs Sustained field will automatically be $0 (if there's an amount in this field prior to closing, overwrite it with $0).

	AND the Direct Cost SubRecord Sustained Amount will automatically be $0 (SubRecords) (if there's an amount in this field prior to closing, overwrite it with $0). AND any related SubRecords will be Closed (if not already). AND a remark will be added to the original record (and any related SubRecords) at the beginning of the Remarks Section stating, "Automatically Dispositioned due to Supplemental Audit being issued" (if we cannot pin the remark to the top of the section, the alternative requested is that we overwrite the remarks and add the aforementioned statement). AND the history tab on the original record (and any related SubRecords) needs to indicate record was automatically closed. AND if the record is already Closed, no change will be made.