Form 1 Record Review – DCMA Reviewer

Reference Guide

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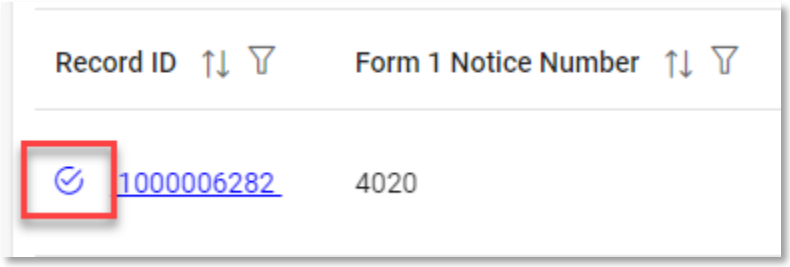
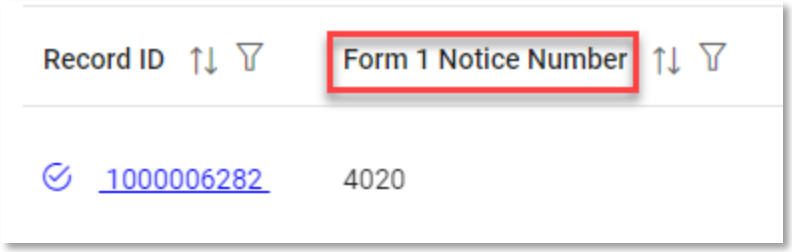
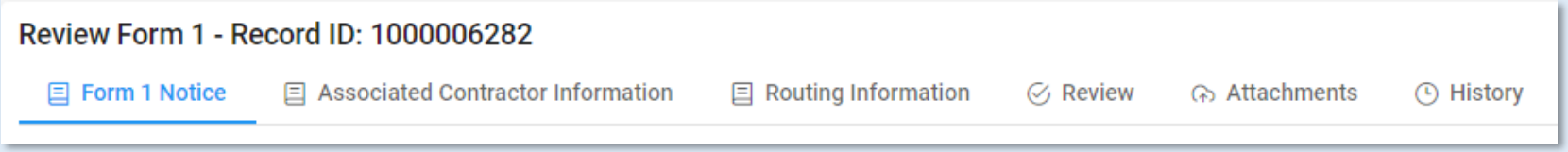
Roles	The role(s) required to **Review** a DCMA NIDC (Form 1) Record: • AT-AT DCMA Reviewer
Reviewing a AT-AT Form 1 Record	This guide provides an overview of how a AT-AT DCMA Reviewer **Reviews** a **DCMA NIDC Record** that was submitted to them for review by the DCMA Contracting Officer in the **Audit 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 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 – DCMA Reviewers** have access to the "My Work" tabe on the dashboard; sort the column by Form 1 Notice Number to help filter the assigned records.  For **AT-AT – DCMA Reviewers** looking for a NIDC Record, use the Search Functionality. To review as a **DCMA 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 NIDC 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 NIDC 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 NIDC record 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 an NIDC 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

- Disbursing Office

Section Name: Items and Costs

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

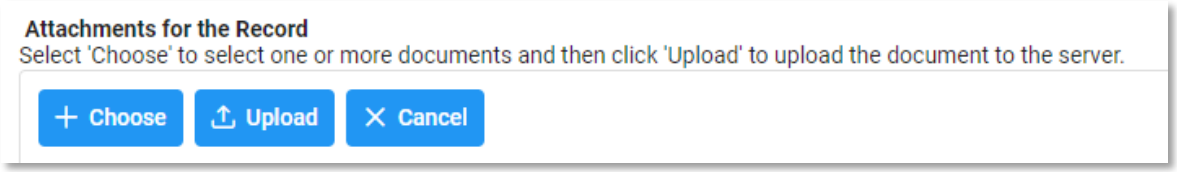
	Remarks • Remarks (***One field across all tabs***) **Moving On** Click the **Submit** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.
Associated Contractor Information Tab	The Associated Contractor Information screen displays and information for the NIDC 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. **Contractor Profile** • Contractor Name • CAGE Code • DUNS • UEI • City • State • Cognizant CMO DoDAAC • Cognizant CMO *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 • DUNS • UEI • Cognizant CMO DoDAAC • Cognizant CMO *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** button if all data has been entered. Otherwise, continue on by selecting the appropriate tab located in the record header.

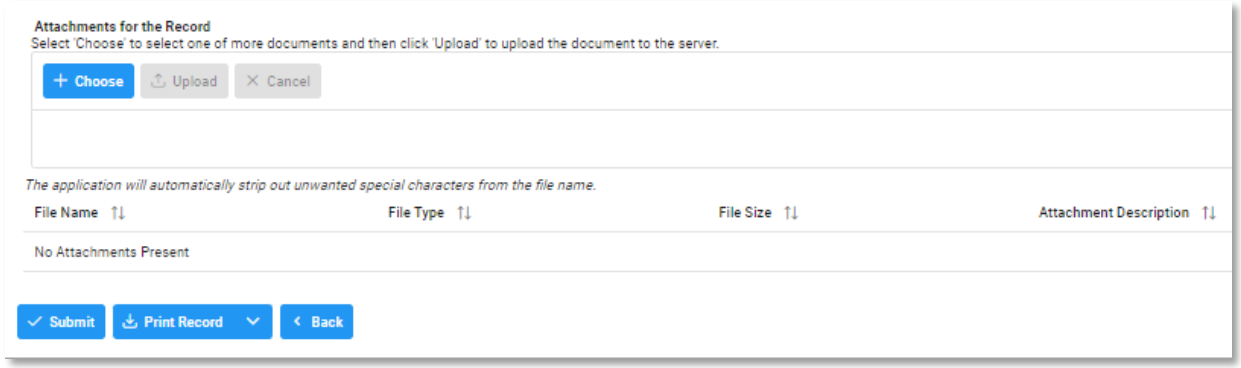
Routing Information Tab	The Routing Information screen displays and information for the NIDC Record Review is entered below. All tabs are accessible throughout the review process and not all fields display; changing the answers may change the displayed fields.
	
	Routing Users Information
	
	Section Name: DCMA Reviewer
	
	• Lookup DCMA Reviewer
	  ○ User Email *
	  ○ User Name * (***(First Name Last Name): Phone Number***)

	Section Name: DCMA Region HQ Monitor
	
	• Is Region/HQ Monitor Review Required? (***options: Off / On***)
	• DCMA Region HQ Monitor Organizational Group
	  ○ Find Group
	  ▪ DCMA Region HQ Monitor Find Organizational Group by Group Name
	  ▪ DCMA Region Monitor PIEE Level 2
	
	Section Name: Current 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.

Review Tab	The Review Record screen displays and information for all the NIDC 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 / Release to CO***) *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.

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



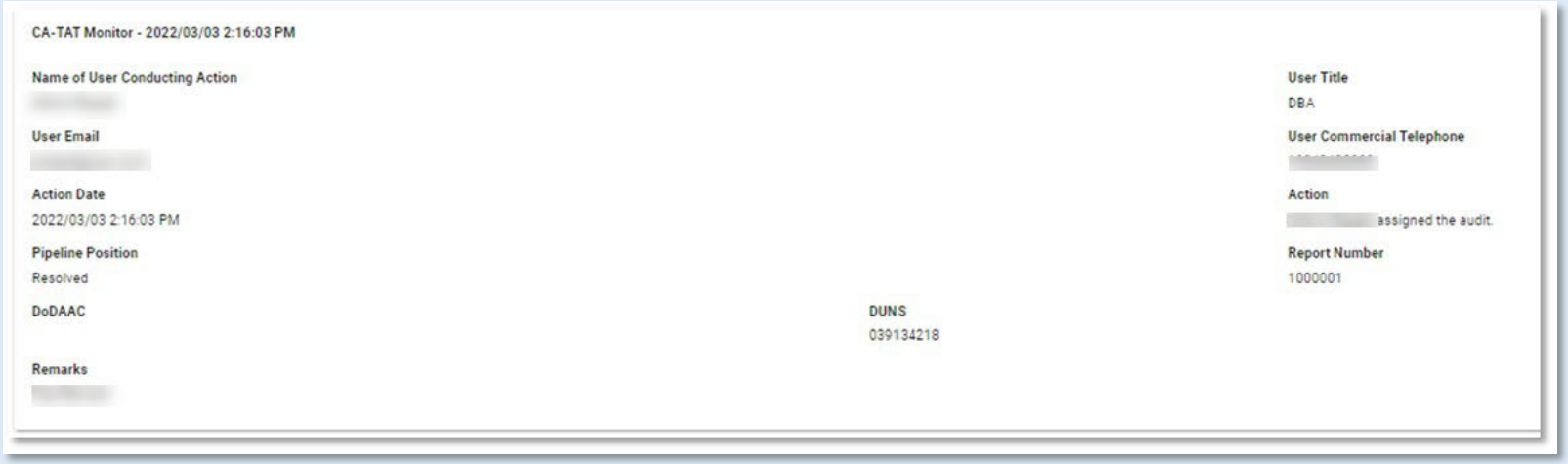
Once the user is finished uploading attachments within the Attachments tab, they may either submit Approval or Rejection for the record by selecting one of the buttons at the bottom of the page or move back to any of the previous pages by selecting the tab; refer to the Record Review tabs located within 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
- DUNS
- UEI
- Remarks
- Modifications



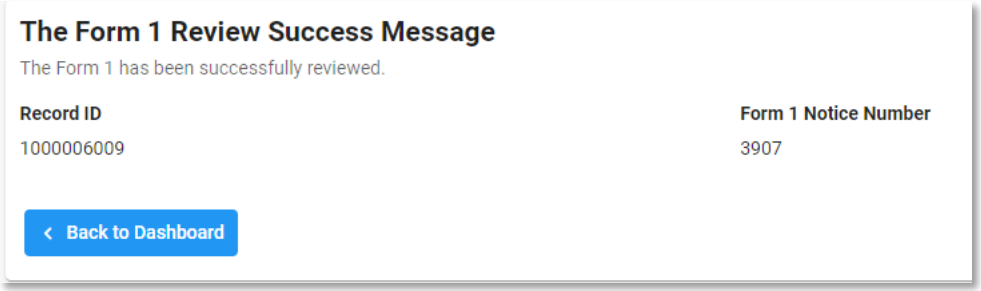
Once the user is finished within the History tab, they may either submit the record by selecting the “Submit” button at the bottom of the page or move back to any of the previous pages by selecting the tab.

Submit Approval of Form 1 Review

Selecting the ‘**Submit Approval for Form 1 Review’**, successfully, displays a success screen with the record information, useful for locating the record later. The DCMA Reviewer may send the Form 1 to a DCMA Regions/HQ Monitor for an additional optional review. Once approved, the DCMA Reviewer must print the NIDC. The Form 1 Review is then assigned to the DCMA Contracting Officer.

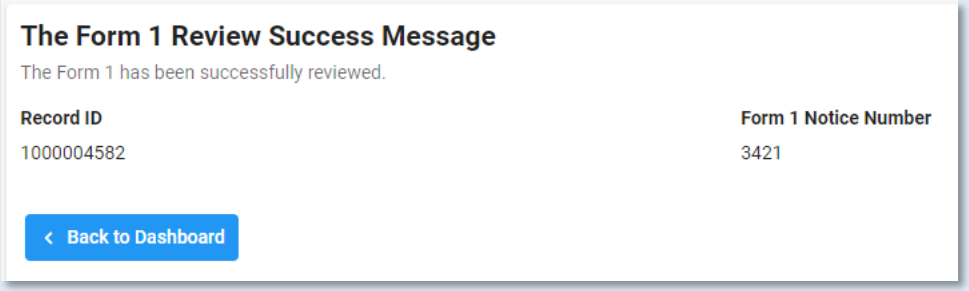
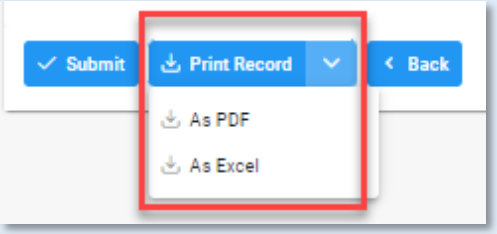
Information provided on the Success Screen:

- Record ID
- Form 1 Notice Number



Submit Rejection of

Selecting the ‘**Submit Rejection for Form 1 Review’**, successfully, displays a success screen with the record informaiton, useful for locating the record later. The rejected the Form 1 Record is then sent back to the Contracting Officer that created the record.

Form 1 Review	**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.