Contracting Officer Representative Tracking (CORT) Tool Updates

Presented by: Mae Bartley, DPAP
Dana Chan, IBM

May 30 – June 1, 2017 • Hyatt Regency Orlando FL
Agenda

• Policy
• Organization Chart
• Changes Throughout Years
• Known Issues
• Over the Horizon – What’s Next
• CORT Tool Help
• Questions
• Resources
Policy

- DFARS 201.602
- PGI 201.602-2, (iv)
- DoD Instruction (DoDI) 5000.72, DoD Standard for Contracting Officer’s Representative (COR) Certification
• CORT Tool is part of the WAWF Suite
• PMO runs monthly Operational Requirements Committee (ORC) meetings
• ECPs are submitted through DPAP to PMO
• ECP owners asked to bring funding for changes
ECP/Release Process

• Submit Engineering Change Proposals (ECPs) (*Rolling Basis*)
• Rough Order Magnitude (ROM) estimate requested
• Rack and stack for ORC Vote
• Release Content Recommendation
• EBCCB Approval of Release Contents
• Software Requirements Review (SRR)
• Preliminary Design Review (PDR)
• Critical Design Review (CDR)
• Operational Assessment Testing (OAT)
• Deployment

Requires submitter presence
## CORT Tool Changes 2015

<table>
<thead>
<tr>
<th>Service Release 5.7</th>
<th>Service Release 5.7.1</th>
<th>Service Release 5.7.2</th>
<th>Service Release 5.8</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery:</strong> June 2015</td>
<td><strong>Delivery:</strong> July 2015</td>
<td><strong>Delivery:</strong> August 2015</td>
<td><strong>Delivery:</strong> November 2015</td>
</tr>
<tr>
<td>ECP 768 - Modifications to All COR Submitted Documents</td>
<td>ECP 767 - Department Admin Structure</td>
<td>ECP 850 - Automated Contract Closeout</td>
<td>ECP 750 - Provide COR Information to Vendors</td>
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<tr>
<td>ECP 770 - Additional and Expanded Role</td>
<td>ECP 771 - EDA Updates</td>
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<td>ECP 787 - CORT Smart Forms</td>
<td>ECP 829 - Permit Posting of Reports to Inactive Contracts</td>
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<tr>
<td>ECP 788 - WAWF CORT VCE Interface</td>
<td>ECP 852 - Contract Management Reports Page Enhancements</td>
<td>ECP 852 - Contract Management Reports Page Enhancements</td>
<td>In <strong>2015, release 5.7 and 5.7.1</strong></td>
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<tr>
<td>ECP 820 - Assisted Acquisition</td>
<td>ECP 861 - Increased Search Capability</td>
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<td>ECP 794 - PIID</td>
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Auditor Roles

• Auditor Role – Provided access to records associated with a DoDAAC.
  – Access is limited and date driven
  – Access is DPAP approved
  – Requires written proof of audit, maybe attached to request for access or emailed to DPAP admin

• Access is provided to all nominations, by a specific contract number for each DoDAAC listed in the Auditor Profile

• All documents associated available, by contract number submitted by each COR for DoDAAC listed in the Auditor Profile
Manager Role

• View All COR (Admin)
  – All nominations, by contract number for the manager’s department

• All COR Submitted Documents
  – All documents available, by contract number submitted by each COR for your department
    • Multiple CORs, Prime COR, Alternate COR

• Link to Report
  – Access to PMO generated/DPAP posted documents
SMART Forms

• Appointment/Designation Letter
  – Digitally signed by Contracting Officer
  – Must be digitally signed by COR and Supervisor
  – Email notification sent to the both roles upon each signature

• Revocation Letter

• QASP Waiver

• Status Report

• COR File Inspection Checklist
Assisted Acquisition

• Non DOD agencies are provided access to CORT
• Agencies are working on DoD contracts
  – Process nomination on behalf of DoD
  – DPAP Admin grants access
• Federal agencies may also use CORT Tool for their contracts
Department Admin (DA) Console

5.7

• Department Admin Console added
• Provided for the registration of DA at all levels of the Group Structure
• Provided DA with authority to view data
  – Associated with all location codes within the group
  – Associated groups lower than that group in the tree.
• Provided DA (at the lowest appropriate level) the ability to activate/deactivate users
Inactive Contracts

• Provided COR the ability to add status reports to nominations that are in the “Inactive Status”
• Provided Contracting Officer/Contract Specialist the ability to approve or reject status report on inactive nomination
### Miscellaneous Document

**Updated COR Online File and All COR Submitted Document menu**

<table>
<thead>
<tr>
<th>Month / Year</th>
<th>Document</th>
<th>Document Type</th>
<th>Created By</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>$\text{[Image: Miscellaneous Document Online File and Submitted Document menu] (24x244 to 720x405)}$</td>
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</tbody>
</table>

- **Added sort features based on:**
  - Month
  - Year
  - Month & Year
  - Document Name
  - Document Type
  - Created on Date
  - Created by

- **Added the capability to:**
  - Edit a document title
  - Added the capability to allow multiple documents uploads at one time
Menu Search Functionality

Note: Users may search by one or more data element at time

- View All COR Submitted Documents
- View All Local COR Records
- View All CORS (Admin)
COR Information to Vendors

• Provided the vendor a direct line through WAWF to contact the appropriate party.

• Vendors now have the ability to lookup a contract (by PIIN/SPIIN) and identify the COR, Contracting Officer and/or Contract Specialist associated with the contract.
  – Results are "filtered" by the user’s CAGE Code
  – Limits visibility of contract COR, CO or CS to appropriate CAGE Codes.
# CORT Tool Changes 2016

<table>
<thead>
<tr>
<th>Service Release 5.8.1</th>
<th>Service Release 5.9</th>
<th>Service Release 5.9.1</th>
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<tbody>
<tr>
<td>Delivery: April 2016</td>
<td>Delivery: June 2016</td>
<td>Delivery: November 2016</td>
</tr>
<tr>
<td>ECP - 822 Contract Completion Date Warning Message</td>
<td>ECP 894 - Fixing SSO Issues</td>
<td>ECP 769 - QA POC Location</td>
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<tr>
<td>ECP 826 - DAU Training</td>
<td></td>
<td>ECP 923 - Include DoDAAC in Subject Line of System Notification Emails</td>
</tr>
<tr>
<td>ECP 892 - Add or Deactivate CORT Tool Certifications</td>
<td></td>
<td>ECP 931 - Contract Specialist Roles for Contractors in CORT</td>
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<td>ECP 933 - Reappointment of COR to a Terminated Nomination</td>
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</tbody>
</table>

In 2016, two releases dedicated to CORT Tool 5.8.1 and 5.91
Automated Load of DAU Training

- Modified the COR Training section of COR Profile and nomination record to display and extract data from DAU for the following COR courses:
  - CLC 106, Contracting Officer's Representative with a Mission Focus
  - CLC 206, Contracting Officer's Representatives in a Contingency Environment
  - COR 206, Contracting Officer's Representatives in a Contingency Environment
  - COR 222, Contracting Officer’s Representative Course
  - CLC 222, Contracting Officers Representative (COR) Online Training
  - CLM 003, Overview of Acquisition Ethics
  - DOD 002, Combatting Human Trafficking for DoD Acquisition Professionals
Automated Load of DAU Training

- Removed the requirement for a copy of the certificates for the listed DAU courses
- Maintain the ability to manually enter courses
Contractor’s Role as Contract Specialist

- Applies to Government Support Contractors (GSC) employed as Contract Specialist
  - Access is limited to a specific DoDAAC
    - “Contracting Specialist Profile” menu option is disabled
  - Limited to nomination records associated with the access DoDAAC
  - Access is revoked with ending date of GSC contract entered on registration
  - GSC must enter contract expiration date in registration
- COR is allowed to identify the QA POC Nomination
- Nomination will be displayed on the QA POC Contract List Status immediately
Reappointment of COR to a Terminated Contract

- If terminated from a contract by the CO/CS, a COR or Alternate COR will be able to be re-appointed to the same contract at a later date
  - TDY
  - Temporary Assignment
  - Rotation
CORT Tool Changes 2017

<table>
<thead>
<tr>
<th>Service Release 5.10.0</th>
<th>Service Release 5.10.0.1</th>
<th>Service Release 5.10.1</th>
<th>Service Release 5.11.0</th>
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<tr>
<td>Delivery: February 2017</td>
<td>Delivery: April 2017</td>
<td>Delivery: June 2017</td>
<td>Delivery: December 2017</td>
</tr>
<tr>
<td>ECP 1017 - Email to Users from Department Admin/GAM</td>
<td>ECP 1067 - DLA PIEE Data Lake WAWF Interface</td>
<td>ECP 1073 - Editable Nomination Fields</td>
<td>ECP 1127 - EDA PIID</td>
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<tr>
<td>ECP 1021 - Auto Deactivation for Departing Personnel</td>
<td>ECP 1068 - DLA PIEE Data Lake EDA Interface</td>
<td>ECP 1074 - Contract Modification and Completion Date</td>
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<tr>
<td>ECP 1024 - Contracting Officer Communication Module</td>
<td>ECP 1084 - Data Lake Access SSO</td>
<td>ECP 1076 - Foreign National DEROS</td>
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<tr>
<td>ECP 1077 - COR Designation Letter Smart Form Changes</td>
<td></td>
<td>ECP 1088 - CORT/Navy CDW Interface</td>
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<td></td>
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<td>ECP 1104 - QASP and Status Report Tracking</td>
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Designation/Appointment Letter Modification

- Identifies contractor by name
- Added date of award
- Specifies appointment is pursuant to the authority of FAR 1.602-2
- Identifies the period covered by the designation
- Added COR Training Type
- Specifies the authority is not re-delegable and cannot be re-designated or transferred
- Certifies the COR meets the qualification requirements established in DoDI 5000.72 instruction
- Modifies the CO, COR and Supervisor Signature and Acknowledgement section
Contracting Communication Module

- The Contracting Communication Module (CCM) is automatically available if the user has one of the following CORT Tool roles:
  - COR
  - Contracting Officer
  - Contracting Specialist
- Provide a secure repository for attachments and two-way communications.
- E-mail alerts will be sent to notify recipients of new messages in the system.
- Data-at-rest and in transit will be protected for Vendors and Government.
Contract Modification Date

• Remove the contract modification menu item from CO/CS

• CO/CS will have the ability to change the Contract Completion Date (CDD) from the Contracting Information section and update the status of nomination based on date entered
  – If the date is a future date, the record status is changed to active
  – If the date is a past date, the record status is changed to inactive
  – If the date is the current date, the record status is changed to active midnight
Foreign National (FN) Date Eligible for Return from Overseas (DEROS)

Removed mandatory requirement for FN to enter DEROS
Quality Assurance Surveillance Plan (QASP) and Status Report Tracking

• For records in pending PCO approval status that have QASP (attached by COR or added to the nomination by CO/CS) - CO must indicate
  – If the COR is required to submit status reports
  – Frequency of submission

• Records in active or inactive status must add above when attaching a QASP
Who’s My Dept Admin:  
https://wawf.eb.mil/xhtml/unauth/lookup/gamLookup.xhtml
Known Issue - Role Activation

• Moving archived users out of archive
• Supervisors receiving email and approving, but CORT Tool role not updating “pending” status
• Fix scheduled for 5.10.1 June 2017 release (will not fix users stuck in “Pending Supervisor Status”)
  – Help Desk is asking users to create new user ID and recreate nominations
Scheduled reports are normally generated on the 1st of the month. Other reports may be generated by the DAs on an as needed basis.
MRS CORT Reports

Select and/or enter the applicable parameters located on the right hand side. *(i.e. This report is to provide DISA a list of all appointment letters issued for “HC1028.”)*

Click on “Apply” to generate the report.
Generated report may be exported into several file format type.
Over the Horizon

• Data Lake Reporting (Report Development)
  – Service Contract with CORs Appointed in DoD CORT Tool
  – COR Report Status
  – CORT 360 Report
  – Training Requirements for CORs Appointed in DoD CORT Tool
  – COR Career Field and Certification Level

• CORT Tool Compliance

• Close Out/Archiving

• PIID Implementation

What’s Next??
Questions??
Resources

DoD POCs – mae.k.bartley.civ@mail.mil
dana.c.adler@us.ibm.com

WAWF: https://wawf.ef.mil

WAWF Helpdesk - disa.ogden.esd.mbx.cscassig@mail.mil
- 866-618-5988

• Hours of operation
  • Monday – Friday 04:30 – 22:00 (MT)
  • Saturday – 08:00 – 15:00 (MT)