

# Universal Examination Record

## Quick Reference Guide

SPM Homepage

Menu

COR Surveillance and Oversight

### Universal Examination Record Access

**Create a Universal Examination Record:** COR and QAPOC  
**Edit a Universal Examination Record:** COR, QAPOC, CS and CO View  
**Review a Universal Examination Record:** Manager, CO/CS

- 1) COR or QAPOC creates the Record and the system generates an email to the CO/CS/QAPOC/ACO.
- 2) A CO or CS reviews and signs the report.
- 3) A CO or CS then will approve or reject the Record.
  - a. Approval: Universal Examination Record is filed in SPM.
  - b. Rejection: Universal Examination Record is emailed to COR with comments for resubmission until it is approved by the Reviewer.

#### Rejection:

If the Universal Examination Record 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.

N/A	N/A	03 / 2019	Universal Examination Record (Smart Form)	Universal Examination Record	Mitchell, William	2019/03/20	Rejected	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
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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
2019-03-20 15:18:24	Mitchell, William	someone@somewhere.com	555 555-1234	Contracting Officer Representative	Submitted	Mitchell, William	
2019-03-20 15:19:21	Mitchell, William	someone@somewhere.com	555 555-1234	Contracting Officer Representative	Submitted	Mitchell, William	
2019-03-20 15:20:21	Officer, Oliver	wawf-test@caci.com	123 123-4567	Contracting Officer	Reviewed	Officer, Oliver	
2019-03-20 15:20:52	Officer, Oliver	wawf-test@caci.com	123 123-4567	Contracting Officer	Rejected	Officer, Oliver	<a href="#">View Comments</a>

The editors can click Edit and make any relevant changes and click on Resubmit to send the Universal Examination Record through the approval process again.

[← Back](#) [✉ Update](#) [✉ Resubmit](#) [? Help](#)

### Universal Examination Record Workflow

**Step 1:** After selecting COR Surveillance and Oversight from the Menu the following page will display. The user will enter in the 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

Search As

Contracting Officer Representative

COR First Name

Equal To

Contract Officer First Name

Equal To

Supervisor / Commander First Name

Equal To

ACO First Name

Equal To

Contract Number

Equal To

COR Last Name

Equal To

Contract Officer Last Name

Equal To

Supervisor / Commander Last Name

Equal To

ACO Last Name

Equal To

Delivery / Task Order Number

Equal To

Nomination / Appointment Status

- Select -

Contract Specialist First Name

Equal To

QA POC First Name

Equal To

Issuing Office DoDAAC

Equal To

Pre Award Number

Equal To

COR Type

- Select -

Contract Specialist Last Name

Equal To

QA POC Last Name

Equal To

Home Organization DoDAAC

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

Display10Items

Filter:

COR Name	COR Home	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
Test, MSCORTREP	S0512A	Primary	Inactive		<a href="#">GS35F0170K</a>	N0002416FB010	Tester, MSCORTCO	Tester, MSCORTGSC	sup, Tess	2019/03/08	S0512A	NO
Test, MSCORTREP	S0512A	Primary	Inactive		<a href="#">N0002418A0002</a>		Tester, MSCORTCO	Test, MSCORTCS	sup, Tess	2019/02/21	N00024	NO
Test, MSCORTREP	S0512A	Primary	Inactive		<a href="#">N0002418A0002</a>		Tester, MSCORTCO	Test, MSCORTCS	sup, Tess	2019/02/22	N00024	YES
Test, MSCORTREP	S0512A	Primary	Inactive		<a href="#">N0002418A0003</a>		Tester, MSCORTCO	Tester, MSCORTCO	sup, Tess	2019/02/06	N00024	YES

Showing 1 to 4 of 4 items

Previous

1

Next

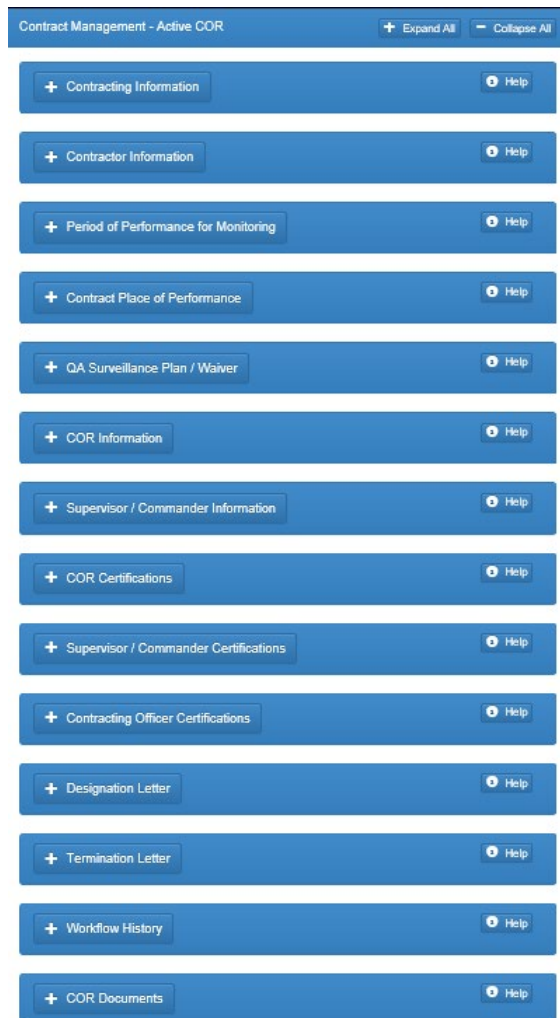
Back

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 Office Certification
- Designation Letter
- Termination Letter
- Workflow History
- COR Documents



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' section of a web application. A dropdown menu is open, listing various report types: COR Status Report, Trip Report, Correspondence Report, Contract Discrepancy Report, Contractor Progress Report, Construction COR Compliance Review, Surveillance Checklist, Surveillance Schedule, Warranty Tracking Information, Warranty Source of Repair Instructions, and Universal Examination Record. A red arrow points to the 'Universal Examination Record' option. Below the dropdown, there is a table with columns: Year, Document, Document Description, Created By, Created On, Status, and Actions. The table shows one entry for 'COR Status Report (Smart Form)' created by 'Hansen, Abby' on '2020/05/04' with a status of 'Reviewed'. At the bottom, there are buttons for 'Add Document(s)' and 'Add Smart Form'.

The required fields are:

- Month
- Year
- Service
- Location
- Date of Surveillance
- Name of Auditor/Inspector
- Compliant
- Observed
- Requirement (Include Contract Reference)
- Comments/Observations
- Additional Ratings
- Summary of Surveillance

Universal Examination Record Smart Form

The screenshot shows the 'Add Smart Form - Universal Examination Record' form. It includes fields for Month (May), Year (2020), Contract Number (AQ0123452), Delivery/Task Order Number, PoP End Date (2021/05/27), Contractor Name, CAGE Code, Service, and Location. Below these is a table for Rating Area with columns: Max Points, Points, Weight, % Raw, LOP %, Scoring, and Rating. The table shows ratings for Functional Area, Additional Rating-Very Good, Additional Rating-Exceptional, and Overall Rating. Below the table is a section for Date of Surveillance and Name of Auditor/Inspector. There is a table for Compliant and Observed status, Requirement (Include Contract Reference), Comments/Observations, and Actions. Below this is a section for Additional Ratings with radio buttons for Very Good, Exceptional, and N/A. At the bottom, there is a section for Summary of Surveillance and a History table with columns: Date, Action By, Email, Phone, Role, Status, Signature, and Comments. The form ends with buttons for Back, Submit, Save, and Help.