



PROCURE-TO-PAY

TRAINING SYMPOSIUM 2019

Orlando

CORT to SPM & JAM

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Topics

- What's changing
- Why
- Old v. new
 - Create COR nomination
 - Approvals

What's changing?

- COR Nominations moving to Joint Appointment Module (JAM)
- Contractor Surveillance moving to new Surveillance and Performance Module (SPM)
- CORT tool decommissioned

Why

- Manage the common data and workflows for all appointments in one place, linked to user profile
- Separate COR actions from appointments
- Supports move away from modules towards capabilities

CORT to JAM—Create COR Nomination

The image displays two overlapping screenshots of a web application interface. The background screenshot shows the 'Contracting Officer Representative Tracking (CORT) Tool' main menu. The foreground screenshot shows a detailed view of a 'COR Nomination - Draft' form.

CORT Tool Main Menu:

- Header: Contracting Officer Representative Tracking (CORT) Tool (left), User : Tim Doe (right)
- Menu: Menu, Exit
- Section: COR Nomination Process
- Navigation Links: COR Information, Contracting Information, Contractor Information, Contract Place of Performance, QA Surveillance Plan (QASP), COR Certification
- Buttons: Submit, Save, Previous, Cancel, Help

COR Nomination - Draft Form:

- Header: Joint Appointment Module (left), Create Appointment, Search Appointments, My Appointments, COR Information, My Training, Exit (right), User : Carmilla Doe (far right)
- Section: COR Nomination - Draft (left), Expand All, Collapse All (right)
- Info: Initiated by Contracting Officer Representative
- Form Fields (each with a '+' icon and a 'Help' icon):
 - Contracting Information
 - Contractor Information
 - Contract Place of Performance
 - Supervisor / Commander Information
 - COR Certifications
 - Workflow History
- Footer Buttons: Back, Submit, Save, Cancel, Help

CORT Successful Submission

Contracting Officer Representative Tracking (CORT) Tool

Menu Exit

Info: COR Nominee Record Saved and Submitted for Approval. User: Tim Doe

COR Nomination Process

COR Information

COR Name: Doe, Tim
COR Home Organization DoDAAC: N00024
Supervisor/Commander Name: Leung, Cora
Supervisor/Commander Phone:

Training Courses	Source	Training Level	Equivalency?	Provider	Certificate	Completion Date	Hours	Actions
Combating Trafficking in Persons	MANUAL	ABC	<input type="checkbox"/>		important_image.jpg	2019/04/04	0	View
Specialized Training/License/Certification - Type C	MANUAL	C	<input type="checkbox"/>		CCM_Communication_awaiting_review.msg	2019/04/03	0	View
P2P	MANUAL		<input type="checkbox"/>		documentation.pdf	2019/04/03	20	View
Contingency COR Training	MANUAL		<input type="checkbox"/>		CACI_Emergency_ResponsePlan2017.doc	2019/04/02	0	View
DAU COR 222, DAU CLC 222 COR on-line training, ALMC-CL COR Course or Equivalent	MANUAL	[A]BC	<input checked="" type="checkbox"/>	Sue Swag	EDA_data.txt	2019/03/07	0	View
DAU CLC 106 COR with a Mission Focus	MANUAL	[A]	<input type="checkbox"/>		documentation.pdf	2019/03/04	0	View
DAU CLM 003 Ethics Training or Agency Equiv	MANUAL	ABC	<input checked="" type="checkbox"/>	Sue Swag	CDRL_attachment.doc	2019/02/27	0	View

Help

Contracting Information

Review the Contract List / Status before starting this nomination. Ensure that this contract number is not already on your COR Contract List.

Contracting Center Department *	Contracting Center DoDAAC *	
AIRFORCE	FU4417	
Contracting Officer *	Contracting Officer Phone *	Contracting Officer Email *
CORT, Cora	904-596-1215	wawf-test@caci.com
Contract Specialist *	Contract Specialist Phone *	Contract Specialist Email *
Smallwood Kvlr	904-596-7000	ksmallwood@caci.com

Success message indicating that the COR nomination has been successfully submitted.

JAM Successful Submission

Joint Appointment Module Create Appointment ▾ Search Appointments ▾ My Appointments ▾ COR Information My Training Exit User : Carmilla Doe

COR Nomination - Pending Supervisor Review [+ Expand All](#) [- Collapse All](#)

Info : Submitted by Contracting Officer Representative. Email notification sent to the COR Supervisor.

[- Contracting Information](#) [Help](#)

Contract Number FA442806C9999	Delivery/Task Order Number 0003	
Contract Type - Select - ▾	Issuing Office N00024	Level 2 - Issuing Agency Navy, Department of the
Pre Award Type - Select - ▾	Pre Award Number 	
Projected Number of CORs on Contract - Select - ▾	Actual Number of CORs on Contract 4	
Type of COR - Select - ▾	COR Training Type - Select - ▾	Contingency Environment - Select - ▾
Is this a cost reimbursement type contract? - Select - ▾	Is the COR required to view the cost vouchers? 	

<https://pieetest01.caci.com/jam/xhtml/auth/Cor.xhtml#>

Success message indicating that the COR nomination has been successfully submitted.

CORT – Contracting Officer Approval

Add Appointment

Contract Place of Performance

QA Surveillance Plan (QASP)

COR Certification

Supervisor/Commander Certification

Contracting Officer

COR Training Type * Type of COR * Contingency Environment *

A Primary Yes

Appointment Letter *	Appointment Date *	Actions	Add	Smart Form
No Appointment Letter found				

QASP Waiver	QASP Waiver Date	Actions
No QASP Waiver found		

Certification	Actions
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 CORT Tool.	<input type="checkbox"/> Certify All
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.	<input type="checkbox"/>
I have reviewed the COR's courses and confirmed that a valid "Contracting Officer Representative" course has been completed by the COR.	<input type="checkbox"/>
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 CORT Tool.	<input type="checkbox"/>
I have reviewed the CORs courses and confirmed that all of the required courses for the type of contract selected has been completed by the COR.	<input type="checkbox"/>
RON PCO GERT EFFECTIVE 160113 1643	<input type="checkbox"/>
I will upload the Annual COR File Inspection Checklist in this system at the end of the anniversary month of appointment each year.	<input type="checkbox"/>
Darrell PCO Certification effective date 12/31/2018	<input type="checkbox"/>

Date Certified

Approval/Rejection Comments

ACO Name (Last, First) ACO Email Address ACO Phone

NONE

Help

Approve Save Reject Previous Cancel Help

Buttons to add an Appointment Letter and a Smart Form

CORT—Contracting Officer Approval Add Appointment

Contracting Officer Representative Tracking (CORT) Tool User : Cora CORT

Menu Exit

COR Nomination Process

Appointment Letter (Add)

SUBJECT: Designation of Contracting Officer's Representative (COR) for

Command <input type="text"/>	Organization <input type="text"/>	Effective/Appointment Date 2019/04/09 <input type="text"/>
Contract Number N0002497C6420	Delivery/Task Order	Contractor Name RGS ASSOCIATES, INC.
COR Training Type None	Date of Award 2001/09/28 <input type="text"/>	Contract Period of Performance <input type="text"/> - thru - 2019/04/24 <input type="text"/>

1. Pursuant to FAR 1.602-2, Tim Doe, , you are designated as the contracting officer's representative (COR) in administration of the subject contract:

1a. eCMRA Responsibility (Para 10): Yes No

1b. SPOT Responsibility (Para 11): Yes No

1c. CTP Responsibility (Para 12): Yes No

1d. CPARS Responsibility (Para 13): Yes No

1e. TASS Responsibility (Para 14): Yes No

1f. Travel Orders Responsibility (Para 15): Yes No

1g. Inspection and Acceptance: Yes No

1h. OGE 450 required (Para 8): Yes No

2. Memo for Record / Other Correspondence / Email

a. Verify that the contractor performs the technical requirements of the contract in accordance with the contract terms, conditions and specifications. Specific emphasis should be placed on the quality provisions, for both adherence to the contract provisions and to the contractor's own quality control program.

b. Perform, or cause to be performed, inspections necessary in connection with paragraph 2a and verify that the contractor has corrected all deficiencies. Perform acceptance for the Government of services performed under this contract.

c. Maintain liaison and direct communications with the contractor. Written communications with the contractor and other documents pertaining to the contract shall be signed as "Contracting Officer's Representative" and a copy shall be placed in the COR's online file in the CORT module of the Procurement Integrated Enterprise Environment.

d. Monitor the contractor's performance; notify the contractor of deficiencies observed during surveillance and direct appropriate action to effect correction. Record and report to the contracting officer incidents of faulty or nonconforming work, delays or problems. In addition, you are required to submit a monthly report concerning performance of services rendered under this contract.

e. Coordinate site entry for contractor personnel, and insure that any Government-furnished property is available when required.

The Add Appointment Letter screen is displayed after clicking the 'Smart Form' button from the Appointment Letter section.

JAM—Contracting Officer Approval

Add Designation Letter

The screenshot displays a web application interface for 'Contracting Officer Approval'. The interface consists of several blue horizontal panels, each with a plus sign and a title, and a help icon on the right. The panels are: Contractor Information, Contract Place of Performance, QA Surveillance Plan / Waiver, COR Information, Supervisor / Commander Information, COR Certifications, Supervisor / Commander Certifications, Contracting Officer Certifications, and Designation Letter. The 'Designation Letter' panel is expanded, showing a table with columns for 'Designation Letter', 'Designation Date', and 'Action'. Below the table is a button labeled '+ Add Designation Letter'. A red arrow points from a callout box containing the text 'Button to add a Designation Letter' to this button. At the bottom of the interface is a navigation bar with buttons for Back, Approve, Reject, Save, Cancel, and Help.

Designation Letter	Designation Date	Action
+ Add Designation Letter		

JAM—Contracting Officer Approval Add Designation Letter

Joint Appointment Module Create Appointment Search Appointments My Appointments COR Lookup Contract Surveillance Exit User: Cora CORT

Add Designation Letter

Agency Name * Agency Address * Effective Date *

MEMORANDUM FOR: Cora Govt
SUBJECT: Designation of Contracting Officer's Representative
Reference: (a) FAR 1.602-2, (b) DFARS Part 201.602-2, (c) DoDI 5000.72

1. Pursuant to the authority of FAR 1.602.2, Cora Govt, Foreign Law Specialist, you are designated as the Contracting Officer Representative (COR) for the administration of the following contract/order:

2. **Contract/Order:**
Contract Number: N0040590M7200
Order Number:
Contractor Name:
Contractor Address:
Date of Award:
Period of Performance Monitoring: 2019/04/02 thru 2019/04/24
COR Training Type: A
Type of COR: Primary
For: *

The Add Designation Letter screen is displayed after clicking the 'Add Designation Letter' button from the previous screen.

3. You will serve as the COR throughout the period of performance monitoring of this contract unless this designation is terminated. Your performance and contributions as the COR will be reported to your immediate supervisor as part of your official performance review. As a matter of practice, the COR should prepare Memorandums for the Record (MFR) of all meetings, trips and telephone conversations relating to this contract/order. Each MFR, other similar records and all other correspondence relating to this contract/order shall cite the contract number/order number. A copy of all documentation and correspondence shall be furnished to the Contracting Officer and all other interested government parties having a need to know. Consideration must be given to restrictions regarding contractor proprietary data, as well as classified and business sensitive information.

4. You ARE AUTHORIZED to take action with respect to the following:

- a. Maintain liaison with the prime contractor, your staff, other contractors, and customers related to the project
- b. Perform inspection and acceptance for the Government assuring performance/delivery is in accordance with contract/order requirements, terms and conditions. Ensure the hours worked by the contractor are the hours billed in the contractor's invoice. [For more complex acquisitions, the Contracting Officer may choose to retain authority for acceptance.]
- c. Promptly report to the Contracting Officer, in writing, any performance issues/delays by the contractor. Your written notice should include actions you have taken to assist in remedying the situation.

SPM—COR Surveillance and Oversight

Search Criteria & Results Screens

Surveillance and Performance Monitoring Module | Menu | Exit | User: Matt Jones

COR Surveillance and Oversight - Search Criteria

Search As: Administrator (Department)

COR First Name: Equal To

Contract Officer First Name: Equal To

Supervisor / Commander First Name: Equal To

ACO First Name: Equal To

Contract Number: Equal To

COR Last Name: Equal To

Contract Officer Last Name: Equal To

Supervisor / Commander Last Name: Equal To

ACO Last Name: Equal To

Delivery / Task Order Number: Equal To

Nomination / Appointment Status: - Select -

Contract Specialist First Name: Equal To

Pre Award Number: Equal To

COR Type: - Select -

Contract Specialist Last Name: Equal To

Search | Reset | Help

Surveillance and Performance Monitoring Module | Menu | Exit | User: Matt Jones

COR Surveillance and Oversight - Search Results

Display: 10 items | Filter

COR Name	COR Home DoDAAC	COR Type	Nomination / Appointment Status	Pre Award Number	Contract Number	Delivery / Task Order Number	Contract Officer Name	Contract Specialist Name	Supervisor / Commander Name	Last Action Date	Issuing Office DoAAC	Reports in Review
		Primary	Active COR		DAAB321D0987	0003				2013/05/10	W15P7T	NO
		Primary	Active COR		DAAB321D0987	0001				2013/05/10	W15P7T	NO
		Primary	Active COR		DAAB321D0987	0002				2013/05/10	W15P7T	NO
		N/A	Active COR		DAAB3700DE252	2113				2012/10/12	W15P7T	YES
		N/A	Active COR		DAAB3700DE252	0271				2012/10/12	W15P7T	NO
		N/A	Active COR		DAAB3700DE252	0276				2012/10/12	W15P7T	NO
		N/A	Active COR		DAAB3700DE252	2100				2016/05/12	W10P7T	YES
		N/A	Active COR		DAAB3700DE252	0284				2012/10/12	W15P7T	YES
		N/A	Active COR		DAAB370DGG281	0108				2013/06/20	W15P7T	NO
		N/A	Active COR		DAAB3701DH006	0060				2012/06/20	W15P7T	NO

Showing 1 to 10 of 809 items

Previous | 1 | 2 | 3 | 4 | 5 | 01 | Next

Back | Export (CSV) | Help

SPM—COR Surveillance File

The screenshot displays a web application interface for the SPM—COR Surveillance File. It features a navigation menu on the left with four items: "Contracting Officer Certifications", "Designation Letter", "Workflow History", and "Surveillance Documents". The "Surveillance Documents" section is expanded, showing a table of documents. The table has columns for Category, Subcategory, Month / Year, Document, Document Description, Created By, Created On, Status, and Actions. The table contains 10 rows of data. Below the table, there is a pagination control showing "Showing 1 to 10 of 10 items" and "Previous 1 Next" buttons. A "Back" button is located at the bottom left of the interface.

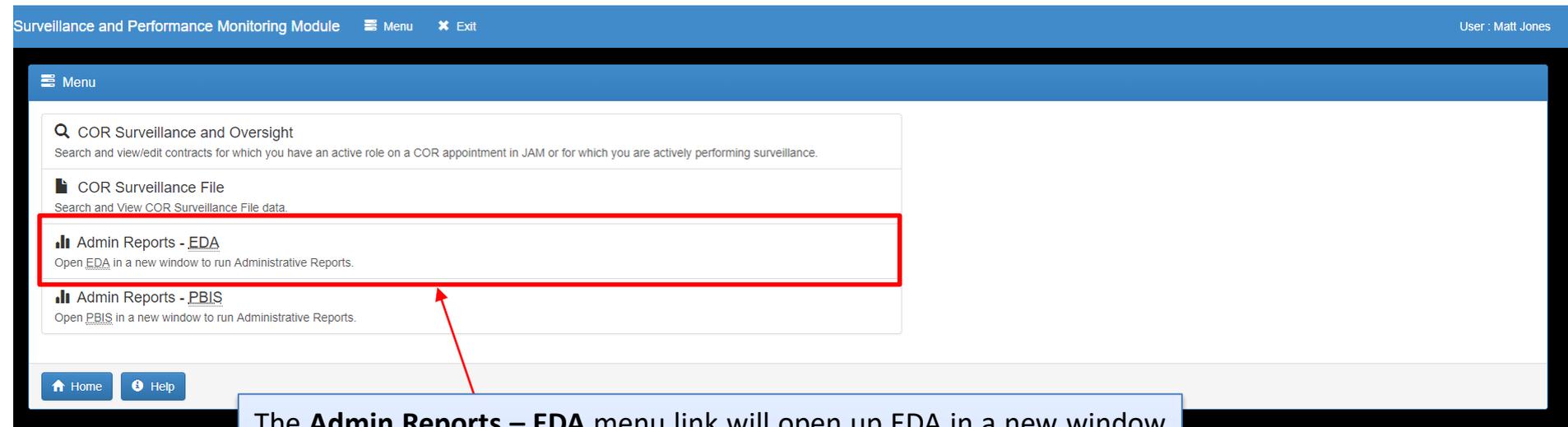
Display 10 items Filter:

Category	Subcategory	Month / Year	Document	Document Description	Created By	Created On	Status	Actions
Contracting Officer	Discrepancy	11 / 2013	payprocess.pdf	Annual COR File Inspection Checklist	Pco 2, Paul	2013/11/15	Submitted	View
Contracting Officer	Discrepancy	03 / 2019	Annual COR File Inspection Checklist(Smart Form)	Annual COR File Inspection Checklist	Tester, MSCORTCO	2019/03/15	Submitted	View
Contracting Officer	Discrepancy	03 / 2019	Annual COR File Inspection Checklist(Smart Form)	Annual COR File Inspection Checklist	Tester, MSCORTCO	2019/03/15	Submitted	View
COR Status / Progress Report	N/A	11 / 2013	vendorCorrects.pdf	COR Status Report	Castle, Cory	2013/11/15	Approved	View
COR Trip Report	N/A	02 / 2019	Trip Report (Smart Form)	Trip Report	Tester, MSCORTCO	2019/02/13	Approved	View
Miscellaneous	Memorandum for the Record	02 / 2019	Memorandum for the Record (Smart Form)	Memorandum for the Record	Test, MSCORTCS	2019/02/26	Submitted	View
Miscellaneous	Other	03 / 1993	Approved Emails for PCM.docx	GFE Property Validation	Tester, MSCORTCO	2019/02/26	Submitted	View
Miscellaneous	Other	02 / 1997	DD1155_N0001918C1004_CLM.pdf	GFE Inventory	Test, MSCORTCS	2019/02/26	Submitted	View
Miscellaneous	Other	02 / 1997	DD1155_N0001918C1004_CLM.pdf	GFE Inventory	Test, MSCORTCS	2019/02/26	Submitted	View
Reports	Discrepancy	03 / 2019	Contract Discrepancy Report (Smart Form)	Contract Discrepancy Report	Tester, MSCORTACO	2019/03/04	Reviewed	View

Showing 1 to 10 of 10 items [Previous](#) 1 [Next](#)

[Back](#)

SPM – Administrative Reports



Surveillance and Performance Monitoring Module Menu Exit User : Matt Jones

Menu

🔍 COR Surveillance and Oversight
Search and view/edit contracts for which you have an active role on a COR appointment in JAM or for which you are actively performing surveillance.

📁 COR Surveillance File
Search and View COR Surveillance File data.

📊 Admin Reports - [EDA](#)
Open [EDA](#) in a new window to run Administrative Reports.

📊 Admin Reports - [PBIS](#)
Open [PBIS](#) in a new window to run Administrative Reports.

Home Help

The **Admin Reports – EDA** menu link will open up EDA in a new window to allow the user to run one or more of the following reports in EDA:

- COR Management Report
- COR Training Report
- Contract Document Report
- COR Contract List Status Report
- COR View all Locals Status Report
- CORT Tool User Report

SPM—Administrative Reports

Surveillance and Performance Monitoring Module Menu Exit User : Matt Jones

Menu

🔍 COR Surveillance and Oversight
Search and view/edit contracts for which you have an active role on a COR appointment in JAM or for which you are actively performing surveillance.

📁 COR Surveillance File
Search and View COR Surveillance File data.

📊 Admin Reports - EDA
Open EDA in a new window to run Administrative Reports.

📊 Admin Reports - PBIS
Open PBIS in a new window to run Administrative Reports.

Home Help

The **Admin Reports – PBIS** menu link will open up PBIS URL in a new window to allow the user to login to PBIS and run one or more of the following reports:

- Service Contract with CORs Appointed in DoD CORT Tool
- Submission of Status Report to the Contracting Officer
- Contract 360 Report for a COCOM



Procure-to-Pay

Training Symposium

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