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

Orientation & Overview

AM&S CORT Tool Training Session

September 12, 2012

AGENDA

- Overview

- Benefits

- Frequently Asked Questions

- Tool Elements

- Roles and Responsibilities

- Time For Questions

OVERVIEW: THE "WHAT"

The CORT Tool is a web-based application designed to track COR and COR related actions within DoD.

- Nominate, appoint, revoke, and terminate a COR for a DoD contract or order issued on behalf of a DoD assisting agency

- Create a profile, document training and experience, and process a nomination package for one or multiple contracts

- Provide DoD personnel a web-based portal for all relevant COR documents

- Common Access Card (CAC) enabled and available to all members of the DoD with an Army or Defense Knowledge Online account (AKO/DKO)

BENEFITS: THE "WHY"

- Centralized repository of COR information

- Electronic nomination workflow process

- Identify and verify courses taken by the COR by complexity of work/requirement

- Track contracts by COR and CORs by contract

- Manage COR documents

THE MAIN MENU HAS TEN MODULES

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

COR Related Links

COR HOME

COR PROFILE

The COR Profile contains basic requirements data about the COR and should be entered by the COR.

- Once entered, the profile information does not need to be entered again and can be used to populate one or more different nomination packages.

- CORs are to log onto the AKO/DKO website @ https://www.us.army.mil to obtain their DKO Names and DKO Email Addresses prior to creating a CORT Tool Profile or completing the Nominating Process.

COR PROFILE

COR PROFILE
(continued)

Contracting Officials are to update DKO Mail Options to ensure CORT Tool Notifications are forwarded to official agency email accounts.

Forward all AKO/DKO Instructions:
- Select "My Account"
- Select "Mail Options"
- Select "Forward Email Address (Non-AKO Account)"
- Type "Forwarding Email Address"
- Confirm by retyping "Forwarding Email Address"
- Select "Webmail Classic"
- Enter "External Email Address"

COR TRAINING COURSES

In this module, the COR enters completed training courses and uploads course certificates.

- Course certificates serve as proof of training and are required by the time the Contracting Officer appoints the COR.
- When the COR access the Training Courses area, they will see three items:
    1. Courses
    2. Course Completion Date
    3. Add Document

COR TRAINING CATEGORIES

Type A   Training required for fixed price, and low performance risk requirements without incentives

Type B   Training required for other than fixed price, and low performance risk requirements without incentives

Type C   Training for unique requirements that need professional licensure, a technical license, or function-specific education or training

COR TRAINING COURSES

		Country (If applicable)	Area Code (3 digits, no dashes)	Phone Number (7 digits, no dashes)	Extension (If applicable)
City/APO:		Unit: 🛈			
State:					
Zip Code:					
	Commercial Phone:				
	DSN Phone:				
Country:	Mobile Phone:				

Are you a Certified Acquisition Official?: ○ Yes ● No

Career Experience: Career Experience Level:

Enter Supervisor's DKO Name and DKO Email Address. To retrieve Supervisor's information conduct a search within DKO.

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.

		Country (If applicable)	Area Code (3 digits, no dashes)	Phone Number (7 digits, no dashes)	Extension (If applicable)
DKO Name:	Note: Check with your supervisor/commander for the correct DKO name (example: DENNIS.BRADLEY or JOSEPH.P.SMITH212)				
	Commercial Phone:				
Email Address:	DSN Phone:				

Training Courses <-Click to collapse
🛈

Enter courses and completion dates, and upload documents

No Courses Listed		
Document:	-Select- ▾	
Course Compl. Date:		
Add Document:	Browse...	

Note: File size being uploaded must not exceed 8 MB (8,000 KB).

➕
Click Here
to Add
Course Certificate

**Save Record OR
Save and Start Nomination Process**

Save Record

Save and Start Nomination Process

COR TRAINING COURSES
(continued)

CONTRACTING STAFF REGISTRATION

Each Contracting Officer and Contract Specialist should complete a contracting staff registration and identify the contracting center.

This registration ties the Contracting Officer and Specialist to their contracting center.

CONTRACTING STAFF REGISTRATION
(continued)

NOMINATING AND APPROVING A COR

The COR begins the nomination process by completing a profile and then selecting "Nomination Process."

The nomination page is broken into three primary areas:

1. COR – where the COR nominee completes their package.
2. Supervisor – where the COR's supervisor reviews and certifies their package.
3. Contracting Officer and Contracting Specialist – where the contracting officer and contracting specialist will review and/or formally approve the COR.

NOMINATING AND APPROVING A COR (continued)

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

- COR Profile Information
- Supporting Contracting Center
- Contract Information
- Contracting Officer
- Contract Specialist
- Quality Assurance Surveillance Plan (QASP)
- Contractor
- COR Certifications

NOMINATING AND APPROVING A COR
(continued)

Once the COR's Supervisor submits the package as approved, the Contracting Officer will receive an email notifying them of the submittal.

The Contracting Officer/Contract Specialist (CO/CS) may review all information entered by the COR and COR's supervisor.

The CO/CS may have a number of actions to perform:

- If the COR did not identify a contract number the CO/CS will need to enter the correct contract number and order.

- The CO/CS will need to certify to the set of COR requirements.

NOMINATING AND APPROVING A COR
(continued)

- The CO/CS will need to identify the Training Type COR should have in accordance with DoD policy.

- The CO/CS must then identify if the mission is in a contingency environment.

- To approve the COR package, the CO/CS must identify the appointment or letter of designation, and identify the appointment date.

- The CO may reject the record, but must enter pertinent notes in the approval/rejection comments section.

COR NOMINATION RECORD PROCESS:
COR'S ROLE (continued)

POST AWARD PROCESS

CONTRACT LIST/STATUS
- Once a COR is appointed, there are a number of modules to open.

- To access an existing appointment, select "CONTRACT LIST/STATUS"

AWAITING MY APPROVAL
- Supervisors and COs will find the nominations awaiting their approval in this section.

- To view any pending nominations (or package), select "Awaiting My Approval."

POST AWARD PROCESS
(continued)

COR SUBMITTED DOCUMENTS
- To view a nomination package, use the search and filter functions. Query by what is most applicable and after the list is retrieved, choose the contract number to view.
- A new COR can view the contract documentation of a previous COR.

REVOKE OR TERMINATE A COR
- A CO must issue a formal revocation letter.
- The CO submits the letter to the COR for confirmation and the COR confirms and returns to the CO.

ORDER OF REGISTRATION

Contracting Specialists, Contracting Officers, and Supervisors:

Complete "Contracting Staff Registration"

⇓

Contracting Officer Representatives :

Create Profile and Begin Nomination Process

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Supervisors:

Forward Nomination to Contracting Officer

⇓

Contracting Officers:

Accept or Reject COR Nomination

RESOURCES

CORT Tool Helpdesk: cort@osd.mil

CORT Website: https://arc.army.mil/DoDCOR/

DPAP CORT Tool Training Material: Additional Materials

- AT&L's full (160+ slide) Training Presentation
- CORT Tool User's Guide
- Frequently Asked Questions (FAQs)
- Contracting Officer Representative Tracking (CORT) Tool Guidance and Instruction

* PowerPoint presentation must be in "slide show" mode to read hyperlinked documents *

FREQUENTLY ASKED QUESTIONS

1. "What are the first step in getting set up?"

   - Obtain an AKO/DKO account @ https:www.us.army.mil

   - AKO/DKO Help Desk (866) 335-2769, option #2

   - Complete CORT Tool Registration @ https:arc.army.mil/DODCOR/

   - CORT Tool Help Desk Email Address: cort@osd.mil

   - Upload COR Nomination Letter, Appointment Letter, and Certifications

2. "What COR training courses are required?"

   - < 3 years of COR experience *training* shall consist of the following courses:

     COR 222 or CLC 222 and CLM 003 Ethics Course or Annual TMA Ethics Training

   - > 3 years of COR experience *refresher training* shall consist of the following courses:

     CLM 003 Ethics Course or Annual TMA Ethics Training **(every 3 years)**

FREQUENTLY ASKED QUESTIONS
(continued)

3. "Will contractor support personnel be allowed access to DKO?"

   - Contractor support personnel are allowed to register within AKO/DKO, but will not be granted CORT Tool access.

4. "Can multiple QASPs be uploaded under one COR Profile?"

   - Yes

5. "How often should CORT Tool data be updated?"

   - Contractor Reports shall be updated monthly, along with all other correspondence.

6. "What if my immediate supervisor is a Deputy CIO or Chief of Staff and is too busy to approve nominations, can someone else act as supervisor?"

   - Yes, but the acting supervisor must be someone in the management chain of the Requirement Activity, and it is It is the responsibility of the self-nominating COR to identify a suitable acting supervisor, explain the responsibility involved, and ensure the acting supervisor has completed the registration process.

FREQUENTLY ASKED QUESTIONS (continued)

7. " I have a new CAC Card and receive "HTTP 403 Forbidden" access error when trying to access CORT Tool what should be done to resolve this issue? Update certificates in DKO by logging onto https://www.us.army.mil to complete the following:

- Click on "I Accept"

- Click on "FOUO Login"

- Click on "My Account"

- Click on "CAC/Certificate Registration" to allow DKO to read and update your certificates

    - If old CAC Information appears, click on "Clear Registered Information", and click on "Register CAC Certificate" Button

- Log out of DKO

- Log into the CORT Tool @ https://arc.army.mil/DODCOR/ (access should be restored)

MORE
QUESTIONS?