

# Create and Edit Non-Audit CAS Records

## Reference Guide

Homepage

AT-AT

Create CAS Record

OR

Dashboard / Search for CAS Record

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## Overview of Creating/Editing a CAS Record

This guide provides an overview of how to create and edit a Non-audit CAS (Cost Accounting Standard) Record within AT-AT.

The Non-audit CAS Record may be [Created](#) by:

- AT-AT – Monitor
- AT-AT – Contracting Officer
- AT-AT – Region/HQ Monitor

The CAS Record is assigned to an AT-AT – Contracting Officer during the create process. The CAS Record may be reassigned to another AT-AT – CO after creating the record.

The roles that may [Edit](#) the CAS Record and is managed by [span of control](#):

- AT-AT – Monitor
- AT-AT – Contracting Officer
- AT-AT – Region/HQ Monitor

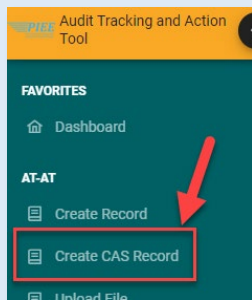
*NOTE: “Span of Control” - is the ability to view or create/edit content inside the PIEE Suite. The span of control is evaluated based on the user’s role’s registered Location Code/Group following the hierarchy.*

## Creating a CAS Record

### Navigation Menu Option

#### Create

Click the **Create CAS Record** option in the AT-AT navigation menu to begin.



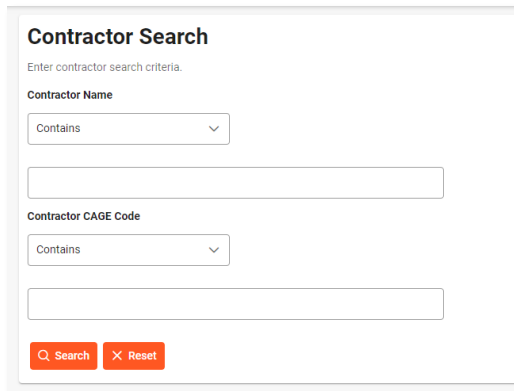
Search for the Contractor being evaluated for cost accounting standards.

## Page Name: Contractor Search

Enter Contractor search criteria.

### Fields:

- Contractor Name (*parameters: Contains / Equal To / Starts With*)
- Contractor CAGE Code (*parameters: Contains / Equal To / Starts With*)



The screenshot shows a web form titled "Contractor Search". Below the title is the instruction "Enter contractor search criteria." The form has two main sections. The first section is for "Contractor Name", featuring a dropdown menu with "Contains" selected and an empty text input field below it. The second section is for "Contractor CAGE Code", also featuring a dropdown menu with "Contains" selected and an empty text input field below it. At the bottom of the form are two buttons: a red "Search" button with a magnifying glass icon and a red "Reset" button with an "X" icon.

### Buttons:

- Search
- Reset

## Contractor Search

---

## Page Name: Select Contractor

Choose a contractor from the search results.

### Columns:

- Contractor Name (*hyperlink – click to begin the create process*)
- Contractor CAGE Code
- DUNS ([Legacy field](#))
- UEI

- Cognizant CMO DoDAAC
- Cognizant CMO

*NOTE: DUNS – is no longer maintained in the DoD and data may not be present in this column for all companies.*

**Select Contractor**

Choose a contractor from the search results.

Contractor Name	Contractor CAGE Code	DUNS	UEI	Cognizant CMO DoDAAC	Cognizant CMO
<a href="#">FLUOR DRIVER INC</a>	L0Q01	203445366	E9EYCUU8HWK9	SCN01A	DCMA AMERICAS
<a href="#">FLUOR FEDERAL SOLUTIONS, LLC</a>	1NW16	080599668	GALAGAQ4N4H5	S2404A	DCMA MANASSAS
<a href="#">FLUOR FEDERAL PETROLEUM OPERATIONS, LLC</a>	6RT19	078490442	KJDUB6XQDTN4	S4402A	DCMA DALLAS
<a href="#">FLUOR INTERCONTINENTAL GERMANY GMBH</a>	CL433	313770452	KKF6YE2ZFPY1	SGR18A	DCMA EUROPE
<a href="#">FLUOR INTERCONTINENTAL GERMANY GMBH</a>	CL433	313770452	KKF6YE2ZFPY1	S3605A	DCMA DAYTON
<a href="#">FLUOR AMEC II, LLC</a>	76ZJ5	079498584	KEKNU6BHHKW9	S1103A	DCMA ATLANTA

Records: 1 to 24

<< < 1 > >> 50

24 Records Returned

Click the Contractor Name hyperlink to begin the Create CAS Record process.

## Page Name: CAS Record – Create

The CAS Record Create screen displays with three tabs that are always visible:

- Create
- Litigation
- CAS Record Closure

### Create Tab / Record Details

CAS Record ID: CAS1000003760

**CAS Record - Create**

Create  Litigation  CAS Record Closure

Contractor

Depending on user's response in the 'Type of CAS Record' field located on the Create tab, one of the following new tabs will display:

- Initial Disclosure Statement
- Revised Disclosure Statement
- CAS Noncompliance

Two additional tabs may display depending on responses in the CAS Noncompliance or Revised Disclosure Statement tabs (see [Revised Disclosure Statement](#) and [CAS Noncompliance](#) sections below). Those tabs are:

- Cost Impact
- Desirable Changes

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*Header Info:*

- CAS Record ID

*NOTE: CAS Record ID will be populated once Contractor is selected*

*Section Name: Contractor:*

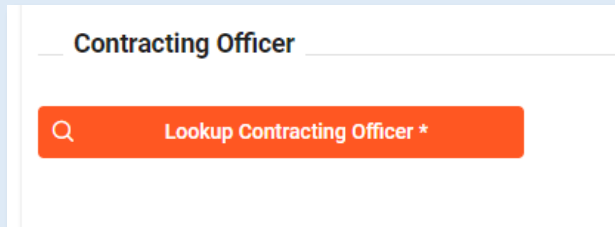
- Name
- CAGE Code
- DUNS ([Legacy field](#))
- UEI

<b>Contractor</b>			
<b>Name</b>	<b>CAGE Code</b>	<b>DUNS</b>	<b>UEI</b>
FLUOR FEDERAL SOLUTIONS, LLC	1NW16	080599668	GALAGAQ4N4H5
<b>Contracting Officer</b>			

*Section Name: Contracting Officer:*

*Buttons:*

- Lookup Contracting Officer



*Page Name: Select a Contracting Officer*

A pop-up displays after clicking the Lookup Contracting officer button.

Contracting Officer Name (First Name Last Name) : Email (*NOTE: The field uses the "Contains" parameter for searching*)

Select a Contracting Officer from the drop-down and click the Save button.

*Fields:*

- Name
- Email
- Phone Number
- DoDAAC
- Cognizant DCMA/Other Contracting Office
- Supervisor Name
- Supervisor Email



### Contracting Officer

🔍 Lookup Contracting Officer \*

<b>Name</b> Don Duck	<b>Email</b> dduck@dla.com	<b>Phone Number</b> 9045000000	<b>DoDAAC</b> S0512A
<b>Cognizant DCMA/Other Contracting Office</b> DCMA LOS ANGELES	<b>Supervisor Name</b> Demo Super	<b>Supervisor Email</b> dduck@dla.com	

### Section Name: Record Details:

- Type of CAS Record

#### Record Details

Type of CAS Record\*

Select ▼

(*Shown if the Type of CAS Record is "Initial Disclosure Statement" or "Revised Disclosure Statement".*)



- Disclosure Statement Title (*NOTE: Mouseover hover hint if Revised Disclosure Statement: "Contractor Name DS Revision No X"*)
- Disclosure Statement Submission Date
- Effective Date of Disclosure Statement

**Type of CAS Record\***

Initial Disclosure Statement ▾

---

Disclosure Statement Title      Disclosure Statement Submission Date      Effective Date of Disclosure Statement\*



OR

**Type of CAS Record\***

Revised Disclosure Statem... ▾

---

Disclosure Statement Title      Disclosure Statement Submission Date      Effective Date of Disclosure Statement\*

            2023/09/19 

*(Shown if the Type of CAS Record is "CAS Noncompliance".)*

- CAS Standard Number
- Date Noncompliance Identified
- Period of Noncompliance Start Date

Type of CAS Record\*

CAS Noncompliance

CAS Standard Number\*      Date Noncompliance Identified      Period of Noncompliance Start Date

(Section always displays)

- Estimated Accrual/Notice Date (*Cannot be a Future Date*)
- [Estimated SOL Date](#) (*Auto calculated 6 years from the Estimated Accrual/Notice Date. More information available at the end of this guide.*)
- Date CO and Legal Coordinated on Estimated Accrual/SOL Date
- [CAS Priority Level](#) (*Auto calculated based upon the Estimated SOL Date compared to the current system date. More information available at the end of this guide.*)

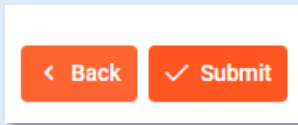
Estimated Accrual/Notice Date\*      Estimated SOL Date      Date CO and Legal Coordinated on Estimated Accrual/SOL Date      CAS Priority Level

Remarks field allows users to enter comments.

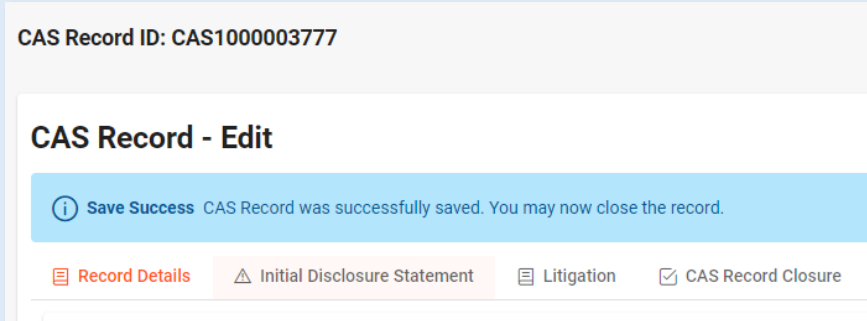
Remarks

Buttons:

- Submit
- Back



After – Create tab becomes CAS Record Details upon successful saved/submission.



The record remains open and Create tab is renamed to Record Details. The CAS Record is now in Edit.

### Post Create

Users creating a record may stop here or continue to the next sections for edit training.

## Editing a CAS Record

### Dashboard

#### Locate a CAS Record

#### Table Name: My Work (CAS)

The **Dashboard** is the default landing page for AT-AT users. The AT-AT Dashboard gives users access to their saved work. Users can access different records available for reviewing, editing, or viewing. The CAS Record Dashboard displays records assigned to the **AT-AT - Contracting Officers**.

Open CAS Records on the Dashboard by clicking the **CAS Record** ID hyperlink. The CAS Record will be read-only by default; click the Edit button to make changes.

**Columns:**

- CAS Record ID
- CAS Priority Level
- Contractor CAGE Code
- Contractor Name
- Type of CAS Record
- Disclosure Statement Title
- CAS Standard Number
- Record Status (*options: Open/Closed*)

**NOTE:** The columns are sortable and filterable.

My Work (CAS) Reset Filter

CAS Record ID	CAS Priority Level	Contractor CAGE Code	Contractor Name	Type of CAS Record	Disclosure Statement Title	CAS Standard Number	Record Closure Status
<a href="#">CAS1000003312</a>	5	06481	NORTHROP GRUMMAN SYSTEMS CORPORATION	Initial Disclosure Statement	153654		Open
<a href="#">CAS1000003777</a>	5	1NW16	FLUOR FEDERAL SOLUTIONS, LLC	Initial Disclosure Statement			Open

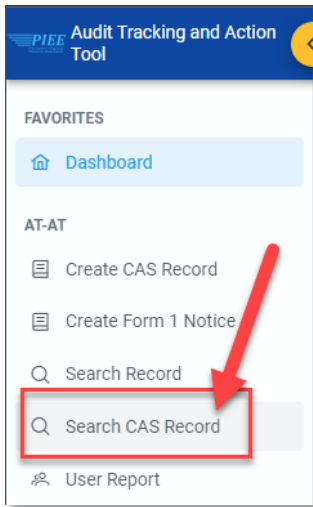
Records: 1 to 2 2 Total Records Returned

**OR**

**Navigation Menu  
Option**

**Locate a CAS Record  
Search**

Click the Search CAS Record option in the navigation menu.



## Page Name: Search CAS Record

### Search Criteria:

- CAS Record ID (*parameters: Contains / Starts With / Equal To*)
- Contractor CAGE Code (*parameters: Contains / Starts With / Equal To*)
- Contractor Name (*parameters: Contains / Starts With / Equal To*)
- Contracting Officer DoDAAC (*parameters: Contains / Starts With / Equal To*)
- Contracting Officer Name (*parameters: Contains / Starts With / Equal To*)
- Contracting Officer's Supervisor Name (*parameters: Contains / Starts With / Equal To*)
- Type of CAS Record (*options: Initial Disclosure Statement / Revised Disclosure Statement / and CAS Noncompliance*)
- CAS Priority Level (*options: Select / 1 / 2 / 3 / 4 / 5 - "Select" will return all records*)
- In Litigation (*options: Yes or No*)
- Record Closure Status (*options: Open or Closed*)

### Buttons:

- Search
- Reset

## Search CAS Record

Enter CAS record search criteria.

<b>CAS Record ID</b> Contains <input type="text"/>	<b>Contractor CAGE Code</b> Contains <input type="text"/>	<b>Contractor Name</b> Contains <input type="text"/>	
<b>Contracting Officer DoDAAC</b> Contains <input type="text"/>	<b>Contracting Officer Name</b> Contains <input type="text"/>	<b>Contracting Officer's Supervisor Name</b> Contains <input type="text"/>	
<b>Type of CAS Record</b> Select <input type="text"/>	<b>CAS Priority Level</b> Select <input type="text"/>	<b>In Litigation</b> Select <input type="text"/>	<b>Record Closure Status</b> Select <input type="text"/>

**NOTE:** At least one search criterion is required to perform a search.

After entering the search criteria, click the Search button.

---

Search Results display below the Search Criteria and allow new searches without leaving the page. Users can find the records quickly and easily.

Locate the record and click the CAS Record ID hyperlink to open the record.

**Table Name: Search Results:**

- CAS Record ID (*Hyperlink to open the record as read-only by default; click the edit button to make changes.*)
- CAS Priority Level
- Type of CAS Record
- Contracting Officer DoDAAC
- Contracting Officer Name
- Contractor CAGE Code
- Contractor Name
- Disclosure Statement
- CAS Standard Number
- In litigation

- Record Closure Status

**Search Results**

Export Results Reset Filter

CAS Record ID	CAS Priority Level	Type of CAS Record	Contracting Officer Dr	Contracting Officer N	Contractor CAGE Cod	Contractor Name	Disclosure Statement	CAS Standard Numbe	In Litigation	Record Closure Statu:
CAS1000003777	5	Initial Disclosure Statement	S0512A	Don Duck	1NW16	FLUOR FEDERAL SOLUTIONS, LLC				Open

Records: 1 to 1

<< < 1 > >> 10

1 Records Returned

*Buttons:*

- Export Results
- Reset Filter

## Exporting Search Results

Click the **Export Results** button to save an excel copy of the current search results.

Sample File Name: AT-AT\_CasRecords\_SearchResult\_20230919\_100432.xlsx

*Exported Columns:*

- CAS Record ID
- CAS Priority Level
- Type of CAS Record
- Contracting Officer DoDAAC
- Contracting Officer Name
- Contractor CAGE Code
- Contractor Name
- Disclosure Statement Title
- CAS Standard Number
- In Litigation
- Record Closure Status



## Search Results

Export Results

Reset Filter

CAS Record ID	CAS Priority Level	Type of CAS Record	Contracting Officer D	Contracting Officer N	Contractor CAGE Cod	Contractor Name	Disclosure Statement	CAS Standard Numbe	In Litigation	Record Closure Statu
<a href="#">CAS1000003777</a>	5	Initial Disclosure Statement	S0512A	Don Duck	1NW16	FLUOR FEDERAL SOLUTIONS, LLC				Open

Records: 1 to 1

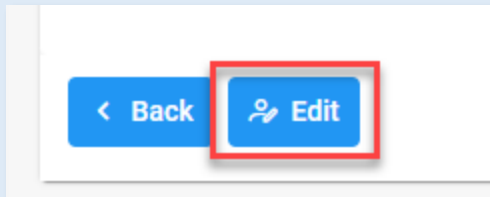
<< < 1 > >> 10

1 Records Returned

After the record opens click the Edit button and begin inserting information.

### Buttons:

- Back
- Edit



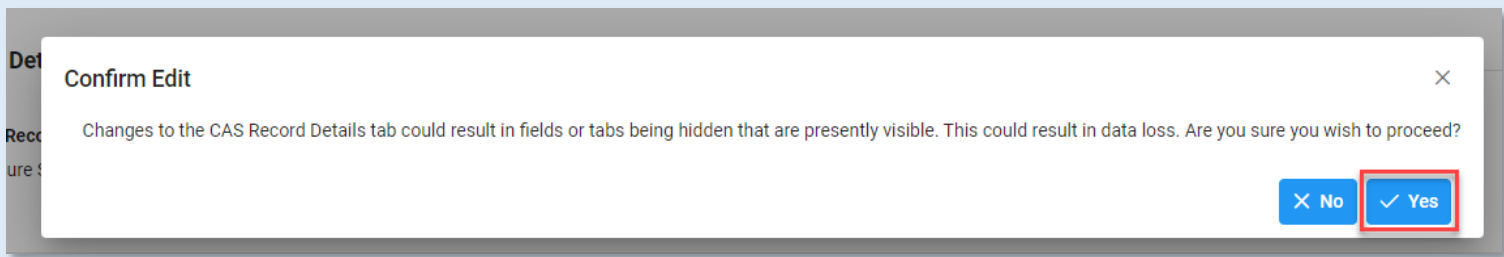
## Enable Editing a Record

### Page Name: Confirm Edit

Changes to the CAS Record Details tab could result in fields or tabs being hidden that are presently visible. This could result in data loss. Are you sure you wish to proceed?

### Buttons:

- No
- Yes



Proceed to the appropriate tab's training.

The Record Details tab may still be edited by users, and changes to the Record Details tab may hide fields or tabs and that data will be lost.

Depending on user's response in the 'Type of CAS Record' field located on the Create tab, one of the following new tabs will display:

- [Initial Disclosure Statement](#)
- [Revised Disclosure Statement](#)
- [CAS Noncompliance](#)

Two additional tabs may display depending on responses in the CAS Noncompliance or Revised Disclosure Statement tabs (see [Revised Disclosure Statement](#) and [CAS Noncompliance](#) sections below). Those tabs are:

- [Cost Impact](#)
- [Desirable Changes](#)

## Type of CAS Record and their Tabs

### Initial Disclosure Statement Tab

Initial Disclosure Statement tab is shown if 'Type of CAS Record' is "Initial Disclosure Statement" on the Create / Record Details tab. If this tab is not displayed continue to the following steps or update the 'Type of CAS Record' field.

### CAS Record - Create

Create
Initial Disclosure Statement
Litigation
CAS Record Closure

---

**Contractor**

Name	CAGE Code	DUNS
FLUOR FEDERAL SOLUTIONS LLC	1NW16	080599668

**Contracting Officer**

---

**Record Details**

Type of CAS Record\*

Initial Disclosure Statement

*Section Name: Initial DS Adequacy:*

- Date of DCAA Adequacy Review Requested
- Date of DCAA Memo on Initial DS Adequacy Issued
- Initial DS Adequacy
- Date Initial DS Determined Adequate (*Shown if Initial DS Adequacy is "Adequate".*)
- Date Initial DS Determined Inadequate (*Shown if Initial DS Adequacy is "Inadequate".*)

**Initial DS Adequacy**

Date of DCAA Adequacy Review Requested	Date of DCAA Memo of Initial DS Adequacy Issued	Initial DS Adequacy	Date Initial DS Determined Adequate
<input type="text"/>	<input type="text"/>	Adequate	<input type="text"/>

OR

Initial DS Adequacy

Date of <u>DCAA</u> Adequacy Review Requested	Date of <u>DCAA</u> Memo of Initial DS Adequacy Issued	Initial <u>DS</u> Adequacy Inadequate	Date Initial <u>DS</u> Determined Inadequate
---	--	--	--

Section Name: Initial DS Compliance:

- Date DCAA Compliance Audit Requested
- Date DCAA Compliance Audit Issued
- [DCAA Audit Report Number](#)
- [Initial DS Compliance](#) (options: Select / Compliant / Noncompliant) (NOTE: When Noncompliant is selected - System will prompt the user to create a new record to track the Noncompliance - starting with the NPNC date OR Audit Report Date if DCAA audit was issued.)
- Date Initial DS Determination Issued

Initial DS Compliance

Date <u>DCAA</u> Compliance Audit Requested	Date <u>DCAA</u> Compliance Audit Issued	<u>DCAA</u> Audit Report Number	Initial <u>DS</u> Compliance Select
---	--	---------------------------------	--

Date Initial DS Determination Issued

Remarks

NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.

Buttons:

- Submit
- Back

Revised Disclosure Statement tab is shown if 'Type of CAS Record' is "Revised Disclosure Statement" on the Create / Record Details tab. If this tab is not displayed continue to the following steps or update the 'Type of CAS Record' field.

## Revised Disclosure Statement Tab

**CAS Record - Create**

Create **Revised Disclosure Statement** Litigation CAS Record Closure

**Contractor**

Name	CAGE Code	DUNS
FLUOR FEDERAL SOLUTIONS, LLC	1NW16	080599668

**Contracting Officer**

---

**Record Details**

Type of CAS Record\*  
Revised Disclosure Statem... ▾

- [Does Revised DS Contain Cost Accounting Practice Changes?](#) (options: Select / Yes / No) (NOTE: When "Yes" is selected the ['Cost Impact Tab'](#) populates)  
(When "No" is selected, system will display a message: "Non-CAP changes (formerly known as Admin Changes) do not require adequacy or compliance. Proceed issuing acknowledgment letter to contractor and input the letter date into field 'Date DS Revision Determination Issued.'")

Record Details **Revised Disclosure Statement**

Does Revised DS Contain Cost Accounting Practice Changes?  
Select ▾

(Shown if "Yes" is selected for Does Revised DS Contain Cost Accounting Practice Change?)

- Type of Cost Accounting Practice Changes (options: Select / Required / Unilateral)
- Number of Cost Accounting Practice Changes
- Contractor Request DS CAP Change Be Deemed Desirable? (options: Select / Yes / No) (NOTE: When "Yes" is selected the ['Desirable Changes Tab'](#) populates)
- DCAA Assistance of Revised DS Requested? (options: Select / Yes / No) (NOTE: When "Yes" is selected more fields display)

Does Revised DS Contain Cost Accounting Practice Changes?  
Yes

Type of Cost Accounting Practice Changes \*      Number of Cost Accounting Practice Changes \*

Select      [ ]

Contractor Request DS CAP Change Be Deemed Desirable? \*      DCAA Assistance of Revised DS Requested?

Select      Select

(Shown if "Yes" is selected for DCAA Assistance of Revised DS Requested?)

- Date DCAA Assistance of Revised DS Requested
- Date DCAA Audit Report Issued (shows if "Audit Report" is selected for Type of DCAA Assistance Provided)
- [DCAA Audit Report Number](#)

Contractor Request DS CAP Change Be Deemed Desirable? \*      DCAA Assistance of Revised DS Requested?



Select      Yes

Date DCAA Assistance of Revised DS Requested \*      DCAA Audit Report Number      Date DCAA Audit Report Issued

[ ]      [ ]      [ ]

(Section always displays)

- Revised DS Adequacy (*options: Select / Adequate / Inadequate*)
- [Revised DS Compliance](#) (*options: Select / Compliant / Noncompliant / Not Applicable (NA)*) (*NOTE: When "Noncompliant" is selected for Revised DS Compliance, system will display a message: "User to create a new record to track the Noncompliance - starting with the NPNC date OR Audit Report Date if DCAA audit was issued."*)
- Date DS Revision Determination Issued

Revised DS Adequacy	Revised DS Compliance	Date DS Revision Determination Issued
Select 	Select 	

*Remarks*

*NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.*

*Buttons:*

- Back
- Submit

**CAS  
Noncompliance  
Tab**

CAS Noncompliance tab is shown if 'Type of CAS Record' is "CAS Noncompliance" on the Create / Record Details tab. If this tab is not displayed continue to the following steps or update the 'Type of CAS Record' field.

### CAS Record - Create

Create
  **CAS Noncompliance**
 Litigation
  CAS Record Closure

**Contractor**

Name	CAGE Code	DUNS
FLUOR FEDERAL SOLUTIONS LLC	1NW16	080599668

**Contracting Office**

---

**Record Details**

Type of CAS Record\*

CAS Noncompliance

(Section auto-populates with information keyed in on Create tab.)

- CAS Standard Number (shows what was entered in the same field on Create / Record Details tab)
- Date Noncompliance Identified (shows what was entered in the same field on Create / Record Details tab)
- Period of Noncompliance Start Date (shows what was entered in the same field on Create / Record Details tab)

CAS Standard Number	Date Noncompliance Identified	Period of Noncompliance Start Date
125	2023/09/05	2023/09/13

(Section always displays)

- [DCAA Audit Report Number](#)
- Contractor Potentially Noncompliant with CAS? (options: Select / Yes / No)



<b>DCAA Audit Report Number</b>	<b>Contractor Potentially Noncompliant with CAS?</b>
34412021N19200003	Select

- Date Disagreement Letter Sent to DCMA (*Shown when "No" is selected for Contractor Potentially Noncompliant with CAS.*)

<b>DCAA Audit Report Number</b>	<b>Contractor Potentially Noncompliant with CAS?</b>
34412021N19200003	No
<b>Date Disagreement Letter Sent to DCAA</b>	
[Calendar Icon]	

(Section is shown when "Yes" is selected for Contractor Potentially Noncompliant with CAS.)

- Notice of Potential Noncompliance (NPNC) Issued Date
- Contractor Response to NPNC Due Date
- Date Contractor Response to NPNC Received
- CO Final CAS Determination (*NOTE: When 'Noncompliant' is selected the 'Cost Impact Tab' populates*)
- Date Compliant Determination Letter Issued (*Shown when "Compliant" is selected for CO Final CAS Determination.*)
- Date Noncompliant Determination Letter Issued (*Shown when "Noncompliant" is selected for CO Final CAS Determination.*)

<b>Notice of Potential Noncompliance (NPNC) Issued Date</b>	<b>Contractor Response to NPNC Due Date</b>	<b>Date Contractor Response to NPNC Received</b>	<b>CO Final CAS Determination</b>
[Calendar Icon]	[Calendar Icon]	[Calendar Icon]	Compliant
<b>Date Compliant Determination Letter Issued</b>			
[Calendar Icon]			

OR

Notice of Potential Noncompliance (NPNC) Issued Date  
Contractor Response to NPNC Due Date  
Date Contractor Response to NPNC Received  
CO Final CAS Determination  
Noncompliant

Date Noncompliant Determination Letter Issued

*Remarks*

*NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.*

*Buttons:*

- Submit
- Back

**Cost Impact Tab**

Cost Impact tab is shown if:

"Yes" is selected for "Does Revised DS Contain Cost Accounting Practice Changes?" on the [Revised Disclosure Statement tab](#).

Record Details > Revised Disclosure Statement > Cost Impact

Does Revised DS Contain Cost Accounting Practice Changes?  
Yes

"Noncompliant" is selected for "CO Final CAS Determination" on the [CAS Noncompliant tab](#).

Record Details [CAS Noncompliance](#) [Cost Impact](#) [Litigation](#) [CAS Record Closure](#)

CAS Standard Number: 125  
 Date Noncompliance Identified: 2023/09/05  
 Period of Noncompliance Start Date: 2023/09/13

DCAA Audit Report Number: 34412021N19200003  
 Contractor Potentially Noncompliant with CAS?: Yes

Notice of Potential Noncompliance (NPNC) Issued Date:   
 Contractor Response to NPNC Due Date:   
 Date Contractor Response to NPNC Received:   
 CO Final CAS Determination: Noncompliant

**Fields:**

- Did Contractor Submit GDM/Cost Impact? (options: Select / Yes / No)

Did Contractor Submit GDM/Cost Impact?

(Section is shown if "Yes" is selected for Did Contractor Submit GDM/Cost Impact?)

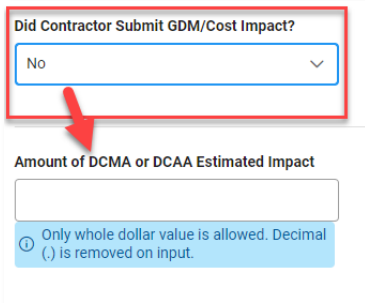
- Date Contractor GDM/Cost Impact Received
- Contractor GDM/Cost Impact Amount

Did Contractor Submit GDM/Cost Impact?

Date Contractor GDM/Cost Impact Received:   
 Contractor GDM/Cost Impact Amount:   
Only whole dollar value is allowed. Decimal (.) is removed on input.

(Section is shown if "No" is selected for Did Contractor Submit GDM/Cost Impact?)

- Amount of DCMA or DCAA Estimated Impact




Did Contractor Submit GDM/Cost Impact?  
No

Amount of DCMA or DCAA Estimated Impact

Only whole dollar value is allowed. Decimal (.) is removed on input.

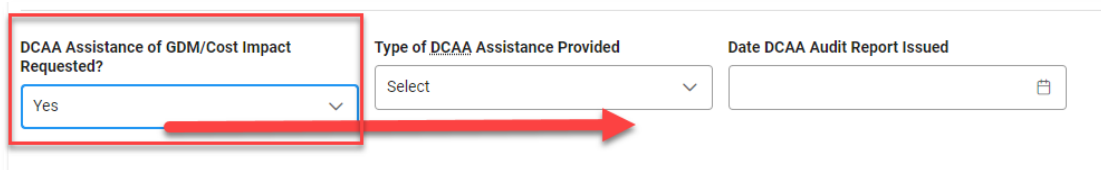
- DCAA Assistance of GDM/Cost Impact Requested? (options: Select / Yes / No)



DCAA Assistance of GDM/Cost Impact Requested?  
Select

(Section is shown if "Yes" is selected for DCAA Assistance of GDM/Cost Impact Requested?)

- Type of DCAA Assistance Provided (options: Select / Audit Report / Other)
- Date of DCAA Audit Report Issued



DCAA Assistance of GDM/Cost Impact Requested?  
Yes

Type of DCAA Assistance Provided  
Select

Date DCAA Audit Report Issued

(Section is shown if "Audit Report" is selected for Type of DCAA Assistance Provided.)

- Date DCAA Assistance of GDM/Cost Impact Requested
- [DCAA Audit Report Number](#)

DCAA Assistance of GDM/Cost Impact Requested?  Yes

Type of DCAA Assistance Provided: Audit Report

Date DCAA Assistance of GDM/Cost Impact Requested \*

Date DCAA Audit Report Issued

DCAA Audit Report Number

- CO Determination (*options: Select / Material / Immaterial*)

CO Determination

Select

- Date of Immaterial Determination (*Shown if CO Determination is "Immaterial".*)

CO Determination: Immaterial

Date of Immaterial Determination

- Negotiated Settlement Reached (*options: Select / Yes / No*) (*Shown if CO Determination is "Material".*)

CO Determination: Material

Negotiated Settlement Reached?: Select

(*Section is shown if "Yes" is selected for Negotiated Settlement Reached.*)

- Settlement Amount of Principal
- Settlement Amount of Compound Interest
- Settlement Total Amount to be Recovered
- Date Demand for Payment Issued

CO Determination

Material **1** ✓

Negotiated Settlement Reached? **2** Yes

Settlement Amount of Principal

Settlement Amount of Compound Interest

Only whole dollar value is allowed. Decimal (.) is removed on input.

Only whole dollar value is allowed. Decimal (.) is removed on input.

Settlement Total Amount to be Recovered

Date Demand for Payment Issued

Only whole dollar value is allowed. Decimal (.) is removed on input.

(Section is shown if "No" is selected for Negotiated Settlement Reached.)

- COFD Amount of Principal
- COFD Amount of Compound Interest
- COFD Total Amount to be Recovered
- Date COFD Issued to Contractor

CO Determination

Material **1** ✓

Negotiated Settlement Reached? **2** No

COFD Amount of Principal

COFD Amount of Compound Interest

Only whole dollar value is allowed. Decimal (.) is removed on input.

Only whole dollar value is allowed. Decimal (.) is removed on input.

COFD Total Amount to be Recovered

Date COFD Issued to Contractor

Only whole dollar value is allowed. Decimal (.) is removed on input.

### Remarks

NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.

### Buttons:

- Submit
- Back

## Desirable Change Tab

Desirable Change tab is shown if "Yes" is selected for 'Contractor Request DS CAP Change Be Deemed Desirable?' on the [Revised Disclosure Statement tab](#).

Record Details   [Revised Disclosure Statement](#)   \$ Cost Impact   Desirable Changes   Litigation

Does Revised DS Contain Cost Accounting Practice Changes?

Yes

Type of Cost Accounting Practice Changes \*   Number of Cost Accounting Practice Changes \*

Select   Select

Contractor Request DS CAP Change Be Deemed Desirable? \*   DCAA Assistance of Revised DS

Yes   Select

- Date Contractor Requested DS CAP Change Be Deemed Desirable

Date Contractor Requested DS CAP Change Be Deemed Desirable

- Revised DS CAP Change Deemed Desirable? (options: Select / Yes / No) (NOTE: When "No" is selected to "Revised DS CAP change Deemed Desirable" - System will prompt the user to process CAP changes as unilateral)

Revised DS CAP Change Deemed Desirable?

Select

(Section is shown when "Yes" is selected for Revised DS CAP Change Deemed Desirable?)

- Date DS CAP Change Deemed Desirable
- Did Contractor Request Equitable Adjustment? (options: Select / Yes / No)

Revised DS CAP Change Deemed Desirable? Yes	Date DS CAP Change Deemed Desirable	Did Contractor Request Equitable Adjustment? Select
--	-------------------------------------	--

(Section is shown when "Yes" is selected for Did Contractor Request Equitable Adjustment?)

- CAS Equitable Adjustment Settlement Amount
- Date CAS Equitable Adjustment Settlement Agreement Signed

Revised DS CAP Change Deemed Desirable? Yes	Date DS CAP Change Deemed Desirable	Did Contractor Request Equitable Adjustment? Yes
CAS Equitable Adjustment Settlement Amount	Date CAS Equitable Adjustment Settlement Agreement Signed	

Only whole dollar value is allowed. Decimal (.) is removed on input.

#### Remarks

NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.

#### Buttons:

- Submit
- Back

### Litigation Tab

Litigation tab is always shown.

#### Fields:

- In Litigation? (options: Select / Yes / No / Not Applicable (NA))
- Docket Number
- Criminal Investigation Involvement? (options: Select / Yes / No)
- Appealed Amount Recovered/Sustained (NOTE: Field only allows for whole dollar value. Decimal is removed on input)



<b>In Litigation?</b> Select	<b>Docket Number</b> <input type="text"/>
<b>Criminal Investigation Involvement?</b> Select	<b>Appealed Amount Recovered/Sustained</b> <input type="text"/>

Only whole dollar value is allowed. Decimal (.) is removed on input.

*Remarks*

*NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.*

*Buttons:*

- Submit
- Back

**CAS Record Closure Tab**

CAS Record Closure tab is always shown.

*Fields:*

- All CO Actions Complete? (*options: Select / Yes / No*)
- Record Closed Date (*NOTE: Auto populates with current system date when All CO Actions Complete is set to "Yes"*)

<b>All CO Actions Completed</b> Yes	<b>Record Closed Date</b> 2023/09/15
--	---

*NOTE: Fields are required for record closure.*

*Remarks*

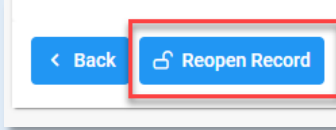
*NOTE: The remarks field is the same field on every tab. Data entered on any tab will be visible in all tabs.*

*Buttons:*

- Submit

	<ul style="list-style-type: none"> <li>• Back</li> </ul> <p><i>NOTE: If 'All CO Actions Complete?' is set to "Yes" and a Record Closed Date is populated, clicking "Submit" will lock the document and it will become read-only. The record status will change from Open to Closed.</i></p>
<p><b>Submit</b></p>	<p>Submit the record to save all changes.</p> <p>Document validation runs displaying soft warnings/errors; make necessary corrections before submitting. The document will remain open on the same tab. Click the Back button or use the navigation menu to work on other records.</p> <p>Otherwise, successfully submitting a record directs the user to a Success screen if the CAS Record Closure tab fields are entered with information.</p> <p><i>Buttons:</i></p> <ul style="list-style-type: none"> <li>• Submit</li> <li>• Back</li> </ul>
<p><b>Closed</b></p>	<p>The CAS Record is considered Closed when the Record Closed Date is populated, and the record is Submitted.</p> <p><i>Fields:</i></p> <ul style="list-style-type: none"> <li>• All CO Actions Complete? (Yes)</li> <li>• Record Closed Date</li> </ul> <p>A success screen displays the CAS Record ID.</p> <p>Use the navigation menus to continue work on another record.</p>
<p><b>Additional Information</b></p>	
<p><b>How to Reopen a Record</b></p>	<p>The roles that may Reopen the CAS Record and is managed by <a href="#">span of control</a>:</p> <ul style="list-style-type: none"> <li>• AT-AT – Monitor</li> <li>• AT-AT – Contracting Officer</li> <li>• AT-AT – Region/HQ Monitor</li> </ul>

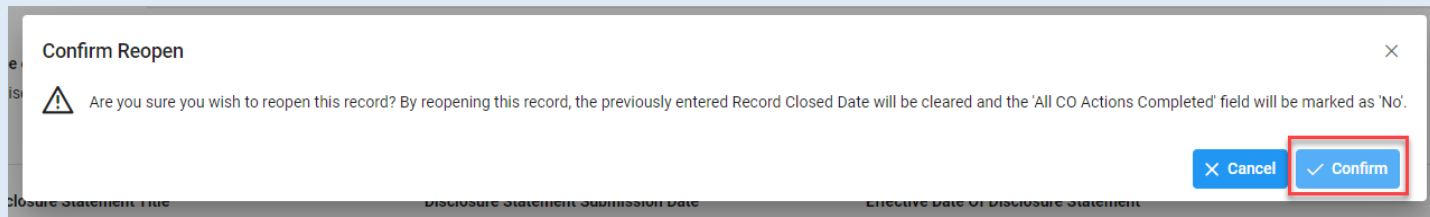
Search for a record via the Search CAS Record navigation menu option. Select “**Closed**” for the ‘Record Closure Status’ field. Open a closed record by clicking the **CAS Record ID** hyperlink. Click the **Reopen Record** button.



*Page Name: Confirm Reopen*

Are you sure you wish to reopen this record? By reopening this record, the previously entered Record Closed Date will be cleared and the 'All CO Actions Completed' field will be marked as 'No'.

Click the **Confirm** button.



*Buttons:*

- Cancel
- Confirm

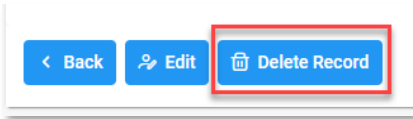
The record is now reopened, and the fields are editable again. The field ‘**All CO Actions Complete?**’ is automatically set to “No” on the [Record Closure tab](#).

## How to Delete a Record

The roles that may Delete the CAS Record and is managed by [span of control](#):

- AT-AT – Region/HQ Monitor

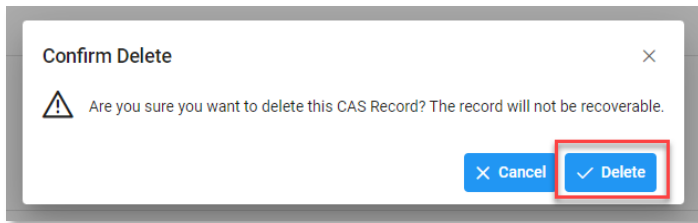
Search for a record via the Search CAS Record navigation menu option. Open a record by clicking the **CAS Record ID** hyperlink. Click the **Delete Record** button.



*Page Name: Confirm Delete*

Are you sure you want to delete this CAS Record? The record will not be recoverable.

Click the **Delete** button.



*Buttons:*

- Cancel
- Delete

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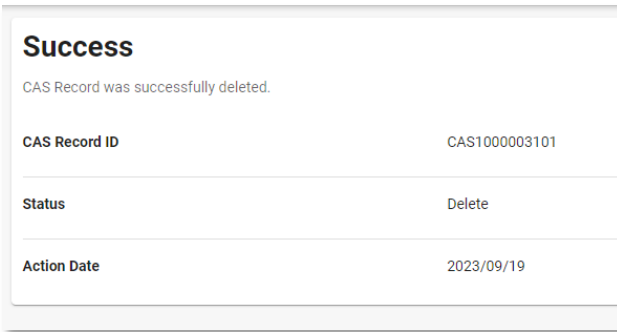
A success screen displays.

*Page Name: Success*

CAS Record was successfully deleted.

*Record Information:*

- CAS Record ID
- Status
- Action Date



[Create / Record Details](#) tab fields:

[Estimated SOL Date](#)

Field is automatically calculated 6 years from the Estimated Accrual/Notice Date and accounts for leap years.

Ex. if Estimated Accrual/Notice Date is 2019/01/01, then calculated Estimated SOL Date should be 2024/12/31.

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[CAS Priority Level](#)

Auto-calculated based upon the Estimated SOL Date compared to the current system date.

For the purpose of this calculation a "year" is calculated as full year no matter if it's a leap year - we need to account for the additional day for the leap year (e.g., if January 1, then year ends December 31)

The values for CAS Priority Level will be 1, 2, 3, 4, or 5 and will be calculated as follows:

The CAS Priority Level will be set to "5" (Priority Level 5) when the calculated difference between the Estimated SOL Date and the current system date is more than four (4) years.

The CAS Priority Level will be set to "4" (Priority Level 4) when the calculated difference between the Estimated SOL Date and the current system date is more than three (3) years, but less than or equal to four (4) years.

**Additional Field  
Information**

The CAS Priority Level will be set to "3" (Priority Level 3) when the calculated difference between the Estimated SOL Date and the current system date is more than two (2) years, but less than or equal to three (3) years.

The CAS Priority Level will be set to "2" (Priority Level 2) when the calculated difference between the Estimated SOL Date and the current system date is more than one (1) year, but less than or equal to two (2) years.

The CAS Priority Level will be set to "1" (Priority Level 1) when the calculated difference between the Estimated SOL Date and the current system date is one (1) year or less than one (1) year.

If Estimated SOL Date has past based on the user's system date, CAS Priority Level should remain at "1".

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*Multi tab fields:*

*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"

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*Initial Disclosure Statement tab fields:*

*Initial DS Compliance*

Selection – Noncompliant

INFO MESSAGE: Create a new CAS record to track the Noncompliance via the 'Create CAS Record' option - starting with the NPNC date OR Audit Report Date if DCAA audit was issued.

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*Revised Disclosure Statement tab fields:*

*Does Revised DS Contain Cost Accounting Practice Changes?*

Selection: No

INFO MESSAGE: Non-CAP changes (formerly known as Admin Changes) do not require adequacy or compliance. Proceed with issuing acknowledgement letter to contractor. Input the acknowledgement letter date into field 'Date DS Revision Determination Issued.'

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*Revised DS Compliance*

Selection – Noncompliant

INFO MESSAGE: Create a new CAS record to track the Noncompliance via the 'Create CAS Record' option - starting with the NPNC date OR Audit Report Date if DCAA audit was issued.

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