

DOD CONTRACTING OFFICER REPRESENTATIVE TRACKING TOOL (CORT TOOL)

USERS GUIDE

February 2012



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I. INTRODUCTION

The Department of Defense (DoD) COR Tracking Tool (CORT Tool) is used to nominate, appoint, track, and revoke an individual as a COR against a DoD contract. This system allows a Contracting Officer Representative (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. This Guide has been prepared to assist new users in properly utilizing the CORT Tool. This system is guided by the Section 813 Contracting Integrity Panel. This panel, which Congress required in the Fiscal Year 2007 National Defense Authorization Act, has developed a DoD Instruction, or DoDI, which establishes uniform guidance for identification, development and management of CORs within DoD. It also establishes a requirement for component and defense agencies to use the DoD CORT Tool to track COR nominations, appointments, terminations and training certifications. The draft instruction is currently under review.

The CORT Tool is Common Access Card (CAC) enabled and available to all members of the DoD. To use, you must have internet access, a registration with Defense Knowledge Online (DKO) and a CAC reader.

Please use the “Print Layout” view setting to see embedded screenshots.

II. HOME PAGE

The CORT Tool homepage at <https://arc.army.mil/DODCOR/>, (Figure 1) contains top level information for each type of user involved in the nomination and appointment of CORs against DoD Contracts and links to navigate the site.

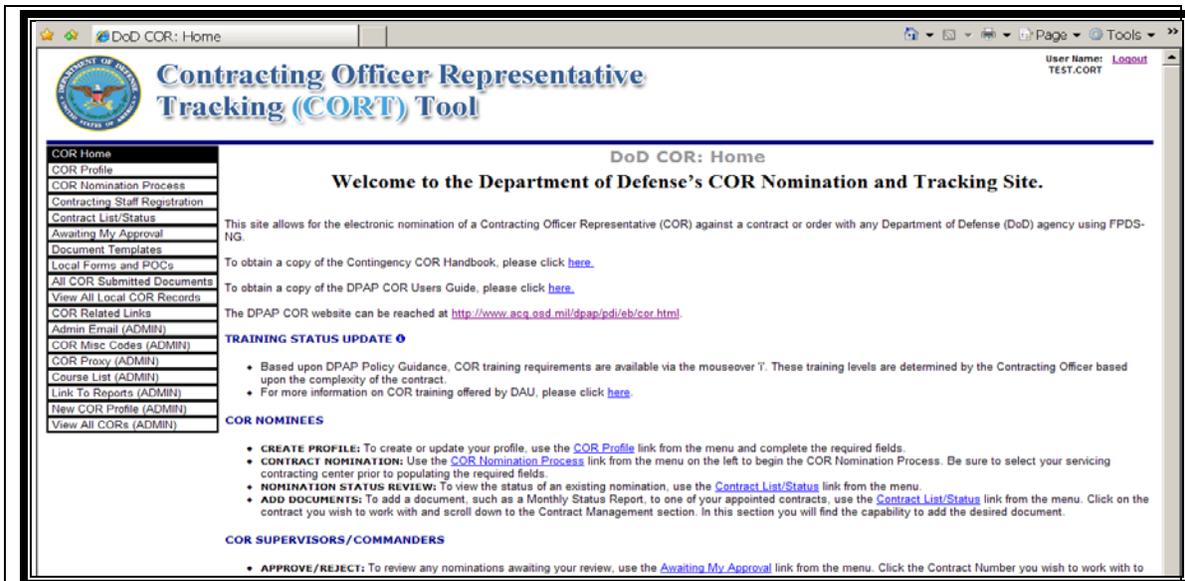


Figure 1: COR Home Page

The CORT Tool menu items are:

- COR Home – Returns the user to the homepage.
- COR Profile – Allows the COR to enter or edit their profile information.
- COR Nomination Process – Allows a COR to begin the nomination process to be appointed a COR on a contract.
- Contracting Staff Registration – Allows the Contracting Officer (CO) and Contract Specialist (CS) to enter or edit their registration information.
- Contract List/Status – Provides the logged in user access to their records for active appointments and those in process.
- Awaiting My Approval – Provides the logged in user access to all records that are awaiting their approval/action.
- Document Templates – Allows the user to see all relevant COR Document templates.
- Local Forms and POC – Allows the user to see all relevant COR Forms and POC for their component and/or major commands.
- All COR Submitted Documents – Allows the COR of any active appointment to see all documents associated with a contract, even those from previous CORs.
- View All Local CORs – Allows the logged in user to review a complete list of nomination for the organization. *This menu item will not be available to all users.*
- COR Related Links – Provides links to various training, document and regulation/processes.
- Admin Links – Are available to the Agency Subject Matter Experts (SMEs) only. It provides SMEs with the ability to add a new COR Profile, proxy as an individual registered in the COR Tool and to view a listing of all CORs and assigned contracts.
- Contingency COR Handbook – Provides the users a link to the Contingency COR Handbook.
- CORT Tool User's Guide – Provides the users a link to this guide.
- CORT Tool Website Link – Provides the users a link to Defense Procurement and Acquisition Policy (DPAP) CORT Tool website.
- Training Status Update – Provides a list of the major COR courses for use with the CORT Tool and provides the definition of the COR training types.

III. COR PROFILE

The COR Profile requires the entry of relevant COR information to ensure the proper nomination and appointment of a COR to a DoD contract. The profile information, once entered, does not need to be entered again and can be used to populate one or more nominations.

The Profile page contains two sections, COR Information and Training Courses. On the initial build of the profile, the COR will complete the COR Information and select “Save Record” at the bottom on the page. The COR will then be able to enter the Training Courses. On subsequent visits to the profile pages both sections will be available simultaneously.

Figure 2 is a screenshot of the COR Profile Information area.

The screenshot shows the 'DoD COR: Profile' form. On the left is a navigation menu with items like 'COR Home', 'COR Profile', and 'New COR Profile (ADMIN)'. The main form area is titled 'DoD COR: Profile' and includes a note: 'Note: All non-mandatory fields are marked with an asterisk (*)'. The form is divided into three main sections: 'COR Information', 'Supervisor/Commander Information', and 'View COR Contract List'. The 'COR Information' section has fields for DKO Name, Work Address, City/APD, State, Zip Code, and Country. The 'Supervisor/Commander Information' section has fields for DKO Name and Email Address. The 'View COR Contract List' section has fields for Email Address, COR's Home Organization (DODAAC), Organization Name, and Unit. There are also fields for Career Experience and Career Experience Level. The form includes a 'Save Record' button at the bottom.

Figure 2: COR Profile Information

The COR will complete all required fields. Some fields, like “Unit”, have blue “I”s that contain helpful information that can be accessed by clicking on the “I”. Mandatory fields not completed will return an error message indicating the value that is missing.

- o DKO Name - Check your DKO account for your DKO name. The “DKO Name” is usually firstname.middleinitial.lastname or is firstname.lastname. Take note of the “period” or “.” between the names.

- Email Address - Enter your **DKO** email address ending with **us.army.mil**. This email address was provided during the DKO registration process.

Supervisors are not required to create a Profile in the CORT Tool. The COR will input all of the supervisor data under the “**Supervisor Information**” section of the COR Profile. CORs need to input the supervisor’s correct DKO name and email address before saving. If the supervisor’s DKO name and email address is incorrect, the supervisor will not be able to view the COR nomination or receive CORT Tool emails regarding the COR’s nomination. Check with your supervisor for his/her correct DKO name before completing. The format for the supervisor’s DKO name is also **firstname.lastname** (example: DENNIS.BRADLEY or JOSEPH.P.SMITH212) and the DKO email address ends with **us.army.mil**.

Note: The COR will receive an error if the COR attempts to identify themselves as the supervisor.

IV. TRAINING

In this section the COR will enter the required COR Training Courses. When the COR accesses the Training Courses area, they will see three items.

- Document – Represents the course to be loaded.
- Course Compl Date – Represents the date the course was completed.
- Add Document – Allows the COR to load the course certificate/transcript.

Completion of the training fields is not required to complete the 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 COR to a contract. The CORT Tool will not allow a COR to be appointed to a contract if the required training courses are missing. The CORT Tool will return an error identifying the missing training courses.

To add your training, follow these steps:

1. Select the course from the drop down menu.
2. Add in the course completion date.
3. Load a copy of the certificate from your computer using the browse feature
4. Click on the “plus” sign at the bottom that states “*Click Here to Add Course Certificate.*”
5. Repeat the above steps to add in additional courses.
6. All refresher training requires the COR to enter the associated hours.
7. All equivalent course requires the COR to check the equivalency box and enter the equivalent provider’s name.

Figure 3 shows a screenshot of the completed Training Courses section.

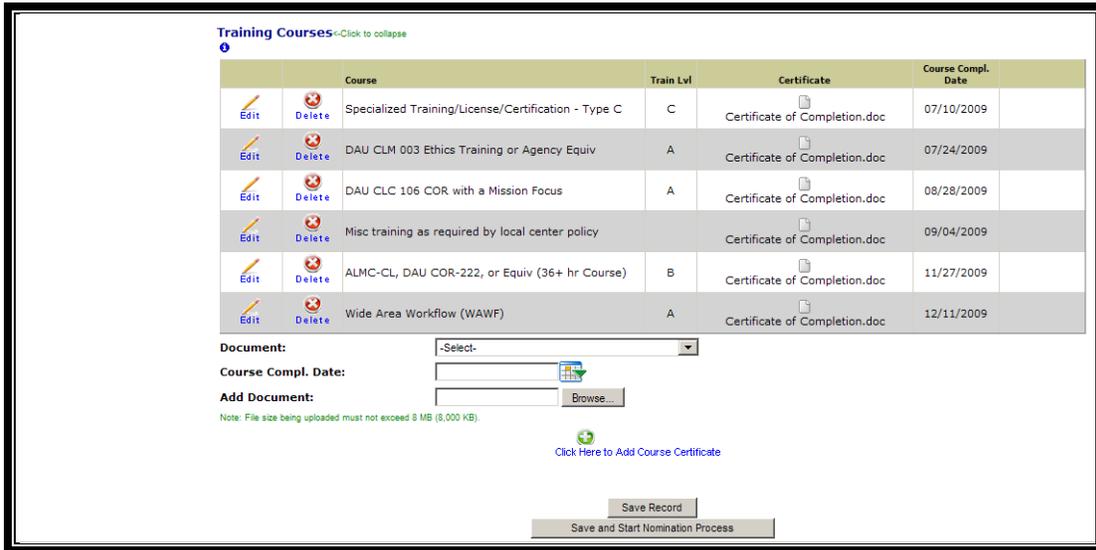


Figure 3: COR Training Courses

Select “Save Record” to complete the Profile and return later or select “Save and Start Nomination Process” to start a nomination.

V. COR NOMINATION PROCESS

The COR can begin a nomination by completing his Profile and selecting “Save and Start Nomination Process” at the bottom of the Profile page or by accessing the “COR Nomination Process” link from the left side menu. This will bring the COR to the nomination page.

The nomination page is broken into three primary areas.

- COR Information – The COR or nominee completes their part of the nomination record.
- Supervisor – The COR’s supervisor or higher authority reviews and certifies their part of nomination.
- Contracting Officer and Contract Specialist – The CO and CS review the nomination and the CO formally appoints the COR to the contract.

A. COR INFORMATION

The COR Information area is broken into a number of distinct areas for nomination completion.

- COR Profile Information – Imports basic information from the profile page to include name, home organization, and training courses completed.
- Supporting Contracting Center - Provides basic information about the department and contracting command awarding contract requiring COR designation.
 - Contracting Center Department - The COR shall select the DoD department or agency awarding the contract (i.e. Army, Navy, Air Force).
 - Contracting Center Department of Defense Activity Address Code (DoDAAC) - The COR shall enter the six digit procurement DoDAAC of the contracting office awarding the contract.

Note: The contracting department and the DoDAACs may be different from the COR’s Home DoDAAC or agency name. For example, a Navy contracting center awarded the contract using a Navy contracting center DoDAAC; however, the COR on the contract is an Army COR and the home DoDAAC is an Army DoDAAC.

- Contract Information - Select “Contract Number is Known” or “Contract number is NOT Known.”
 - If the COR selects “Contract Number is Known,” the COR must enter the contract number. This number should be at least thirteen (13) characters in length and the 9th digit should not be an “R”, “Q” or a “T.” If applicable, enter the delivery or task order. **DO NOT ENTER A SOLICITATION NUMBER AS THE CONTRACT NUMBER.**
 - If the COR selects “Contract Number is NOT Known,” enter a preaward number (i.e. purchase request number, solicitation number or an identifying number) in the text box. The number should be twelve (12) characters or less in length.
 - Record Status - The “Record Status” defaults to “**Draft**” and will remain in “draft” status until the nomination is submitted to the supervisor for review.
- Contracting Officer (CO) - The COR shall identify and select the CO of the nomination from the drop down menu.
- Contract Specialist (CS) - The COR shall identify and select the Contract Specialist of the nomination from the drop menu.
- Quality Assurance Surveillance Plan (QASP) - DFARS 237.172 requires that quality assurance surveillance plans (QASP) be prepared in conjunction with the preparation of the statement of work or statement of objectives for solicitations and contracts for services. The COR shall load a QASP to the CORT Tool and shall enter a description of the QASP.

QASPs are required for service contracts over \$150k, however, it is not required for the submission of the nomination. The CO is required at time of appointment to have a QASP attached to the record.

- Contractor - This area will be prepopulated at time of award with FPDS data. No data entry is required. (*Under development*)
- COR (Nominee) Certifications – Prior to submission of the record to the supervisor, the COR must complete the all of “COR certifications” by checking the block next to each certification or selecting “All” at the top of the certifications.

Click to collapse-> COR

COR (Nominee) Certifications:

Cert. Activation	All	Certification
3/21/2011	<input type="checkbox"/> I certify	I have taken all of the additional training mandated by the contracting activity to be appointed as a COR on this contract.
3/21/2011	<input type="checkbox"/> I certify	I have the necessary clearance for this contract and any relevant information
3/21/2011	<input type="checkbox"/> I certify	I hereby understand that I am required, as a COR, to complete the yearly administrative review of my COR files with the Contracting Officer in the anniversary month of the appointment each year.
3/21/2011	<input type="checkbox"/> I certify	I hereby understand that I may be required, as a COR, to complete COR Reports and submit them within the CORT Tool as specified in the contract.
3/21/2011	<input type="checkbox"/> I certify	I may be held personally liable for unauthorized acts.
3/21/2011	<input type="checkbox"/> I certify	I will complete the COR specific "refresher training" as required by "DoD Standards for Certifications of Contracting Officer Representative (COR) for Services Acquisition" every 3rd year. I will update the training section of this CORT Tool with a copy of the refresher course certificate and date of course completion.
3/21/2011	<input type="checkbox"/> I certify	If applicable, I have registered as a user of Wide Area Workflow (WAWF) online and taken the training at https://wawf.feb.mil and will process payments when possible using WAWF.

Submit Record to Supervisor/Commander Save Record (without routing)

Figure 4: COR Certifications

Once completed, the COR must select one of the following:

- Submit Record to Supervisor - This save the record and sends it to the supervisor for approval or rejection. It also sends an email is sent to the supervisor of record in the COR Profile with an embedded link to the CORT Tool advising of this action.
- Save Record (without routing) - This allows the COR to save the record to return to at a later time.
- Cancel Record - This cancels the record in its entirety and removes it from the CORT Tool.

B. SUPERVISOR

The Supervisor or Higher Authority is responsible for approving or rejecting the nomination before submitting to the CO. Once the COR has submitted a nomination record to the Supervisor, the Supervisor will receive an email directing him to the CORT Tool site. All emails will be sent to the DKO email address, so it is suggested that you auto forward your DKO emails to a non-DKO email account (i.e. work email).

The Supervisor enters the COR Tool and selects the “Awaiting My Approval” link. The Supervisor will see all the nomination awaiting their review and approval (Figure 5 shown below). To access a nomination, click on the contract/preaward number.

Representative (COR) Tool

DoD COR: Awaiting my Approval

COR Nominees Awaiting My Approval as Supervisor 0

COR	Contract/PreAward Number	Contracting Officer
FRANKIE.WILLI	XXXXXX-10-C-0009-0000	KELLY, JIMMY
FRANKIE.WILLI	XXXXXX-10-C-0010-0000	KELLY, JIMMY
FRANKIE.WILLI	XXXXXX-10-C-0011-0000	KELLY, JIMMY
FRANKIE.WILLI	XXXXXX-10-P-R007-0000	KELLY, JIMMY

Navigation menu: COR Home, COR Profile, COR Nomination Process, Contracting Staff Registration, Contract List/Status, Awaiting My Approval, All COR Submitted Documents, New COR Profile (ADMIN)

Figure 5: Supervisor “Awaiting my Approval” Nomination Records.

Selects the applicable record and reviews the COR’s information (Figure 6). Specifically, the Supervisor shall:

- o Ensure the COR Training courses are listed.
- o Ensure the Contracting Center Department and DoDAACs are correct.
- o Verify the Contract Information (contract or preaward number) is correct.
- o Ensure the correct CO and CS is selected.
- o Ensure the QASP or memorandum, indicating the reason a QASP is not required, is loaded.

DoD COR: Nomination Process for TEST- ZZ

[View Complete COR Information](#)

COR INFORMATION

DKO Name: TEST.CORT
 Supervisor/Commander: MAE.BARTLEY
 Courses:

COR's Home Organization DODAAC: HQ0102
 Supervisor/Commander Commercial Phone: 703-588-0832

Course	Training Lvl	Certificate
DAU CLM 003 Ethics Training or Agency Equiv	ABC	Certificate of Completion.doc
DAU CLC 106 COR with a Mission Focus	[A]	Certificate of Completion.doc
Refresher Training		Certificate of Completion.doc
DAU COR 222, DAU CLC 222 COR on-line training, ALMC-CL COR Course or Equivalent	[A]5C	Certificate of Completion.doc
Other		Certificate of Completion.doc

Supporting Contracting Center

Contracting Center: DEFENSE
 Department: HQ0102
 Contracting Center DODAAC:

Contract Information

Contract Number is Known Contract Number is NOT Known

Contract/Solicitation Number: TEST- ZZ
 Record Status: PENDING SUPERVISOR REVIEW

Contracting Officer

Contracting Officer: GAUGHAN, PAUL
 Commercial Phone: 7036993723
 Email: PAUL.GAUGHAN@US.ARMY.MIL

Contracting Specialist

Contracting Specialist: GAUGHAN, PAUL
 Commercial Phone: 7036993723
 Email: PAUL.GAUGHAN@US.ARMY.MIL

QA Surveillance Plan (QASP)

Note: The file should have a file extension (doc, pdf, etc).
 Note: File size being uploaded must not exceed 5 MB (5,000 KB).

Existing Document: [Sample QASP.doc](#)
 Description: Sample

Figure 6: Supervisor's Nomination Review

Next, click the "Supervisor/Commander tab to expand (Figure 7) if this section is collapsed.

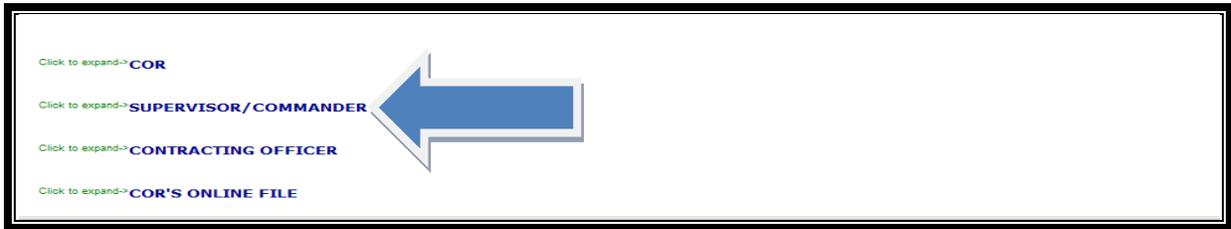


Figure 7: Supervisor Section

Otherwise, complete the certifications by checking the block next to each certification or selecting "All" at the top of the certifications. Figure 8 below details the Supervisor's certifications.

Cert. Activation	All	Certification
3/21/2011	<input type="checkbox"/> I certify	I certify that I am the Supervisor (or higher authority) of the Nominee and I submit the Nominee's name to the Contracting Officer as an acceptable candidate for Contracting Officer's Representative.
3/21/2011	<input type="checkbox"/> I certify	If Applicable, this COR Nominee has registered as a user of Wide Area Workflow (WAWF) online and taken the training at https://wawf.eb.mil, and will process payments when possible using WAWF.
3/21/2011	<input type="checkbox"/> I certify	The Nominee has the technical or administrative abilities and the required security clearance commensurate with the proposed COR duties.
3/21/2011	<input type="checkbox"/> I certify	The Nominee has time available to adequately perform such duties.
3/21/2011	<input type="checkbox"/> I certify	The Nominee is familiar with pertinent contract clauses such as changes, inspection and acceptance, Government-furnished property, termination, and the concepts of excusable and nonexcusable delays in contract performance.
3/21/2011	<input type="checkbox"/> I certify	The Nominee may be held personally liable for unauthorized acts.
3/21/2011	<input type="checkbox"/> I certify	The Nominee possesses the necessary ability to analyze, interpret, and evaluate factors involved in contract administration.
3/21/2011	<input type="checkbox"/> I certify	The Nominee will complete the applicable COR Reports and place a copy of these reports in this CORT Tool.
3/21/2011	<input type="checkbox"/> I certify	The Nominee will complete the COR specific "refresher training" as required by "DoD Standards for Certification of Contracting Officer Representatives (COR) for Services Acquisition every 3rd year and will update the training section of the CORT Tool with a copy of the refresher course certificate and date of course completion.
3/21/2011	<input type="checkbox"/> I certify	The Nominee will complete yearly administrative review of the nominees COR files with the Contracting Officer in the anniversary month of appointment each year.
3/21/2011	<input type="checkbox"/> I certify	The Nominee's integrity and adherence to the Standards of Conduct DoDD5500.7-R, The Joint Ethics Regulation (JER) and the Procurement Integrity Act (FAR 3.104) are above reproach.
3/21/2011	<input type="checkbox"/> I certify	To the best of my knowledge, the Nominee has no violations with US Government purchase cards.
3/21/2011	<input type="checkbox"/> I certify	To the best of my knowledge, the Nominee has no security violations.
3/21/2011	<input type="checkbox"/> I certify	To the best of my knowledge, the Nominee has no violations with US Government credit cards.

Approval/Rejection Comments:

Supervisor/Commander Approve Save Record (without routing) Supervisor/Commander Reject

Figure 8: Supervisor Certifications

Once the certifications are checked, the Supervisor must select one of the following:

- Supervisor/Commander Approve – This forwards the nomination record to the CO.
- Save Record (without routing) – This allows the Supervisor to save the nomination record to review at a later date.
- Supervisor/Commander Reject – This sends the nomination back to the COR for correction. If rejecting, the Supervisor must enter mandatory rejection comments.

- Cancel Record – This cancels the nomination record in its entirety and removes it from the COR Tool.

C. CONTRACTING OFFICER/CONTRACT SPECIALIST

Once the Supervisor selects “Supervisor/Commander Approve” the nomination is sent to the CO and CS identified on the record. Both will receive an email directing them to the COR Tool. The CO will access the “Awaiting My Approval” link to view all pending nominations and select the contract or Preaward Number.

When the record opens review the information entered by the COR and COR’s Supervisor to finalize the nomination. Click the “Contracting Officer tab to expand this section (See Figure 7).

Figure 9 below depicts the areas the CO will need to complete on the nomination page.

Reassignment of the PreAward Contract HQ010202C1234

Contract Number: HQ0102-02-0-TE01

Delivery/Task Order: 2121

COR Training Type: A

Contingency Environment: No

Waive QASP?: [H:\COR Tool\SAMPLES\0](#) [Browse...](#)

Contracting Officer Certifications:

Cert. Activation		Certification
3/21/2011	<input checked="" type="checkbox"/> I certify	I have prepared and signed an appointment/designation letter, and had the COR sign the appointment/designation letter and am uploading the letter in this COR Tool.
3/21/2011	<input checked="" type="checkbox"/> I certify	I have reviewed the COR's courses and confirmed that a valid "Contracting Officer Representative" course has been completed by the COR.
3/21/2011	<input checked="" type="checkbox"/> I certify	I will ensure that the COR completes the required COR Report and uploads it in this Tool. I will then review the COR Report and approve or reject it in the COR Tool.
3/21/2011	<input checked="" type="checkbox"/> I certify	I will perform a yearly administrative review of the COR's files in the anniversary month of appointment using the Annual COR File Inspection Checklist.
3/21/2011	<input checked="" type="checkbox"/> I certify	I will prepare and sign a COR Revocation/Termination Letter following completion of the above contract/delivery order/purchase order. I will sign the Revocation/Termination Letter and have the COR sign the letter. I will then upload the signed COR Revocation/Termination Letter into the COR Tool because I understand that this is the only way to turn off the e-mail notifications and move this contract/delivery order/purchase order to the Inactive area of the COR Tool.
3/21/2011	<input checked="" type="checkbox"/> I certify	I will upload the Annual COR File Inspection Checklist in this system at the end of the anniversary month of appointment each year.

Approval/Rejection Comments:

Appointment Letter: [H:\COR Tool\SAMPLES\A](#) [Browse...](#) Appointment Date: 10/02/2011

[Contracting Officer Approve](#) [Save Record \(without routing\)](#) [Contracting Officer Reject](#)

ACO DKO Name: JOHN.DOE4

QA POC DKO Name: MICKY MOUSE

[Save Record \(without routing\)](#)

Figure 9: Contracting Officer Appointment Process

The CO/CS shall complete the following actions:

1. If the COR previously selected “Contract Number is NOT Known,” the CO shall enter the correct contract number and delivery or task order number (if applicable); otherwise, go to step 2.
2. Indicate the COR Training Type required to perform as a COR on the contract. Ensure that the training type is in accordance with DoD policy. (See the *Undersecretary of Defense, Acquisition Technology and Logistics memorandum of March 29, 2010 entitled DoD Standards for Certifications of CO Representatives (CORS) for Services Acquisitions*).

3. Indicate whether the COR will be performing this contract in a contingency environment.
4. Check the “Waive QASP” box only if the you determine that QASP should be waived. Using the browse feature load a copy of the memorandum waiving the QASP requirement. Otherwise ensure that a QASP, if required, is loaded either by the by the COR or the CO.
5. Complete the certifications by checking the block next to each certification or selecting “All” at the top of the certifications. Once completed, the CO shall load the appointment or letter of designation. Enter the COR appointment date.
6. If known, the CO should enter the DKO name of the Administrative Contracting Officer (ACO), if the contract is being administered by someone other than the CO; otherwise leave blank.
7. If known, enter the DKO name of the Quality Assurance Point of Contact (QA POC); otherwise leave blank.
8. The CO must select one of the following:
 - Contracting Officer Approve - This approves the nomination and appoints the COR to the contract. This places the COR in an “Active” status. An emailed is generated and sent to the COR advising of his appointment.
 - Save Record (without routing) – This allows the CO to saves the record to review and or update at a later date.
 - Contracting Officer Reject - This allows the CO to reject the record. To reject, the CO shall select r
 - *Reject and DO NOT set status to cancel.* This sends the nomination record back to the COR for correction. It also generates an email to the COR advising of the rejection.
 - If rejecting, the CO must enter mandatory comments, detailing rationale for the rejection
 - CO will need to reload the appointment letter and input appointment date after COR resubmits.
 - *Reject AND set status to cancel* – This cancels the nomination record in its entirety and removes the record from the CORT Tool

VI. POST AWARD ACTIVITIES

Once a COR is appointed, the COR will be able to load and view older COR documentation. To access an existing appointment, select the link for Contract List/Status. This link will provide the user a complete listing of all actions they are associated with either as a COR, COR Supervisor or CO/Specialist. See Figure 10 example below. From here, the user can select the record of their choosing.

COR	Contract Number	PreAward Number	Status	Supervisor/Commander	PCO	Specialist	Last Action Date	Reports for Review
STEPHEN.P.COLVIN		123456789	DRAFT	CATHERINE.M.WARD	MAE.BARTLEY	MAE.BARTLEY		NO
KIMBERLEE.C.WATTS	HC1028-01-C-TEST-0000	TESTCONTRACT	ACTIVE	BEVERLY.MAYES	MAE.BARTLEY	MAE.BARTLEY	7/15/2011	YES
PAUL.GAUGHAN	HC1028-01-C-TEST-0000		ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	9/30/2011	YES
MATTHEW.B.SINES		HD0102-01-TEST	PENDING SUPERVISOR REVIEW	JAMES.H.WHITE	MAE.BARTLEY	PAUL.GAUGHAN		NO
WILLIAM.MACZEES	HD0102-01-C-0001-0000	TEST_00011	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	8/10/2011	NO
WILLIAM.MACZEES	HD0102-01-C-0001-0000	TESTCONTRACT	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	8/10/2011	YES
PAUL.GAUGHAN	HD0102-01-C-BAL2-0000	00002	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	8/26/2011	NO
JOHN.BROWN77	HD0102-01-C-T001-0000	SESSION 7-1	TERMINATED	DANA.CHAN	MAE.BARTLEY	PAUL.GAUGHAN	7/20/2011	NO
WILLIAM.MACZEES	HD0102-01-C-TEST-0000	TEST DATA 2	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	8/26/2011	NO
JOHN.DOBIE		HD010201CTEST0000	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	7/19/2011	NO
PAUL.GAUGHAN	HD0102-01-C-TEST-0000	TEST	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	DAVID.PROPERT	8/23/2011	YES
WILLIAM.MACZEES	HD0102-01-D-TEST-0000	TEST_0000	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	9/20/2011	NO
JULIO.BANDS	HD0102-02-C-0001-0000	TEST - CONTRAC	ACTIVE	MARTHA.L.BROOKS2	MAE.BARTLEY	MAE.BARTLEY	7/7/2011	NO
WILLIAM.MACZEES	HD010202C01A00000		ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	9/21/2011	NO
PAUL.GAUGHAN	HD0102-02-C-TE01-0000	TEST9298	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	10/4/2011	NO
TESTCORT	HD010202C-TEST9298	TEST112	RECORD REJECTED BY PCO	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN		NO
JOHN.DOBIE		HD010202C01A00000	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	6/23/2011	YES

Figure 10: Contract List Status

A. ONLINE CONTRACT FILE

From the “Contract List Status” select the contract with an “Active” COR appointed. When the contract opens, click on the “Online Contract Folder” tab to expand this section (Figure 6).

Figure 11: Online Contract Folder

CORs, Supervisors, and COs/CSs will have the ability to add, edit or delete Status Reports, Annual COR File Inspection Checklist, COR Trip Report, COR Correspondence and Miscellaneous Documents

- Status Reports – CORs shall submit any required status report. Identify the month and year of the report. Using the browse feature, select the report to load. Once loaded, the report can be approved or rejected by the CO.
- Annual COR File Inspection Checklist – CO/CS shall load their yearly inspection checklist of the COR’s file.
- COR Trip Reports – CORs shall load trip reports associated with the contract or order.
- COR Correspondence Report – CORs shall load any correspondence between the COR and the contractor.
- Miscellaneous Documents – The COR can load a host of other documents for their file.

To add files:

1. Select the applicable month and year.
2. At “Add file” select browse to upload the document.
3. Click on the green plus sign to (Add File) to complete.

B. DOCUMENT TEMPLATE

DoD Sample Templates are available to aid in nomination and appointment of CORs (See Figure 12).

The screenshot displays the 'COR: Document Templates' web interface. On the left is a navigation menu with items like 'COR Home', 'COR Profile', and 'Document Templates'. The main content area is titled 'COR: Document Templates' and includes links for 'Designation Letter' and 'Revocation/Termination Letters'. Below these links are two tables of document templates.

Document Template	Description	Target User
 Sample COR Designation Ltr.doc	Use this COR Designation Letter for all contracts	PCO
 Sample COR Revocation Ltr.doc	Use this COR Revocation Letter to remove COR responsibilities for a COR from a contract.	PCO
 Sample COR Termination Ltr.doc	Use this COR Termination Request Letter to inform the PCO that you no longer will perform COR responsibilities for a contract.	COR

Figure 12: Document Template Samples

C. LOCAL FORMS and POCs

This section contains of approved documents and for use and points of contact for your Component, major commands or subcommands (Figure 13).

The screenshot shows the 'Contracting Officer Representative Tracking (CORT) Tool' interface. The top header includes the DoD logo and the text 'Contracting Officer Representative Tracking (CORT) Tool'. A user name 'MAE.BARTLEY' is visible in the top right. The main content area is titled 'DoD COR: Handbooks' and includes a dropdown menu for 'Please select a Contracting Center Department:' with 'DISA' selected. Below this is a link for 'DISA COR Handbook and POCs' and a 'Back to Top' link. A table with three columns is shown: 'Handbook Document', 'Description', and 'POC'. The table is currently empty. On the left side, there is a navigation menu with the following items: COR Home, COR Profile, COR Nomination Process, Contracting Staff Registration, Contract List/Status, Awaiting My Approval, Document Templates, Local Forms and POCs (highlighted), All COR Submitted Documents, View All Local COR Records, COR Related Links, Admin Email (ADMIN), COR Misc Codes (ADMIN), COR Proxy (ADMIN), Course List (ADMIN), Link To Reports (ADMIN), New COR Profile (ADMIN), and View All CORs (ADMIN).

Figure 13: Local Forms and POC Sample

VII. CONTRACTING STAFF REGISTRATION

All contracting personnel shall complete a Contracting Staff Registration. By completing this registration, the CORT Tool builds a directory of all contracting personnel assigned to perform work for a contracting center. To create a registration, CO and CS select the “Contracting Staff Registration” tab from the left side menu. When the page as shown below opens, complete all of the fields:

The screenshot shows the 'DoD COR: Contracting Staff Registration' form. The form is organized into three columns. The first column contains: 'First Name:' (text input), 'DKO Name:' (text input with 'TEST.CO2020'), 'Role:' (dropdown menu with 'SELECT ONE'), and 'Active Status:' (dropdown menu with 'Select One'). The second column contains: 'Middle Name:' (text input), 'Phone:' (text input), and five 'Contracting Center's DODAAC:' fields (each with a text input and a blue information icon). The third column contains: 'Last Name:' (text input), 'Email:' (text input), and five 'Contracting Center's DODAAC Organization:' fields (each with a text input). At the bottom of the form are two buttons: 'Save Changes' and 'Cancel Changes'.

Figure 14: Contracting Staff Registration

The following steps detail how to complete the Contracting Staff Registration Page:

1. Enter you first, middle, and last name (middle initial is also acceptable). The DKO name will pull from you CAC card logon. Enter your phone number and DKO email address. Format is firstname.lastname@us.army.mil.
2. Select the appropriate contracting role.
 - Select the “Contracting Officer Role” if you are responsible for COR appointments. Selecting this role places your name in the directory of contracting personnel for both CO and CS.
 - Select the “Contract Specialist Role” if you are not responsible for COR appointments. Selecting this role places your name in the directory for CS only.
3. Enter all the Contracting Center DoDAACs and the Contracting Center DoDAACs Organization name. You may enter a total of five DoDAACs and organization names.
4. Select “Active Status.” From the drop down menu select “Active.”
5. When completed, select “Save Changes”.

Contracting personnel can make updates their registration on an as needed basis. Changes may be made to any field in the except the DKO name. After changes are made, select “Save Changes” to retain changes.

VIII. CONTRACT LIST STATUS

To see a list of all the nominations and list of contracts, select the “Contract List Status”. From there the user can click on the preaward number or contract number (if known) to view the record. See Figure 15 below.

The screenshot displays the 'Contracting Officer Representative Tracking (CORT) Tool' interface. At the top right, the user is identified as 'TEST.CORT' with a 'Logout' link. The main heading is 'DoD COR: Contract List for COR Nominee TEST.CORT'. Below this, there are filter options for record types: ACTIVE, DRAFT, PENDING PCO REVIEW, PENDING SUPERVISOR REVIEW, RECORD REJECTED BY PCO, RECORD REJECTED BY SUPERVISOR, and TERMINATED. A 'REPORTS FOR REVIEW (YES)' checkbox is also present. A button labeled 'Please click here to select identified records' is visible. The main content is a table with the following data:

COR	Contract Number	PreAward Number	Status	Supervisor/Commander	PCO	Specialist	Last Action Date	Reports for Review
TEST.CORT	HQ0102-01-C-0001-0000	TEST-CONT22	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	12/14/2011	NO
TEST.CORT	HQ0102-01-D-TE12-1010	TESTCOR98	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	10/18/2011	NO
TEST.CORT	HQ0102-02-C-TE95-0000	TEST12	PENDING PCO REVIEW	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN		NO
TEST.CORT		TEST- ZZ	PENDING SUPERVISOR REVIEW	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY		NO
TEST.CORT		TEST123456	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	10/19/2011	NO

Figure 15: Contract List/ Status

IX. AWAITING MY APPROVAL

Supervisors and COs will find pending all nominations in “Awaiting My Approval” link. Pending nominations are displayed as indicated in Figure 16 below.

The screenshot shows the 'Contracting Officer Representative Tracking (CORT) Tool' interface. The main heading is 'DoD COR: Awaiting my Approval'. On the left is a navigation menu with options like 'COR Home', 'COR Profile', 'Contracting Staff Registration', etc. The main content area is divided into two sections: 'COR Nominees Awaiting My Approval as Supervisor/Commander' and 'COR Nominees Awaiting My Approval as Contracting Officer'. Each section contains a table with columns for COR, Contract/PreAward Number, and Supervisor/Commander.

COR Nominees Awaiting My Approval as Supervisor/Commander		
COR	Contract/PreAward Number	Contracting Officer
WILLIAM MACZEES	TEST 546	BARTLEY, MAE
JOHN.DOEII	TEST11	GAUGHAN, PAUL
TEST.CORT	TEST123456	BARTLEY, MAE

COR Nominees Awaiting My Approval as Contracting Officer		
COR	Contract/PreAward Number	Supervisor/Commander
JOHN.DOEII	TEST1234	MAE.BARTLEY

Figure 16: Awaiting my Approval

X. ALL COR SUBMITTED DOCUMENTS

To view all documents submitted on a contract by a COR, select “All COR Submitted Documents.” A list of the contracts the user has access to will be displayed (Figure 17). On this page you are given a variety of search and filter functions. Query by what is most applicable.

The screenshot shows the 'Contracting Officer Representative Tracking (CORT) Tool' interface. The main heading is 'DoD COR: CORs By Name'. It features search criteria fields for COR, Contract #, Supervisor/Commander, and PCO. Below the search fields are checkboxes for record types: ACTIVE, DRAFT, PENDING PCO REVIEW, PENDING SUPERVISOR REVIEW, RECORD REJECTED BY PCO, RECORD REJECTED BY SUPERVISOR, and TERMINATED. The main content is a large table listing various contracts with columns for COR, Contract Number, PreAward Number, Status, Supervisor/Commander, PCO, Specialist, and Last Action Date.

COR	Contract Number	PreAward Number	Status	Supervisor/Commander	PCO	Specialist	Last Action Date
STEPHEN.P.COLVIN	123456789	123456789	DRAFT	CATHERINE.M.WARD	MAE.BARTLEY	MAE.BARTLEY	
PAUL.GAUGHAN	HC1028-01-C-TEST-0000		ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	09-30-2011
KIMBERLEE.C.WATTS	HC1028-01-C-TEST-0000	TEST CONTRACT	ACTIVE	BEVERLY.MAYES	MAE.BARTLEY	MAE.BARTLEY	03-15-2011
MATTHEW.B.SINES	HQ0102-01-TEST	HQ0102-01-TEST	PENDING SUPERVISOR REVIEW	JAMES.M.WHITE1	MAE.BARTLEY	PAUL.GAUGHAN	
WILLIAM.MACZEES	HQ0102-01-C-0001-0000	TEST - 0001	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	08-10-2011
WILLIAM.MACZEES	HQ0102-01-C-0001-0000	TESTCONTRACT	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	08-10-2011
PAUL.GAUGHAN	HQ0102-01-C-BA12-0000	D0002	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	05-26-2011
JOHN.BRONW77	HQ0102-01-C-T001-0000	SESSION 7-1	TERMINATED	DANA.CHAN	MAE.BARTLEY	PAUL.GAUGHAN	07-20-2011
WILLIAM.MACZEES	HQ0102-01-C-TEST-0000	TEST DATA 2	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	05-26-2011
PAUL.GAUGHAN	HQ0102-01-C-TEST-0000	TEST	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	DAVID.PROPERT	08-23-2011
JOHN.DOEII	HQ010201CTEST0000	HQ010201CTEST0000	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	07-19-2011
WILLIAM.MACZEES	HQ0102-01-D-TEST-0001	TEST - 369	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	09-20-2011
JULIO.RAMOS	HQ0102-02-C-0001-0000	TEST - CONTRAC	ACTIVE	MARTHAL.BROOKS2	MAE.BARTLEY	MAE.BARTLEY	07-07-2011
WILLIAM.MACZEES	HQ010202C01A80000	HQ010202C01A80000	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	09-21-2011
PAUL.GAUGHAN	HQ0102-02-C-TE01-0000	TEST9999	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	10-04-2011
TEST.CORT	HQ0102-02-C-TEST-0000	TEST12	RECORD REJECTED BY PCO	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	
JOHN.DOEII	HQ010202CTEST0000	HQ010202CTEST0000	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	06-27-2011
JOHN.DOE4	HQ010202CTEST01A8	HQ010202CTEST01A8	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	09-16-2011
WILLIAM.MACZEES	HQ0102-02-D-TEST-AB12		ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	09-29-2011
WILLIAM.MACZEES	HQ0102-02-D-TEST-AB13		ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	09-29-2011
JOHN.DOEII	HQ010203CTE340000	HQ010203CTE340000	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	10-05-2011
JOHN.DOEII	HQ0102-03-C-TEST-0000	TEST 5-1	TERMINATED	MAE.BARTLEY	MAE.BARTLEY	PAUL.GAUGHAN	07-14-2011
WILLIAM.MACZEES	HQ0102-08-D-6998-0001	TEST DATA	ACTIVE	MAE.BARTLEY	MAE.BARTLEY	MAE.BARTLEY	04-05-2011

Figure 17: All COR Submitted Documents

After your list is retrieved, select the contract number to view the record (Figure 18) and all documents posted to the contract.

Contract Management Reports for HC102801CTEST0000						
Monthly Status Reports						
Month/Year	Version	Status	Document	Created By	Created On	
10-2011	3	Submitted	COR Monthly Report SAMPLE.docx	MAE.BARTLEY	12/14/2011 09:12 AM	
10-2011	2	Submitted	COR Monthly Report SAMPLE.docx	MAE.BARTLEY	12/14/2011 09:12 AM	
10-2011	1	Submitted	STATUS REPORT.docx	PAUL.GAUGHAN	10/04/2011 10:58 AM	
07-2011	1	Submitted	STATUS REPORT.docx	MAE.BARTLEY	07/14/2011 09:51 AM	
03-2011	1	Approved	STATUS REPORT.docx	MAE.BARTLEY	03/15/2011 11:08 AM	

Annual COR File Inspection Checklist			
Year	Document	Created By	Created On
2007	COR Checklist.doc	MAE.BARTLEY	10/07/2011 10:50 AM

COR Trip Report			
Month/Year	Document	Created By	Created On
10-2011	Trip Report.docx	MAE.BARTLEY	10/26/2011 09:48 AM
09-2010	Trip Report.docx	PAUL.GAUGHAN	09/30/2011 09:01 AM
06-2011	Trip Report.docx	MAE.BARTLEY	07/20/2011 09:53 AM

COR Correspondence Report			
Month/Year	Document	Created By	Created On
10-2011	Correspondence.docx	PAUL.GAUGHAN	10/04/2011 10:58 AM

Miscellaneous Documents					
Month/Year	Document	Document Desc	Created By	Created On	
09-2011	Monthly COR Report to PCO.docx	Other	MAE.BARTLEY	09/29/2011 01:59 PM	
09-2011	Trip Report.docx	Other	MAE.BARTLEY	09/20/2011 01:54 PM	

Figure 18: Contract Documents

To view a document, click on the icon above the name of the document.

XI. VIEWING PREVIOUS COR's DOCUMENTATION

A new COR can view the documentation of a previous COR for a contract. From the side menus, select "All COR Submitted Documents." Select the contract they wish to view (Figures 17 and 18).

XII. ADMIN ROLES

A. COR Proxy (ADMIN)

As an agency Subject Matter Expert (SME), the "COR Proxy" feature may be used to assist users with nomination or registration problems. Simply type in the DKO name of the person you need to assist and click "Set Proxy." You will now be entered in the CORT Tool as that person.

<ul style="list-style-type: none"> COR Home COR Profile COR Nomination Process Contracting Staff Registration Contract List/Status Awaiting My Approval Document Templates Local Forms and POCs All COR Submitted Documents View All Local COR Records COR Related Links 	<p>DoD COR: Proxy</p> <p>Please enter the DKO NAME of the person you wish to proxy: <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Set Proxy"/></p>
---	--

Figure 19: COR Proxy

B. Links to Reports (ADMIN)

SMEs may view the status of their COR's profiles, contracting personnel registration or COR nomination record. SMEs may also view the status of their COR training and monthly CORT Tool statistics. Select "Link to Report (ADMIN)" and click on the icon of the report you want to review.

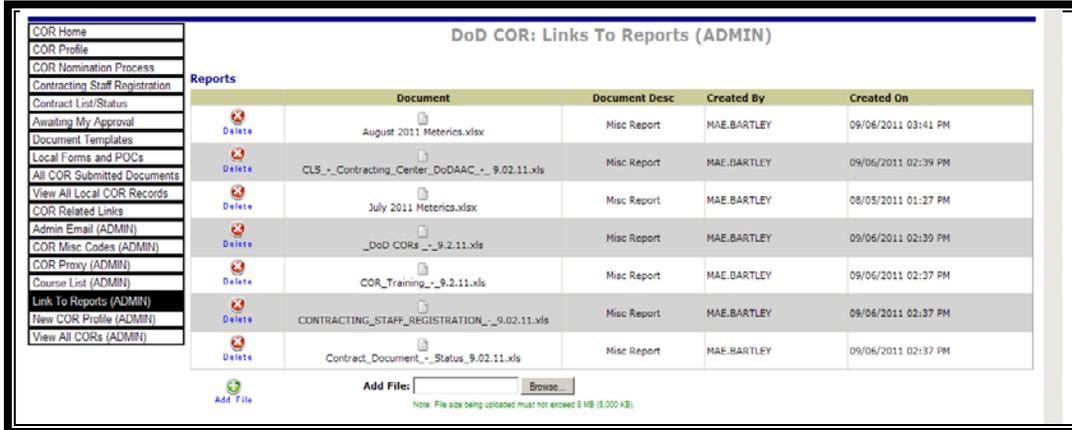


Figure 20: Links to Report (ADMIN)

C. New COR Profile (ADMIN)

SMEs may create profiles for CORs within and outside of your organization. To add a new COR into the CORT Tool, select the "New COR Profile (ADMIN)" from the left navigation and complete all data fields. When finished, click "Save Record" (Figure 21).

DoD COR: Profile

Note: All non-mandatory fields are marked with an asterisk (*)

COR Information

DKO Name:

Work Address:

City/APO:

State:

Zip Code:

Country:

Are you a Certified Acquisition Official?: Yes No

Career Experience Level:

Supervisor/Commander Information

Note: If the supervisor/commander email address is not a valid address you will receive an email when you try to submit nominations for approval.

DKO Name:

Email Address:

Commercial Phone:

DSN Phone:

Mobile Phone:

Save Record

Figure 21: New COR Profile (ADMIN)

XIII. REVOKING/TERMINATING A COR

To terminate an appointed COR, a CO must issue a formal revocation/termination letter. The CO submits the letter to the COR for confirmation and the COR confirms and returns to the CO. Figure 22 shows how to formally revoke a COR appointment in the CORT Tool.

The screenshot shows a web form for revoking a COR. At the top, there is a section for 'Approval/Rejection Comments' with a file upload area containing 'APPOINTMENT LETTER.doc' and an 'Appointment Date' field set to '09/16/2011'. Below this is a red-bordered box containing the 'COR Revocation Letter' field with a file path 'H:\CORT Tool\SAMPLES\' and a 'Browse...' button, and a 'Revocation Date' field set to '09/16/2011'. A 'Revoke COR' button is located below the red box. At the bottom of the form, there are dropdown menus for 'ACO DKO Name' (DANA CHAN) and 'QA POC DKO Name' (WILLIAM MACZEES), and a 'Save Record (without routing)' button.

Figure 22: COR Revocation Process

To terminate/revoke a COR in the CORT Tool:

1. Expand the Contracting Officer section.
2. Upload a copy of the COR Revocation Letter.
3. Enter the revocation date.
4. Click on “Revoke COR”.

XIV. DATA BACKUP

All data is currently stored in the Procurement Data Warehouse in Huntsville, Alabama.

XV. HELP DESK

The DoD CORT Tool helpdesk contacts at the DoD level are:

- Help Desk: cort@osd.mil
- Mae Bartley: Mae.Bartley@osd.mil Phone: 703-588-0832
- CORT Tool Website: <https://arc.army.mil/DoDCOR/>
- Training Materials: <http://www.acq.osd.mil/dpap/pdi/eb>

For AKO/DKO related questions contact the AKO/DKO helpdesk <https://www.us.army.mil> or call 1-866-335-2769. They are available 24/7.