



**DEPARTMENT OF THE ARMY**  
US ARMY MEDICAL RESEARCH AND MATERIEL COMMAND  
504 SCOTT STREET  
FORT DETRICK MD 21702-5014

MCMR-AAP-A

14 November 2016

MEMORANDUM FOR DISTRIBUTION

SUBJECT: Procurement Advisory Notice (PAN) 17-03 Nominating, Appointing, and Tracking Contracting Officer's Representatives (CORs) using the Department of Defense (DoD) Contracting Officer's Representative Tracking Tool (CORT Tool)

1. PURPOSE. The purpose of this memorandum is to establish policy and guidance for the application used to nominate, appoint, track, and revoke an individual as a COR under awards executed by the US Army Medical Research Acquisition Activity (USAMRAA) for Army and non-Army requirements. The DoD CORT Tool shall be used for this purpose. The CORT Tool shall be used for CORs associated with all applicable Army contracts and non-Army contracts, task orders, and call orders. This policy does not apply to the appointment of Grant Officer's Representatives when awarding assistance agreements.

2. REFERENCES.

a. DoD Instruction 5000.72, DoD Standard for Contracting Officer's Representative (COR) Certification, dated March 26, 2015 located at <http://www.dtic.mil/whs/directives/corres/pdf/500072p.pdf>.

b. DoD COR Handbook, 12 March 2012, located at [http://www.acq.osd.mil/dpap/cpic/cp/docs/USA001390-12\\_DoD\\_COR\\_Handbook\\_Signed.pdf](http://www.acq.osd.mil/dpap/cpic/cp/docs/USA001390-12_DoD_COR_Handbook_Signed.pdf).

c. Under Secretary of Defense Memorandum, 21 March 2011, Subject: Deployment of the Department of Defense (DoD) Contracting Officer Representative Tracking Tool CORT Tool located at [http://www.acq.osd.mil/dpap/dars/pgi/docs/Signed\\_CORT\\_Policy\\_Memo.pdf](http://www.acq.osd.mil/dpap/dars/pgi/docs/Signed_CORT_Policy_Memo.pdf).

d. Update to the Department of Defense Contracting Officer Representative Tracking Tool, Under Secretary of Defense, Acquisition Technology & Logistics (USD, AT&L), February 10, 2014 located at <http://www.acq.osd.mil/dpap/policy/policyvault/USA001548-13-DPAP.pdf>.

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Procurement Advisory Notice (PAN) 17-03 supersedes and replaces PAN 12-03 Nominating, Appointing and Tracking Contracting Officer's Representatives dated 9 July 2012 in its entirety.

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e. WAWF eBusiness Suite CORT Training  
<https://wawf.eb.mil/xhtml/unauth/help/help.xhtml>. See Help – CORT Tool Documents.

f. CORT Training, Documents, and other Resources  
<http://dodprocurementtoolbox.com/> . See Home>>eBusiness>>Systems and Tools>>CORT.

g. Office of the Deputy Assistant Secretary of the Army (Procurement) Memorandum, 19 April 2012, Material Weakness on Service contract Oversight and Surveillance.

h. Office of the Deputy Assistant Secretary of the Army (Procurement) PARC Policy Alert 12-32, 20 April 2012, Material Weakness on Service contract Oversight and Surveillance located at <https://procurement.army.mil>. See Policy Vault>>PARC Notifications>>PARC Notifications Archive.

i. USAMRAA PAN 17-05, Contractor Performance Assessment Reporting System (CPARS) Guidance for Contracting Officer Representatives (CORs), dated 17 Nov 2016

j. USAMRAA PAN 17-04, Administration and Surveillance of Service Contracts, dated 17 Nov 2016

3. BACKGROUND. The Army identified inadequate oversight of service contracts as an Army-wide material weakness in Fiscal Year (FY) 2006. Inadequate oversight of service contracts continues to be one of the top issues identified in Procurement Management Reviews, US Army Audit Agency (AAA) audits, DoD Inspector General audits, and Government Accountability Office reports. In order to more closely monitor service contracts and correct this material weakness, the DoD CORT Tool was implemented for Army and non-Army DoD contracts. The Defense Federal Acquisition Regulation (DFARS) requires Defense Agencies and DoD Field Activities to use the CORT Tool at DFARS 201.602-2 and Procedures, Guidance and Instructions (PGI) 201.602-2(iii). A description of COR duties can be found in the DoD COR Handbook, 12 March 2012, located at [http://www.acq.osd.mil/dpap/cpic/cp/docs/USA001390-12\\_DoD\\_COR\\_Handbook\\_Signed.pdf](http://www.acq.osd.mil/dpap/cpic/cp/docs/USA001390-12_DoD_COR_Handbook_Signed.pdf).

#### 4. APPLICABILITY.

a. The procedures apply to all Army and DoD organizations submitting requests to USAMRAA for selected supply requirements, and all service requirements, with a value expected to exceed \$150,000.

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b. A COR can be appointed for service contracts valued less than \$150,000 or for supply contracts of any value when determined to be needed by a Contracting Officer (KO).

c. A COR appointment is not necessary when KOs decide to perform surveillance duties themselves and documents the file to that effect.

## 5. GENERAL.

a. USAMRAA must consistently demonstrate 100% compliance when appointing CORs in the CORT Tool for all active applicable service contracts, to include task/delivery orders, with a value greater than the simplified acquisition threshold.

b. Future Contracting Enterprise Reviews (CERs) will include metrics to capture the percentage of COR appointments on file within CORT for awarded service contracts, the percentage of CORs trained to minimum Army standards, the percentage of Quality Assurance Surveillance Plans (QASP) included in service contracts, and the percentage of CORs submitting monthly reports into the CORT Tool.

## 6. POLICY.

a. Nominated CORs for Army contracts and non-Army DoD customers' will use the CORT Tool to create their Profiles, complete self-nominations, and upload certificates of training. The CORT Tool is now available through Wide Area Work Flow (WAWF) at <https://wawf.eb.mil/>.

b. The COR's supervisor will use the CORT Tool to review, approve, or reject the COR nomination.

c. The KO will use the CORT Tool to appoint and upload the COR appointment letter.

## 7. CORT TOOL PROCEDURES.

a. The DoD CORT Tool is a web management tool for the appointment of CORs. CORT allows a perspective COR, COR Supervisor, and Contracting Officer to electronically process the nomination of CORs for one or multiple contracts. It provides built in workflows for the nomination process to include email alerts/status reminders for monthly status report due-ins and delinquencies. The CORT Tool provides contracting

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personnel and requiring activities the means to track and manage COR assignment across multiple contracts across DoD.

b. The CORT Tool is Common Access Card (CAC) enabled and available to all members of the DoD. To use, one must have internet access, a registration with WAWF, and a CAC. CORT training, documents, and other resources found within the DoD Procurement Toolbox include, but are not limited to, the latest CORT Tool User Guide and WAWF CORT Tool Frequently asked questions.

c. The COR Profile requires the entry of relevant information to ensure proper nomination and appointment of a COR. 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." The COR will then be able to enter the Training Courses. On subsequent visits to the Profile page, both sections will be available simultaneously. Select "Save Record" to complete the Profile and return later or select "Save and Start Nomination Process" to start a nomination.

d. The COR can begin the nomination by completing their Profile and selecting "Save and Start Nomination Process" or by accessing "COR Nomination Process." This will bring the COR to the nomination page. The nomination page is broken into three areas; COR Information – where the COR or nominee completes their part of the nomination record; Supervisor – where the COR's supervisor or higher authority reviews and certifies their part of the nomination; and Contracting Officer and Contract Specialist – where the KO and CS review the nomination and the KO formally appoints the COR. The COR Information area is broken into several distinct areas for nomination completion including the requirement for the COR to load a QASP. The COR nominee must complete all of the "COR certifications" by checking the block next to each certification or by selecting "All" at the top of the certifications. Once completed, the COR must select Submit Record to Supervisor – this saves the record and submits it to the supervisor for approval or rejection, Save Record (without routing) – this allows the COR to save the record and return at a later time, or Cancel Record – this cancels the record in its entirety and removes it from the CORT Tool.

e. Once the COR has submitted a nomination to the supervisor, the supervisor will receive an e-mail directing him or her to the CORT Tool site. All e-mails will be sent to the Army Knowledge Online (AKO) e-mail address. The supervisor or higher authority is responsible for approving or rejecting the nomination before it is sent to the KO. The supervisor selects "Awaiting My Approval". The supervisor will see all the nominations awaiting their review and approval. To access a nomination, click on the contract/pre-

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award number. The supervisor completes the certifications by checking the block next to each certification or by selecting "All" at the top of the certifications. Once the certifications are checked, the supervisor must elect one of the following:

Supervisor/Commander Approve – this forwards the nomination record to the KO, 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, or Cancel Record – this cancels the nomination record in its entirety and removes it from the CORT Tool.

f. Once the supervisor selects "Supervisor/Commander Approve", the KO and the CS identified on the record will receive an e-mail directing them to the CORT Tool. The KO will access "Awaiting My Approval" to view all pending nominations and will select the contract/pre-award number. The KO/CS must then complete eight separate actions concluding with selecting 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 e-mail is generated and sent to the COR advising of their appointment; Save Record (without routing) – this allows the KO to save the record to review and or update at a later date; or Contracting Officer Reject - this allows the KO to reject the record. The KO will select Reject and DO NOT set status to cancel to permit the a resubmission of the nomination after the COR resolves the issues or the KO will select Reject AND set status to cancel which cancels the nomination in its entirety and removes the record from the CORT Tool.

g. Once a COR is appointed, the COR will be able to load and view older COR documentation. To select an existing appointment, select "Contract List/Status. This will provide the user a complete listing of all actions they are associated with either as COR, COR supervisor, or KO/CS.

h. From the Contract List/Status, select the contract with an "Active" COR appointed. When the contract opens, click on the "Online Contract Folder". Herein, supervisors and KOs/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.

i. A new COR can view documentation of a previous COR for a contract. From the side menus, select "All COR submitted Documents and select the contract to be reviewed.

j. To terminate an appointed COR, a KO must issue a formal revocation/termination letter. The KO submits the letter to the COR for confirmation and the COR confirms and

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returns to the KO. The KO then expands the KO section, uploads a copy of the COR revocation letter, enters the revocation date, and clicks "Revoke COR".

## 8. RESPONSIBILITIES.

a. CORs will ensure the tasks and responsibilities included in the COR appointment letter are performed to the fullest possible extent. CORs will submit reports assessing contractor performance on a monthly basis and as required by the QASP. CORs will work closely with the KO/CS to assist in contract administration and to ensure successful contractor performance. COR will elevate contract performance issues to the KO/CS for resolution.

b. COR supervisors will ensure the CORs have the appropriate training and experience to properly perform COR duties. Supervisors will ensure the tasks included in the COR appointment letter are included in the COR's performance objectives and the performance of these tasks is included in the COR's performance rating. Supervisors will ensure the COR gives priority to their duties and allow the appropriate time for these tasks to be completed.

c. KOs shall ensure the COR appointment letter is fully executed before contract award and ensure the COR has completed the appropriate training.

d. KOs will ensure the CORs have uploaded all relevant documents, to include the posting of monthly reports and annual COR file checklists in the CORT Tool. KOs shall notify the COR and the COR's supervisor of any delinquencies or non-compliances of the COR in the performance of their duties.

9. PROPONENT. The proponent for this Procurement Advisory Notice (PAN) 17-03 is the USAMRAA Procurement Policy Branch. Please submit any comments, concerns and suggestions to the Procurement Policy Branch e-mail address at USARMY Ft Detrick MEDCOM USAMRAA Mailbox policy [usarmy.detrick.medcom-usamraa.mbx.policy@mail.mil](mailto:usarmy.detrick.medcom-usamraa.mbx.policy@mail.mil).

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