

Trip Report

Quick Reference Guide

SPM Homepage

Menu

COR Surveillance and Oversight

Trip Report Access

Create a Trip Report: COR, CO, CS, QAPOC, ACO and Manager

Edit a Trip Report: COR, CO, CS, QAPOC, ACO and Manager

View a Trip Report: COR, CO, CS, QAPOC, ACO, Manager and DPAP Admin

Reviewer: COR, CO, CS, QAPOC, ACO, DPAP Admin, and Manager (Cannot be the Creator)

Trip Report Workflow

- 1) User with a Creator role creates, and a system generated email is sent to the Reviewers.
- 2) User with a Reviewer role approves or rejects the Trip Report. The Reviewer will find the Approve/Reject buttons in the COR Documents section of the contract in SPM. Please see the screenshot below.
- 3) A system generated email is sent to the Creator once an approval or rejection is indicated by the Reviewer.
 - a. Approval: Trip Report is filed in SPM.
 - b. Rejection: Trip Report is sent back to the Creator with comments for resubmission until it is approved by the Reviewer.

— COR Trip Report(s)

Display 10 items Filter:

Category	Subcategory	Month / Year	Document	Document Description	Created By	Created On	Status	Actions
Trip Report	N/A	05 / 2020	Trip Report (Smart Form)	Trip Report	Lee, Ruta	2020/05/19	Submitted	View Approve Reject

Showing 1 to 1 of 1 items

Previous 1 Next

Rejected:

If the COR Trip Report was rejected the COR can now see the rejected document in their COR Documents list. Click on the Edit button and make the necessary changes.

— COR Documents Help

— COR Trip Report(s)

Display 10 items Filter:

Category	Subcategory	Month / Year	Document	Document Description	Created By	Created On	Status	Actions
Trip Report	N/A	05 / 2020	Trip Report (Smart Form)	Trip Report	Lee, Ruta	2020/05/19	Rejected	View Edit Delete

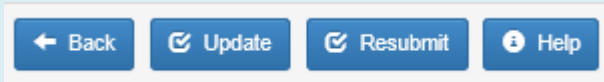
Showing 1 to 1 of 1 items

Previous 1 Next

If there are comments with the rejection, they can be found after clicking View and scrolling to the History section. Click on the View Comments button to see the notes on the rejection.

History							
Date	Action By	Email	Phone	Role	Status	Signature	Comments
2020-05-19 11:21:57	Lee, Ruta	midnightsky097+ckspmcor@gmail.com	6666666666	Contracting Officer Representative	Submitted	Lee, Ruta	
2020-05-19 11:27:57	Newmar, Julie	midnightsky097+ckspmco@gmail.com	8888888888	Contracting Officer	Rejected	Newmar, Julie	View Comments

The COR can click Edit and make any relevant changes and click on Resubmit to send the COR Trip Report through the approval process again.



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

Q COR Surveillance and Oversight - Search Criteria

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

Q Search ↻ Reset ⓘ Help

Steps to Smart Form Access

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
Mitchell, William	FU4417	Primary	Active COR		FA302018D3303		Officer, Oliver			2019/03/14	FU4417	YES
Mitchell, William	FU4417	Primary	Active COR		W15P7T11DG402	3333	Officer, Oliver			2019/03/08	FU4417	YES
Mitchell, William	FU4417	N/A	Active COR		W81QVN14D0025	W01QVN14D00350029	Officer, Oliver			2017/03/15	FU4417	NO

Showing 1 to 3 of 3 items

Previous 1 Next

← Back Export (CSV) Help

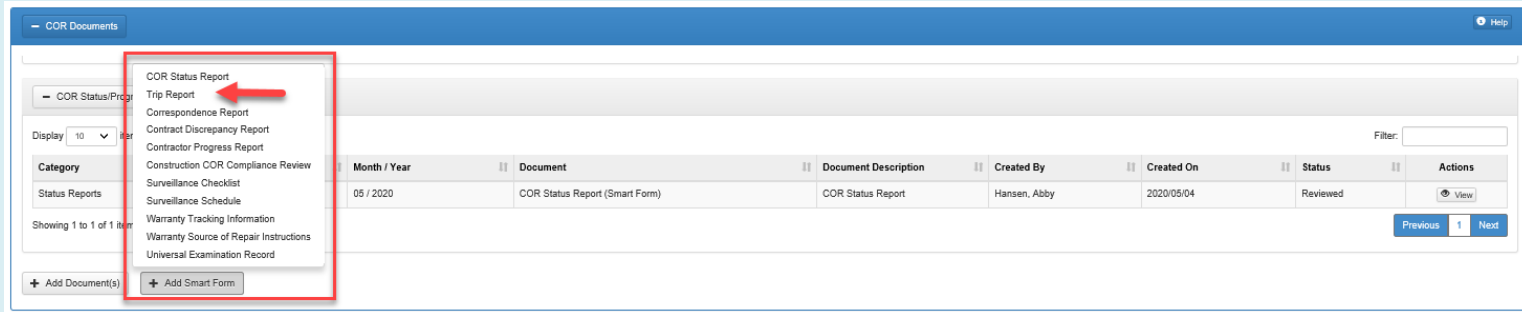
Step 3: After selecting the Contract Number link, the following page will be displayed. Each contract will have the following sections of information: Contracting Information, Contractor Information, Period of Performance Monitoring, Contract Place of Performance, QA Surveillance Plan/Waiver, COR information, 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 COR Documents section. The user will click on Add Smart Forms and select the appropriate Smart form.

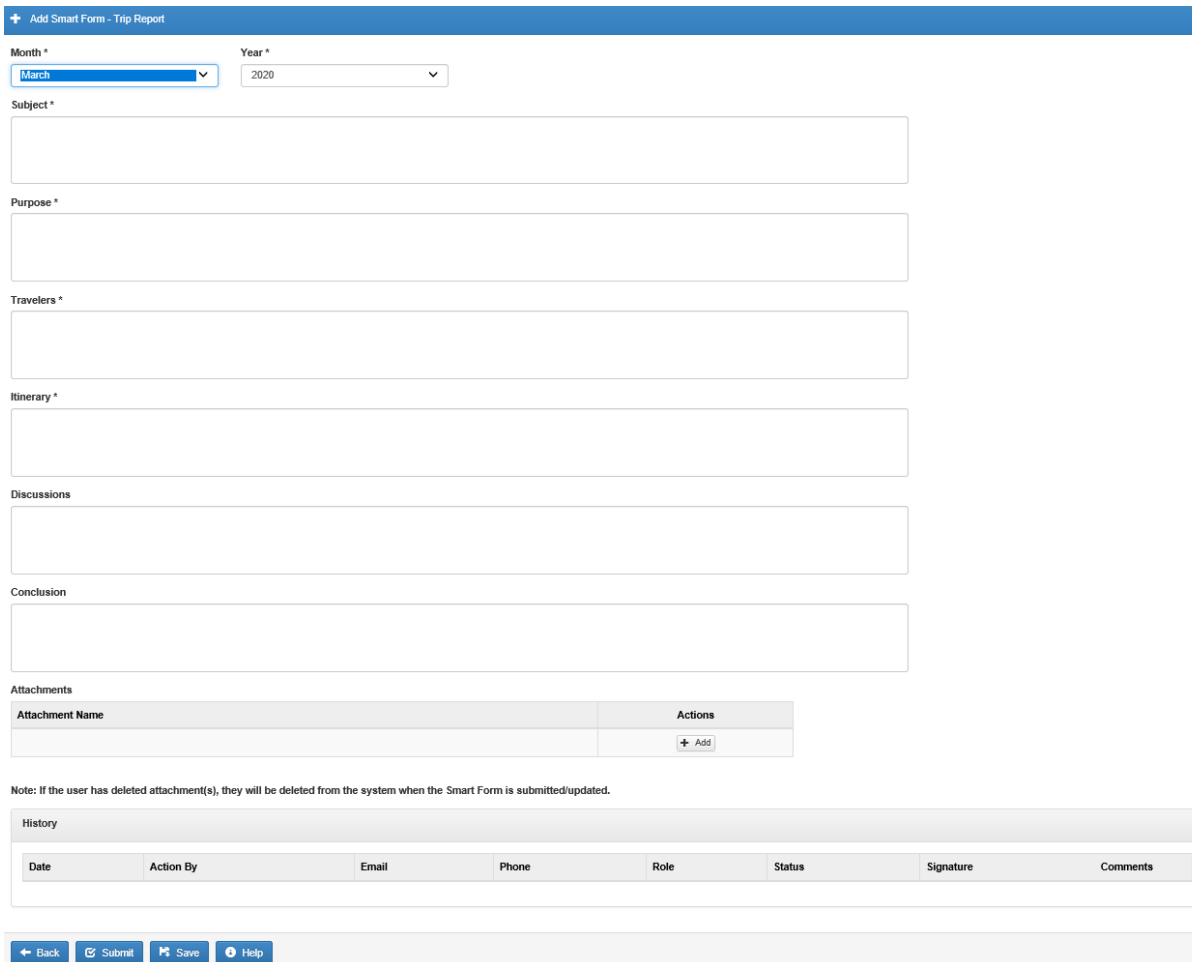
Smart Form Selection



The screenshot shows the 'COR Documents' interface. A dropdown menu is open, listing various report types. A red arrow points to 'COR Status Report'. Below the dropdown is a table with columns: Month / Year, Document, Document Description, Created By, Created On, Status, and Actions. The table contains one row: 05 / 2020, COR Status Report (Smart Form), COR Status Report, Hansen, Abby, 2020/05/04, Reviewed, and a View icon. At the bottom of the interface are buttons for 'Add Document(s)' and 'Add Smart Form'.

The required fields are: Month, Year, Subject, Purpose, Travelers, Itinerary, Discussions, Conclusion and Signature.

Trip Report Smart Form



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

- Month ***: A dropdown menu with 'March' selected.
- Year ***: A dropdown menu with '2020' selected.
- Subject ***: A large text input field.
- Purpose ***: A large text input field.
- Travelers ***: A large text input field.
- Itinerary ***: A large text input field.
- Discussions**: A large text input field.
- Conclusion**: A large text input field.
- Attachments**: A table with columns 'Attachment Name' and 'Actions'. The 'Actions' column contains an '+ Add' button.
- Note**: A note stating: "If the user has deleted attachment(s), they will be deleted from the system when the Smart Form is submitted/updated."
- History**: A table with columns: Date, Action By, Email, Phone, Role, Status, Signature, and Comments.
- Buttons**: A row of buttons at the bottom: Back, Submit, Save, and Help.