

# Examples of Deadline Tracking in Action

## Training Document

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## Example 1: Upcoming Deadline Notification Timeline

### Scenario:

- Report Type: Claims and Equitable Adjustments (Report Code C)
- Report Date: March 1
- Target Resolution Date: September 1 (6 months = 184 calendar days)

### Timeline:

**March 1:** Record created; Target Resolution Date set to September 1

**July 17:** System calculates that 75% of time has elapsed (138 days completed, 46 days remaining)

- First "Upcoming Deadline" email sent to assigned user

**July 24:** Weekly reminder email sent (39 days remaining)

**July 31:** Weekly reminder email sent (32 days remaining)

**August 2:** System detects 30 days remaining

- Weekly reminder email sent to assigned user
- Primary Supervisor now CC'd on all future emails

**August 9:** Weekly reminder email sent to user and supervisor (23 days remaining)

**August 16:** Weekly reminder email sent to user and supervisor (16 days remaining)

**August 23:** Weekly reminder email sent to user and supervisor (9 days remaining)

**August 30:** Weekly reminder email sent to user and supervisor (2 days remaining)

**September 1:** Deadline reached

## Example 2: Missed Deadline Notification Schedule

### Scenario:

- Report Type: Post Award (Report Code D)
- Report Date: January 15
- Target Resolution Date: July 15 (6 months)
- Actual Resolution Date: Not entered
- Deadline missed

*Timeline:*

**July 15:** Target Resolution Date deadline reached; Actual Resolution Date field is empty

**July 16:** First "Due Date Missed" email sent

- Sent to: Assigned user and Primary Supervisor
- Message: "Action for Target Resolution Date was missed 1 calendar day ago for Report Number [###]."

**August 15:** Second missed deadline email sent (30 days after first)

- Message: "Action for Target Resolution Date was missed 31 calendar days ago..."

**September 14:** Third missed deadline email sent (30 days after second)

- Message: "Action for Target Resolution Date was missed 61 calendar days ago..."

**September 20:** User enters Actual Resolution Date

- **All notifications stop immediately**

### **Example 3: Using Revised Deadline to Reset Notifications**

*Scenario:*

- Report Type: Business Systems (Report Code B)
- Date Report Received: April 1
- Target Resolution Date: April 11 (10 calendar days)
- User realizes deadline cannot be met

*Timeline:*

**April 1:** Record created; Target Resolution Date set to April 11

**April 9:** System begins sending upcoming deadline notifications (75% of 10 days = 7.5 days elapsed)

**April 10:** User determines the original deadline cannot be met

- User enters **Revised Target Resolution Date: April 25**
- System immediately stops tracking April 11 deadline
- System begins calculating notifications for April 25 deadline

**April 19:** System reaches 75% elapsed time for new deadline (April 1 to April 25 = 24 days; 75% = 18 days)

- New upcoming deadline notifications begin for April 25 deadline

**April 23:** User completes resolution actions

- User enters **Actual Resolution Date: April 23**
- **All notifications stop immediately**

## **Example 4: Deferred Status Impact on Notifications**

*Scenario:*

- **Report Type:** Incurred Costs (Report Code G)
- **Report Date:** February 1
- **Target Disposition Date:** February 1 of following year (12 months)
- Upcoming deadline notifications have begun

*Timeline:*

**November 1:** Upcoming deadline notifications are being sent weekly (3 months remain until February 1 deadline)

**November 8:** User determines the contractor requires additional time

- User changes record Status to **Deferred**
- **All deadline notifications immediately stop**

**December 15 - January 28:** No emails sent while record remains in Deferred status

**January 29:** User receives updated information from contractor

- User changes record Status from Deferred to **Open**
- **Deadline tracking resumes immediately**

**January 30:** System detects that deadline (February 1) is only 2 days away

- Because fewer than 30 days remain, supervisor is CC'd
- Upcoming deadline email sent to user and supervisor

**February 2:** Deadline missed (Actual Disposition Date not entered)

- "Due Date Missed" email sent to user and supervisor