

Step-by-Step Training Document: Managing Deadlines in AT-AT

Training Document

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AT-AT Module

AT-AT

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Viewing Deadline Information for a Record

Step 1: Log in to the AT-AT application

Step 2: Navigate to the record

Step 3: Locate the deadline fields in the record details:

- **Target Resolution Date** (*auto-calculated*)
- **Revised Target Resolution Date** (*user-entered, if applicable*)
- **Actual Resolution Date** (*user-entered when action complete*)
- **Target Disposition Date** (*auto-calculated*)
- **Revised Target Disposition Date** (*user-entered, if applicable*)
- **Actual Disposition Date** (*user-entered when action complete*)
- **SOL Date** (*auto-calculated*)

Entering an Actual Resolution Date or Actual Disposition Date

Entering these dates stops the corresponding deadline notifications.

Step 1: Open the record requiring the date entry

Step 2: Locate the appropriate field:

- **Actual Resolution Date** (*to stop Target Resolution Date notifications*)
- **Actual Disposition Date** (*to stop Target Disposition Date notifications*)

Step 3: Click into the date field

Step 4: Enter or select the completion date

Step 5: Click **Submit** to update the record

Result: After saving, the system immediately stops sending notifications for that specific deadline.

Entering a Revised Target Resolution Date or Revised Target Disposition Date

Use these fields when the original deadline cannot be met and a new deadline is established.

Step 1: Open the record requiring a revised deadline

Step 2: Locate the appropriate field:

- **Revised Target Resolution Date** (*to override Target Resolution Date*)
- **Revised Target Disposition Date** (*to override Target Disposition Date*)

Step 3: Click into the date field

Step 4: Enter or select the new deadline date

Step 5: Click **Submit** to update the record

Result: The system immediately stops tracking the original deadline and begins tracking the revised deadline using the same notification rules (75% elapsed time, weekly reminders, etc.).

Placing a Record in Deferred Status

Deferred status pauses all deadline notifications until the status is changed.

Step 1: Open the record that needs to be deferred

Step 2: Locate the **Deferred Status Date** field (*displays if 'In Litigation' is "Yes" or 'Criminal Investigation' is "Yes"*)

Step 3: Enter or select the date

Step 4: Click **Submit** to update the record

Result: All deadline email notifications are immediately paused for this record. The deadlines remain in the system but no emails are sent.

Removing Deferred Status to Resume Deadline Tracking

Step 1: Open the deferred record

Step 2: Locate the **Deferred Status Removed Date** field

Step 3: Enter or select the date

Step 4: Click **Submit** to update the record

Result: Deadline email tracking resumes immediately. If deadlines have passed while in Deferred status, missed deadline emails will begin according to the missed deadline schedule.

Deadline Tracking Rules and Special Conditions

Understanding these rules helps predict system behavior:

Rule 1: Revised Dates Override Original Dates

- When a **Revised Target Resolution Date** is entered, the system stops tracking the **Target Resolution Date**
- When a **Revised Target Disposition Date** is entered, the system stops tracking the **Target Disposition Date**
- The system begins tracking the revised date using the same notification rules

Rule 2: Actual Dates Stop Corresponding Notifications

- Entering an **Actual Resolution Date** stops all notifications related to **Target Resolution Date** or **Revised Target Resolution Date**
- Entering an **Actual Disposition Date** stops all notifications related to **Target Disposition Date** or **Revised Target Disposition Date**
- These actions are immediate and cannot be undone (though dates can be edited)

Rule 3: Deferred Status Pauses All Deadline Emails

- When a record status is changed to **Deferred**, all deadline email notifications are paused
- Deadlines do not change; only notifications are paused
- No emails are sent while the record remains in Deferred status

Rule 4: Removing Deferred Status Resumes Email Tracking

- When a record is changed from **Deferred** to an active status, deadline tracking resumes immediately
- If deadlines were missed during the Deferred period, missed deadline emails begin on the appropriate schedule

Rule 5: Record Status Affects Deadline Tracking

Open Records: All applicable deadlines are actively tracked according to the rules outlined in this module

Deferred Records: No deadline emails are sent while a record maintains Deferred status

Closed Records: No deadline tracking occurs for closed records; all notifications cease

Tips and Best Practices

Monitor Your Deadlines Proactively

Do not rely solely on email notifications. Regularly review assigned records in AT-AT to stay aware of upcoming deadlines.

Act on 75% Notifications Immediately

When the first upcoming deadline notification arrives, it means only 25% of the available time remains. Begin taking action immediately to meet the deadline.

Use Revised Dates Appropriately

Revised Target Resolution Dates and **Revised Target Disposition Dates** should be used when legitimate circumstances prevent meeting the original deadline. Document the reason for the revision in the record notes.

Communicate with Your Supervisor

When a deadline cannot be met, inform your supervisor before the deadline passes rather than waiting for missed deadline notifications.

Enter Actual Dates Promptly

As soon as resolution or disposition actions are completed, enter the **Actual Resolution Date** or **Actual Disposition Date** to stop unnecessary notifications.

Use Deferred Status Correctly

Use Deferred status only when legitimate business reasons require pausing work on a record. Examples include:

- Waiting for contractor response
- Pending legal review
- Administrative hold requested by management

NOTE: Do not use Deferred status simply to avoid deadline notifications.

Check Your PIEE Profile

Ensure your PIEE profile lists the correct Primary Supervisor, as this individual will receive copies of your deadline notifications.

Be Aware of Time Zones

Remember that all deadline calculations operate on GMT. If working in a different time zone, be aware that notifications may arrive at unexpected local times.

Common Issues and Troubleshooting

Issue 1: Not Receiving Expected Deadline Notifications

Possible Causes:

- Email address in PIEE profile is incorrect or outdated
- Email notifications are being filtered to spam/junk folder
- Record is in Deferred or Closed status

Solutions:

1. Verify email address in PIEE profile is correct
2. Check spam/junk email folders and whitelist AT-AT notification sender
3. Verify record status is Open (not Deferred or Closed)
4. Contact AT-AT system administrator if issue persists

Issue 2: Deadline Appears Incorrectly Calculated**Possible Causes:**

- Wrong Report Code assigned to record
- Incorrect date entered in Report Date or Date Report Received field
- Misunderstanding of which starting date applies to the Report Code

Solutions:

1. Verify the Report Code is correct for the report type
2. Check that Report Date or Date Report Received field contains the correct date
3. Refer to the Deadline Calculation Reference Table to confirm which starting date applies
4. If dates are incorrect, contact supervisor or administrator to correct the record

Issue 3: Notifications Continue After Entering Actual Date**Possible Causes:**

- Actual Date was not saved properly
- Wrong Actual Date field was updated
- System processing delay

Solutions:

1. Re-open the record and verify the Actual Resolution Date or Actual Disposition Date was saved
2. Ensure the correct Actual Date field was populated (Resolution vs. Disposition)
3. Allow up to 24 hours for system processing
4. Contact AT-AT system administrator if notifications continue beyond 24 hours

Issue 4: Supervisor Not Receiving Notification Copies

Possible Causes:

- Primary Supervisor not designated in user's PIEE profile
- Primary Supervisor email address is incorrect in PIEE
- Notification has not yet reached the 30-day threshold

Solutions:

1. Verify Primary Supervisor is correctly designated in PIEE profile
2. Confirm Primary Supervisor's email address is accurate
3. Check deadline timeline—supervisor notifications only begin when 30 or fewer days remain
4. Update PIEE profile if information is incorrect

Issue 5: Cannot Place Record in Deferred Status

Possible Causes:

- User lacks permission to change record status
- Record is already closed
- System constraint based on record type

Solutions:

1. Verify user role and permissions with AT-AT administrator
2. Confirm record is not already in Closed status
3. Contact supervisor if status change is required but not available

Summary and Next Steps

Key Takeaways

Automatic Deadline Calculation: AT-AT automatically calculates Target Resolution Dates and Target Disposition Dates based on Report Code and either the Report Date or Date Report Received.

Proactive Notifications: The system begins sending upcoming deadline notifications when 75% of available time has elapsed, with weekly reminders continuing until the deadline.

Supervisor Involvement: When 30 or fewer days remain until a deadline, the user's Primary Supervisor is automatically CC'd on all subsequent notifications.

Missed Deadline Escalation: When a deadline is missed, both the assigned user and supervisor receive immediate notification, with reminders continuing every 30 days.

User Control: Users can manage notifications by entering Actual Dates (to stop notifications), Revised Dates (to reset deadlines), or using Deferred status (to pause notifications).

Status Matters: Record status directly impacts deadline tracking—Open records are tracked, Deferred records pause notifications, and Closed records stop all tracking.

Next Steps

Practice Reviewing Deadlines: Log into AT-AT and review the deadline fields on your assigned records to familiarize yourself with the information available.

Set Up Email Filters: Create email filters or folders to organize AT-AT deadline notifications so they are easy to find and act upon.

Review Your PIEE Profile: Verify that your email address and Primary Supervisor designation are correct in your PIEE profile.

Explore Related Training: Consider completing additional AT-AT training modules on record management, status workflows, and reporting features.

Apply Your Knowledge: As you receive deadline notifications, refer back to this training to understand what stage of the notification process you're in and what actions to take.