

# Contracting Officer Representative Tracking (CORT) Tool - User Guide

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The Department of Defense (DoD) Contracting Officer Representative Tracking Tool (CORT Tool) is a web-accessible management application designed to provide management insight into the COR nomination and designation process. This guide supplement the CORT Tool Web Based Training (WBT) located at <https://wawftraining.eb.mil/xhtml/unauth/web/wbt/WbtSummary.xhtml> and the Frequently Asked Questions (FAQs). Please contact your Department Administrator for specific agency identified and required training.

**Version 2**

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# I. INTRODUCTION

The Department of Defense (DoD) Contracting Officer Representative Tracking Tool (CORT Tool) is a web-accessible management application designed to provide management insight into the COR nomination and designation process. It is used to nominate, designate, track and revoke an individual as a Contracting Officer Representative (COR) against any DoD contract awarded by a Department of Defense Agency. It provides visibility and accountability necessary for leaders to manage the thousands of CORs assigned throughout the Department. Efforts are currently underway to develop DoD Instruction (DoDI), which establishes uniform guidance for identification, development and management of CORs within DoD.

The CORT Tool provides an automated means to access important information about DoD CORs. It allows a COR to create a profile and process a nomination for one or multiple contracts and/or orders. It provides contracting personnel a web based portal for all relevant COR actions. It provides built in workflows for the COR nomination and designation. It collects COR training information. It sends CORs, Supervisors and Contracting Officer (CO) email alerts and status reminders for report due-ins and delinquencies. This Guide has been prepared to assist new users of the CORT Tool through the COR Nomination Process.

In April 2013, the CORT Tool was moved from the Defense Knowledge Online (DKO) portal to DoD Wide Area Workflow (WAWF) EBusiness Portal. All users of the CORT Tool and all nominations (active and in-process records) were transferred to the new platform during migration. The CORT Tool website is <https://wawf.eb.mil/>.

Throughout the CORT Tool warning, informational and error message will be displayed following an action by the user.

- Warning messages are designated by a yellow triangle as indicated below.
- Successfully completed actions are designated by the blue circle with a center “i”.
- Error messages are designated by a square with center “X”.



**Warning – A condition exist that may cause a future problem.**



**Useful information - An action was successfully completed.**



**Error - An error or problem has occurred, which must be fixed before the user can proceed.**

## II. REGISTRATION

The CORT Tool is Common Access Card (CAC) enabled and available to all military and civilian members of the DoD. To access the CORT Tool, each user must have or create a WAWF account. User may also view a demo of registration process at <https://wawftraining.eb.mil/wbt/xhtml/wbt/overview/overview2875.xhtml>.

If you encounter problems with registration contact the helpdesk for assistance or review the user registration guidance under the “Help/Training” menu.

### A. CORT Tool Roles

A user may register for one or more of the following roles:

1. **Contracting Officer Representative (COR)** – representative of the contracting officer who will be performing contract surveillance and oversight. This role allow an individual to nominate himself as a COR on a contract.
2. **Supervisor/Commander** – representative of the requiring activity who supervises the COR. This role approves or rejects nominations submitted by COR
3. **Contract Specialist** – individual performing contracting duties within the department. This role allows the individual to add contract information to the any COR nomination.
4. **Contracting Officer** – individuals, appointed in writing by their agency, performing contracting duties and granted the authority to designate CORs on contract. In addition to Contract Specialist duties, this role performs COR designation, appointment and revocation functions.
5. **Administrative Contracting Officer** – contracting officer who perform contract administration functions. This role allows ACO to view the nomination.
6. **Quality Assurance Point of Contact** – individual performing quality assurance function. This role allows the QAPOC to view the nomination.
7. **Auditor** – individuals responsible for conducting audits of contracts, department or agency. The roles grants access to nomination for a specified time. (**Available June 2015**).

8. **Manager** – individuals within a department performing department oversight of COR. This role grants access to all department nomination and department reports (**Available June 2015**).
9. **Department Administrator** - department leads, who perform, role activation and deactivation, deployment, department oversight and trouble shooting on behalf of all department users.

## B. Migrated Users

Users of legacy CORT or Army VCE are automatically migrated to the WAWF Platform. To facilitate the migration, a User ID was established for each migrated users. Two emails were sent to these users. The first email advised the user of his assigned User ID (i.e. *CORT9999*). The second email provided the user with the password associated with the User ID. Upon receipt of the password, the migrated users are to access the CORT Tool using the following steps.

1. Access website at: <https://wawf.eb.mil>
2. Read the Privacy Statement and Warning then click the “Accept” button to display the WAWF Home page
3. Enter your User ID and Password then click the “Login” button (*User ID and Password are case sensitive*)
4. Complete the Security Questions and click the “Submit” button
5. Click the “CORT Tool” menu option from the portal menu to open the CORT Tool in a new browser window

Note: Migrated users who did not receive an email must contact the Helpdesk at 1-866-618-5988 to retrieve their assigned User ID and password for the migrated account.

Upon logon, the migrated shall convert their “User ID and Password” access to “CAC” access by performing the following:

1. Select “Security”
2. Select “Change Authentication Type”
3. From drop down menu select ‘Common Access Card’ when presented with the question, how will you be accessing the Wide Area Workflow eBusiness Suite applications?
4. Click on the “Certificate Logon Button” to select your certificate
5. Select your certificate and follow the prompts.

Note: Army migrated users on login to WAWF must update their user profile and AKO email address to access the migrated VCE records.

## C. New Users

A new user must first create a WAWF account. New users shall use the following steps ensure their computer is configured properly to access the portal:

1. Access website at: <https://wawf.eb.mil>
2. Read the Privacy Statement and Warning and then click the “Accept” button to display the WAWF Home page. Click on the “Help/Training”
3. Click the “Machine Setup” link to display the Machine Setup page
4. Read the Machine Setup page
5. Review the JAVA Runtime Environment Installation section to make sure you have the correct version of JAVA installed on your machine. *(Some users may need to coordinate with your local IT Help Desk to ensure the JAVA installation will not interfere with other applications on your computer).*

Once the user has determined the correct version of JAVA is installed on the computer, perform the following steps to complete the registration with CAC access.

1. Access WAWF website at: <https://wawf.eb.mil> or test database (<https://wawf-gt.nit.disa.mil/>)
2. Select “Continue to this website (not recommended)”
3. Click the “Register and read the Privacy Impact Act and
4. Click on “Agree” to accept the terms and conditions.
5. Select Type of User and Applications Needed (Government)
6. Click “Next” and complete the User Profile - Mandatory fields are marked with an asterisk.
  - a. First Name –enter first name
  - b. Middle Name (optional)
  - c. Last Name – enter your last name
  - d. Organization – enter your organization name
  - e. Job Title – enter your Job Title
  - f. Suffix (optional)
  - g. Email – enter your email
  - h. Confirm Email – re-enter your email
  - i. Commercial Phone – Required Field
  - j. Extension (optional)
  - k. International Phone Number (optional)
  - l. Mobile (optional)
  - m. Grade/Rank
  - n. DSN Telephone (optional)
  - o. Citizenship (Select *US, Other or FN*)
  - p. Designation (Select *Civilian, Military or Contractor*)
  - q. Annual Awareness Training Date – Select applicable date



- r. AKO name (optional)
7. Click Next – Additional Profile is displayed; complete the supervisor information
  - a. First Name – enter supervisor’s first name
  - b. Last Name – enter supervisor’s last name
  - c. Job Title – enter supervisor’s title
  - d. Email – enter supervisor email
  - e. Confirm Email – reenter supervisor’s email
  - f. DSN – enter supervisor DSN
  - g. Phone Number – enter supervisor phone
  - h. Extension – enter supervisor’s extension
  - i. International Phone Number
8. Complete the Agency Information
  - a. Agency Name (*If DoD, enter Service or ODA name; If Non-DoD, enter agency name i.e. GSA, State, USAID, DHS*)
  - b. Address – Enter street address
  - c. City – Enter city name
  - d. State – Enter state name or abbreviation
  - e. Zip Code – Enter 5 or 9 digit code
  - f. Organization – Enter the name of the organization within your agency
  - g. Office Code – Enter your six digit agency code (*If DoD, enter your Home Location DoDAAC; if Federal, enter your Home Location FEDAAC*)
9. Click Next
10. Click on COR Role under COR Tracking Tool
  - a. Select Role
  - b. Location Code Type – Select DoDAAC
  - c. Home Organization – Enter your six- digit DoDAAC or FEDAAC
  - d. Home Department – Select your organization department; Army user shall select OSD or Conversion; after VCE select Army; (*VCE migration is expected to occur in June 2015*).
  - e. Justification – Enter reason for system access
  - f. Attachment – Upload attachment as required by agency
11. Click on Save
12. Add iRAPT roles if needed (*Applicable when registering for COR, CO Role*) and click on next

**CAC Instructions:**

13. Choose Authentication method – CAC
14. Select Common Access Card and click on Certificate Login
15. Enter your organization name on the Statement of Accountability and Click on Signature
16. Successful registration is displayed
17. User receives a successful registration email
18. Click on Home to return you to the registration page

### Userid/Password Instructions

13. Choose Authentication method – UserID/Password (FN) or TEST DATA Base
  - a. Enter userid
  - b. Enter password
  - c. Re-enter password
  - d. Click on Next
14. Answer three security questions and click on NEXT
15. Enter your organization name on the Statement of Accountability and Click on Signature
16. Re-enter your password and click on submit
17. Successful registration is displayed
18. User receives a successful registration email
19. Click on “Home” to return you to the registration page

The registration request will enter the “Pending” status until approved by your supervisor. To view the view the status of the request, perform the following:

1. Select “User”
2. Click on “Review Request Status” - *Role Maintenance page is displayed with the status of the user's roles and message*
3. Scroll to the bottom of the page and either click the “Send Reminder to your Supervisor/Sponsor” button for those requests requiring supervisor approval; or click “Home” to return to the user dropdown

## **D. Supervisor Approval of Role Request**

Once a registration has been submitted, the user’s supervisor will receive an email advising of the role request. The supervisor must approve or reject the request. To do that, perform the following:

1. Click on the link sent in the email (This link will be available for 72 hours)
2. Under COR Tracking Tools “ACTIONS”, select Approve or Reject
3. Add additional justification (optional)
4. Check the box next to the statement: Check the box to indicate that you have read the user justification for access
5. Click on “submit” to finalize
6. Supervisor is presented with a success message
7. Click on “Home” to return to the log in page

The supervisor must approve a role request within thirty (30) days. On day thirty one (31) the registration expires and the user role is automatically rejected.

# III. DEPARTMENT ADMINISTRATORS (DAs)

The Military Departments, Defense Agencies and DoD Field Activities Components have identified one or two individuals who will act as **Component Department Administrator (CDA)** for CORT Tool Deployment and Implementation. The CDAs are CORT Tool Subject Matter Experts (SMEs) who have overall responsibility for training and deployment of the capability within each component. These CDAs and agency leads are identified in Appendix A.

Appendix A also contains a list of individuals the Services (Department of the Navy, Air Force, Army and DLA) have designated as **Local Department Administrators (LDA)** for its major commands and subcommands. Within the CORT Tool, these individuals are responsible for role activation and DA2875 maintenance for their commands and/or location DoDAAC only as designated by the CDA.

## A. Role Activation / DeActivation

Role activation is required for all CORT Tool roles. CDA and designated LDA are responsible for role activation for newly created registration, modifications to current registration or addition of new roles.

CDAs or designated LDAs will receive an email stating the following user role(s) will need activation upon Supervisor/Sponsor approval on the CORT application. The email will indicate the user name, certificate, email, phone number, role, and department and location code. The DD2875 status for the user referenced in the email will have the status "**APPROVAL REQUIRED**" indicated next to the name and will remain so until the supervisor approves the role requested. Once the supervisor approves the role, a DD2875 is created and a second email is generated and forwarded to the designated CDA or designated, stating the following user has been approved or rejected and will require activation on the CORT application. In addition, the status of DD2875 status has changed to "**REVIEW REQUIRED**." (All caps and Hyperlinked). The CDA or designated LDA should perform the following for each role requiring approval.

1. Access Role Activation
2. Scroll across screen to DD2875
3. Click on "**REVIEW REQUIRED**" (This should be hyperlinked)
4. Review the DD2875; and click on "Close to return to role activation"
5. Go to "**Actions**" and click on "Edit"
6. Scroll down to DD2875 and change DD2875 status to "**Attached in WAWF**"
7. Click on "Save DD2875"; it will return you to the previous screen
8. Select "change status" from drop down box under "Actions"
9. Click on "**Save**"

Role activation may be required for previously registered users of the CORT Tool who have not submitted a DD2875. The majority of these users will have “Review Required” (no hyperlink) as their DD2875 status. To activate these users, the CDA or designated LDAs shall perform the following:

1. Access Role Activation
2. Scroll across screen to “actions” and click on “Edit”
3. Scroll down to the “Attachment” section and upload a copy of the DD2875
4. Scroll down to DD2875 and change DD2875 status to “**Attached in WAWF**” or “**STORED IN ANOTHER LOCATION**”
  - a. If “Attached in WAWF” is selected, click on “Save DD2875”
  - b. If “**STORED IN ANOTHER LOCATION**” is selected, DAs must enter VALID comments indicating the location of the DD2875
5. Click on “Return” to go back to the previous screen
6. Select “change status” from drop down box under “Actions”
7. Click on “Save

DAs are responsible for deactivating users who no longer works for their agency. These users should be placed in “archive” status. To archiver a user, perform the following:

1. Log into the CORT Tool
2. Select Role Activation
3. Search for the user
4. Scroll across screen to “actions” and select “Send to Archive”

If the archive user moves to a new organization, the user will need to contact the help desk to get his role reactivated or the receiving agency DA may request the assistance of the DPAP Administrator.

## **B. SAAR (DD2875) Maintenance**

DAs are responsible for ensuring that each user within their department completes a DD2875 and that the DD2875 is either attached in WAWF or stored in another location. If the documents are “stored in another location”, the DA must maintain the location and its contents. For documents stored in a DA maintained location, the DA shall indicate the location of the DD2875 in the comment section of each activated role.

Current users, who have not previously submitted a DD2875, are required to provide the DD2875 for continued CORT Tool access. These users shall complete sections 1 and 2 of the form. The form shall be signed by the employee and the Supervisor. The user shall complete other sections when required by the user’s department or agency.

The DA may view the DD2875 loaded by a CORT Tool user or attach a DD2875 for a user, by performing the following steps:

1. Access the CORT Tool website at: <https://wawf.eb.mil>
2. Click on CORT Tool
3. Select "Role Activation"
4. Select search criteria and click "Search"
5. Scroll to the DD2875 drop down menu select one of the following
  - a. Attached in WAWF
  - b. Stored in another location
6. Scroll to "Actions" and select
  - c. "Change Status" to activate or
  - d. "Send to Archive" to archive account
7. Select the "edit" link (*View or upload DD2875*)
8. Add comments
9. Using browse feature, upload the DD2875
10. Select "Upload"

## IV. USER MAINTENANCE AND SECURITY

When registering, a user provides personal contact information and data concerning the role he/she requires within the WAWF e-Business Suite application. This data is saved into the user's WAWF e-business profile. WAWF e-business Profile Maintenance option is then used to update personal information such as name, organization, title, e-mail address, supervisor and agency information. User may also view a demo of all processes described in this section at: <https://wawftraining.eb.mil/wbt/xhtml/wbt/overview/overviewLogon.xhtml>

### A. WAWF e-Business/CORT Profile

To update the WAWF e-business profile, access the website and perform the following:

1. Click on "User"
2. Click on Profile
3. Select "Edit" next to user profile
4. Update this section as needed
5. Click on "Submit"
6. Repeat steps 3 through 5 for the "Supervisor" and "Agency Information" sections (if needed)
7. Click "Home" to return to the log on page

### B. View/Edit/ WAWF e-Business/CORT Roles

To view or edit a WAWF E-business Role, each user must perform the following:

1. Select "User"
2. Select View/Edit Roles
3. The Role Maintenance page displayed showing the Home Department, Location Code, Active Status, Justification and Attachments for each application and the roles associated with the application (i.e. CORT, IRAPT, etc – *This section cannot be modified*)
4. Click on "View/Add" under Justification/Attachment
5. Type a justification in the Justification box and click the Save Justification
6. Add an attachment by using the Browse and Upload buttons (*Manual DD2875 are the only attachments that shall be added here- **DO NOT POST TRAINING CERTIFICATES HERE***)
7. Click the "Previous" button when finished
8. Click on "Home" to return to the log on page

## C. Add a WAWF e-Business (CORT) Role

To add additional roles to your CORT Tool account, access the website and perform the following:

1. Select "User"
2. Click on "Add Role"
3. Select "COR Roles" under the COR Tracking Section
4. From the drop down menu
  - a) Select a role from the Role dropdown.
  - b) Select a Location Code Type – *DoDAAC for Government employees*
  - c) Enter a valid six-digit DoDAAC/location code (*i.e. N00612*) for "Home Organization"
  - d) Select the appropriate Department (*Army users select OSD or Conversion; Army will become available in June 2015*)
  - e) Add a justification for the role added
  - f) Add attachment and click on upload (*Optional*)
5. Click on "Save"
6. A success message will display letting the user know they have successfully added the CORT Tool role

## D. Change Authentication Type

1. Select "Security"
2. From the dropdown, select "Common Access Card" under how they will be accessing Wide Area Workflow e-Business Suite applications
3. Click on "Certificate Logon" – the details of your certificate should be displayed
4. Click on the applicable certificate and select "submit" to associate the selected certificate with the account
5. Continue to login

## E. Change Password

1. Select "Security"
2. From the dropdown, click the Change Password link
3. Enter a new password
4. Re-enter the password
5. Click on the "submit" button
6. A success message is displayed indicating the new password has been successfully reset
7. Reset passwords may expire after sixty days of use

## F. Change Security Questions

1. Select "Security"
2. From the dropdown, click the Change Question link
3. Select new security questions from the dropdowns and enter answers
4. Click the Submit button when finished
5. A success message is displayed indicating the security answers have been successfully reset
6. Click the Logout link when finished

*\*Note: Change Password and Change Security Questions are applicable to foreign nationals and "excerpted" users only.*



# V. CORT TOOL PROFILES

Within the CORT Tool application, certain roles require a CORT Profile. They include COR, CO and CS. QAPOC, ACO and Auditor roles will soon require a Profile.

## A. COR Profile

The COR Profile requires the entry of relevant COR information to ensure the proper nomination and appointment of a COR on a DoD contract. The Profile information, once entered, is used to populate every nomination the COR creates. The Profile page contains three sections, COR Information Section, the Supervisor section and the Training Courses. The COR Profile must be completed before the COR begins a nomination.

### 1. COR Information Section

This section contains the COR's personal information as displayed in Figure 1. The COR must complete each element as indicated below:

The screenshot shows the 'Contracting Officer Representative Tracking (CORT) Tool' interface. The user ID is 'CORTTeste'. The main section is titled 'COR Profile' and contains a sub-section 'Contracting Officer Representative Information'. The form includes the following fields:

- Work Address \*
- City / APO \*
- State \* (dropdown menu)
- Zip Code \*
- Country \* (dropdown menu, currently set to 'United States')
- DEROS Date
- Unit
- Certified Acquisition Official \* (dropdown menu, currently set to 'No')
- Career Experience \*
- Experience Level \*
- Second Career Experience
- Second Experience Level
- Third Career Experience
- Third Experience Level

A 'Help' button is located at the bottom left of the form.

Figure 1

- a) Work Address – Enter COR physical location address
- b) City/APO – Location of City, or “FPO/APO”
- c) State - Select your State from the drop down menu
- d) Zip Code - Enter 5 digit code
- e) County – US is default

- f) DEROS – If you are deployed, enter your return date
- g) Unit – Enter the organization name
- h) Certified Acquisition Official or Predominant Acquisition Career requires a yes or no answer

1) If “No”, then an entry in the text box is required for both Career Experience and Career Experience Level.

(a) COR Career Experience - Indicate the COR’s area of expertise (*i.e. Engineering Tech, Level IV, Scientist, Pilot, Plumber, Fireman, etc*). You must enter at least one, but no more than three Career Experience.

(b) COR Career Experience Level - indicate the number of years of experience (*i.e. 11 years*). Enter level for each Career Experience entered.

2) If the certified acquisition official is “Yes”, select career from the drop down Predominant Acquisition Career and then select certification level from down menu.

## 2. Supervisor Information Section

Enter the complete or partial last name of the Supervisor in the “Name (Last, First)” input field and wait one second. The CORT Tool will display a list of Supervisors (max of 20) who have a last name that matches the complete or partial last name entered. The organization of the Supervisor is also displayed in the list to help in identifying Supervisors who may have the same first and last name.

If your Supervisor’s name is not displayed in the list, enter the Supervisor’s complete last name and first name separated by a comma and wait one second. For example: “Smith, John”. Select your Supervisor name from the list of matching Supervisors. The CORT Tool will auto-populate the Supervisor’s Email, Organization and Phone.

The screenshot shows a web form titled "COR Profile". At the top, there is a blue bar with the text "Contracting Officer Representative Information" and a plus sign icon. Below this is another blue bar with the text "Supervisor Information" and a minus sign icon. The form contains several input fields: "Name (Last, First) \*" with the value "NONE", "Email \*", "Organization \*", and "Phone \*". A "Help" button is located at the bottom left of the form.

Figure 2

If your Supervisor's name is still not displayed in the list, select "None" as your Supervisor and ask your Supervisor to create a WAWF CORT Tool registration. You may update the COR Profile with the Supervisor name, once your Supervisor completes a registration into the CORT Tool. A supervisor's name must be present in order to start or process a nomination.

Note: The individual entered as Supervisor should be the COR's immediate supervisor who has knowledge of the COR's skill, education and experience.

### **3. Training Course Information Section**

In this section the COR enters the mandatory training courses and attaches a copy of associated certificate of completion. Section 813 of the National Defense Authorization Act for FY 2007 required the Department of Defense Panel on Contracting Integrity (Panel) to identify contracting vulnerabilities that may lead to fraud, waste, and abuse in the defense contracting system. The Panel identified surveillance of services acquisitions as an area of vulnerability.

To correct the noted deficiencies, the Sufficient Contract Surveillance subcommittee developed a DoD COR certification standard, which defines minimum COR competencies, experience, and training required to be a COR on a contracts. The Defense Acquisition University (DAU), working with Panel representatives, developed baseline training competencies identified in the standard. The Panel recommended and DoD adopted the following specific DAU courses or equivalents as minimum training requirement for CORs:

- CLC 106, CORs with A Mission Focus (Type A only)
- COR 222, Contracting Officer Representative Course or equivalent (Type B/C) (optional for Type A if CLC 106 is present)
- CLC 206, CORs in the Contingency Environment (Contingency (when applicable))
- CLM 003 or agency equivalent on procurement ethics (All CORs )
- COR Refresher - Hours specified, no specific course

In addition, DoD requires each COR to complete the course entitled "Combating Trafficking in Person."

Completion of the Training Course Information section is not required to complete the COR's Profile nor is it required when the nomination record is submitted. However, proof of training is required by the time the CO is ready to appoint the individual as a COR on a contract. The CORT Tool will not allow an individual to be designated as COR on a contract if the required training courses are missing. As a minimum the COR must load certificates for the following courses:

- CLC 106, CORs with A Mission Focus or COR 222, Contracting Officer Representative or equivalent
- CLM 003 or agency equivalent on procurement ethics (annual requirement)
- Combating Trafficking in Person (annual requirement)

Note: Agencies may have additional training requirements to be completed and uploaded. Please contact your DA for any additional agency specific training requirements.

To add a training course and to upload the applicable certificate, click on the “Add” button located in the upper right hand corner and select the applicable course from the drop down menu.

Course	Training Level	Equivalency?	Provider	Certificate	Completion Date	Hours	Action	Add
Combating Trafficking in Persons	ABC	<input type="checkbox"/>		SAMPLE - Certificate of Completion - TIP.docx	2013/06/11	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Misc training as required by local center policy		<input type="checkbox"/>		Certificate of Completion -111.doc	2013/06/03	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
DAU CLM 003 Ethics Training or Agency Equiv	ABC	<input type="checkbox"/>		SAMPLE - Certificate of Completion - Ethics.docx	2013/02/04	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Misc training as required by local center policy		<input type="checkbox"/>		TEST CERTIFICATE - (Misc - 1) #5.docx	2013/01/01	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Refresher Training		<input type="checkbox"/>		Certificate of Completion -11.doc	2012/01/01	16	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Other		<input type="checkbox"/>		Certificate of Completion -1.doc	2012/01/01	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
DAU CLC 106 COR with a Mission Focus	[A]	<input type="checkbox"/>		SAMPLE - Certificate of Completion - CLC 106.docx	2011/07/03	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Refresher Training		<input type="checkbox"/>		TEST CERTIFICATE - (REFRESHER -1) #3.pdf	2010/06/22	8	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Other		<input type="checkbox"/>		TEST CERTIFICATE - #1.pdf	2010/02/02	0	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	

Buttons: Save, Cancel, Help

Figure 3

- A. When selecting “Ethics or COR 222” (Equivalent courses) perform the following:
  1. Enter the course completion date
  2. If the course is NOT provided by DAU, check the equivalency box; otherwise leave blank
  3. If equivalency box is checked, enter the name of the non-DAU provider; otherwise leave blank
  4. Using browse feature, upload a copy of the certificate received upon completion of the course
  5. Click on OK
  
- B. When selecting “Other, Refresher Training or Miscellaneous”
  1. Enter the name of the course (i.e. *Source Selection*)
  2. Enter the course completion date
  3. If “Refresher Training “was selected, enter the number of hours
  4. Using the browse feature, upload a copy of the certificate received upon completion of the course
  5. Click on OK
  
- C. When selecting any of the remaining course type
  1. Enter the course completion date

2. Using the browse feature, upload a copy of the certificate received upon completion of the course
3. Click on OK

When all training courses have been added, they will be displayed in descending order by course completion date (See Figure 3). Select the **“Save”** button to retain all COR Profile Information. Select the **“Cancel”** button to abort changes to the COR Profile data.

Note the warning designated by the yellow triangle and comments associated with blue **“I”**. Once the COR Profile is saved, the COR may update and change as needed.

## B. Contracting Officer Profile

The Contracting Officer Profile allows the CO to enter DoDAAC of all contracting center the CO supports. The main contracting center supported DoDAAC is entered on the CO’s initial role registration. To add additional DoDAACs to the CO Profile, perform the following:

Contracting Officer Profile			
Contracting Center Information			
Item	Contracting Center DoDAAC	Contracting Center Organization	Actions <input type="button" value="Add"/>
1	HC1047	DISA	<a href="#">Edit</a> <a href="#">Delete</a>
2	HQ0102	DEF PROCUREMENT/ACQUISITION POLICY	<a href="#">Edit</a> <a href="#">Delete</a>
3	N00140	NAVSUP FLT LOG CTR PHILADELPHIA	<a href="#">Edit</a> <a href="#">Delete</a>
4	N00421	NAVAL AIR WARFARE CENTER AIR DIV	<a href="#">Edit</a> <a href="#">Delete</a>
5	N00612	NAVSUP FLT LOG CTR CHARLESTON	<a href="#">Edit</a> <a href="#">Delete</a>
6	SP0600	DLA ENERGY	<a href="#">Edit</a> <a href="#">Delete</a>

Figure 4

1. Click on the **“Add”** button located in the upper right hand corner
2. Type a valid six-digit DoDAAC in the **“Contracting Center DoDAAC”** field
3. Click on the enter button on your computer-The name associated with the DoDAAC auto populates in the **“Contracting Center Organization Field”**
4. Click **“OK”** to add DoDAAC to the Profile

By completing the CO Profile, the CORT Tool builds a directory of the COs assigned to perform work for the entered contracting center. Figure 4 displays a sample of a CO Profile. A DoDAAC must be in the CO Profile before the COR begins processing a nomination. When processing a nomination record, the COR will select the applicable CO from the drop down menu compiled from all CO Profiles.

## **C. Contract Specialist Profile**

The Contract Specialist Profile allows the CS to enter the contracting center DoDAACs the CS supports. The main contracting center supported DoDAAC is entered on the CS's initial role registration into the CORT Tool. In addition, all DoDAACs associated with a CS Contracting Staff Registration in legacy CORT Tool was transferred to the CS Profile during migration. A DoDAAC must be in the CS Profile, before the COR begins processing a nomination. To add additional DoDAACs to the CS Profile, follow the steps listed above in the CO Profile.

By completing this Profile, the CORT Tool builds a directory of the Contract Specialists (CS) assigned to perform work for the entered contracting center. When processing a nomination record, the COR will select the applicable CS from the drop down menu compiled from this all CS Profiles.

## **D. Administrative Contracting Officer Profile**

The ACO Profile allows the ACO to enter the contracting center DoDAACs the ACO supports. The main contracting center supported DoDAAC is entered on the ACO's initial role registration into the CORT Tool. To add additional DoDAACs to the ACO's Profile, follow the steps listed above in the CO Profile. By completing this Profile, the CORT Tool builds a directory of ACOs. When processing a nomination record, the CO or CS will select the applicable ACO from the drop down menu compiled from this all ACO Profiles.

*Note: In a future build, the ACO will be able to view all nominations associated with DoDAACs in the ACO profile.*

## **E. Quality Assurance Point of Contract Profile**

The QA POC Profile allows the QA POC to enter the contracting center DoDAACs the QA POC supports. The main contracting center supported DoDAAC is entered on the QA POC's initial role registration into the CORT Tool. To add additional DoDAACs to the QA POC's Profile, follow the steps listed above in the CO Profile. By completing this Profile, the CORT Tool builds a directory of all QA POC. When processing a nomination record, the CO or CS will select the applicable QA POC from the drop down menu compiled from this all QA POC Profiles.

*Note: In a future build, the QA POC will be able to view all nominations associated with DoDAACs in the QA POC profile.*

## F. Auditor Profile

The Auditor Profile allows the Auditor to enter the contracting center DoDAACs the Auditor requires access to conduct its audit. To enter DoDAACs to the Auditor's Profile, perform the following steps:

1. Click on the "Add" button located in the upper right hand corner
2. Type a valid six-digit DoDAAC In the "Contracting Center DoDAAC" field
3. Click on the enter button on your computer -The name associated with the DoDAAC auto populates in the "Contracting Center Organization Field"
4. Add the date required for access (*Auditor will lose access to this DoDAAC when this date passes*)
5. Click "OK" to add DoDAAC to the Profile

# VI. COR DESIGNATION PROCESS

The COR Designation Process begins with an individual nominating himself as a COR on a contract.

The nomination is then sent to COR Supervisor, who should be familiar with the requirement, the nominee's experience, training, and ability, and will either approve or reject the nomination.

Upon receipt of the nomination from the Supervisor, the CO or CS shall verify and validate that the nominee training requirements are met and the nominee meets the requirements for the type of contract for which a COR is being designated.

## A. Nomination Record

The nomination record contains seven primary sections. They include the COR Information, Contracting Information, Contractor Information, QA Surveillance Plan (QASP), COR Certification, Supervisor/Commander Certification and Contracting Officer sections. **Access to all sections are dependent upon the user roles and the status of the nomination.** Each section contains a “Help” button that provides guidance and direction on how to complete.

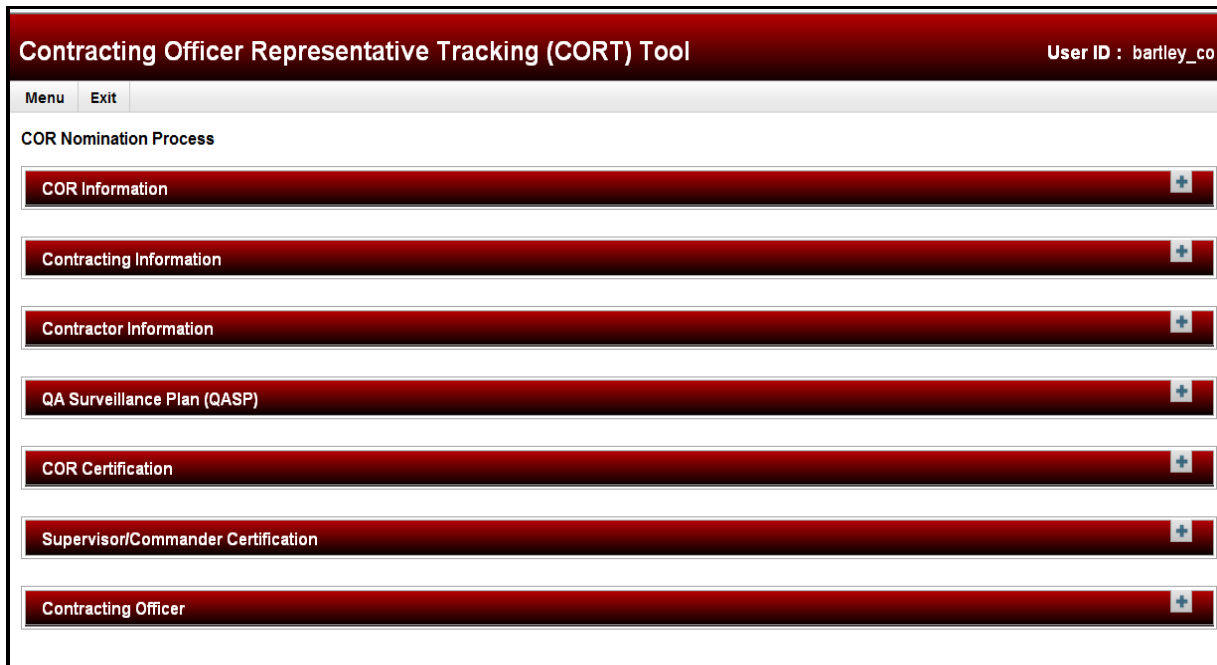


Figure 5



Click the “Plus” sign in the upper right hand corner to expand each section and the resulting “Minus” sign to collapse. A description of each section follows:

## **1. COR Information**

This section contains basic information that has been imported from the COR’s Profile page. It includes the COR’s name, home organization, and training courses completed. On a nomination, each role, except COR, is granted “view only” access to the training certificates.

## **2. Contracting Information**

Before beginning the nomination, the COR, as a minimum, will need to know the following:

- Contracting Center Department: Department awarding the contract
- Contracting Center DoDAAC: Office Code of contracting agency awarding the contract
- Contract Number or Preaward Contract Number
- Contracting Officer Name and
- Contract Specialist Name

To begin, the COR must enter the above information into the Contracting Information section. The COR may also enter the Contract Completion Date and Task Order number if known.

All other roles, except CO, CS and DAs are given “view only” access to this section.

## **3. Contractor Information**

The CORT Tool auto populates this section with the contractor information associated with the contract number. If a contract is posted in Electronic Document Access (EDA), its data will be pulled into the CORT Tool, when a valid contract number is entered on a nomination. Each role is granted “view only” access to this section.

## **4. Quality Assurance Surveillance Plan (QASP)**

The COR, CS or CO may add, view, edit or delete a QASP. QASPs are required for service contracts over the simplified acquisition threshold; however, the QASP is not required for the submission of the nomination by the COR.

At time of appointment/designation, the CO must ensure that a QASP is uploaded in the CORT Tool or waive the requirement for a QASP. If the QASP is being waived, the CO must enter a reason for the waiver. All other roles are provided “view only” access to this section of the record.

## 5. COR Certifications

The final step for the COR is the completion of the “COR Certifications”. The COR shall check the box next to **each** individual certification or check the “Certify All” box to accept the list of certifications. The certifications should only be checked if the COR is ready to send the nomination to the supervisor for approval. Once all certifications are checked, the nomination populates the “Date Certified” field; to remove the “date certified” uncheck the box. *Note, certifications must be checked and date certified populated before the nomination is sent to the supervisor.*

The COR shall select the “submit” button to send the nomination to the Supervisor for approval. The nomination is now placed in the Pending Supervisor Approval status. When a nomination is in this status, all other roles are granted view only access to this section of the nomination.

## 6. Supervisor/Commander Certifications

This section becomes viewable to the Supervisor when the nomination enters the “Pending Supervisor Review” status. The Supervisor may either check the box next to each certification or select the “Certify All” box to accept the list of certifications. Once all of the certifications are checked, the nomination populates the “Date Certified” field for the Supervisor.

The Supervisor selects submit to send the nomination to the contracting officer for approval. The nomination is now placed in the Pending PCO Approval status. When any nomination is in this status, all roles are provided view only access to the COR and Supervisor’s certifications sections of the nomination.

## 7. Contracting Officer

This section becomes viewable to the CO and CS when the nomination enters the “Pending PCO Review” status. The CO or CS enters basic information about the nomination required to appoint or designate the COR. They include COR Training Type, type of COR and certifications, etc. The CO or CS are responsible for ensuring the COR’s training certificates and information are accurate.

The CO is responsible for loading the appointment or letter of designation into the CORT Tool and approving any nomination (the CS will not be allowed to load the letter and approve the nomination). Once a nomination has been approved, all roles, except CO and CS are granted view only access to the Contracting Officer section of the nomination.

## B. Status of Nominations

Each nomination within the CORT Tool is in one of the following statuses:

1. **Draft** - The nomination was started and/or saved by the COR.
2. **Pending Supervisor Review** – COR submitted nomination to Supervisor for approval.
3. **Rejected by the Supervisor** - Supervisor reviewed and rejected the COR nomination. Reason for rejection is documented in the Supervisor comment section.
4. **Pending PCO Review** - Supervisor has reviewed, approved, and submitted nomination to the CO for approval.
5. **Rejected by the PCO** – CO or CS reviewed and rejected the COR's nomination. Reason for rejection is documented in the CO comment section.
6. **Active** - CO approved the COR nomination. The individual is designated as COR on the contract.
7. **Inactive** – The contract completion date associated with the nomination is in the past.
8. **Terminated** - The CO has revoked or terminated the COR's designation.
9. **Cancelled** - The nomination has been cancelled by any user.
10. **Recalled** - When nominations are cancelled by a Department Administrator, they will remain in this status for 30 days. They DA may recall this nomination at any time during the 30 day period. On day 31, the cancelled nominations are removed from the CORT Tool.

## C. Roles and Responsibilities in the COR Nomination Process

Each nomination contains four major roles. They include the COR, Supervisor, CO and CS. In addition, some nomination may contain two additional roles, ACO and QA POC. These two roles require the consent of the CO or CS.

# 1. Contracting Officer Representative Role

The COR begins a nomination by selecting “COR Nomination Process” from the CORT Tool menu. The first five sections of the record are displayed. The COR completes each data element as indicated below.

- a) **COR Information Section** – View only access granted. No action required by COR.
- b) **Contracting Information Section:** Complete each of the following elements as indicated below:
  - (1) **Contracting Center Department** – Select the DoD department or agency awarding the contract (i.e. Navy, Air Force: *Note: Army will be available after VCE migration expected June 2015*).
  - (2) **Contracting Center Department of Defense Activity Address Code (DoDAAC)** - Enter the six digit procurement DoDAAC or FEDAAC of the contracting office awarding the contract.
  - (3) **Contracting Officer** - Select the CO from the drop down menu. The email and phone number auto-populates.
  - (4) **Contract Specialist** - Select the CS from the drop menu. The email and phone number auto-populates.
  - (5) **Contract Number is Known** – Select yes or no. If yes, enter the following:
    - a. If yes is selected, go to step 6.
    - b. If no is selected, enter a Preaward number and proceed to the QASP section.
  - (6) **Contract Type** – If known, enter the type otherwise leave blank for the contracting officer/contract specialist to complete.
  - (7) **Contract Number** – If known, enter the contract otherwise leave blank for the contracting officer/contract specialist to complete.
    - a. When the 9<sup>th</sup> position of the contract number equals “D” “H” or “A”, the COR is prompted to enter a task/deliver order number. Enter a task order number and click on the “Add” link.
    - b. If additional task orders are required add the order number and click on the “Add” link besides each order until completed (*Maximum of 100 orders per nomination*).
    - c. If an order was entered in error, click on the “Delete” link beside each order to remove.
  - (8) **Contract Completion Date** – If known, enter the contract completion date otherwise leave blank for the contracting officer/contract specialist to complete
  - (9) **COR Nomination Status** - Defaults to “Draft.” The nomination remains in “Draft” status until it is submitted to the Supervisor for review.

- c) **Contractor Information Section**- View only. No action required.
- d) **Quality Assurance Surveillance Plan Section** - Click the “Add” button and upload a copy of the QASP; otherwise leave blank
- e) **COR Certifications Section**- Check the box next to each certification or check the box next to “Certify All”. The “Date Certified” field populates. Add needed comments for the Supervisor or CO; otherwise leave blank
- f) **Complete Nomination:** When all of the above sections are completed, the COR finishes his portion of the nomination by selecting one of the following:
  - (1) **Submit** - This finalizes the COR’s portion of nomination and forwards it to the Supervisor for review and approval. The “nomination status” changes to “Pending Supervisor Review.” An email is sent to the Supervisor requesting approval or rejection of the nomination.
  - (2) **Save** – This saves the nomination in draft status. The COR may return to the nomination at a future time to complete.
  - (3) **Cancel** – This cancels and removes the COR nomination from CORT Tool. Once cancelled, a user will not be able to access the nomination. Note: CORs may only cancel nominations that are in “Draft” or “Rejected” status.
  - (4) **Previous** – This returns the COR to the “COR Nomination Process” menu. The nomination is not saved. Before clicking on previous, the COR must select save to retain all data entered on the nomination.

## 2. Supervisor/Commander

The Supervisor is responsible for reviewing and approving or rejecting it nomination submitted by the COR. The Supervisor will receive an email directing him to the CORT Tool. When the Supervisor clicks on “Awaiting My Approval,” he will search for the applicable nomination by either:

- Clicking the “Search” button to view all contracts that are in the “Pending Supervisor Review” status and that are associated with the Supervisor User ID; or
- Typing in a specific or partial contract number and then click on search.

A list of contracts/preward is displayed as indicated in Figure 6.

Awaiting My Approval

COR Nominations Awaiting My Approval as Supervisor / Commander (2 items found)

Sorted by Contract Number/PreAward Number in ascending order

Item	COR	Contract/PreAward Number	Contracting Officer	COR Certified
1	Chan, Dana	<a href="#">F33657-99-D-0028-SD1G</a>	Dartley, Officer	2013/06/05
2	Chan, Dana	<a href="#">TRYINGTODUPLICATE</a>	Chan, Dana	2013/06/13

Previous Help

Figure 6

Click on the applicable Contract/PreAward number from the displayed list.

- a) **Nominations Sections.** The first six sections of nomination record are displayed. Review each section of the nomination. Verify and validate the qualifications of the COR. Annotate any discrepancies in the comment block.
- b) **Supervisor Certification Section.** Check the box next to each certification or check the box next to "Certify All." The "Date Certified" fields auto-populates when all certifications are checked. Next, enter comments, if needed. The supervisor finishes this portion of the nomination process by selecting one of the following:
  - c) **Complete Nomination.** Upon completion of the certification, the Supervisor finishes his portion of the nomination by selecting one of the following
    - (1) **Approve** – This finalizes the nomination and forwards to the CO for review, approval or rejection. The nomination changes to "Pending PCO Approval" status. An email is sent to the CO to approve or reject the nomination.
    - (2) **Save** – This retains the nomination in the "Pending Supervisor" status. It allows the Supervisor to return the nomination at any time to complete.
    - (3) **Reject** – This sends the nomination back to the COR for corrections. Include a reason for the rejection in the comment section. Rejection comments are mandatory.
    - (4) **Cancel** - This removes the nomination from the CORT Tool. The Supervisor may only cancel nominations that are in the "Pending Supervisor Review" status. Once cancelled, users will no longer be able to access the nomination.
    - (5) **Previous** – This returns the Supervisor to previous menu (i.e. awaiting my approval or contract list status). Before clicking on previous, the Supervisor must select save to retain all data entered on the nomination.

### 3. Contracting Officer and Contract Specialist Roles

The CO is responsible for reviewing, rejecting, designating or revoking a nomination, submitted by the COR and approved by the supervisor. The CS is responsible for reviewing and or rejecting a nomination submitted by the COR and approved by the Supervisor.

Once the Supervisor approves the nomination submitted by the COR, it is sent to the CO and CS identified on the record. The CO will receive an email directing him to the CORT Tool. The CO accesses the nomination using the “Awaiting my Approval” or “Contract List/Status” menu option. Note: The CS may not receive an email from the COR submitting the nomination, but the CS may access the nomination using the Contract List/ Status.

When the CO enters the CORT Tool and selects the “Awaiting My Approval” link, or when the CS accesses Contract List Status, both will search for applicable nomination by either:

- Clicking the “Search” button to view all contracts in the “Pending PCO Review” status and are associated with your User ID; or
- Typing in a specific or partial contract number and then clicking on search.

A list of Contract/PreAward is displayed as indicated in Figure 6 above. Click on the applicable Contract/PreAward number from the displayed list.

- a) **Nominations Sections.** Seven sections of nomination record are displayed. Review each and complete applicable sections of the nomination as described below.
- b) **Contracting Information Section.** The CO or CS completes this section if not previously completed by the COR.
  - (1) **Contracting Center Department** - Update or accept
  - (2) **Contracting Center Department of Defense Activity Address Code (DoDAAC)** – Update or accept
  - (3) **Contracting Officer (CO)** – Update or accept
  - (4) **Contract Specialist (CS)** – Update or accept
  - (5) **Contract Type** – From the drop down menu, select applicable contract type. Note: If DoD FAR Type is selected, the contract number must be thirteen (13) characters in length and the ninth position, must be an alphabet. For all other types, a minimum of six characters is required.

- (6) **Contract Number** – Verify the contract number previously entered by the COR or enter a contract number for the previously entered preaward number.
  - (7) **Delivery/Task Order Number** - If applicable, verify the delivery/task order number previously entered by the COR or enter a delivery/task order number for the previously entered preaward number.
  - (8) **Contract Completion Date** – If applicable, enter the contract completion date or verify the date entered by the COR- *(If orders have different completion date, the CO must modify the date after COR designation using the Contract Modification option).*
- c) **Quality Assurance Surveillance Plan Section:** When applicable, add the QASP to the nomination, by clicking the “Add” button and upload a copy of the QASP for this nomination. If waiving the QASP, complete the QASP waiver or enter comments.
- d) **Contracting Officer Section.** This section must be completed by the CO or CS as noted below.
- (1) **COR Training Type** - From the drop down menu, select the applicable COR Training Type. Ensure that the training type is in accordance with current DoD policy.
    - a. Type A - Low-risk, fixed-price - service contract requirements without incentives.
    - b. Type B - Other than low risk - service contract requirements.
    - c. Type C - Unique service contract requirements that necessitate a professional license or certification.
  - (2) **Type of COR** – Indicate whether the COR will be the “primary or alternate” COR on the nomination; otherwise, select N/A from the drop down menu.
  - (3) **Contingency Environment** – Indicate whether the COR will be performing this contract in a contingency environment by selecting yes or no from the drop down menu.
  - (4) **Appointment Letter (CO Only)** - Click the “Add” button to upload a signed copy of the letter of designation to appoint the COR.
  - (5) **QASP Waiver.** If a QASP is not required for this nomination or is being waived, indicate the reason for QASP waiver. *Note: Smart Forms for a QASP waiver will be available shortly. Using this form, select the reason for a waiver. If other is selected, a reason for the waiver is required.*



- (6) **Certifications** – Check the box next to each certification or click on the “Certify All” box at the top. The Date Certified fields populates when all certifications are check. All certifications must be in order to approve the nomination.
  - (7) **Approval/Rejections Comments.** - Enter any all required comments for the COR or Supervisor. When rejecting a nomination, comments are mandatory
  - (8) **Administrative Contracting Officer (QA POC)** - To grant an ACO access to the nomination and its contents enter the name of the ACO from the drop down menu; otherwise select “None.”
  - (9) **Quality Assurance Point of Contact.** To grant and QA POC access to the nomination and its contents, applicable enter the QA POC from the drop down menu; otherwise enter “None.”
- e) **CO Complete Nomination.** The CO finishes this portion of the nomination by selecting one of the following:
- (1) **Approve** – This finalizes the nomination and designates the COR. The nomination is placed in “Active” status. An email is generated and sent to the COR advising of successful appointment and designation as a COR on the contract.
  - (2) **Save** – This retains the nomination in the “Pending PCO Review” status. Note: If the CO added an appointment or letter of designation, it is removed from the nomination when this button is selected.
  - (3) **Reject** - This sends the nomination back to the COR for corrections. Rejection comments are mandatory; therefore, the CO shall add a reason for the rejection in the comment section. If the CO added an appointment or letter of designation, it is removed from the nomination when the button is selected.
  - (4) **Cancel** – This cancels the nomination in its entirety. The CO may only cancel nominations that are in “Pending PCO Review”. Once the cancelled, a user will not be able to access the nomination.
  - (5) **Previous** – This returns the CO to the previous menu. Before clicking on previous, the CO should click on save to retain all data (except the designation letter). If the CO added an appointment or letter of designation, it will be removed from the nomination when this button is selected.
- f) **CS Complete Nomination:** The CS finishes this portion of the nomination process by selecting one of the following:

- (1) **Save** – This retains the nomination in the “Pending PCO Review” status. Note: If the CO added an appointment or letter of designation, it is removed from the nomination when this button is selected.
- (2) **Reject** - This sends the nomination back to the COR for corrections. Rejection comments are mandatory; therefore, the CS shall add a reason for the rejection in the comment section.
- (3) **Cancel** – This cancels the COR nomination in its entirety. Once cancelled, users will not be able to access the nomination. Note: The CS may only cancel nominations that are in “Pending PCO Review”.
- (4) **Previous** – This return to the CS to the previous menu. Before clicking on previous, the CS should click on “save” to retain all data. If a designation letter was previously added, it will not be saved.

## 4. Administrative Contracting Officer and Quality Assurance Point of Contract Roles

The CO and CS are responsible for entering the ACO and QA POC fields in the Contracting Officer Section of the nomination. When entered, the name ACO and QA POC are immediately granted access to the nomination record for contract surveillance and oversight. These records are then accessible by these roles using Contract List/Status.

The ACO and QA POC names are only entered when the records are in the “Pending PCO Review”, “Active” or Inactive statuses.

## 5. Department Administrator Role

The Department Administrator has an advisory role in the COR Designation Process. They provide guidance and assistance COR, Supervisor, CO and CS using the “View All COR Nomination” menu option. The DAs are able to view any nomination to answer to questions arising during and after the COR Designation Process. In addition, the DAs may perform the two functions they listed below on a nomination

- a) **Cancel a Nomination.** A CDA or LDA may cancel any contract nomination that is not in an active status, by performing the following:
  - (1) Select “View All COR Nominations” and click on search
  - (2) Select the applicable contract number
  - (3) Scroll down to the “Cancel Contract Nomination” section and click on the “Cancel” button

- (4) Click on OK in the confirmation dialog that is being displayed
- (5) The confirmation message is displayed at the top and the recall Contract Nomination section is displayed

b) **Recall a Nomination.** A CDA or LDA may recall cancelled contract nominations cancelled in error by the DA. To do so, perform the following:

- (1) Select “View All COR Nominations, check the cancelled box and click on Search
- (2) Select the applicable contract number
- (3) Scroll down to the “Recall Contract Nomination” section and click the “Recall” button
- (4) Click on OK in the confirmation dialog that is being displayed
- (5) Contract nomination is recalled and contract nomination status is set to previous status

Note: Contract nominations must be recalled within 30 days of cancellation. Contract nominations older than 30 days will be permanently deleted from the database.

## D. Contract List/Status

The Supervisor is responsible for reviewing and approving or rejecting it nomination submitted by the COR. The Supervisor will receive an email directing him to the CORT Tool. When the Supervisor clicks on “Awaiting My Approval,” he will search for the applicable nomination by either:

- Clicking the “Search” button to view all contracts that are in the “Pending Supervisor Review” status and that are associated with the Supervisor User ID; or
- Typing in a specific or partial contract number and then click on search.

CORs, Supervisors, CO, CS, ACO, and QA POC may view a nomination using Contract List/ Status. To access, log into the CORT Tool and select “Contract List/Status” from the menu. When the user clicks on “Contract List/Status” from the menu he may search for the applicable nomination by either:

- Clicking the “Search” button to view the list of COR nomination in all status (See Figure 7 below);
- Checking the box (es) next to the applicable statuses and click on “Search”. A list of COR nominations in selected statuses is displayed; or
- Typing in the specific contract number, and then clicking on the search button.

Figure 7 below, displays search results using the “Search” method delineated above.

Search Result as COR (64 Items found)									
Sorted by Contract Number in ascending order									
Item	COR	Contract Number	PreAward Number	Status	Supervisor / Commander	PCO	Specialist	Last Action Date	Reports For Review
1	Bartley, COR		<a href="#">WAWFTEST123</a>	RECORD REJECTED BY PCO	Chan, Dana	Wood, Mary	Wood, Mary		NO
2	Bartley, COR		<a href="#">WAWFTEST3</a>	PENDING PCO REVIEW	Chan, Dana	Brown-Murphy, Bonnie	Brown-Murphy, Bonnie		NO
3	Bartley, COR		<a href="#">TEST12345678</a>	PENDING SUPERVISOR REVIEW	Bartley, Mae	Chan, Dana	Chan, Dana		NO
4	Bartley, COR		<a href="#">MONDAYTEST1</a>	PENDING SUPERVISOR REVIEW	Bartley, Mae	Bartley, Officer	Bartley, Officer		NO
5	Bartley, COR		<a href="#">FRIDAYTEST2</a>	PENDING PCO REVIEW	Bartley, Supervisor	Bartley, Officer	Bartley, Officer		NO
6	Bartley, COR		<a href="#">TEST</a>	RECORD REJECTED BY SUPERVISOR	Bartley, Mae	Bartley, Officer	Bartley, Specialist		NO
7	Bartley, COR	<a href="#">986532</a>	<a href="#">TEST3</a>	TERMINATED	Bartley, Supervisor	Bartley, Officer	Bartley, Specialist	2013/03/25	NO
8	Bartley, COR	<a href="#">DA1234567890121315</a>	<a href="#">TEST2</a>	PENDING PCO REVIEW	Bartley, Supervisor	Bartley, Mae	Bartley, Specialist		NO
9	Bartley, COR	<a href="#">DTRA1122334455667788</a>	<a href="#">TEST1</a>	ACTIVE	Bartley, Supervisor	Bartley, Officer	Bartley, Specialist	2013/03/07	NO
10	Bartley, COR	<a href="#">FA3002-08-C-0007</a>		ACTIVE	Bartley, Supervisor	Bartley, Officer	Bartley, Officer	2013/02/26	YES
11	Bartley, COR	<a href="#">FA8108-09-D-0004</a>	<a href="#">FEBTEST1</a>	ACTIVE	Bartley, Supervisor	Bartley, Officer	Bartley, Officer	2013/02/22	YES
12	Bartley, COR	<a href="#">FA8108-09-D-0006</a>	<a href="#">FEB22TEST2</a>	ACTIVE	Bartley, Supervisor	Bartley, Officer	Bartley, Officer	2013/02/25	NO
13	Bartley, COR	<a href="#">FY233308C61111</a>		PENDING PCO REVIEW	Bartley, Supervisor	Bartley, Officer	Bartley, Specialist		NO
14	Bartley, COR	<a href="#">HC1028-13-C-0000</a>	<a href="#">WAWFTEST2</a>	ACTIVE	Chan, Dana	Carmaggop, Eileen	Carmaggop, Eileen	2013/06/18	NO

Figure 7

Note: When nominations are in the “Draft”, “Rejected by Supervisor” or “Rejected by PCO” status, the COR accesses the contract list/status to complete or to resubmit the nomination. When a nomination is in the “Pending PCO” status, a Contract Specialist accesses the contract list/status to update the nomination with specific contract information about the contract, prior to Contracting Officer approval.

## E. COR Revocation/Termination

Once a COR has been designated and the “Active” status is displayed on the record, all users are now granted access COR Revocation Section.

COR revocation or termination is the responsibility of the Contracting Officer. The CO is able upload a revocation/termination letter to this section of the record. All other users are granted “View Only” access.

To revoke or terminate a designated COR, the CO must issue a formal revocation/termination letter. Once the CO has a signed copy of the letter, the CO terminates the COR in the CORT Tool by performing the following:

1. If collapsed, click on the minus sign to expand the COR Revocation section
2. Upload a copy of the COR Revocation Letter
3. Enter the revocation date
4. Click on “OK” to upload revocation letter; you may now view, edit or delete this document
5. Click on “Revoke COR”
6. Record Status changes to “Terminated”

To gain access to any document posted to a contract by a terminated COR, a new COR must self-nominate using the COR Nomination process and be designated by the CO. The new COR shall use the EXACT SAME CONTRACT number as the terminated COR. Once the new COR has been designated, he will be able to view the document posted by the terminated COR using the "View All COR Submitted Document" menu.

## F. Annual Inspection Checklist

Once the COR has been designated and the "Active" status is displayed on the record, all users are granted access to the Annual Inspection Checklist section.

The CO or CS are required to inspect the COR files and to document the results of the inspection. The CO or CS shall use the Annual Inspection Checklist section to document the results of the yearly administrative review.

All other users are granted "view only" access to this section.

## G. Rejected Nominations

The COR is responsible for completing nominations that has been "rejected" by a Supervisor, CO or CS. The COR shall either update or resubmit the nomination or cancel the nomination in its entirety.

To update and resubmit, perform the following:

1. Log into the CORT Tool
2. Select Contract List/Status and search for the applicable contract number using one of three search criteria listed above
3. Click on the applicable contract number
4. Review the nomination and make any required changes
5. Scroll to the bottom of the nomination, and click on " **submit** "

To cancel the nomination, perform the following:

1. Log into the CORT Tool
2. Select Contract List/Status and search for the applicable contract number using one of three search criteria listed above
3. Click on the applicable contract number
4. Scroll to the bottom of the nomination, and click on " **cancel** "

*Note: When a nomination has been rejected, do not attempt to resubmit the nomination by creating a brand new nomination, using the same contract number. This will generate a duplicate contract number error.*

## **I. Contract Completion Date Modification**

When a contract completion date on a nomination is reached, the nomination will convert to “Inactive” status. To convert back to active, the contract completion date may be changed to a future date by the CO or CS using “Contract Modification” menu item CO or CS shall perform the following:

1. Log into the CORT Tool and select Contract Modification
2. Enter the contract number and/or click on search
3. Click on the applicable contract number
4. Enter the new the contract ending date
5. Select OK to approve change or cancel to retain the original ending date

The nomination will return to “inactive” status when the new contract completion date is reached.

*Note: Changes made to the contract completion date in the Contracting Information or any other section of the nomination will not prevent the nomination from moving to the inactive status.*

## **J. View All Local CORS**

This section allows the CO, CS, and Auditor to search for records associated with a Contracting Center. In order to see a record, the contracting center DoDAAC must be included in the users Profile. All search criteria is optional. Users may search using partial or complete data elements.

1. Select “View All Local COR”
2. Click on “Search” to display all nomination or refined search using one of the criteria
3. Select the applicable contract number to the view the nomination record

*Note: ACO and QAPOC will have access to the functionality in a future release.*

# VI. CONTRACT DOCUMENTS

As part of the surveillance activities, the COR shall maintain copies of all unclassified documentations required by the contract in the CORT Tool. If a DoD enterprise system (i.e., IRAPT, EDA) exists where these documents are currently maintained, the COR shall not maintain those documents in the CORT Tool.

Appendix B contains a list of documents that are maintained in a DoD enterprise system and a sampling of documents that may be maintained in the CORT Tool. The contract dictates the documents are required by the COR and that shall be maintained by the CORT Tool.

## A. COR Online File

DoD requires each COR to establish and maintain an online files for each contract. These files must be available for review by the contracting officer and other officials as authorized by the contracting officer. Once an individual is designated as a COR on a contract, the COR Online File become available to all CORT Tool users associated with the nomination.

To access the file, log into the CORT Tool and select Contract List/Status. Use one of the following search options to view nomination associated with each the user.

- Click the “Search” button to review the entire list of COR nominations in all status. From the drop down menu sort the nomination by status is ascending order. All “Active” records will be displayed first;
- Check the box next to “Active” and then click on search. A list of all COR records in the “Active” status is displayed; or
- Type in the specific COR contract number and then click on the search button.

From the search results, select the contract number of an “Active” COR. When the records opens, scroll down to the “COR Online File”.

### 1. Contracting Officer Representative

A COR may add, view, edit or delete documents using the COR Online File. Figure 8 below, displays the COR’s view of the Online File.

COR Online File						
<b>COR Status Reports</b>						
Month / Year	Version	Status	Document	Created By	Created On	Actions <input type="button" value="Add"/>
No Status Reports found						
<b>COR Trip Reports</b>						
Month / Year	Document	Created By	Created On	Actions <input type="button" value="Add"/>		
No Trip Reports found						
<b>COR Correspondence Reports</b>						
Month / Year	Document	Created By	Created On	Actions <input type="button" value="Add"/>		
No Correspondence Reports found						
<b>Miscellaneous Documents</b>						
Month / Year	Document	Document Type	Created By	Created On	Actions <input type="button" value="Add"/>	
05 / 2013	Sample QASP Letter .docx	Quality Assurance Surveillance Plan	BARTLEY, COR	2013/05/14	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	

Figure 8

To add a document, click on the “add” button located on the upper right hand corner of each section.

1. Select the applicable month and year (*current month and year is the set default*)
2. Click on browse to locate document on your computer.
3. Click on “Upload”
4. Select document type when adding a “Miscellaneous Report”; otherwise go to next step; Surveillance Reports are added to the “COR Status Reports” Section
5. Click on “OK” to confirm

## 2. Contracting Officer and Contract Specialist

CO and CS may view, approve and or reject Status Reports. CO and CS are granted “view only” access to all other type reports, i.e. Trip Report, COR Correspondence and Miscellaneous Documents. Figure 9 below display the CO’s and CS’s view of the COR Online File.

COR Online File						
<b>COR Status Reports</b>						
Month / Year	Version	Status	Document	Created By	Created On	Actions
06 / 2013	1	Approved	MONTHLY STATUS REPORT.docx	DOVER, SHAUNA	2013/06/06	<a href="#">View</a>
05 / 2013	1	Submitted	Monthly COR Report to PCO.docx	DOVER, SHAUNA	2013/06/06	<a href="#">View</a> <a href="#">Approve</a> <a href="#">Reject</a>
<b>COR Trip Reports</b>						
Month / Year	Document	Created By	Created On	Actions		
02 / 2013	Trip Report.docx	DOVER, SHAUNA	2013/06/25	<a href="#">View</a>		
<b>COR Correspondence Reports</b>						
Month / Year	Document	Created By	Created On	Actions		
06 / 2013	Correspondence.docx	DOVER, SHAUNA	2013/06/25	<a href="#">View</a>		
<b>Miscellaneous Documents</b>						
Month / Year	Document	Document Type	Created By	Created On	Actions	
03 / 2012	Miscellaneous.docx	Maintenance Plan	DOVER, SHAUNA	2013/06/25	<a href="#">View</a>	

Figure 9



### 3. Supervisors/Commanders, ACO, QA POCs and DAs

Supervisors/Commanders, ACO, QA POCs and DAs are provided view only access to the documents contained in the COR Online File. Figure 10 below displays what these users will see.

The screenshot shows a web application window titled "COR Online File". It contains four distinct sections, each with a table of data:

- COR Status Reports:** A table with 7 columns: Month / Year, Version, Status, Document, Created By, Created On, and Actions. It lists four records from May 2013, all submitted by BARTLEY, COR.
- COR Trip Reports:** A table with 5 columns: Month / Year, Document, Created By, Created On, and Actions. It lists one record from May 2013: "Lawrence Test Trip Report.docx" by BARTLEY, COR.
- COR Correspondence Reports:** A table with 5 columns: Month / Year, Document, Created By, Created On, and Actions. It displays the message "No Correspondence Reports found".
- Miscellaneous Documents:** A table with 6 columns: Month / Year, Document, Document Type, Created By, Created On, and Actions. It displays the message "No Miscellaneous Documents found".

Figure 10

## B. Contract Management Reports

All documents posted to the COR Online by the COR and all Annual Inspection Checklist posted to nomination by the CO or CS may be viewed by all CORT Tool users using the "All COR Submitted Documents" menu option. To view these documents; perform the following:

1. Select "All COR Submitted Documents"
2. Select "Search" to retrieve the list of the available contracts
3. Select the applicable contract number. The user is given view only access to all documents contained in the file.
4. Click on the "view" link to open the posted document

## VII. MISCELLANEOUS

This section addresses local forms and POC, Related Links and Document Template.

### A. Local COR Forms

This section contains approved documents for use by the services and defense agency. It also identified agency points of contacts for CORT Tool functions. The Component DA or his designee may add agency points of contacts and documents to this section.

To add an agency Point of Contact:

1. Select the Local Form and POC tab from the menu.
2. Select the “add” button.
3. Select the Point of Contact from drop down menus.
4. Select the role, policy or system.
5. Select OK.

To add documents for your agency,

1. Select the Local Form and POC tab from the menu.
2. Select the “add” button.
3. Click on “Browse” to find the document on your computer.
4. Click on “Ok” to load the document.

Once loaded all users may click on “View” to see the documents. DAs may click on delete to remove the document. All other users are provided “view only” access to the contents from the site. The documents can be downloaded by each user.

### B. COR Related Links

This section contains provides direct link to various training, documentation, regulation and processes applicable to COR.

### C. Document Template

This section contains approved DoD Sample Templates that are available to aid in designation, revocation or termination of CORs.

## D. My Organization

This section allows a user to correct or update their home organization DoDAAC, home organizational name or home department associated with the user role. To update,

1. Select the “My Organization” tab from the main menu
2. Enter a valid six digit DoDAAC. The organization name associated with the DoDAAC will automatically populate.
3. Select the correct department from the drop down menu
4. Click on Save

**Note:** *In a future release, this menu option will no longer be available for CORT Tool users.*

## VIII. ADMINISTRATIVE

This section is for use primarily by the DAs and Manger role in the CORT Tool. These individuals perform oversight of Department and of the department CORs.

### A. View All COR (Admin)

This men item allows CORT Tool CDA, LDA or Manager to search for nomination within their department. All search criteria is optional. Users may search using partial or complete data elements.

1. Select View All COR (Admin)
2. Click on “Search” to display all nomination or refined search using one of the criteria
3. Select the applicable contract number to the view the nomination record

### B. Link to Reports (Admin)

This section allows CORT Tool CDA, LDA or Manager to view all reports posted by the DPAP Administrator. To access:

1. Select Link to Reports
2. Click on “View” to open the applicable report

## C. View All Users (DAs only)

This section allows CORT Tool CDA or LDA to modify the home location code of a user in his department. To change, perform the following:

1. Select "View All Users (Admin)"
2. Enter last name or userid (DA can search by a complete or partial Last Name or by a complete User ID)
3. Click on Search
4. Click on Edit
5. Change the location code -A valid code must be presented. If the location is invalid an error message will be displayed
6. Click on save
7. An informational message is displayed when the DA modifies the user information

## IX. CORT TOOL TRAINING

Online training with step by step instructions and screen shots are available. This handbook is a supplemental guide to the Web Based Training (WBT). Training is located at <https://wawftraining.eb.mil/xhtml/unauth/web/wbt/WbtSummary.xhtml>. Please contact your Department Administrator or Manager for specific agency identified and required training.

## X. HELPDESK

For technical assistance with CORT Tool, please contact the WAWF Helpdesk at:

- Help Desk Number: 866-618-5988
- Email: [disa.ogden.esd.mbx.cscassig@mail.mil](mailto:disa.ogden.esd.mbx.cscassig@mail.mil)

The helpdesk regular hours of operation are as follows:

- Monday – Friday 04:30 – 22:00 (MT)
- Saturday – 08:00 – 15:00 (MT)

## Appendix B: File Documentation

This appendix contains a list of documents that may be maintained in the CORT Tool and/or in COR Online file, unless otherwise noted. They include, but are not limited to,

Contract - **EDA**

All Contract Modifications - **EDA**

Contract Data Requirements List (CDRL) - **EDA**

All DD 250s – **WAWF**

All invoices - **WAWF**

Contractor Performance Assessment Report - **CPARS/PPIRS**

Required Regulations – **Available via the WEB**

Warranty Tracking Document – PEREP Warranty Tracking Database

COR Training Documents/Certificates/Professional Licenses

COR Appointment/Designation Letter

Deficiency Reports

Quality Assurance Surveillance Plan

Memo for Record

COR Correspondences

Emails

Surveillance Check List

Surveillance Schedule

Quality Control Plan

Environmental Plan

Maintenance Plan

Work Plan

GFE Inventory

Safety Plan

Test Reports

GFE Property Validation

Miscellaneous Contract Documents

Status Reports

Trip Reports

COR Revocation/Termination

Annual COR File Inspection Checklist

COR Telephone Conversation Record

ALL documents required by the Contract

Any COR Related Documents

Warranty Documents

## Appendix C – System Emails

Email From	Subject	Email Description/Instructions	Email Sent To
COR	COR Nomination approval required for [[CONTRACT_NUMBER]]	COR Nominee Submitted To Supervisor	Supervisor
COR	COR Report Rcvd - [[CONTRACT_NUMBER]]	COR Status Report Created	CO
Supervisor	COR Supervisor has approved COR Nominee for [[CONTRACT_NUMBER]]	COR Supervisor approves Nominee	COR
Supervisor	COR Supervisor rejects Nominee for [[CONTRACT_NUMBER]]	COR Supervisor rejects Nominee	COR
Supervisor	COR Nominee approval for [[CONTRACT_NUMBER]]	COR Supervisor approves Nominee and Submits TO CO	COR, CO
CO	COR Appointed for [[CONTRACT_NUMBER]]	Contracting Officer appoints Nominee	COR
CO	Contracting Officer rejects Nominee for [[CONTRACT_NUMBER]]	Contracting Officer rejects Nominee	COR
CO	COR Status Report Rejected for [[CONTRACT_NUMBER]]	COR Status Report Rejected	COR,
CO	COR Status Report Approved for [[CONTRACT_NUMBER]]	COR Status Report Approved	COR
CO	Final COR Report	Final COR Report	COR
System	Annual COR OGE Form 450 Reminder	Annual COR OGE Form 450 Reminder	COR
System	COR Nomination Package Over 60 Days Old	COR Nomination Package Over 60 Days Old	COR
System	Waiting Supervisor Approval	Waiting Supervisor Approval	Supervisor
System	Waiting CO Approval	Waiting Contracting Officer Approval	CO
System	PCO/Specialist Reassignment of [[CONTRACT_NUMBER]]	COR Contract Reassignment of PCO or SP	COR
System	Contract Completion Date Modification	Contract Completion Date Modification	COR, CO

## Appendix D: Glossary – Abbreviations and Acronyms

ACO	Administrative Contracting Officer
AKO	Army Knowledge Online
APO	Army Post Office
BI	Business Intelligence
CAC	Common Access Card
CDA	Component Department Administrator
CLC	Continuous Learning Contracts
CLM	Continuous Learning Acquisition & Management
CO	Contracting Officer
COR	Contracting Officer Representatives
CORT Tool	Contracting Officer Representative Tracking Tool
CS	Contract Specialist
DA	Department Administrator
DAU	Defense Acquisition University
DKO	Defense Knowledge Online
DoD	Department of Defense
DoDAAC	Department of Defense Activity Address Code
DoDI	Department of Defense Instruction
EDA	Electronic Document Access
FN	Foreign National
FPO	Foreign Post Office

LDA	Local Department Administrator
LN	Local National
QA POC	Quality Assurance Point of Contact
QASP	Quality Assurance Surveillance Plan
SAAR	System Authorization Request Form (DD 2875)
SME	Subject Matter Experts
WAWF	Wide Area Workflow
WBT	Web-Based Training



## Appendix E: Frequently Asked Questions

FAQs can be found on the DPAP website at: <http://www.acq.osd.mil/dpap/pdi/eb/cor.html>.

# Appendix F - Change History

Version	Date	Description of Change	Author
<b>1</b>	<b>11/22/2013</b>	<b>Version 1</b>	<b>M. Bartley</b>
<b>2</b>	<b>03/27/2015</b>	<b>Version 2</b>	<b>M. Bartley</b>