1. PURPOSE. This Instruction:

   a. Reissues, updates, and renames DCMA Instruction (DCMA-INST) 121, “Contracting Officer’s Representative” (Reference (a)).

   b. Outlines the duties and responsibilities of contracting officer’s representative (COR) and defines the mandatory use of the Contracting Officer’s Representative Tracking (CORT) Tool to track performance of qualifying service and supply contracts.

   c. Is established in accordance with the authority in DoD Directive 5105.64, “Defense Contract Management Agency (DCMA)” (Reference (b)) and all references listed herein.

   d. Complies with Federal Acquisition Regulation (FAR) 1.604 “Contracting Officer’s Representative (COR)” (Reference (c)).

   e. Supplements the requirements of the Defense Federal Acquisition Regulation Supplement (DFARS) 201.602-2, “Responsibilities” (Reference (d)).

   f. Implements the requirement for career development of CORs outlined in DFARS Procedures, Guidance and Information (PGI) 201.6, “Career Development, Contracting Authority, and Responsibilities” (Reference (e)).

   g. Establishes performance monitoring in compliance with Office of the Under Secretary of Defense (OUSD) memorandums, “Monitoring Contractor Performance” (Reference (f)) and “DoD Standard For Certification Of Contracting Officer’s Representative For Service Acquisitions“ (Reference (g)).

   h. Implements COR appointment requirements and deployment of the DoD “Contracting Officer Representative Tracking (CORT) Tool” (Reference (h)).

   i. Is instituted pursuant to the DoD COR Handbook (Reference (i)).
2. APPLICABILITY. This Instruction:

a. Is applicable to all DCMA personnel responsible for or involved in the administration of all contracts awarded and/or administered by DCMA headquarters (HQ) Procurement Center.

b. Provides standardized procedures to be followed by DCMA field activities and applies directly to:
   - Contracting officers (KO) who delegate oversight responsibilities to CORs
   - Supervisors who approve COR nominations
   - Personnel appointed as COR in accordance with their assigned duties
   - Supervisors who review CORs performance of those duties

3. MANAGERS’ INTERNAL CONTROL PROGRAM (MICP). This Instruction contains managers’ internal control provisions that are subject to evaluation and testing as required by DCMA-INST 710, “Managers’ Internal Control Program” (Reference (j)). The COR process flowchart is located at Appendix A on the resource page for this Instruction.

4. RELEASABILITY – UNLIMITED. This Instruction is approved for public release.

5. PLAS CODE.

a. Process: 211 – Procure supplies and services, or Task E211 if locally collected.

b. Programs: ACAT/Other Customers (when applicable).

c. Other National; Training and Travel; Local Programs (when applicable).

6. POLICY RESOURCE WEB PAGE. The policy resource page includes links to regulatory documents, performance standards, and additional guidance, and is located at https://home.dema.mil/policy/121r.

7. EFFECTIVE DATE. By authority delegated to me by the Director, DCMA, this Instruction is effective immediately.

Timothy P. Callahan
Executive Director
Contracts
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(a) DCMA-INST 121, “Contract Officer’s Representative,” July 1, 2012 (hereby canceled)
(c) FAR 1.604, “Contracting Officer’s Representative (COR)”
(d) DFARS 201.602-2, “Responsibilities”
(e) DFARS PGI 201.6, “Career Development, Contracting Authority, and Responsibilities,”
(g) Office of the Undersecretary of Defense Memorandum, “DoD Standard for Certification of Contracting Officer’s Representative for Service Acquisitions,” March 29, 2010
(j) DCMA-INST 710, “Managers’ Internal Control Program,” April 21, 2014
(k) FAR 1.602, “Contracting officers”
(l) FAR 46.105, “Contractor responsibilities”
(m) DFARS 237.172, “Quality Assurance Surveillance Plan (QASP)”
(n) FAR 42.1502, “Policy”
(o) DCMA-INST 109, “Contractor Performance Assessment Reporting” November 28, 2012, as amended
(p) Office of the Undersecretary of Defense Memorandum, “Performance Based Service Acquisition,” February 1, 2006
(q) DoD Contracting Officers Representative Tracking (CORT) Tool - User Guide
(u) OMB Memorandum, “Federal Acquisition Certification for Contracting Officer’s Representatives (FAC-COR),” September 6, 2011
CHAPTER 1

POLICY

1.1. GENERAL. This Instruction documents and describes the training and management strategies for COR to ensure ethics and continuity of standards for contracts awarded by the DCMA HQ Procurement Center. This policy provides standards for the training and management of CORs by:

1.1.1. Providing guidance for prospective, newly appointed, and current CORs to accomplish their mission.

1.1.2. Describing COR roles and responsibilities.

1.1.3. Outlining the monitoring and surveillance activities required of the COR.

1.1.4. Detailing the designation and performance monitoring of those responsible for designating CORs.

1.1.5. Identifying documentation and reporting requirements.

1.1.6. Providing CORs with the tools and techniques to monitor and document contractor performance.

1.2. COR POLICY. It is DCMA policy that:

1.2.1. Only fully trained and ethically aware personnel shall be appointed as a COR or alternate contracting officer’s representative (ACOR).

1.2.2. A COR shall be appointed on all service contracts exceeding the simplified acquisition threshold (SAT). A COR may be appointed on contracts for supplies, construction, and services (below SAT) when the KO determines that it is in the government’s best interest.

1.2.3. Contracts not exceeding the SAT may be exempted from the requirement to appoint a COR if the KO determines that the following three conditions are met:

- The contract will be awarded using simplified acquisition procedures
- The requirement is not complex
- The KO documents the contract file in writing as to why the appointment of a COR is unnecessary (in accordance with DFARS PGI 201.602-2(iv)(A) (Reference (d)))

1.2.4. The COR or ACOR nominee will be selected at the appropriate organizational level where the contract administration functions are actually being conducted.
1.2.5. The Contracting Officer’s Representative Tracking (CORT) Tool shall be utilized for the nomination, tracking, and management of all CORs.

1.2.6. The COR nomination shall be accomplished concurrently with the submission of the purchase request package (PR) to the Procurement Center. If a COR nomination is not accomplished in a timely manner, the KO should request nomination from the requiring activity (RA).

1.2.7. A COR shall be appointed at contract award (see Appendix A, COR Assignment Flowchart located on the resource page). No service contract shall be awarded prior to appointment of a qualified COR.

1.3. COR PERFORMANCE STANDARDS. The COR duties will be reflected in the nominee’s annual performance standards; therefore, the RA must allow adequate resources (i.e., time, products, equipment, opportunity) for the COR to perform his or her COR functions. COR management will evaluate the individual’s performance of COR duties as part of their performance assessment throughout the period of the contract.

1.4. PRIMARY, ALTERNATE, AND MULTIPLE CORS.

1.4.1. Any individual appointed or designated by the KO under the authority of FAR 1.602 (Reference (k)) is, by definition, a COR and must comply with the DoD COR training standards.

1.4.2. There may be one COR, multiple CORs, or ACORs for any specific contract. The KO is responsible for determining the number and type of CORs to be appointed based in part from input from the RA.

1.4.3. Multiple CORs may be designated by the KO when contract performance takes place in multiple locations, over multiple functions, or on contracts with 24-hour operations.

1.4.4 An ACOR may be designated on large or complex contracts or to cover periods when the primary COR will not be available. ACOR appointment letters shall identify duties to be assumed by the ACOR in the absence of the primary COR.

1.4.5. The KO is responsible to ensure that the COR appointment letter is specific when delegating functions and duties to the COR.

1.4.6. The KO shall ensure that the COR is familiar with and understands their respective roles and responsibilities, and has completed all required COR training prior to appointment.
CHAPTER 2

ACQUISITION TEAM ROLES AND RESPONSIBILITIES

2.1. SUPERVISORS, DIRECTORS, AND COMPONENT HEADS. Supervisors, directors, and component heads shall take necessary actions required to ensure only trained and qualified personnel are selected and appointed as CORs and that adequate resources be made available to the CORs to support their mission.

2.2. REQUIRING ACTIVITY (RA). The RA is the entity that has a requirement for supplies or services and requests the initiation of the acquisition. The RA identifies and designates personnel who are responsible for developing command resource requirements, identifying sources of funding, determining costs, acquiring funds, distributing and controlling funds, and tracking costs and obligations. The RA is responsible for the selection of the prospective COR nominee.

2.3. CONTRACTING OFFICER (KO). The KO reviews all contracts to evaluate the need for appointment of a COR. At contract award, the KO will appoint a COR and identify their duties in the letter of appointment. Only the KO has the authority to appoint a COR and specify COR duties.

2.4. CONTRACT SPECIALIST (CS). The CS assists the KO in administration of contracts and oversight of the COR.

2.5. CONTRACTING OFFICER’S REPRESENTATIVE (COR). The COR’s primary duty is to assist the KO/CS in the technical monitoring and administration of a contract. CORs are required to be properly trained and appointed in writing at contract award. The surveillance activities performed by CORs are tailored to the complexity and dollar value of the specific contract for which they are designated. The COR acts as the “eyes and ears” of the KO and is responsible for bringing any issues or performance problems to the attention of the KO. CORs routinely interface between the RA (which is most likely the COR’s organization), the contractor, and the KO. The COR is responsible to document and report contractor performance in the Contractor Performance Assessment Reporting System (CPARS).

2.6. SUPERVISOR/HIGHER AUTHORITY. The COR’s supervisor or higher authority reviews, certifies, approves, or rejects the COR nomination. They will evaluate the individual’s performance of COR duties as part of their annual performance assessment.

2.7. CONTRACTOR. Once the contract is awarded, the contractor becomes a member of the Acquisition Team. FAR 46.105 (Reference (l)) requires that the contractor be responsible for carrying out its obligations under the contract by:

2.7.1. Controlling the quality of supplies or services.
2.7.2. Tendering to the Government for acceptance only those supplies or services that conform to contract requirements.

2.7.3. Maintaining evidence that the supplies or services conform to required quality requirements, are within the expected cost, and are delivered on time.

2.7.4. Furnishing required information to the Government.
CHAPTER 3
COR NOMINATION AND APPOINTMENT PROCESS

3.1. REQUIRING ACTIVITY (RA) NOMINATION AND RESPONSIBILITIES.

3.1.1. The nomination process begins when the RA identifies a need for a contract that will require a COR. Early involvement in the acquisition process by the prospective COR nominee and early nomination of that COR will greatly improve the likelihood of successful administration of the resultant contract.

3.1.2. To be nominated as a COR, the individual must:

- Be an employee, military or civilian, of the U.S. Government
- Possess the requisite security clearance
- Have completed all required COR training
- Possess experience commensurate with the COR responsibilities that the KO will delegate

3.1.3. When selecting a COR nominee, the RA must verify that the nominee has the necessary technical qualifications and experience, which shall include:

- Assertion that the nominee is a government employee (in no case shall contractor personnel serve as a COR)
- Knowledge of government contracting processes
- Understanding of pertinent contract clauses
- Ability to analyze, interpret, and evaluate requirements
- Evidence of completion of all mandatory training requirements
- Applicable security clearance or other specified requirements
- Statement that the individual has sufficient time and resources to accomplish COR duties in conjunction with other workload commitments

3.1.4. To ensure the COR has a thorough understanding of the contract requirement, the prospective COR should be involved in the development of the technical requirements, Quality Assurance Surveillance Plan (QASP), and other pre-award supporting documents and activities.

3.1.5. To nominate a COR, the individual identified by RA as the COR nominee submits a request for COR designation to their supervisor via the CORT Tool. Once approved by the supervisor, the nomination is forwarded by the supervisor to the KO for review and approval. The KO will either reject the COR nomination back to the supervisor or approve the nomination and issues the appointment letter.
3.2. COR NOMINATION PROCEDURES/RESPONSIBILITIES.

3.2.1. COR. Using the CORT Tool, the prospective COR can begin the nomination process by completing the Profile and selecting “Save and Start Nomination Process” at the bottom of the Profile page or by accessing the “COR Nomination Process” link from the left side menu. This will bring the COR to the nomination page. The nomination page is broken into three primary areas.

3.2.2. COR Nomination. The COR nominee completes their part of the nomination record. This includes the upload of training certificates and other required documents to the CORT Tool.

3.2.3. Quality Assurance Surveillance Plan (QASP). DFARS 237.172 (Reference (m)) requires that QASP be prepared in conjunction with the preparation of the statement of work (SOW) or statement of objectives for solicitations and contracts for services.

3.2.3.1. The COR nominee must upload a QASP to the CORT Tool and shall enter a description of the QASP.

3.2.3.2. QASPs are required for all service contracts over $150,000; however, a QASP is not required to be uploaded prior at the time of submission of the nomination.

3.2.3.3. The KO is required to ensure that the QASP, all training certificates, and other required documents are attached to the CORT Tool record prior to the time of COR appointment.

3.2.3.4. Only the KO may waive the requirement for a QASP. If approved by the KO, the KO uploads a written QASP waiver into the CORT Tool.

3.2.4. Prior to submission of the nomination to the supervisor, the COR nominee must complete a “COR certification” by checking the block next to each certification or selecting “All” at the top of the certifications. Once this is done, the COR nomination will automatically be sent to the responsible supervisor.

3.3. SUPERVISOR/HIGHER LEVEL RESPONSIBILITIES.

3.3.1. Once the COR nominee has submitted a nomination record to their supervisor, the supervisor will receive an e-mail directing the supervisor to the CORT Tool site. All e-mails will should be sent to the Army Knowledge Online (AKO) e-mail address, so it is suggested to auto forward the AKO e-mails to a non-AKO e-mail account (i.e. work e-mail) COR’s DCMA e-mail address to ensure COR profile reflects DCMA e-mail and not Army Knowledge Online (AKO) e-mail.

3.3.2. Upon receipt of the nomination, the COR nominee’s supervisor or higher authority will review the COR nominee’s qualifications package. The COR nominees’ supervisor is
responsible for understanding the limits of the COR’s authority and verifying that the training requirements are met.

3.3.3. The supervisor or higher authority is responsible for rejecting or approving or the nomination in the CORT Tool.

3.3.4. Once the supervisor selects “Supervisor/Commander Approve” the nomination is automatically sent to the KO and CS identified on the record. Both will receive an e-mail directing them to the CORT Tool.

3.3.5. Once appointed, the supervisor should include the COR’s duties in the individual’s performance standards. At the appropriate time, the supervisor should consult with the KO for input related to the COR’s performance of duty and evaluation assessment.

3.4. CONTRACTING OFFICER (KO) AND CONTRACT SPECIALIST (CS) RESPONSIBILITIES.

3.4.1. The KO will access COR nomination using the CORT Tool by selecting the “Awaiting My Approval” nomination button and selecting a contract or pre-award number.

3.4.2. The KO and CS shall review the nomination and the KO will determine if the COR is acceptable or is not acceptable.

3.4.3. If the COR is not fully qualified, the KO will reject the appointment back to the Supervisor/Requiring Activity for action and resubmission.

3.4.4. If the COR is fully qualified, the KO will formally approve the appointment in the CORT Tool and issues a COR Appointment Letter.

3.4.5. The COR appointment is made in writing (see Appendix B, C, and D) and will specify:

3.4.5.1. The extent and limit of authority, and that the authority is not re-delegable.

3.4.5.2. The period covered by the designation.

3.4.5.3. That the COR may be held personally liable for unauthorized acts or commitments.

3.4.5.4. That the COR has no authority to make commitments that affect price, quality, quantity, or other terms of the contract.

3.4.6. COR appointment shall be made in writing by the KO and acknowledged in writing by the appointee and contractor, then uploaded to the CORT Tool by the KO.
CHAPTER 4

DoD STANDARD FOR CERTIFICATION OF CORS

4.1. **DoD CERTIFICATION STANDARDS.** The USD (AT&L) Memorandum (Reference (g)) established the “DoD Standard for COR for Service Acquisitions” (DoD COR Standard).

4.2. **CONTRACTING OFFICER (KO) RISK EVALUATION AND TYPE SELECTION.** The KO determines the standard and defines minimum COR competencies, experience, and training requirements based on the nature and complexity of the contract requirement and performance risk. The DoD COR Standard identifies three types of training and experience requirements.

- **Type A:** Fixed-price, no incentive, low performance risk requirements
- **Type B:** Other than fixed-price, no incentive, low performance risk requirements
- **Type C:** Unique requirements that necessitate a professional license, higher education, or specialized training

4.3. **RISK TYPE DEFINITIONS.**

4.3.1. **Type A Training:** Low-risk, fixed-price service contract requirements without incentives (see Table 1). Attributes of these types of requirements might include: minimum technical or administrative complexity, no identifiable risk factors, low likelihood for contract modification, or the effort is follow-on requirement to an existing contract. COR duties and responsibilities are generally limited to kind, count, and/or condition, or basic monitoring requirements of contract performance.

4.3.2. **Type B Training:** Other than low risk service contract requirements. Attributes might include: nature of the work is more complex, effort will be performed in multiple regions or in remote geographic locations, service contract contains incentive arrangements or cost sharing provisions, or contract may be a cost-type or time and materials type (see Table 2). COR duties and responsibilities are increased and more complex.

4.3.3. **Type C Training:** Unique service contract requirements that necessitate a professional license or certification. Attributes of such requirements might include: high risk or complex oversight of services or facilities (see Table 3). COR duties and responsibilities involve highly complex or specialized training.

4.4. **SPECIAL REQUIREMENTS FOR NON-FIRM FIXED-PRICE CONTRACTS.** The DoD standard for certification of CORs for service acquisitions requires that CORs on any contract that is not firm-fixed price shall meet at least Type B requirements for education, training, and experience.
<table>
<thead>
<tr>
<th>NATURE OF TYPE A WORK/requirement</th>
<th>REQUIRED COMPETENCY TOPICS</th>
<th>REQUIRED COMPETENCIES</th>
<th>EXPERIENCE/TRAINING REQUIREMENTS</th>
</tr>
</thead>
</table>
| Fixed-price requirements without incentives, low performance risk. Attributes of such requirements might include: lack of technical or administrative complexity, no identifiable risk factors, limited requirement for technical expertise, low likelihood of modification, effort is a follow-on to an existing contract. COR duties/ responsibilities are generally limited to minimal technical and/or administrative monitoring of the contract. | General:  
- Attention to Detail  
- Decision Making  
- Flexibility  
- Oral and Written Communication  
- Problem Solving/Reasoning  
- Self-management/Initiative  
- Teamwork  
- Technical:  
- Business Ethics  
- Effective Communication of Contract Requirements  
- Effective Contract Performance Management  
- Effective COR Performance | Upon completion of mandatory training, COR should be able to perform at least the following competencies in a manner consistent with the nature of Type A work/requirements:  
1. Assist in acquisition planning.  
2. Assist in contract award process.  
3. Establish/maintain COR file with all required documentation.  
4. Identify, prevent unethical conduct and instances of fraud/waste/abuse.  
5. Perform technical/administrative monitoring and reporting duties in accordance with letter of delegation and surveillance plan.  
6. Recommend/monitor proposed changes.  
8. Monitor contract schedule compliance.  
9. Perform liaison duties between the Contracting Officer, the Requiring Activity, and the contractor for management of the contract.  
10. Inspect, accept, or reject deliverables during contract performance and at close-out in accordance with contract terms and conditions.  
11. Monitor the control/disposition of Government furnished assets.  
12. Perform surveillance in a contingency environment, when applicable. | Experience:  
- Agency experience: minimum of 6 months (may be waived).  
- Relevant technical experience: As determined by the nominating supervisor for the Contracting Officer’s consideration and appointment.  
- General competencies: As determined by the nominating supervisor for the Contracting Officer’s consideration and appointment.  
Training:  
- DAU CLC 106: Contracting Officer’s Representative (Basic)  
- DAU COR XXX (to be determined)  
- COR in the Contingency Environment, when applicable (competency 12)  
- Minimum of 1 hour acquisition ethics training (e.g., CLM 003 or agency provided training) annually.  
- Additional training mandated by the contracting activity (e.g., WAFW).  
Refresher Training:  
- Minimum of 8 hours COR specific training.  
- Every 3 years, OR  
- Prior to assuming COR responsibilities if the individual has not served as a COR within the previous 24 months.  
- Minimum of 1 hour acquisition ethics training (e.g., CLM 003 or agency provided training) annually.  
- Any additional training mandated by the Activity. |
<table>
<thead>
<tr>
<th>NATURE OF TYPE B WORK/REQUIREMENT</th>
<th>REQUIRED COMPETENCY TOPICS</th>
<th>REQUIRED COMPETENCIES</th>
<th>EXPERIENCE/TRAINING REQUIREMENTS</th>
</tr>
</thead>
</table>
| Fixed-price requirements without incentives, other than low performance risk. Attributes of such requirements might include: the nature of the work is more complex; effort will be performed in multiple remote/remote geographic locations; contract contains incentive arrangements or cost sharing provisions; contract is cost-type of B & M/L1 type, or FP LOE. COR duties/responsibilities are of increased complexity. | **General:**  
  - Attention to Detail  
  - Decision Making  
  - Flexibility  
  - Influencing/Persuasive interpersonal skills  
  - Oral and Written Communication  
  - Planning and Evaluating  
  - Problem Solving  
  - Reasoning  
  - Self-management/initiative  
  - Teamwork. | Upon completion of mandatory training, COR should be able to perform at least the following competencies in a manner consistent with the nature of Type B work/requirements:  
  1. Assist in acquisition planning.  
  2. Assist in contract award process.  
  3. Establish/maintain COR file with all required documentation.  
  4. Identify/present selected contract and instance of fraud/near-fraud.  
  5. Review technical submittals/ensure compliance with Statement of Work/Statement of Objectives (e.g., perform technical monitoring and reporting in accordance with a Quality Surveillance Plan).  
  6. Perform administrative monitoring and reporting duties (e.g., handle security issues, attend meetings, etc.)  
  7. Recommend/monitor proposed changes  
  10. Perform liaison duties between the Contracting Officer and the contractor for management of the contract.  
  11. Inspect, accept or reject deliverables during contract performance and at close-out in conformance with contract terms and conditions.  
  12. Review and validate that contractor payment requests are commensurate with performance.  
  14. Perform surveillance in a contingency environment, when applicable. | **Experience:**  
  - Agency experience: minimum of 12 months (may be waived by the requiring activity. Waiver to be addressed in nomination package)  
  - Relevant technical experience: As determined by the nominating supervisor for the Contracting Officer’s consideration and appointment.  
  - General competencies: As determined by the nominating supervisor for the Contracting Officer’s consideration and appointment.  
  - **Training:**  
    - DAU COR 222 or AMLC-CL or equivalent course  
    - DAU COR X20 (to be determined), COR in a Contingency Environment, when applicable (competency 14).  
    - Minimum of 1 hour acquisition ethics training (e.g., DAU CLM 003 or agency provided training) annually.  
    - Additional training mandated by the Contracting activity (e.g., WAWF).  
  - **Refresher Training:**  
    - Minimum of 16 hours COR specific training:  
      - Every 3 years, OR  
      - Prior to assuming COR responsibilities if the individual has not served as a COR within the previous 24 months  
    - Minimum of 1 hour acquisition ethics training (e.g., DAU CLM 003 or agency provided training) annually.  
    - Any additional training mandated by the Activity. |
Table 3. **Type C**: Unique service contract requirements that necessitate a professional license, certification or specialized training.
CHAPTER 5
COR TRAINING REQUIREMENTS

5.1. TRAINING STANDARDS.

5.1.1. Training types and levels for CORs are determined by the KO based upon the complexity of the contract. Most contracts awarded by the Procurement Center are firm fixed-price in nature and require the COR to complete only Type A, COR training requirements. In addition to the mandatory classes, the COR nominee must have 6 months of agency experience and relevant technical experience. Specific course requirements for Type A, B, and C can be found at Table 4.

Table 4. Training by Type: Course Requirements

<table>
<thead>
<tr>
<th>COR Type Courses [A, B, C]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COR Training Types</strong></td>
</tr>
<tr>
<td>A, B</td>
</tr>
<tr>
<td>A, B, C</td>
</tr>
<tr>
<td>A, B, C</td>
</tr>
<tr>
<td>A, B, C</td>
</tr>
<tr>
<td>C</td>
</tr>
</tbody>
</table>

5.1.2. CORs for service contracts that are not firm-fixed price shall meet Type B or C requirements for education, training, and experience. In addition to the mandatory classes, the COR nominee must have 12 months of Agency experience and relevant technical experience.

5.1.3. While current Defense Procurement Acquisition Policy (DPAP) does not require completion of Defense Acquisition University (DAU) COR 222 or CLC222 for CORs assigned to firm-fixed price contracts, the KO may require the course for more complex firm-fixed price contracts or contracts with multiple option years.

5.2. MANDATORY TRAINING REQUIREMENTS. CORs must complete all mandatory training courses, or equivalents, and certifications before appointment.

5.2.1. DAU CLC106. Continuous Learning-Contracting (CLC) 106, “Contracting Officer’s Representative with a Mission Focus” (8-hour online course).
5.2.2. **DAU COR 222 or CLC222.** CLC222 “Contracting Officer’s Representative” (32-hour online course) COR online training or COR222 Contracting Officer’s Representative” (32-hour customer support in residence offering) or equivalent (may be required at the digression of the KO).

5.2.3. **DAU CLM003.** Ethics Training for Acquisition Technology & Logistics Workforce (2 hours) or agency equivalent.

5.2.4. **Wide Area Workflow (WAWF).** WAWF training is required for all CORs performing electronic acceptance. A copy of the WAWF training certificate must be uploaded and saved in the CORT Tool. WAWF training includes the following overviews:

- WAWF System and Home Page Overview
- Session Timeout Overview
- Navigation
- User Roles
- Document Types Overview
- Generated E-mail Overview
- Receipt and Acceptance System (Inspector, Receiver, and Acceptor)

5.2.5. **Trafficking In Persons (TIP).** CORs are required to complete “Combating Trafficking in Persons” and ensure it is listed within their Profile. The DoD Trafficking in Persons Web site provides links to TIP training, including mandatory general awareness course J3TA-US030, Combating Trafficking in Persons.

5.2.6. **OGE Form 450, Confidential Financial Disclosure Report.** In addition to ethics training, the COR nominee is required to complete an Office of Government Ethics (OGE) Form 450, Confidential Financial Disclosure Report, within 30 days of appointment and annually thereafter.

5.2.7. **Contractor Verification System (CVS).** This is only required for CORs who oversee contractors performing on-site at a government facility.

5.2.7. **Contractor Performance Assessment Reporting System (CPARS) Overview.** This course is required for CORs on contracts exceeding $1 million and is a prerequisite to Quality and Narrative Writing (length 2.5 hours). This training provides the COR with an overview of the policies and regulations governing CPARS, the CPARS workflow, and CPARS application functionality.

5.2.8. **Quality and Narrative Writing.** This course is required for CORs appointed to contracts exceeding $1 million (length 1.25 hours). This training gives the COR an understanding of the need for quality and accuracy in narrative writing, examples of narratives and resources to aid in creating quality past performance evaluations, and examples of strategies for making the CPARS process more effective.
5.3. CONTRACT SPECIFIC TRAINING PROVIDED BY THE KO/CS. Regardless of the level of COR experience or formal training, CORs will receive contract-specific training from their KO or CS. Although this training is normally a desk-side briefing on COR duties and specific contract terms, conditions, and requirements of the contract, it may be accomplished remotely via video teleconferencing, telephone, or other media for CORs remotely from the KO’s location.

5.4. REFRESHER AND REOCCURRING TRAINING REQUIREMENTS. In addition to any specific additional training identified by the KO, the COR shall complete refresher training. The exact training should be coordinated between the KO and CORs supervisor to ensure it is relevant to the contract being administered.

5.4.1. Type A. The COR must complete a minimum of 8 hours of refresher training relevant to the work being performed every 3 years. A suggested course might be the COTR refresher course (DAU FAC017 - 8 hours).

5.4.2. Type B and C. The COR must complete a minimum of 16 hours of refresher training relevant to the work being performed every 3 years.

5.4.3. OGE Form 450, Confidential Financial Disclosure Report. Filing of OGE Form 450 is an annual requirement.

5.4.4. Ethics Training. The CORs must complete the course “Ethics Training for Acquisition Technology & Logistics Workforce” (2 hours) or agency equivalent annually and upload it to their profile in the CORT Tool.

5.4.5. Combating Trafficking in Persons. CORs are required to complete “Combating Trafficking in Persons” annually and upload it to their profile in the CORT Tool.

5.5. ADDITIONAL COR TRAINING CLASSES. COR training is available from the Defense Acquisition University (DAU) online (see the resource page for this Instruction Appendix C). COR courses recommended, but not required include:

- Contracting Overview (DAU CLM024 - 8 hours)
- Improved Statement of Work (DAU CLM031 - 4 hours)
- Contracting for the Rest of Us (DAU CLC011 - 2 hours)
- Past Performance Information (DAU CLC 028 - 3 hours)

5.6. ALTERNATE OR EQUIVALENCY TRAINING. Equivalency to DAU courses requires formal assessment and accreditation through the American Council on Education. More information on COR equivalency and other training can be found at the DAU Web site.
CHAPTER 6
CORT TOOL AND WAWF

6.1. CONTRACTING OFFICER REPRESENTATIVE TRACKING (CORT) TOOL.

6.1.1. The DoD CORT Tool is a Web-based capability used for the appointment and management of CORs. It provides contracting personnel, the RA, and COR management a means to track and manage COR assignments across multiple contracts DoD-wide.

6.1.2. This tool allows a prospective COR, supervisors, and KOs to electronically process the nomination and appointment of a COR for one or multiple contracts.

6.1.3. The CORT Tool provides for the collection of COR training certificates, recording contractor performance, and the posting of monthly status reports. It provides built-in workflows for the nomination process to include e-mail alerts and status reminders for monthly status report due-ins and delinquencies.

6.1.4. It also allows the KO, CS, and COR supervisor to review the CORs performance of duty and contract surveillance using the electronic COR file contained in the CORT Tool.

6.2. CORT TOOL USERS GUIDE.

6.2.1. DoD Contracting Officer Representative Tracking Tool (CORT Tool) Users Guide dated February 2012 - September 2013 is available online in the CORT Tool.

6.2.2. The CORT Tool homepage contains top level information for each type of user involved in the nomination and appointment of CORs against DoD contracts and links to navigate the site.

6.2.3. The CORT Tool is accessible through the WAWF interface. See the WAWF home page or contact the WAWF advisor for instructions on accessing the systems.

6.3. WIDE AREA WORK FLOW (WAWF).

6.3.1. The 2001 Defense Authorization Act mandates that all contract invoicing must be done electronically. DoD implemented this requirement via WAWF. Complete information concerning the WAWF system is found at the WAWF Web site.

6.3.2. The WAWF system is a secure, Web-based application for Government contractors and authorized DoD users to generate, capture, and process receipt and payment documents. It enables electronic submission of contractor invoices and Government inspection and acceptance documents.

6.3.3. The WAWF system creates a virtual folder to combine the three documents required to pay a contractor, which is the contract, the invoice, and the receiving report.
6.3.4. Once WAWF training has been completed by the COR, a copy of the training certificate is to be provided to the KO prior to appointment and are saved in the automated COR contract file located in the CORT Tool.

6.4. ASSISTANCE TOOLS.

6.4.1. DoD CORT Tool Assistance. A number of Web sites are available to assist in understanding the COR nomination and appointment process and are shown below. Other related links are provided on this Instruction’s resource page.

- CORT Help Desk
- CORT Tool Web site
- Training Materials at the WAWF site

6.4.2. DAU Service Acquisition Mall (SAM). SAM provides the user tools and templates needed to create a performance-based service acquisition requirement. SAM consists of “Wings” and “Stores” containing information related to differing categories of service.

6.4.3. Other COR Resources. Other COR resources include:

- CORT Handbook
- Contingency COR Handbook
- DPAP COR Users Guide
- DPAP COR Web site
7.1. GENERAL DUTIES. The CORs assist in the technical monitoring or administration of a contract.

7.1.1. COR primary duties will be specified by the KO appointment letter. Generally, CORs have the responsibility to:

7.1.1.1. Read and understand the contract thoroughly.

7.1.1.2. Maintain detailed file documentation.


7.1.1.4. Inform the KO/CS of any problems or non-conformances.

7.1.1.5. Ensure that the requirements of the contract are being met by the contractor.

7.1.1.6. Ensure that requests for payment are processed in a proper and timely manner.

7.1.1.7. Provide the KO timely reports on contractor performance via CPARs.

7.1.1.8. Perform surveillance based on the requirements of the contract and the QASP.

7.1.2. In-depth comprehensive guidance on performance of COR duties may be found in the DoD COR handbook located online.

7.2. PRE-AWARD ACTIVITIES. The KO may call upon the COR to take part in various pre-award activities. These activities are designed to give the COR a better understanding and insight into contract requirements. These activities may include but are not limited to:

7.2.1. Utilizing various forms of market research to develop a complete purchase request package with all supporting documentation.

7.2.2. Developing and setting planning milestones due dates.

7.2.3. Preparing the initial cost estimates and cost/benefit analysis to prioritize requirements.

7.2.4. Determining requirement for acquisition and look for long-range strategies to maximize competition, minimize costs, and reduce lead times.

7.2.5. Participating in source selection evaluations.
7.3. POST-AWARD ACTIVITIES. Upon contract award, the KO will provide the COR with the COR appointment letter, one complete copy of the contract, and any other documents pertinent to contract performance. Upon receipt of this information, the COR should:

7.3.1. Read and understand the contract thoroughly.

7.3.2. Assist the KO with the Post Award Orientation or Conference as needed.

7.3.3. Monitor the schedule of deliverables as required by the contract.

7.3.4. Determine the priorities of the tasks that must be monitored.

7.3.5. Understand the surveillance and monitoring techniques that must be used.

7.3.6. Identify potential performance problem areas in the contract.

7.3.7. Perform Inspection and Acceptance, and certification of invoices for payments via WAWF.

7.3.7. Ensure CPARS reporting is accomplished within the required time period.

7.4 QUALITY ASSURANCE SURVEILLANCE PLAN (QASP). The RA is responsible to draft the performance work statement (PWS) and develop the QASP for service contracts.

7.4.1. A QASP is an important tool that the COR uses as a guide to systematically and effectively monitor the quality of the services received and contractor compliance with the terms of the contract.

7.4.2. The QASP is mandatory for any contract, task order, or delivery order for services over the SAT. While the Performance Requirements Summary is releasable to the contractor, the QASP is not releasable as it is an internal Government document which is used by the COR to survey the contractor’s quality assurance process. Because the QASP is developed and used solely by the Government, the QASP can be modified at any time.

7.5. PROBLEM MANAGEMENT. Problem identification and resolution are primary responsibilities of the COR. When problems arise, the COR shall be proactive and should:

7.5.1. Attempt to resolve technical and administrative issues that arise in accordance with the terms and conditions outlined in the contract.

7.5.2. Refer questions and/or disputes between the COR and contractor to the KO. General guidance on the division of responsibilities between the KO and COR is at Table 5.

7.5.3. Be firm but fair in all actions.
7.5.4. Anticipate and resolve difficulties; and ensure satisfactory completion of the contract; and foster full and complete coordination, cooperation, and communication among the contractor, KO, and all Government personnel assigned to monitor contract performance.

7.5.5. Validate the accuracy of all contractor responses.

7.5.6. Follow-up on issues until they are resolved.

Table 5. General COR, RA, and KO Responsibilities

<table>
<thead>
<tr>
<th>Action</th>
<th>COR/RA</th>
<th>Contracting Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct market research</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Prepare SOW/PWS</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Prepare QASP</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Prepare IGCE</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Prepare GFP list</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Develop sources</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Prepare solicitation</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Conduct pre-bid conference</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Evaluate proposals</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Award contract</td>
<td>N/A</td>
<td>Responsible</td>
</tr>
<tr>
<td>Conduct contract surveillance</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Request modifications</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Make modifications</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Conduct progress meetings</td>
<td>Assist</td>
<td>Responsible</td>
</tr>
<tr>
<td>Conduct inspection/acceptance</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>Evaluate contractor’s performance</td>
<td>Responsible</td>
<td>Assist</td>
</tr>
<tr>
<td>CPARS</td>
<td>Responsible/Assist</td>
<td>Responsible</td>
</tr>
</tbody>
</table>

Table 5 highlights the relationship between COR and KO responsibilities.
7.6. PERFORMANCE EVALUATION OF THE COR. Performance evaluation of the COR is a joint effort between the COR’s supervisor and KO.

7.6.1. The supervisor shall address COR responsibilities in job descriptions and performance standards. When identifying an employee to be nominated as COR, the supervisor must ensure that the COR is afforded necessary resources (i.e., time, supplies, equipment, opportunity) to perform the designated functions. The supervisor must also affirm that performance of the designated duties and responsibilities are addressed as part of the COR’s performance assessments. COR supervisors are encouraged to solicit input regarding performance of COR duties from the KO.

7.6.2. The KO, or DCMA Procurement Center policy personnel, may review a COR’s file to ensure all regulations and practices are being followed. This feedback may be given to the COR’s supervisor and should be reflected during performance reviews.

7.6.3. The Supervisor has an inherent responsibility to provide guidance to a COR; however, such guidance shall not conflict with the KO’s appointment letter or requirements of the contract.

7.7. CONTRACTOR PERFORMANCE ASSESSMENT REPORTING SYSTEM (CPARS). The COR has primary responsibility to collect and report contractor performance assessment information in an accurate and timely manner.

7.7.1. Contractor performance information is entered into the CPARS, at intervals specified in the contract (normally annually), when contractor performance warrants reporting, and at the end of the contract.

7.7.2. The Government performance assessment shall reflect the contractor’s actual performance as documented by the COR during the monitoring process.

7.7.3. CPARS reporting is required on all contracts issued by the DCMA Procurement Center for services and information technology that exceed the current DoD deviation threshold of $1 million as specified at FAR 42.1502, Policy (Reference (n)).
CHAPTER 8

COR CONTRACT FILE

8.1. MAINTENANCE OF COR CONTRACT FILE. The COR shall maintain a COR contract file for each assigned contract. The COR file is a part of the official contract file and must be maintained in accordance with the KO’s instructions. This COR file shall be available for review by the KO, CS, or other authorized officials.

8.2. ELECTRONIC COR CONTRACT FILE (CORT TOOL). The CORT Tool assists the COR in documenting the contractor’s performance and provides forms, checklists, QASP formats, etc. The COR updates and maintains the COR file in the electronic CORT Tool. At a minimum, the COR shall:

8.2.1. Maintain a separate file for each contract. Include the contract number on each record and all related correspondence.

8.2.2. Ensure the KO and other interested parties receive a copy of all significant correspondence, as well as posting to the CORT Tool.

8.2.3. Safeguard proprietary data and classified or business-sensitive information.

8.2.4. Upon completion of the contact, forward the COR file to the KO for retention in the official contract file.
CHAPTER 9

TRUSTED AGENT DUTIES AND RESPONSIBILITIES

9.1. TRUSTED AGENT (TA) RESPONSIBILITIES. A COR may be requested to serve as a TA in the CVS on contracts where contractor personnel will require access to DCMA facilities and/or information systems.

9.1.1 Access will be provided to the contractor using a Common Access Card (CAC).

9.1.2 The contractor shall submit a request for a CAC directly to the TA/COR.

9.1.3 Upon receipt, the TA/COR will review the application and if proper, initiate and approve contractor CAC applications via the CVS.

9.1.4 Prior to inputting or uploading any data into the CVS, the TA shall contact their local DCMA Personnel Security Specialist to validate that a contractor meets all requirements for a CAC.

9.1.5 A contractor requiring access to DCMA facilities for less than 6 months will typically be issued a temporary escort-required badge unless otherwise authorized by the Personnel Security Specialist.

9.2. TA DUTIES. The TA is responsible for the following duties:

9.2.1 Creation of the contractors accounts in CVS.

9.2.2 Review of completed contractor CAC application forms.

9.2.3 Approval or rejection of the CAC application as appropriate.

9.2.4 Re-verification of assigned contractors every 6 months.

9.2.5 Revocation of contractor eligibility for CAC upon completion of contract or when warranted.

9.2.6 Distribution of temporary user identification and passwords.
CHAPTER 10

COR PERSONAL LIABILITY/REVOCATION OF APPOINTMENT

10.1. COR PERSONAL LIABILITY. A COR may be held personally liable for unauthorized acts, and shall avoid even the appearance of impropriety or conflict of interest. The following are actions that a COR shall not engage in:

10.1.1. Seek employment with an entity that may be affected by performance or non-performance of their official COR duties.

10.1.2. Agree to or sign any contractual action.

10.1.3. Waive the Government’s rights.

10.1.4. Take any action which may affect contract performance such as issuing instructions to stop or start work, expand the scope of work, approve any action which impacts cost.

10.1.5. Order or accept goods or services not expressly required by the contract.

10.1.6. Authorize delivery or disposition of Government property not specified in the contract.

10.1.7. Discuss any acquisition plans with contractor personnel.

10.1.8. Provide any advance information that may give one contractor a competitive advantage over another contractor in future procurements.

10.2 DETERMINATION TO REVOKE COR APPOINTMENT. Although the final determination to revoke the COR appointment is the KO’s decision, it must be accomplished through close coordination with the COR’s supervisor and RA.

10.3. REVOCATION OF COR APPOINTMENT. COR appointments can be revoked in the event of dereliction of duties, for ethics violations or at the request of the RA.

10.3.1. Prior to termination of appointment, the KO must notify the COR in writing and identify which contract or contracts the COR is being terminated on. The KO may consider taking other corrective actions as appropriate, such as counseling or amending the appointment letter to clarify or further limit the COR’s authority.

10.3.2. The written termination notification must identify the contract(s) upon which the COR is being terminated and a copy must be sent to the COR, the COR’s supervisor, and the contractor.
10.3.3. Upon withdrawal of the COR’s appointment, the employee will assist with the transition of the COR files to the new COR.

10.3.4 In the event a COR needs to request relief from COR duties, the COR must notify the supervisor and KO in sufficient time to permit timely appointment and transition of a successor COR.
CHAPTER 11

CONTRACT CLOSEOUT

11.1. RESPONSIBILITIES. Contract closeout actions are primarily the KO’s responsibility, however, COR assistance may be required. COR assistance is indispensable when disputes or litigation is involved. A contract is not completed until it has been closed. Timely contract closeout accomplishes the following:

11.1.1. Allows all affected activities to concentrate on current and future requirements.

11.1.2. Allows for de-obligating excess funds.

11.1.3. Identifies the need for additional funds.

11.2. DISPOSITION OF THE COR CONTRACT FILE.

11.2.1. If the COR has a hard copy COR file, the COR is to physically transfer those files to the KO to become part of the official contract file.

11.2.2. If the COR is using the COR file in the CORT Tool, then the COR must ensure all documents are posted to that file.

11.2.3. The KO, with the assistance of the COR, must ensure that the following actions are accomplished:

11.2.3.1. Services have been rendered.

11.2.3.2. Articles have been delivered and accepted.

11.2.3.3. Payments and collections have been made.

11.2.3.4. Property and classified information have been disposed.

11.2.3.5. Assignments of refunds, credits, etc., have been executed by the contractor.

11.2.3.6. Administrative actions have been accomplished.

11.2.3.7. Excess funds have been de-obligated.

11.2.3.8. Contract file is properly documented.

11.2.3.9. A release of liabilities, obligation, and claims has been obtained from the contractor.
### GLOSSARY

#### ACRONYMS

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>ACO</td>
<td>administrative contracting officer</td>
</tr>
<tr>
<td>ACOR</td>
<td>Alternate Contracting Officer’s Representative</td>
</tr>
<tr>
<td>AKO</td>
<td>Army Knowledge Online</td>
</tr>
<tr>
<td>CAC</td>
<td>common access card</td>
</tr>
<tr>
<td>CAO</td>
<td>contract administration office</td>
</tr>
<tr>
<td>CDR</td>
<td>contractor discrepancy report</td>
</tr>
<tr>
<td>CDRL</td>
<td>contract data requirements list</td>
</tr>
<tr>
<td>CICA</td>
<td>Competition in Contracting Act</td>
</tr>
<tr>
<td>CLC</td>
<td>continuous learning - contracting</td>
</tr>
<tr>
<td>CLIN</td>
<td>Contract Line Item Number</td>
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<tr>
<td>COR</td>
<td>contracting officer’s representative</td>
</tr>
<tr>
<td>CORT Tool</td>
<td>Contracting Officer’s Representative Tracking Tool</td>
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<tr>
<td>CPARS</td>
<td>Contractor Performance Assessment Reporting System</td>
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<tr>
<td>CS</td>
<td>contract specialist</td>
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<tr>
<td>CVS</td>
<td>Contractor Verification System</td>
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<tr>
<td>DAU</td>
<td>Defense Acquisition University</td>
</tr>
<tr>
<td>DCMA-INST</td>
<td>DCMA instruction</td>
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<tr>
<td>DAEO</td>
<td>designated agency ethics official</td>
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<tr>
<td>DFARS</td>
<td>Defense Federal Acquisition Regulation Supplement</td>
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<tr>
<td>DID</td>
<td>data item description</td>
</tr>
<tr>
<td>DoDD</td>
<td>DoD Directive</td>
</tr>
<tr>
<td>DPAP</td>
<td>Defense Procurement and Acquisition Policy</td>
</tr>
<tr>
<td>FAR</td>
<td>Federal Acquisition Regulation</td>
</tr>
<tr>
<td>GFP</td>
<td>government-furnished property</td>
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<tr>
<td>HCA</td>
<td>head of the contracting activity</td>
</tr>
<tr>
<td>HQ</td>
<td>headquarters</td>
</tr>
<tr>
<td>IGCE</td>
<td>independent government cost estimate</td>
</tr>
<tr>
<td>IT</td>
<td>information technology</td>
</tr>
<tr>
<td>KO</td>
<td>contracting officer</td>
</tr>
<tr>
<td>MFR</td>
<td>memorandum for the record</td>
</tr>
<tr>
<td>OGE</td>
<td>Office of Government Ethics</td>
</tr>
<tr>
<td>OUSD</td>
<td>Office of the Under Secretary of Defense</td>
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<tr>
<td>PAS</td>
<td>pre-award survey</td>
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<tr>
<td>Abbreviation</td>
<td>Description</td>
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<td>--------------</td>
<td>--------------------------------------------</td>
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<tr>
<td>PBSA</td>
<td>performance-based service acquisition</td>
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<tr>
<td>PGI</td>
<td>DFARS procedures, guidance and information</td>
</tr>
<tr>
<td>PLAS</td>
<td>Performance Labor Accounting System</td>
</tr>
<tr>
<td>PWS</td>
<td>performance work statement</td>
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<tr>
<td>QAR</td>
<td>quality assurance representative</td>
</tr>
<tr>
<td>QASP</td>
<td>quality assurance surveillance plan</td>
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<tr>
<td>RA</td>
<td>requiring activity</td>
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<td>RFP</td>
<td>request for proposal</td>
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<td>SAM</td>
<td>Service Acquisition Mall</td>
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<tr>
<td>SAT</td>
<td>simplified acquisition threshold</td>
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<tr>
<td>SOW</td>
<td>statement of work</td>
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<tr>
<td>TA</td>
<td>trusted agent</td>
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<tr>
<td>TCO</td>
<td>terminating contracting officer</td>
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<tr>
<td>TIP</td>
<td>trafficking in persons</td>
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<tr>
<td>WAWF</td>
<td>Wide Area Work Flow</td>
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