DEPARTMENT OF DEFENSE
CONTRACTING OFFICERS
REPRESENTATIVE TRACKING TOOL
(CORT Tool)

Contracting Officer/Contract Specialist (CO/CS) Training
MARCH 2011
ARMY/DEFENSE KNOWLEDGE ONLINE (AKO/DKO) - BASICS

• AKO/DKO accounts **required** for each user of the CORT Tool
  – AKO/DKO portal:  [www.us.army.mil](http://www.us.army.mil)
  – Contact the AKO/DKO helpdesk with issues
  – Annotate e-mail address

• **Common Access Card (CAC) required and must be registered to each account**
  – Once logged in, click on "My Account" at the top of the page (next to the DKO logo).
  – Click on the "CAC/Cert Registration" option.
  – Click on the "Register" button.
  – Follow the prompts to complete the registration process.
  – When prompted, enter the password use to log on to DKO
  – Upon completion of the CAC registration, log out and log back in with CAC.
ARMY/DEFENSE KNOWLEDGE ONLINE (AKO/DKO) - BASICS

- Each user will be provided with a “us.army.mil” e-mail address
  - E-mail generated from the CORT Tool will be sent to the us.army.mil account
  - Each user may have their e-mails forwarded to “daily” e-mail
    - Login in to AKO/DKO portal: www.us.army.mil
    - From the “My Account” menu at the top of the page click “Mail Preferences”
    - Select “Mail Options”
    - Click the “Forward Email” radio button
    - Enter the forwarding address information and click “SUBMIT”
  - Result in automatic forwarding of CORT Tool e-mail notifications
- If a user elects not to forward their e-mail; users will need to consistently check AKO/DKO e-mail accounts
- Contracting Officer and Contract Specialist should use the provided AKO/DKO name and email address when completing staff registration in CORT Tool
CONTRACTING OFFICER & CONTRACT SPECIALIST

Part 1 - Contracting Staff Registration
HOME PAGE

CORT Tool Menu: Most users will only see the first 8 tabs.
HOME PAGE MENU

All Users

- **COR Home** – Returns the user to homepage
- **COR Profile** - allows the COR to enter or edit their profile information
- **Contracting Staff Registration** – allows the Contracting officer and Contract Specialist to enter to enter their registration information
- **Contract List/Status** - provides the logged in user access to their records both active appointments and those in process
- **Awaiting My Approval** - provides the logged in user access to all records that are awaiting their approval/action (contracting officer & supervisor)
- **Document Templates** - allows the user to see “samples” COR Document templates
- **All COR submitted Documents** - allows the COR of any active appointment to see all documents associated with a contract, even those from previous CORs
CONTRACTING STAFF REGISTRATION

From Homepage, Select “Contracting Staff Registration”
1. Complete all applicable fields.
2. For “DKO Name” use the user name created when establishing the DKO account (i.e. “john.smith” or “mary.c.jones4”).
3. For e-mail, use the us.army.mil address.
1. Select a Contracting Officer (CO) or Contract Specialist (CS) role.
2. Selecting CO allows the user to be both a CO and CS.
1. Alternate Contracting Center DODACC- If you support more than one contracting organization, please enter the organization’s six (6) digit organizational code). You may enter up to four (4) alternate DoDACCs.
2. Alternate Contracting Center's DoDAAC Organization - Enter your organization’s name.
CONTRACTING STAFF REGISTRATION - Completed

1. Select “save changes.”
2. New Registration - Top of page will state “Contracting Staff Profile Has Been Inserted.”
3. Update to Registration – Top of page will state “Contracting Staff Profile has been updated.”
NOTE: For a COR to begin a nomination, the CS and CO must be registered at the appropriate DoDAAC.
CONTRACTING OFFICER & CONTRACT SPECIALIST

Part 2 - Roles & Responsibilities
CONTRACTING OFFICER/SPECIALIST

• Receive an email directing them to the CORT Tool site.
• Access the “Awaiting my Approval” or “Contract Status List”
  – All unapproved nominees’ records entered by the COR and supervisor will be displayed.
• Click on the applicable “contract/preaward” number to access and review the record.
  – Enter the contract number if “contract number is NOT known” was previously selected.
  – Complete the certifications and add comments (mandatory if rejecting)
  – Complete all other data fields and identify the COR Training Type (A, B, C),
• Upload a copy of the “letter of designation” and input effective date
• When terminating or revoking a COR, upload a copy of termination letter with effective date.
  – Successor CORs will have to complete a new nomination.
• Approve, saves, rejects or cancel the nomination
• If Nomination is rejected, CO/CS will need to reload the Appointment letter
Email requesting CO/CS approval or rejection of nomination.

Dear CHAN, DANA,

MAE BARTLEY is nominated as a Contracting Officer's Representative (COR) for contract TEST 123456. Your approval or rejection is requested.

Please go to the COR System at https://arc.army.mil/DODCOR/. Once in the system, the following steps will help you process this request:

1. Click on Awaiting My Approval in the left menu; 2. Find this COR Nomination using the Contract Number above and click the link to open the record; 3. If approval is granted, use the link in the left menu to access the Document Templates. Otherwise skip to step 8; 4. Choose the appropriate template for your contract, complete the necessary information, save the letter to your computer, close out of the COR Management System, open the COR Appointment letter. Please fill out the fields at the bottom of the appointment letter first, and THEN electronically sign it using ApproveIT Desktop 5.8.2, otherwise it invalidates all signatures as 'redlined', save the letter to your computer and mail the signed letter to the COR Nominee for their signature; 5. Once the completed letter is mailed back to you, save the letter onto your computer. 6. Use steps 1 & 2 above to return to the Self Nomination record; 7. Scroll down to the Contracting Officers section and upload the saved appointment letter; 8. After completing the remainder of the Contracting Officers section, click the "Approve" button to complete the Appointment or the "Reject" button to return your comments to the nominee. NOTE: The completed appointment letter is required in order to approve the COR Nominee request.

For technical issues involving ApproveIT Desktop 5.8.2, please contact your local DOIM help desk. They will be able to assist you in installation and maintenance issues.

If this cannot be done then you must print out the COR Appointment Letter, sign it in pen, scan the COR Approval Letter, and then e-mail it to the COR for signature. Once the COR e-mails the signed letter back to you, then you can follow the instructions above to place the signed COR Appointment Letter in the COR Management System.

This email was automatically-generated. You may contact the COR named above directly, if you wish to discuss this appointment; you can do so by simply replying to this message.

Thank You.
CONTRACTING OFFICER/SPECIALIST – Awaiting My Approval

Contracting Officer clicks on “Awaiting My Approval” to see COR Nominees requiring action as a CO. A list of actions will be displayed.

Note: This list may not be available for Contract Specialist.
If there are no actions, the Contracting Officer will be advised that there are “No Contracts Actions Awaiting Your Approval.”
If the Contracting Officer has not completed a contracting staff registration, when they select “Awaiting My Approval” they will be advised “You do not have rights to this page.”
To view all of your actions, select “Contract List Status; or
CONTRACTING OFFICER/SPECIALIST - Contract List Status

• **Active COR** – Contracting Officer has approved the COR nomination

• **Draft** – a nomination has been started by the COR, on a contract action but has not been to the supervisor

• **Rejected** – Nomination has been rejected by the contracting officer or the supervisor

• **Submitted to Supervisor** – Nomination has been sent to the supervisor for approval prior to sending to the contracting officer

• **Supervisor Approved** – Nomination has been reviewed by the supervisor and sent to the contracting officer for approval

• **Terminated** – COR is no longer assigned to a contract
CONTRACT STATUS/LIST - CO/CS Filter – “Supervisor Approved”

To see one CO/CS actions, use the “Records to Filter Out” process. From the Contract Status List,
1. Check all data fields except “Supervisor Approve” and
2. Click on “Apply Checkbox Filters.”
3. Select the contract number from here or return to Awaiting My Approval and select the contract number.
CONTRACT STATUS/LIST – CO/CS Filter—“Supervisor Approved

After selecting the record, review the nomination, then scroll to Contracting Officer’s section.
CONTRACTING OFFICER/SPECIALIST

COR Nomination Review

If the COR Nominee indicated that the “Contract number is not known” (i.e. Solicitation, PR or MIPIR), the Contracting Officer must enter the contract number here.
1. Complete certification; Check all that apply.
2. Add approval (optional) or rejection (mandatory) comments.
3. Select the COR Training Type required for this contract.
Select “Yes” if the contract is in a “Contingency Environment” or Select “No” if the contract is not in a “Contingency Environment.”
1. Upload a copy of the signed “letter of designation” or “appointment letter” and add applicable date.

2. When completed, click on “Contracting Officer Approve,” “Save Record Without Routing” or “Contracting Officer Reject.”
To approve the nomination, select “Contracting Officer Approve”
CONTRACTING OFFICER/SPECIALIST - Approves A Nomination

If an error occurs when the CO selects “Contracting Officer Approves,” . . .
The CO must ensure errors have been corrected. Reload Appointment Letter and select contracting officer approve.
CONTRACTING OFFICER/SPECIALIST - Approves A Nomination

Record now states “COR Appointed”
CONTRACTING OFFICER/SPECIALIST - Approves A Nomination

Email is sent to the COR.
To save the nomination, to update at a later date, select “Save Record (without routing).”
CONTRACTING OFFICER/SPECIALIST – Saves A Nomination

Record now states “COR Contract Record Updated.”
1. Select “Contracting Officer Reject.”
2. Add comments (REQUIRED).
3. The dialogue box appears and defaults to “Reject but DO NOT set status to Cancelled.”
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination –Not Cancelled

Click “OK” if additional information is required from the COR and/or COR Supervisor.
Click “Cancel” if the rejection was submitted in error.
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination – Not Cancelled

Record now states “COR Nominee Record Rejected by Contracting Officer.” An email is sent to the COR.
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination –Not Cancelled

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From: MAE.BARTLEY@us.army.mil
To: KRISTINE.PREECE.CTR@ITA.MIL
Cc: Puglisi, Gary; MAE.BARTLEY@us.army.mil
Subject: Contracting Officer rejects Nominee for TEST - KP

X-Priority: 3
Content-Type: multipart/mixed;
boundary="--------------AD8C24a_23F7E4A11B2357B3"

This is a multi-part message in MIME format.

--------------AD8C24a_23F7E4A11B2357B3
Content-Type: text/plain; charset=us-ascii
Content-Transfer-Encoding: 7bit

Dear KRISTINE PREECE,

Your contracting officer has rejected your request to be a Contracting Officer’s Representative (COR) for contract TEST - KP. The reasons are as follows:

Reject per USA

To revise your nomination, please go to the CORT Tool at https://erc.army.mil/DODCOR/. Once in the tool, the following steps will help you process this request:

1. Click on COR Contract List in the left menu; 2. Find the contract you need to revise and click its link to open the record; 3. If needed, the rejection comments (seen above) can be viewed in the Contracting Officer section of the Self Nomination record; 4. When you are ready to resubmit your nomination, use the “Submit Record to Supervisor” button in the COR section of the COR Self Nomination record.

Note: The COR Nominee’s Supervisor must nominate a new COR if this COR Nominee is not going to be selected.

This email was automatically-generated. You may contact me if you wish to discuss this message; you can do so by simply replying to this message.

Thank You.
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination – Cancelled

Change default to “Reject AND set status to Cancelled.” Click “OK” to approve cancellation.
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination – Cancelled

Select “OK” to continue.
CONTRACTING OFFICER/SPECIALIST Rejects A Nomination – Cancelled

Record now states COR Contract Record Cancelled.” Once cancelled, the nomination does not show up in the CORT Tool.
CONTRACTING OFFICER/SPECIALIST
Revoking/Terminating A COR

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”
Click on “OK” to terminate or “Cancel” to retain.
CONTRACTING OFFICER/SPECIALIST
Revoking/Terminating A COR

Record now states “COR Appointment Terminated.”
Select Document Templates from the main menu.
Document Templates

Contracting Officer Representative Tracking (CORT) Tool

Designation Letter
PCOs should choose the Designation Letter template below.

<table>
<thead>
<tr>
<th>Document Template</th>
<th>Description</th>
<th>Target User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample COR_Designation</td>
<td>Use this COR Designation Letter for all contracts</td>
<td>PCO</td>
</tr>
<tr>
<td>Document Template</td>
<td>Description</td>
<td>Target User</td>
</tr>
<tr>
<td>Revocation/Termination Letters</td>
<td>Use this COR Revocation Letter to remove COR responsibilities for a COR from a contract.</td>
<td>PCO</td>
</tr>
<tr>
<td>Sample COR_Revocation</td>
<td>Use this COR Termination Request Letter to inform the PCO that you no longer will perform COR responsibilities for a contract.</td>
<td>COR</td>
</tr>
</tbody>
</table>
CONTRACTING OFFICER & CONTRACT SPECIALIST

Part 3 – Contract Management
CONTRACT MANAGEMENT

- CORS, COR Supervisors, Contract Specialists and Contracting Officers will have the ability to view, add, edit or delete the following documents;
  - Monthly Status Reports, (COR)
  - Annual COR File Inspection Checklist (CO/CS)
  - COR Trip Report (COR)
  - COR Correspondence (COR) and
  - Miscellaneous Documents (COR)
  - To add files
    - Select the applicable month and year
    - Add file, by selecting browse to upload the document
    - Click on “Add File” to complete

- Contracting Officers will approve or reject the “Monthly Status Report”
Click on “Contract Management” to expand or “collapse” the contract management information.
To add a report:
1. Select a month
2. Select the year.
3. Upload the document
4. Click on “Add File”
Contracting Officer Representative Tracking (CORT) Tool

DoD COR: Contract Management for N00030-09-C-9999-0000

Status Report Added

Record now states “Status Report Added.” An e-mail is generated and sent to the contracting officer.
Reports can be “edited” or “deleted” by the COR. To delete, click on delete, ...
Record now states, “status report deleted”
1. To edit click on edit.
2. Upload the revised report.
3. Click on “save” to replace the existing report.
Record now states, “status report updated”
APPROVE/REJECT – Monthly Status Reports

Contracting Officers will approve or reject status reports.

1. To approve, click on “approve.”
APPROVE/REJECT – Monthly Status Reports

2. Click on “OK” to complete approval.
APPROVE/REJECT –
Monthly Status Reports

Report now states, status report approved. An email is generated and sent to COR.
APPROVE/REJECT – Monthly Status Reports

To reject the report, click on reject. Add a reason for rejection and an email is generated and sent to the COR.
APPROVE/REJECT – Monthly Status Reports

Click on “OK” to complete the rejection; “Cancel” to maintain.
APPROVE/REJECT – Monthly Status Reports

Record now states “Status Report Rejected.” An email is generated and sent to the COR.
Once rejected, CORs must add a new report, which...
REJECTED MONTHLY STATUS REPORT – COR View Revised

... will be replaced with a new version.
CONTRACT MANAGEMENT - Other COR Reports

CORs may upload other types of reports (i.e. Checklist, Trip Reports, Correspondences and Miscellaneous Documents.

Contracting Officer may upload Annual Inspection Checklist
CONTRACT MANAGEMENT - Miscellaneous Documents

Types of Miscellaneous documents that can be added.
Select “All COR Submitted Documents” and select the contract number. . . .
An entire listing of all documents from any COR is available. Documents are available to all roles.
CONTRACTING OFFICER & CONTRACT SPECIALIST

Part 4 – Reminder Emails
Reminders Emails

• Reminders emails will be sent on the following occasions:
  
  – CORS
  • Refresher training needed
    – Late in taking Refresher training
  • Monthly report due
    – Late monthly report reminders
  • COR self nomination over 30 days
  • Annual 450 requirements due

  – Supervisors
  • COR nomination over 30 days waiting supervisor approval

  – Contracting Officers
  • Annual COR Inspection
    – Late Annual COR Inspection
  • Contract Completion
  • Nomination over 30 days waiting on Contracting Officer approval
  • Contracts over 30 days old needing a termination