

# Surveillance Checklist

## Quick Reference Guide

SPM Homepage

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COR Surveillance and Oversight

### Surveillance Checklist Access

**Create a Surveillance Checklist:** COR, CO, CS, QAPOC, and ACO

**Edit a Surveillance Checklist:** COR, CO, CS, QAPOC, and ACO

### Surveillance Checklist Workflow

COR/CO/CS creates the checklist and the system generates an email to the COR/CO/CS after it is created.

### Steps to Smart Form Access

**Step 1:** After selecting COR Surveillance and Oversight from the Menu the following page will display. The user will enter in search criteria and click the Search button. The Search results will be restricted by role, agency and DoDAAC.

Q COR Surveillance and Oversight - Search Criteria

<b>Search As</b> Contracting Officer Representative	<b>Contract Number</b> Equal To	<b>Delivery / Task Order Number</b> Equal To	<b>Pre Award Number</b> Equal To
<b>COR First Name</b> Equal To	<b>COR Last Name</b> Equal To	<b>Nomination / Appointment Status</b> - Select -	<b>COR Type</b> - Select -
<b>Contract Officer First Name</b> Equal To	<b>Contract Officer Last Name</b> Equal To	<b>Contract Specialist First Name</b> Equal To	<b>Contract Specialist Last Name</b> Equal To
<b>Supervisor / Commander First Name</b> Equal To	<b>Supervisor / Commander Last Name</b> Equal To	<b>QA POC First Name</b> Equal To	<b>QA POC Last Name</b> Equal To
<b>ACO First Name</b> Equal To	<b>ACO Last Name</b> Equal To	<b>Issuing Office DoDAAC</b> Equal To	<b>Home Organization DoDAAC</b> Equal To

Q Search    ↻ Reset    ⓘ Help

**Step 2:** A list of relevant contracts will be returned.

Q COR Surveillance and Oversight - Search Results

Display **10** items Filter:

COR Name	COR Home DoDAAC	COR Type	Nomination / Appointment Status	Pre Award Number	Contract Number	Delivery / Task Order Number	Contract Officer Name	Contract Specialist Name	Supervisor / Commander Name	Last Action Date	Issuing Office DoDAAC	Reports in Review
Hansen, Abby	N82649	Primary	Active COR		<a href="#">123</a>	D003	West, Lisa	West, Lisa	Adams, Chris	2020/01/03	S0512A	YES
Hansen, Abby	N82649	Primary	Active COR		<a href="#">AQ0123452</a>		West, Lisa	Jones, Betty	Adams, Chris	2020/02/03	S0512A	NO
Hansen, Abby	N82649	Primary	Terminated COR		<a href="#">E0960391D0999</a>	YC25	West, Lisa	West, Lisa	Adams, Chris	2020/02/03	S0512A	NO
Hansen, Abby	N82649	Primary	Terminated COR		<a href="#">N0002418C0140</a>		West, Lisa	West, Lisa	Adams, Chris	2020/01/03	S0512A	NO

Showing 1 to 4 of 4 items Previous **1** Next

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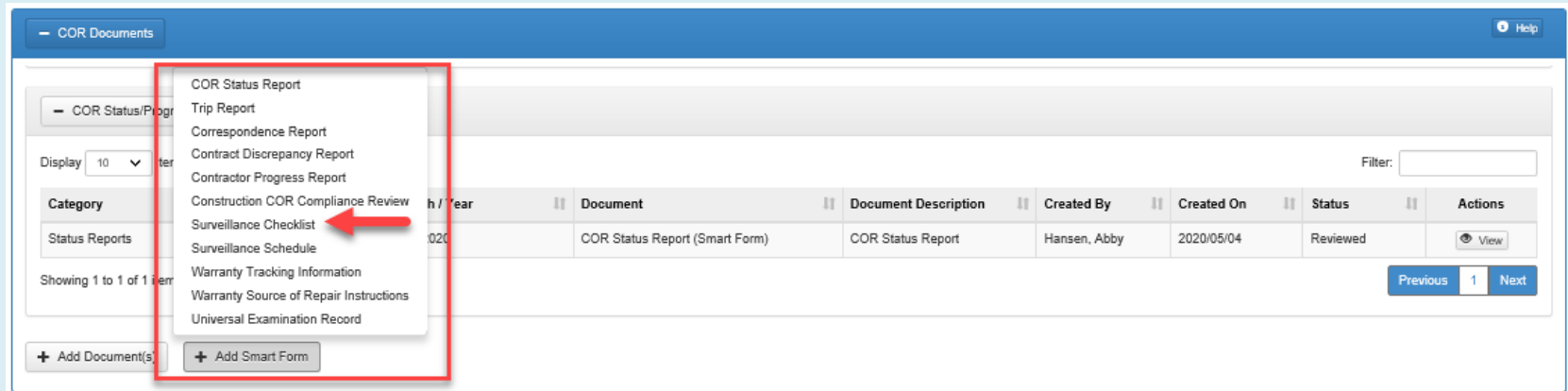
**Step 3:** After selecting the Contract Number link, the following page will be displayed. Each contract will have the following sections of information: Contracting Information, Contractor Information, Period of Performance Monitoring, Contract Place of Performance, QA Surveillance Plan/Waiver, COR information, Supervisor/Commander Information, COR Certifications, Supervisor/Commander Certifications, Contracting Officer Certifications, Designation Letter, Termination Letter, Workflow History, and COR Documents.

Contract Management - Active COR + Expand All - Collapse All

+ Contracting Information	Help
+ Contractor Information	Help
+ Period of Performance for Monitoring	Help
+ Contract Place of Performance	Help
+ QA Surveillance Plan / Waiver	Help
+ COR Information	Help
+ Supervisor / Commander Information	Help
+ COR Certifications	Help
+ Supervisor / Commander Certifications	Help
+ Contracting Officer Certifications	Help
+ Designation Letter	Help
+ Termination Letter	Help
+ Workflow History	Help
+ COR Documents	Help

To create, edit or view Smart forms, the user will navigate to the Surveillance Documents section. The user will click on Add Smart Forms and select the appropriate Smart form.

### Smart Form Selection



The required fields are: Month, Year, Date of Report, Item Number, Performance Standard/Requirement, SOW/SOO/PWS Reference, Performance Objective/Acceptable Quality Level (AQL), Method of Surveillance, Performance Threshold, Frequency, Findings, Is the contractor compliant with this requirement, Are the delays/discrepancies noted above caused by the contractor, Comments, and Recommended actions.

### Surveillance Checklist Smart Form

The screenshot shows the 'Add Smart Form - Surveillance Checklist' form. It includes the following sections and fields:

- Month \***: Dropdown menu (March)
- Year \***: Dropdown menu (2020)
- Contract Number**: Text field (012456)
- Order Number**: Text field
- Date of Report \***: Text field (2020/03/06)
- Checklist Items \***:
  - Checklist Item 1**:
    - Item Number \***: Text field
    - Performance Standard/Requirement \***: Text field
    - SOW/SOO/PWS Reference \***: Text field
    - Remove Item**: Red button
    - Performance Objective/Acceptable Quality Level (AQL) \***: Text field
    - Method of Surveillance \***: Text field
    - Performance Threshold \***: Text field
    - Frequency**: Dropdown menu (- Select -)
    - Findings \***: Text area
    - Is the contractor compliant with this requirement? \***: Radio buttons (Yes, No)
  - + Add Item**: Blue button
- Are the Delays/Discrepancies noted above caused by the contractor? \***: Radio buttons (Yes, No)
- Comments**: Text area
- Recommended Actions**: Text area
- History**: Table with columns: Date, Action By, Email, Phone, Role, Status, Signature

At the bottom, there are navigation buttons: Back, Cancel, Save, and Help.