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| DEFENSE Pricing and COntracting |
| Joint Appointment Module (JAM) and Surveillance and Performance Module (SPM) |
| **Frequently Asked Questions** |
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| **Version 6.0.0 Release - Draft** |

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| The document contains frequently asked questions of users of JAM and SPM. This document will be updated periodically. |

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# POLICY

**Question: Is there written policy governing the use of the JAM and SPM?**

**Answer:** The requirement to use the Joint Appointment Module (JAM) and Surveillance and Performance Module (SPM), formerly called CORT Tool, is currently contained in PGI 201.602-2(iii). The companion DFARS 201.602-2 is currently being revised to add in this coverage. The publication of February 2014 memorandum and the DoDI 5000.72 and mandates and clarifies the use of the JAM/SPM (CORT Tool). The DoDI can be found here: <http://www.dtic.mil/whs/directives/corres/pdf/500072p.pdf>

**Question: Our agency has a COR reporting and tracking tool. Can we use that instead?**

**Answer:** No, the PIEE JAM and SPM are the DoD mandated tools to use. These are the tools all agencies will need to use.

**Question: Why should I use JAM and SPM if I have paper documents?**

**Answer:** The PIEE JAM and SPM are the DoD mandated tools to use. These are the tools all agencies will need to use. The requirement to use JAM and SPM are currently contained in PGI 201.602-2(iii).

**Question: PGI 201.602-2(iii) does not defined service contracts. The broad definition is that the DoD contracts for either supplies or services. Is JAM and SPM use required for all services, services defined in FAR 37.101, or are services defined in FAR 37.102 (a) (1) exempt?**

**Answer:** JAM and SPM are required on all service contracts above the micro purchase threshold.

**Question: What organization owns and funds JAM and SPM?**
**Answer:** JAM and SPM are modules in the PIEE Suite which is operation by DLA. All PIEE operations are funded by DLA. All changes to any module are funded by the activity requesting the change.

**Question: Is a QASP required on all services as defined in FAR 37.101, or are services defined in FAR 37.102 (a) (1) exempt?**

**Answer:** The QASP is required on all services contract unless waived by the Contracting Officer.

**Question: What are the qualifications to be a COR?**

**Answer:** COR qualifications are addressed in the Undersecretary of Defense, Acquisition Technology & Logistics (USD, AT&L), March 29, 2010, memorandum entitled “COR Standard for Certification of Contracting Officers Representatives (CORS) for Service Acquisition. These qualifications are currently being incorporated into a COR DoD Instructions. Please contact your Department Administrator as each agency may require additional courses and qualification.

**Question: When an option is exercised on a contract that was issued prior to the start of the CORT Tool or JAM/SPM must the COR now complete a nomination in JAM/SPM to account for the new contract period?**

**Answer:** Yes. Even though the contract was not loaded into the tool, the option years should be.

**Question: Can I get a waiver from using the JAM and SPM?**

**Answer:** In 2011, waiver provisions were included in the DPAP memorandum to provide agencies time and space to begin deploying and using the CORT Tool (formerly) for COR nomination, appointments and online filing. The publication of February 2014 memorandum and the DoDI 5000.72 and mandates and clarifies the use of the CORT Tool. Our decision to not address waiver in both documents was intentional as waiver for deployment is no longer applicable. Any references to waiver is being and/or will be removed. Therefore, all DoD contracts reportable to FPDS in accordance with FAR 4.606 and that are below the requirements in OUSD(AT&L) memorandum, dated February 10, 2014, shall use the CORT Tool as specifically stated in the memorandum that ". . . all Military Departments and Defense Agencies shall use the CORT Tool for all contracts for which a COR has been designated. Any decision not to use the CORT Tool for contract, for which a COR has been designated, must be in compliance with the requirement outlined in the 10 February 2014 memorandum.

**Question: If a COR is located at a remote location and unable to access a DoD computer, can the COR be exempt (or get a waiver) in using the CORT Tool?**

**Answer:** There is no exemption unless the COR is working on a classified contract and the COR still must use JAM for the nomination/appointment and SPM for the online file. If the user does not have CAC access, please contact Mae Bartley who can ask the PIEE PMO for PKI exemption so the COR can access PIEE via a User ID and password.

**Question: Is there any new guidance for CORs to complete the OGE Form 450?
Answer:** On March 26, 2015, the Defense Procurement and Acquisition Policy Office published DoDI 5000.72, "DoD Standard for Contracting Officer's Representative (COR) Certification," a new Instruction that establishes policies and standards, assigns responsibilities, and provides procedures to certify CORs. The new instruction can be found at <http://www.dtic.mil/whs/directives/corres/pdf/500072p.pdf>. The Instruction requires Contracting Officers to evaluate whether CORs should file the OGE Form 450 and provides the applicable standard for determining which CORs are required to file an OGE Form 450. Specifically, whether the COR's duties and responsibilities require that the employee "participate personally and substantially through decision or the exercise of significant judgment, and without substantial supervision and review, in taking a Government action regarding contracting or procurement; administering or monitoring grants, subsidies, licenses, or other federally conferred financial or operational benefits; or other activities in which the final decision or action will have a direct and substantial economic effect on the interest of any non-Federal entity."

**Question: I received an email about the OGE Form 450. What do I do?**

**Answer:** For nominations issued prior to May 10, 2016, CORs are required to complete and file the OGE 450 Form by February of each year while they are active CORs and include a statement in the February Monthly COR Report stating that this has been submitted. Supervisors are to ensure that the Nominee has filed an OGE Form 450 and there is no conflict of interest or apparent conflict of interest interfering with this appointment.

For nominations issued on or after May 10, 2016, if required, CORs are complete and submit the initial OGE 450, and an annual OGE 450 thereafter in accordance with the component and contracting agency procedures. If an OGE Form 450 is required, Supervisor will ensure that the COR Nominee/COR completes and files the initial and all annual OGE Form 450. Submission will be within the required time and in accordance with the component and contracting agency procedures. Contracting Officers will ensure that the initial and all annual OGE Form 450 have been reviewed by appropriate personnel in accordance with the component and contracting agency procedures.

**Question: Our agency views the DoDI 5000.72 to say that a COR needs to be appointed before loading a contract in EDA, but JAM does not allow this. Will JAM be updated to allow a COR to be appointed before loading a contract into EDA?**

**Answer:** No, JAM will not allow a Contracting Officer to officially appoint until the contract is loaded into EDA and JAM can verify the contract number. DPC has submitted changes to PGI to update the DoDI 5000.72 and DoD COR Handbook to ensure that language in policy match system requirement. DPC Deputy Director has submitted a letter for DPC Director signature that will address the policy changes. The actual policy update may take some time to conclude. Please contact your Agency head SPM GAM to discuss.

# GENERAL INFORMATION

**Question: What was the Contracting Officer Representative Tracking Tool (CORT Tool)?**

**Answer:** The CORT Tool was a web management application designed to nominate, appoint, track, and revoke an individual as a COR supporting a DoD contract. It provided DoD personnel a web-based portal for all relevant COR actions. The Tool allowed a COR, COR Supervisor and Contract Specialist/Contracting Officer to electronically process nomination of CORs for one or multiple contracts. With release 6.0.0, the CORT Tool was broken into 2 modules, called the Joint Appointment Module (JAM) and Surveillance and Performance Module (SPM). JAM is where the COR can nominate or the CO/CS can appoint a COR and SPM is where the COR’s Online file is kept. Both modules are in PIEE which is CAC-enabled and available to all members of the DoD with internet access.

**Question: What are the benefits of using JAM and SPM?**

**Answer**: Benefits include:

* Electronic nomination process
* Review status of all COR nomination requests
* Identify CORs by name, career field, certification level and other contact information
* Identify COR supervisor by name and other contact information
* Identify contracting officer/specialist by name and other contact information
* Identify all training completed by the COR by complexity of the work/requirement (Type A/B/C), including basic and refresher training requirements
* Track contracts by COR
* Track CORs by contract
* Add, review, and store documents, such as a Status Report, COR trip report, correspondences and other miscellaneous documents to one or more of the COR appointed contracts
* Termination of COR appointment

**Question: What is the current location of JAM and SPM?**

**Answer:**  The CORT Tool is located inside the Procurement Integrated Enterprise Environment (PIEE) Portal at <https://wawf.eb.mil>.

**Question: What is PIEE and the difference between PIEE and JAM/SPM?**

**Answer:** Procurement Integrated Enterprise Environment (PIEE) is the single sign on portal to gain access to the eBusiness suite systems contained within the portal. Those systems include the JAM, SPM, Wide Area Work Flow (WAWF), and the Electronic Document Access (EDA).

**Question: How do I obtain access to SPM?**

**Answer**: You must create an account in PIEE at the address listed above. Once the account has been created, you must add roles in SPM. Access is granted once the role is activated.

**Question: How do I contact the Help Desk?**

**Answer:** The Help Desk can be reached at 866-618-5988 or at disa.global.servicedesk.mbx.eb-ticket-request@mail.mil.

**Question: The term Supervisor is confusing. Is this the same person as the COR’s Supervisor?**

**Answer:** With release 6.0.0 the COR’s Supervisor is also the Supervisor listed in the COR’s PIEE user profile. The Supervisor will be automatically populated into the COR’s nomination/ appointment from the COR’s user profile and will be sent an email.

**Question: It has been a couple of days and my Supervisor has not approved my role request.**

**Answer:** A user can send a reminder email to their Supervisor. After signing into PIEE, go to your “Profile” and click on “Send Reminder to your Supervisor”.

**Question: If a user adds more roles, will they have to complete another SAAR (DD2875)?**

**Answer:** Yes, when a user adds more roles, the SAAR process with start again with an email sent to the Supervisor to approve.

**Question: How will the GAM know if the user’s role has been approved by their Supervisor?**
**Answer:** When the GAM accesses Role Management on the Administrative Console, view the status under the “User Roles”.

**Question: As a GAM how to I approve the user’s role?**

**Answer:** Perform the following for each role you need to approve:

1. Log into PIEE
2. Click on Administration Console and then click on PIEE Administration
3. Click on User/Role Management
4. Perform search for user and then click on hyperlink for user
5. Click on User Roles and locate role user is looking for
6. Under Actions, change to active, place in comments and activate

## Existing Users

**Question: I have users who have roles Pending Supervisor Approval, but do not have a Supervisor listed or need to change their Supervisor. As a GAM, what steps can I take?**

**Answer:** If the user’s role is Pending Supervisor Approval in Archive and there is no Supervisor listed on the user’s profile or the Supervisor needs to be changed, GAMs need to follow these steps:

1. Go into the Admin Console in PIEE
2. Go to User Management
3. Go to User Information
4. Search for user, change the "Search For" criteria to "Archive"
5. When you receive search results, click on hyperlink User ID
6. Scroll to bottom of page and Click "Edit"
7. Bottom of the page, change "Registration Status" to "Pending"
8. Click "Save"
9. You may receive an error upon saving because fields are not complete, such as the Rank/Grade or Phone. You will need to enter something into these fields to save. The user can change it when they go into their profile.
10. User should now be able to log into PIEE
11. User should go to User then Profile and update all information, including the Supervisor
12. User needs to resubmit the request to the Supervisor
13. When Supervisor approves, the role will be active

**Question: The Supervisor needs to approve a role request for a user, but the Supervisor does not have the email with the link from PIEE. What can I do?**

**Answer:** The user’s GAM can resubmit the request to the Supervisor if the user’s Supervisor listed is correct. Follow these steps:

1. Log into PIEE and go to Admin Console
2. Go to Role Management
3. Go to Role Activation
4. Search for user – remember user may be in archive if do not see in current
5. After search results appear, click on “View Access Approval” hyperlink
6. You can now see all information in User’s Profile
7. To resubmit request to Supervisor, click on “Request Status” on left side menu
8. In the center of page, under “Action” click on drop down box and change to “Resubmit”
9. Click on “Submit Request”

**Question: I have the wrong Supervisor listed, how do I change it? What if I am also locked out of my account?**

**Answer:** Your GAM can help. Ask a GAM to go into the Admin Console in PIEE, search for the user, and then change the Supervisor. The GAM can also set the user’s account to pending so the user can log in.

**Question: How do I tell if a user’s account is CAC enabled?**

**Answer:** GAMs can check if a user’s account is CAC enabled by following these steps:

1. Go into the Admin Console in PIEE
2. Go to User Management
3. Go to User Information
4. Search for user
5. Under the “x509” field, if the field is blank, the user’s account is not CAC enabled

**Question: Does a separate DD2875 need to be submitted for JAM and SPM, or may we use a general one on file that covers Agency IT Systems?**

**Answer:** A DD2875 is required and is created during the online PIEE registration process. The user does not need to submit a paper copy of this form.

**Question: What do I place in the Justification box?**

**Answer:** Your justification may include langue that similar to the following: “Access is requiredto perform duties as COR” or CO, CS, QAPOC, etc.

**Question: My Supervisor is on TDY, how do I get my role approved?**

**Answer:** Log into PIEE and click on “My Account” and then “Alternate Supervisor”. Add an Alternate Supervisor who is available to approve nominations/appointments.

**Question: What is the Security policy on why PIEE user accounts are set to inactive after 60 days of non-use?**

**Answer:** The policy is for 30 days, the PIEE eBusiness Suite is operating under an approved extension to 60 days. This access control policy is applied at the Single Sign On (SSO) component which enforces the access control policy across the entire suite of application/modules. There is no provision for application/module specific access control policy(s).

# ROLES

**Question:** **What are the current roles available in PIEE for use in JAM and SPM?**

**Answer:** The current roles available are Department Administrator (DA), Contracting Officers (CO), Contract Specialists (CS), Contract Officer Representatives (CORs) Quality Assurance Points of Contact (QAPOC) and Administrative Contracting Officers (ACO), Auditor and Manager. User’s will add these roles under the SPM system.

**Question: May I register for one, a combination, or all roles?**

**Answer:** You may only register for the role(s) that corresponds with the duties you perform.

 **Question: Are non-role based users access available?**

**Answer:** Yes, if you are a non-role based user, but need access to JAM or SPM, register for the auditor (must be performing an audit) or manager role.

**Question: How does one get a new role added to PIEE?**

**Answer:** After logging into the PIEE Portal, complete the following steps:

1. Click on “My Account”
2. Click on “Add Additional Roles”
3. Verify User Profile, Supervisor, and Agency information is correct and click “Next”
4. On the Roles page, complete steps 1-4
5. Under step 4 you can change the DoDAAC if requesting a role under a DoDAAC different then your home location and click “Next”
	1. NOTE: You cannot request an additional COR role
6. Complete Justifications, document attachments are optional and a scanned upload of a DD2875 is not necessary
7. Review Summary and click “Next”
8. Review “Statement of Accountability Agreement” and press “Signature” to sign

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**Question: My SPM role was rejected by my Supervisor because my DoDAAC is wrong. How do I update it?**

**Answer:** Your home location DoDAAC is part of your PIEE User Profile, but may be different then your role DoDAAC. If you are a COR, you may have only one COR role and your GAM will need to reject the role so you can update the DoDAAC. Other roles may apply for the role again at a different DoDAAC.

# CONTRACTING OFFICER REPRESENTATIVE (COR)

**Question: I’m an active COR, but I do not have the option to start a nomination as a COR. How do I get the menu option to create a nomination?**

**Answer:** After accessing JAM, click on the “COR Information” section and make sure all the fields are complete.

**Question: My Supervisor rejected my SPM role, what do I do now?**

**Answer:** Once a Supervisor rejects a user’s role request, the action lies with the user. A COR needs to do log back into PIEE and update any wrong information and resubmit the role request. A user can change their Group and Home Organization at this time. To update, complete the following steps:

1. Log into PIEE, go to “User” and select “View Request Status”
2. Click “Edit” next to the rejected role
3. Update Home Organization, enter comments, and save (Ensure that a VALID Home Organization DoDAAC is entered)
4. Select “Resubmit” from dropdown for updated role and Submit request back to Supervisor

**Question**: **I am a COR who is also a Supervisor of employees. What role(s) should I register for in SPM?**

**Answer:** If you are only performing COR duties on a contract, register as a COR. If you are responsible for monitoring the COR, but will not be performing COR duties, register as Manager or QAPOC/ACO.

**Question: I am a brand-new COR. I have completed my SPM registration and I now have access to the JAM module. May I go directly to JAM to start a new nomination?**

**Answer:** Yes, you may access JAM and begin a nomination.

**Question: I have not competed all my COR Training. May I self-nominate on a contract?**

**Answer:** Yes, you may start a nomination on a contract and request a training waiver from the CO, however, the nomination approval is up to the CO. If the CO approves the training waiver you have a certain number of days to complete training or your nomination will be terminated.

**Question: What is the difference between COR Training and COR Competencies?**

**Answer:** COR Training Type and COR Competency Levels are different things. COR Training Type A/B/C refers to the training the COR needs to perform as a COR on the contract. COR Training Type is chosen by the Contracting Officer or Specialist and the COR must have completed certain classes, i.e., CLC 106 or COR 222, to be a COR on the contract. The JAM system will check that the COR has the correct training loaded depending on the COR Training Type the CO/CS chooses. For example, a CO will not be able to appoint a COR on a Type B contract where the COR only has class CLC 106 loaded.

COR Competencies are COR entered, self-certified field, and are a combination of training and experience. The COR Competencies are not linked to any other fields in the nomination/appointment. Below are details about competencies:

Competencies for a COR may be acquired or developed through a combination of formal education, training, and experience. Please reference DoDI 5000.72 for more information.

Competencies for Type A standards are:

1. Attention to detail
2. Decision making ability
3. Flexibility
4. Oral and written communication skills
5. Problem solving and reasoning
6. Self-management and initiative
7. Teamwork
8. Business ethics
9. Effective communication of contract requirements
10. Effective contract performance management
11. Effective COR performance

Competencies for Types B and C standards include the Type A competencies listed above, as well as:

Influencing and persuasive interpersonal skills

Planning and evaluating

Defining government requirements

Understanding and knowledge of contract type

Effective analytic skills

Project management

Strategic planning

Understanding the marketplace

**Question: My contract is not loaded into EDA yet. Can I start a COR self-nomination?**

Answer: Yes, as a COR you can start a nomination with a Pre-Award number.

1. Click “Create Appointment”
2. Click “COR Nomination”
3. Click “COR Nomination – Pre- Award Number”
4. COR needs to place in the Issuing Office DoDAAC, Select the Pre-Award Type, and place in the Pre-Award Number
5. Select the CO and CS
6. Add the Contract Place of Performance (not mandatory)
7. Add QASP (not mandatory)
8. Click Certify All for COR Certifications which will populate the Date Certified
9. Click Submit to route nomination to your Supervisor

**Question: My Supervisor is on TDY and I have an interim Supervisor, how do I change my Supervisor?**

**Answer:** You can place in an “Alternate” Supervisor in your PIEE User Profile.

**Question: How do I nominate myself to be a COR on a contract?**

**Answer:**  After logging into PIEE, click on the JAM icon and then click on “Create Appointment”. Complete all the fields. Select submit to send the nomination to your Supervisor.

**Question: When I get to the DoDAAC field on the COR Nomination Process, what DoDAAC should I enter, my home location or the contracting officer/contract specialist DoDAAC.**

**Answer:** CORs should enter the contracting center DoDAAC or the DoDAAC where the contracting officer/specialist resides.

**Question: How does a COR change their DoDAAC on the COR Role?**

**Answer:** With the implementation of PIEE, a Department Admin can no longer change the COR’s DoDAAC. To change, a GAM must reject the COR role. This will allow the COR to change the DoDAAC by following the below steps:

1. Login to PIEE
2. Click on My Account
3. Click on Manage Roles
4. Under Select, check the box next to the rejected CORT role and click on Request Activation at the bottom of the page
5. Complete steps 1-4, make sure to change your DoDAAC/Location code at step 3

**Question: I’m a COR and I have a few nominations for which the statuses are “Draft”, “Rejected by the Supervisor” and “Rejected by the PCO”**. **Am I required to act on these nominations?**

**Answer:** Yes. For nominations in “Draft Status”, submit the nomination to your Supervisor for approval. For nominations in any “Rejected” status, review the comments entered by the Supervisor or Contracting Officer. Make changes as needed. Select submit to resend nomination back to the Supervisor or select cancel, if the nomination is no longer required.

**Question: Where can I find the status of a nomination/appointment?**

**Answer**: After performing a search for the nomination/appointment the status is listed in the search results.

**Question:** **As a COR, how do I add reports to the COR online file?**

**Answer:** COR documents are stores in the Surveillance and Performance Module (SPM). You need an active COR nomination or appointment to access your contract file in SPM. To enter a report to the online files:

1. Log into SPM
2. Select “COR Surveillance and Oversight Menu”
3. Find the contract number and COR
4. Click on contract number
5. Scroll down to “Surveillance Documents”
6. Click “Add Documents” or “Add Smart Forms”
7. Choose document type, complete fields or upload document

**Question:** **My Contracting Officer rejected my status report. Am I required to resubmit this report?**

**Answer**: Yes. The report must be resubmitted, until it is approved by the Contracting Officer or Contract Specialist or the Contracting Officer or Specialist advises that the report is no longer required.

**Question: How often does a COR need to add a status report?**

**Answer:** The frequency of status report in a based upon the requirements of the contracts. SPM is a vehicle to electronically collect those status reports mandated by the contract. If the PCO is requiring the COR per the contract to write a report each month for each order for twelve months, the then PCO is required to review each report for each order for twelve months. Frequency of status reports is dictated by the contract terms and conditions. The SPM provides a venue for compliance with frequency of the submittal.

**Question**: A CO is trying to approve a Monthly Status Report however, she only has a view button and not a approve/reject button. Her PIEE roles shows she is a KO for the correct DoDAAC. What does she need to do in order to sign and approve her MSR?
**Answer:**  If the MSR was loaded using the smartform follow the below steps:

1. Log into SPM
2. Select “COR Surveillance and Oversight Menu”
3. Find the contract number and COR
4. Click on contract number
5. Scroll down to “Surveillance Documents”
6. Find the status report and click on review
7. When the document opens, review it; when ready to approve, click review at the bottom
8. Sign the document with CAC
9. Click on “Approve”

**Question: What is the difference between the Contract Deficiency Reports (CDR) Module in PIEE and the Contract Deficiency Report (CDR) available in the Surveillance and Performance Monitoring (SPM) Module?**

**Answer:** The CDR Module is where the COR identifies an error in how the contract was created and the Contract Deficiency Reports (CDRs) in the module are used to report and resolve identified contract deficiencies. Contract deficiencies range from conflicting quality requirements to missing long lines of accounting. Deficiencies may cause delays in production, shipment and delivery, payment delays, erroneous payments, and contract close-out problems.

The COR Handbook refers to "deficiency reports" in the COR's online file and the CDR Report in the SPM Module documents where surveillance should be increased when the contractor begins to experience problems or difficulties in performance, financial strength, management, quality assurance, or accounting system. User complaints, unsatisfactory contract performance, equipment breakdown, and meetings can be documented and filed in the form of a contract deficiency report.

CDR Module in PIEE = Contract Deficiency

CDR Report in SPM = Contractor Performance Deficiency/Execution of Contract Deficient

CORs are expected to use the CDR Module and CDR Report as necessary.

**Question: How do Alternate CORs view Primary COR’s documents and vice versa?**

**Answer:** As a COR, you should be able to see all the other COR’s documentation in SPM contract file when you perform a search under COR Surveillance File.

**Question: What smart forms are available?**

**Answer:** SPM users can create and maintain the following contract nomination documents via smart forms (html):

* Annual COR File Inspection Checklist
* Status Report
* Contract Discrepancy Report
* Trip Report
* Memorandum for the Record
* Contractor Progress Report Review/Update to the COR
* Correspondence Report
* Construction COR Compliance Review
* Contractor Surveillance Assessment Report
* Surveillance Checklist
* Surveillance Schedule
* Warranty Tracking Information
* Warranty Source of Repair Instructions
* Universal Examination Record
* Designation Letter
* Termination Letter
* Quality Assurance Surveillance Plan (QASP)
* QASP Waiver

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| * Deficiency Report
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| * Environmental Plan
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| * GFE Validation Report
 |
| * GFE Property
 |
| * Maintenance Plan
 |
| * Required Regulation
 |
| * Safety Plan
 |
| * Surveillance Checklist
 |
| * Test Report
 |
| * Work Plans
 |
| * Other
 |
| * Funds Tracking
 |
| * Integrated Master Plans
 |
| * Memo for the Record
 |

**Question: Can I save a smart form to my computer?**

**Answer:** Yes. After completing and saving the smart form to your nomination follow these steps:

* Click on View next to the smart form document
* Scroll to the bottom of the completed Smart Form
* Click on View as PDF
* Save the PDF to your computer

**Question: What is the size limit of the comments section in the smart form?**

**Answer:** The max size is 2000 characters. If you are cutting and pasting comments from a Word document or other formatted text documents, the formatting characters are contained in the pasted text.If you enter more than 2000 characters into the comments section the comments are automatically truncated.

**Question:** **Does the Contracting Officer have the functionality to modify the training requirements on the existing COR Designation letter in JAM?
Answer:** Yes, the contracting officer can modify the Designation Letter to add additional training requirements via the edit functionality. Any changes made to the current document must be signed by the CO, COR and Supervisor.

**Question: May a DA modify the COR Designation Letter?**
**Answer:** No, a DA cannot modify the Designation Letter because the letter must be signed by the CO, COR and supervisor.

**Question: Who can accomplish this modification?**
**Answer:** The Contracting Officer is responsible for this action.

**Question: I’m with a Federal Agency, can I use JAM and SPM?**

**Answer:** Yes, JAM and SPM provides assisted acquisition for non-DoD users. External agencies and their users will register in PIEE via their PIV card. If the user does not have a CAC or PIV card, user’s will need to contact the JAM/SPM PM to obtain a user name and password. To register and complete a nomination:

* Replace “DoDAAC” with external agency name.
* Federal users must register using their FEDAAC as the location code
* Federal users must select a federal agency from the Home Department dropdown list
* Federal users may register for any role OTHER THAN DPAP Administrator
* Federal users must be activated by DPAP Admin

**Question: What is a FEDAAC and how do I find out what mine is?**

FAR 4.1603 to obtain the correct AAC to be used by GSA

<https://www.acquisition.gov/sites/default/files/current/far/html/Subpart%204_16.html>

(1) Positions 1 through 6. The first six positions identify the department/agency and office issuing the instrument. Use the AAC assigned to the issuing office for positions 1 through 6. Civilian agency points of contact for obtaining an AAC are on the AAC Contact list maintained by the General Services Administration and can be found at <http://www.gsa.gov/graphics/fas/Civilian_contacts.pdf>. For Department of Defense (DoD) inquiries, contact the service/agency Central Service Point or DoDAAC Monitor, or if unknown, email DODAADHQ@DLA.MIL for assistance.

# COR SUPERVISOR

**Question: Is there a difference between a COR Supervisor and the user’s Supervisor?**

**Answer:** No, in PIEE release 6.0.0 the COR’s Supervisor is the Supervisor listed in the COR’s PIEE user profile.

**Question: I am a COR Supervisor, do I need to complete a registration in the in PIEE?**

**Answer:** No, with PIEE release 6.0.0, emails will be sent to Supervisors to approve COR nominations/appointments without the Supervisor being a registered PIEE user.

**Question: What is the role of the COR Supervisor?**

 **Answer:** The Supervisor is part of the COR nomination/appointment approval workflow and responsible for certifying and approving or rejecting the COR’s nomination/appointment. The COR Supervisor will need to electronically sign the Designation letter.

**Question: I am a COR Supervisor, who is also a COR. May I approve my own COR nominations?**

**Answer:** No, as Supervisor you will not be able to approve you own nominations. **A COR and a Supervisor cannot be the same person on a nomination.**

**Question: When may a Supervisor approve or reject a COR nomination/appointment?**

**Answer:** A Supervisor may only approve or reject a nomination/appointment when it is in the “Pending Supervisor Review” status**.**

**Question: How does a Supervisor approve or reject a COR nomination/appointment?**

**Answer:** Upon receipt of an e-mail indicating that a COR nomination is awaiting the Supervisor's approval, the Supervisor will click on the link in the email which allow you to certify and approve.

**Question: I rejected my COR’s nomination/appointment and requested several changes be made. How will the rejected nomination/appointment be sent to the COR or the Contracting Officer/Contract Specialist?**

**Answer**: The status of the appointment changes to “Rejected by Supervisor” and is return to the COR or the CO/CS. The COR or the CO/CS will enter JAM and make the changes requested. When completed, the COR resubmits the rejected nomination to the Supervisor for approval. The status of the rejected nomination now changes to “Pending Supervisor Review”. Upon your approval of the nomination, it will be sent to the Contracting Officer/Specialist.

**Question: How I do cancel a nomination/appointment?**

**Answer:** When the nomination/appointment is in a pending status it may be cancelled the nomination by scrolling down to the bottom of the nomination and selecting the “Cancel” button. Select “OK” when the dialogue box is presented. After 30 days the nomination/ appointment will be removed from view.

**Question: How do I view reports posted by my CORs?**

**Answer:** As a Supervisor, you will not be able to view the reports submitted by you COR because you do not have an active role in SPM. If you wish to see reports, you must register for a Manager Role in SPM. You will then be able to view the COR’s file.

**Question:** **I am a COR for several contracts and am in the process of transferring those responsibilities to one of my subordinates in coordination with the Contracting Officers of those contracts, but am unclear what is required or what more I should do to make this work. Can I transfer nominations/appointments to another COR?**

**Answer:** No, nominations/appointments cannot be transferred from one COR to another. Each COR must be appointed or self-nominate to the contract. Once appointed, the COR can then access all the documents previously posted by existing CORs on the contract. Once the new COR has been appointed, your Contracting Officer should terminate your appointment on those contracts.

# CONTRACTING OFFICER/CONTRACT SPECIALIST

**Question: I’m a Contractor Contracting Specialist (CS), how do I register in PIEE?**

**Answer:** As a Contractor CS if you will be logging into PIEE with a user ID and password and not a CAC, before you register, you will need to get your user ID on an exemption list. Please email the 8 digit user ID you will use, your email address, and justification you need to be added to the exemption list to your Component Level Department Admin. Your GAM or Department Administrator should email the list to a DPAP Admin as well as Kelley Bell (kelley.bell.ctr@dla.mil) for the ID to be added. Once the ID is added, you can register for a PIEE account and add the CS role.

**Question: As a GAM how do I activate a Contractor Contract Specialist?**

**Answer:**

1. Click on User/Role Management from Admin Menu
2. Click on “Search by Role” on top tab
3. Place in search parameters for Contractor Contract Specialist (i.e., first and last name)
4. At the bottom of the search page, place in the contract number
5. Perform search
6. Click on the hyperlink for the Contract Number header
7. Enter in contract expiration date and save
8. You can now activate the Contractor CS

**Question: I work in contracting and I was advised to register for a SPM Role. Which role should I register for Contracting Officer, Contract Specialist or both?**

**Answer:** You may register for either or both the Contracting Officer or Contract Specialist Role. Register for the Contracting Officer role if you are a warranted Contracting Officer who has been granted authority to designate CORs; otherwise, register for Contract Specialist role. You should not register for both.

**Question: As Contracting Officer, my CORT Tool menu used to display a Contracting Officer Profile Tab. Do Contracting Officers need to create a Profile in the JAM/SPM?**

**Answer:** No, with release 5.11.1 this capability has been removed. The following profiles have been removed:

* Remove "Contracting Officer Profile" capability from the CORT tool
* Remove "Contract Specialist Profile" capability from the CORT tool
* Remove "Auditor Profile" capability from the CORT tool
* Remove "Administrating Contracting Officer Profile" capability from the CORT tool
* Remove "Quality Assurance Point of Contact Profile" capability from the CORT tool

SPM users who want to add additional Contracting Centers will have to use the PIEE “Add Role” process to add additional locations (Contracting Centers) to their roles. Existing contracting center locations for the above roles will be migrated to the PIEE Group Structure where possible.

**Question: As Contract Specialist, my CORT Tool menu used to display a Contract Specialist Profile Tab. Do Contract Specialist need to create a Profile in the CORT Tool?**

**Answer**: No, with release 5.11.1 this capability has been removed. The following profiles have been removed:

* Remove "Contracting Officer Profile" capability from the CORT tool
* Remove "Contract Specialist Profile" capability from the CORT tool
* Remove "Auditor Profile" capability from the CORT tool
* Remove "Administrating Contracting Officer Profile" capability from the CORT tool
* Remove "Quality Assurance Point of Contact Profile" capability from the CORT tool

CORT Tool users who want to add additional Contracting Centers will have to use the PIEE “Add Role” process to add additional locations (Contracting Centers) to their roles. Existing contracting center locations for the above roles will be migrated to the PIEE Group Structure where possible.

**Question: As a Contracting Officer/Contract Specialist who provides support to various contracting commands, do I need to register for each contracting command’s DoDAAC?**

**Answer:** No, with release 5.11.1 this capability has been removed. The following profiles have been removed:

* Remove "Contracting Officer Profile" capability from the CORT tool
* Remove "Contract Specialist Profile" capability from the CORT tool
* Remove "Auditor Profile" capability from the CORT tool
* Remove "Administrating Contracting Officer Profile" capability from the CORT tool
* Remove "Quality Assurance Point of Contact Profile" capability from the CORT tool

CORT Tool users who want to add additional Contracting Centers will have to use the PIEE “Add Role” process to add additional locations (Contracting Centers) to their roles. Existing contracting center locations for the above roles will be migrated to the PIEE Group Structure where possible.

**Question: My contract is not loaded into EDA yet. As a CO or CS can I start a COR appointment?**

**Answer:** No, to use the CO/CS appointment process, the contract needs to be first loaded into EDA.

**Question: How does a Contracting Officer approve or reject a COR self-nomination?**

**Answer:** Upon receipt of an e-mail indicating that a COR nomination is awaiting the contracting officer’s approval, enter the JAM and select “My Appointments” and then “Search for COR appointments where my approval is required”. Click on the contract number of the appointment you want to approve, complete the contract information section, attach the designation letter, and complete the Contracting Officer section. Scroll down to the bottom of the nomination and either select “Approve” to appoint the COR, "Save" to update the nomination on a later date or “Reject" to return the nomination the COR for corrections.

**Question: I am the Contract Specialist on the nomination, how do I approve a nomination?**

**Answer:** Contract Specialists may not formally approve a nomination/appointment. This is to ensure compliance with the policies of FAR 1.602, which state that the “Contracting Officer . . . shall designate COR”. Only the Contracting Officer can sign the designation letter and formally approve the nomination. As the CS though, you can perform all other tasks.

**Question: As a CO/CS am I now able to begin the appointment process?**

**Answer:** Yes, the contracting officer or contracting specialist is now able to begin the appointment process. The CO/CS will need to know the contract number to create an appointment. CORs are still able to start a nomination with a pre-award number, but the CO/CS must know the contract number.

**Question: Does this mean that the Contract Specialist will not be able to make COR appointments?**

**Answer:** Yes, COR appointments are the responsibility of the Contracting Officer.

**Question: What exactly will I be able to complete as a Contract Specialist?**

**Answer:** The Contract Specialist can perform all same tasks as the Contracting Officer, except for COR designation and revocation.

**Question: How will a Contract Specialist complete the nomination?**

**Answer:** The Contract Specialist will access the nomination/appointment using the “My Appointments” tab. Once the nomination/appointment has been accessed, update the Contracting Officer section and select save. The Contracting Officer has final designation and revocation authority.

**Question: As Contract Specialist will I be able to load the Designation Letter?**

**Answer**: Yes, the Contract Specialist will be able to complete all fields in the designation letter, except the signature. Only the contracting officer may sign and approve though.

**Question: Where do I enter the Quality Assurance (QA) POC and the ACO?**

**Answer:** These are optional data fields and provide read only access to holders of these role. Both are completed by the Contracting Officer/Contract Specialist during appointment. They may also be added to the nomination/appointment after the COR has been appointed by either the Contracting Officer or the Contract Specialist.

**Question: I have several CORs on one Delivery/Task Order contract. Do they all need to self-nominate and be appointed as CORs on the basic contract or on the individual task orders?**

**Answer:** Each COR must self-nominate or be appointed as a COR and/or alternate COR on each individual contract, but task orders can be added to each contract nomination/appointment. With the implementation of JAM, once a contract and task orders are selected and the COR is appointed, new task orders are not able to be added to the nomination/appointment. A new nomination/appointment will need to be created.

**Question: Does the Alternate COR need to maintain the same files for a contract as the Primary COR?**

**Answer:** Both the primary and alternate CORs should maintain separate files in SPM. However, both roles should not be posting the same documents for the same contract, i.e. only one monthly status report is required for the contract, versus both the COR and the Alternate posting the same status report. Both roles do not need to maintain the same documentation. Documents posted by primary and/or the alternate is viewable to both the primary and alternate, as well as any user that has view only rights.

**Question: I have one COR and alternate COR on the basic Delivery/Task Order contract. Does the COR and the alternate COR need to self-nominate or be appointed as COR and alternate COR on the basic contract or on each individual task orders?
Answer:** Follow the guidance in DoDI 5000.72, which states that when an individual is designated as a COR for more than one contract (or more than one task or delivery order under a contract), a letter of designation must be provided for each contract (or task or delivery order).

**Question: May the Contracting Officer or Contract Specialist on a nomination that has already been approved by a Supervisor be changed without canceling the nomination or starting over?**

**Answer:** Yes, the Contracting Officer and the Contract Specialist can both be changed by the Department Admin.

**Question: As Contracting Officer or Contract Specialist, how do I cancel an appointment?**

**Answer**: If the appointment is in “Draft” or “Pending PCO Review,” and you are the Contracting Officer or the Contract Specialist on the appointment, you may cancel it by scrolling down to the bottom of the and selecting the “cancel” button. When the dialogue box opens, select “OK” to complete the cancellation.

**Question: Can a CO only see the contracts they are the CO on in SPM?**

**Answer:** A CO will be able to see every contract for the DoDAACs that they have in their PIEE User Profile. They can register for as many DoDAACs to their user profile in PIEE that they need access to.

**Question: I need to update the Place of Performance, but the fields in JAM are grayed out. How do I update?**

**Answer:** The Place of Performance needs to be updated through SPM. Access SPM and search for the contract. Once in the file, you scroll down to the place of performance to update.

**Question: What changes can I make to a nomination/appointment as a CO or CS?**

**Answer:**  The CO/CS cannot make changes in most status in JAM except the pending PCO status. In SPM, the CO/CS can make changes to some fields.

**In JAM**

Contracting Officer/Contracting Specialist on a nomination/appointment can edit:

* Pending Supervisor - view only
* Pending COR - view only
* Active COR - Period of Performance for Monitoring
* Rejected - view only
* inactive - view only
* Pending PCO – CO (CO can change CS) CS (CS can change CO), QAPOC, ACO, type of COR, contract type, COR Training Type, Contingency, cost reimbursement, vouchers, number of CORs, additional signatory, period of performance, place of performance, QASP, Designation letter

Contracting Officer/Contracting Specialist for a DoDAAC can edit:

* Pending Supervisor - view only
* Pending COR - view only
* Pending CO - view only
* Active COR - view only
* Rejected - view only
* Inactive - view only

**In SPM**

Contracting officer/Contracting Specialist on a nomination/appointment can edit:

* Active - CO, CS, QAPOC, ACO, Issuing Office, Place of Performance, QASP, Surveillance Document Add
* Inactive -CO, CS, QAPOC, ACO, Issuing Office, Place of Performance, QASP, Surveillance Document Add

Contracting Officer/Contracting Specialist on a DoDAAC can edit:

* Active - CO, CS, QAPOC, ACO, Issuing Office, Place of Performance, QASP, Surveillance Document Add
* Inactive - CO, CS, QAPOC, ACO, Issuing Office, Place of Performance, QASP, Surveillance Document Add

# QUALITY ASSURANCE POINT OF CONTACT (QA POC)/ADMINISTRATIVE CONTRACTING OFFICER (ACO)

**Question: I am a QA POC or an ACO, do I need an active SPM role?**

**Answer:** Yes. You will need add the role for QA POC or ACO in PIEE under the SPM module.

**Question: Does the QA POC and ACO need to complete a Profile in the JAM/SPM?**

**Answer**: No, with release 5.11.1 this capability has been removed. The following profiles have been removed:

* Remove "Contracting Officer Profile" capability from the CORT tool
* Remove "Contract Specialist Profile" capability from the CORT tool
* Remove "Auditor Profile" capability from the CORT tool
* Remove "Administrating Contracting Officer Profile" capability from the CORT tool
* Remove "Quality Assurance Point of Contact Profile" capability from the CORT tool

SPM users who want to add additional Contracting Centers will have to use the PIEE “Add Role” process to add additional locations (Contracting Centers) to their roles. Existing contracting center locations for the above roles will be migrated to the PIEE Group Structure where possible.

**Question: What are the responsibilities QA POC/ACO?**

**Answer:** The QA POC and the ACO may:

* Review the status of a COR Nomination/Appointment
* View all COR submitted documents
* View only access to the documents contained in the COR’s online files
* May access a nomination/appointment in any status using when their name is included on the nomination/appointment

**Question: Should QA POC and ACO be assigned to one organization, multiple organizations, or just organizations with contracting authority?**

**Answer**: For SPM use, onlyone organization is required and that organization is entered when the users creates the PIEE account.

**Question: How do you add a QA POC or an ACO role to SPM?**

**Answer:** After logging into the PIEE Portal, complete the following steps:

1. Click on “My Account”
2. Under Roles, click on “Add Additional Roles”
3. Complete Profile and Supervisor/Agency
4. Under “Roles”, click drop down to choose SPM for the application
5. Select role wanted
6. Click “Add Roles”
7. Continue through Justification, Summary, and Agreement

**Question: Can the input of the QA POC and ACO names be a mandatory field to be populated by the CO/CS during completion of nomination process?**

**Answer:** These are optional field, because not every agency uses these roles. If these fields are required by an agency, it is recommended that your command communicate this requirement to the Contracting Officers and Contract Specialists and they request completion of these fields on all nominations/appointments.

# AUDITOR AND MANAGER

**Question: Do Auditors and Managers need to register in PIEE to use SPM?**

**Answer:** Yes, non-participants that want views in the COR’s surveillance and performance files also require an active SPME role to support audit and agency oversight.

**Question: What is the difference between Auditor and Manager?**

**Answer:** These roles have no role in the nomination/appointment process itself, but have read only access to the nomination/appointment in SPM and may access the documents currently being posted by CORs. The Auditor role is specifically for an individual responsible for conducting audits of contract, department, agency or COR. Auditors will be able to gain access to the records to assist in procurement fraud investigation. Each Auditor will register for certain DoDAACs in their PIEE user profile. Auditors will be granted view only contracts associated with that DoDAAC for a specified period of time. Access will be revoked upon date expiration. Manager’s registration is similar to the Department Administrators, but will not have administrative rights.

**Question: I’m not sure if I should make my user a DA or Manager.**

**Answer:** The Manager role is for individuals within a department performing department/agency oversight of COR. This role grants access to all department nomination and department reports. This role was created to fulfill and comply with the COR DoDI 5000.72 requirement to designate COR coordinator(s) and to provide the coordinator access to the CORT Tool for oversight. There are exceptions, and it is for someone in a high-level position within your organization. For example, if the Secretary of the Navy requested manager access to SPM. For the manager role, it is recommended that justification of the roles be inputted by the user before a GAM approves this role.

**Question: How does a GAM grant access to an Auditor?**

**Answer:** When a user registers for the Auditor role, they must provide a copy of "Audit Review" letter. The letter may be submitted directly to their GAM or the user may upload the letter during the registration process. Once the review letter is either uploaded or emailed and the registration is pending, please contact a GAM grant access to SPM.

**Question: I’m an Auditor and I need access to multiple DoDAACs. How do I add all the DoDAACs?**

**Answer:** You will add additional DoDAACs in your PIEE user profile.

**Question: As an Auditor, how to change my SPM access expiration date?**

**Answer:** Each Auditor will register for certain DoDAACs and expiration dates via the PIEE user profile. Access will be revoked upon date expiration. To access your profile and change the expiration date, log into PIEE and update your profile before accessing SPM.

**Question: How do Managers and Auditor see document and nominations?**

**Answer:** Documents are viewable by searching in SPM with the “COR Surveillance and Oversight” menu option.

# Group Administrator (GAM)/DEPARTMENT ADMINISTRATORS (DA)

**Question: Should I be a PIEE GAM?**

**Answer:** The PIEE Group Administrator (GAM) manages and activates users in their organization to give them access to the PIEE Suite. The GAM may be an individual tasked with security responsibilities or they may be someone else. It is up to your Federal Agency to determine who has this responsibility. GAMs are usually government employees; however, contractors acting on behalf of the Government may be appointed as a GAM for the Government. To appoint a GAM, the Federal Agency must contact their existing GAM with information defining the identity of the designated GAM. Notification must be supported by an official appointment letter signed by the Federal Agency designating this responsibility to the individual(s). A copy of the appointment letter will be submitted electronically to the Ogden Customer Support Center. The initial deployment of a GAM for a new activity will start once Ogden receives the GAM letter. Subsequent GAM requests are maintained by the Federal Agencies original/primary GAM. More details on GAMs can be found here: <https://wawf.eb.mil/xhtml/unauth/web/homepage/federalCustomersGettingStartedHelp.xhtml>

**Question: Should I register as a Department Administrator or GAM?**

**Answer:** GAMs will have access to all roles within the PIEE suite. If you will not be activating and deactivating roles, but acting as a JAM/SPM SME, then you should be a SPM Department Administrator. There are two types of DAs. Component DA (CDA) and Local DA (LDA). CDA are responsible for the entire Service, Defense Agency or Federal Agency. CDA are the lead for the Service, Defense or Federal Agency. LDAs are responsible for a command, subcommand, agency or office within the Service, Defense Agency or Federal Agency.

**Question:** **What is the role of the CDA in SPM?**

**Answer:** The CDAs have overall responsibility for training and deployment of the JAM/SPM within their Service, Defense or Federal Agency.

**Question**: **As a DA, can I create a registration for a new COR?**

**Answer:** No.Each new user will need to create a new registration for the SPM application.

**Question: I have a new COR from a non-DoD agency that does not have a DoD CAC. Will a non-DoD COR be able to process nomination on DoD contracts?**

**Answer:** Theseindividuals will be eligible for the CAC exemptions and may be granted access via user name and password if the user does not have a Civilian PIV card. These users should contact the PIEE Helpdesk or the DPAP Administrator to apply for a CAC exemption. External agencies and their users will have the ability to register via user name and password and enter contracts for which CORs are assigned. Department will be replaced with “Non DoD”.

**Question: As a DA can I create roles for multiple DoDAACs?**

**Answer:** DAs have access to all nominations/appointment at their DoDAAC level and the levels below. There is no need to create multiple user roles associated at different DoDAACs.

**Question: Can COR be their own DA?**

**Answer:** Yes, there is nothing in SPM that prevents this from occurring, however, the COR should be performing the COR surveillance function required by the CO. When appointing DAs, the SPM lead should consider the following:

* DAs are performing oversight of JAM/SPM and it users
* DAs are aiding all user and all roles on JAM/SPM on their nomination

In most cases where the COR and the DAs are the same person, the COR/DA failed to sufficiently perform any of the DA functions listed above. When the two are separate, with COR focusing on surveillance and the DA focusing on oversight and training, both roles perform in a satisfactory manner.

**Question: How do I cancel a nomination?**

**Answer:** DAs have ability to cancel any contract nomination/appointment in the system that is not “Active” and DAs have ability to recall any contract nomination in the system that is “Cancelled”. Contract nominations must be recalled within 30 days of cancellation. Contract nominations older than 30 days will be permanently deleted from the database.

**Question: How do I change the Home Location DoDAAC for a user?**

**Answer:** If the user is a COR, the role must be rejected to allow the COR to update their DoDAAC. If the user has another role, the user can add the role again with another DoDAAC.

## Administrative Console

**Question: Where are the Admin functions located?**

**Answer:** After logging into PIEE, go to the Administrative Console menu located on the top of the page and then click on PIEE Administration. There are 7 Administrative actions the user can perform.

* Group Management - Administer groups and subgroups by adding, renaming, moving / deleting groups in the group structure, and adding / moving locations in the group structure.
* Location Management - Administer locations by editing locations, adding extensions, editing extensions and viewing location and extension data.
* History Management - Review historical data for database tables.
* Table Management - Administer database tables by viewing table data.
* Subject Matter Expert (SME) Management - Manage Subject Matter Experts (SME) by Application and/or Location Code.
* User / Role Management - Manage users and roles.
* Additional Administration

## Group Management

**Question: What is the Group Management Section for?**

**Answer:** Group Management is where the GAM can administer groups and subgroups by adding, renaming, moving / deleting groups in the group structure and adding / moving locations in the group structure.

**Question: How do I find out who the Department Administrator is for a location?**

**Answer:** After logging into PIEE and accessing the Administrative Console, go to “Group Management” and then to “Group Lookup”. You can then search on a location code which will show the Group Path and the GAM(s) associated with the location.

## Location Management

**Question: What is the Location Management Section for?**

**Answer:** Location Management allows GAMs to search by DoDAAC to see where in location code is located in the hierarchy.

## User/Role Management

**Question: Where do I activate/deactivate/archive/reject a user?**

**Answer:**  Role Management is used for administering roles by activating, deactivating, and archiving user roles. The GAM can also reject a user’s request.

**Question:** **Who activates and deactivates the roles in the PIEE?**

**Answer:** A GAM will activate and deactivate all the SPM roles via the Administrative Console in PIEE.

**Question: As a GAM, how do I activate a user?**

**Answer:** After logging into the PIEE, follow these steps:

1. Click on “Administration” on the top of the screen after you log into PIEE
2. Click on “PIEE Administration”
3. Click on “User/Role Management”
4. Input search criteria (user ID, last name, etc) - you may want to adjust your query to limit the amount of results
5. Click on hyperlink User ID
6. Click on “User Roles” on left menu
7. Click on the arrows under “Action” for the role you want to activate select activate
8. Click “Update”
9. Place in Justification and click “Confirm”

**Question: How do I deactivate a user?**

**Answer:** After logging into the PIEE, follow these steps:

1. Click on “Administration” on the top of the screen after you log into PIEE
2. Click on “PIEE Administration”
3. Click on “User/Role Management”
4. Input search criteria (user ID, last name, etc) - you may want to adjust your query to limit the amount of results
5. Click on hyperlink User ID
6. Click on “User Roles” on left menu
7. Click on the arrows under “Action” for the role you want to activate select deactivate
8. Click “Update”
9. Place in Justification and click “Confirm”

**Question: How do I reject a user?**

**Answer:** After logging into the PIEE, follow these steps:

1. Click on “Administration” on the top of the screen after you log into PIEE
2. Click on “PIEE Administration”
3. Click on “User/Role Management”
4. Input search criteria (user ID, last name, etc)
5. Click on hyperlink User ID
6. Click on “User Roles” on left menu
7. Click on the arrows under “Action” for the role you want to activate select reject
8. Click “Update”
9. Place in Justification and click “Confirm”

## User Management

**Question: I have a user who entered the wrong organization, can I change this for the user?**

**Answer:** No. If the user is a COR, reject the role and the COR can change their DoDAAC. All other roles the user can reapply for the role at the correct DoDAAC.

**Question: I see under User Management the menu options for Reset Password and Reset Certificate, how do I use these?**

**Answer:** As a DA you can now help your users reset their passwords or CAC certificates. To reset, search for the user, verify their info, and press submit. If you do not know the user’s user ID, go to Role Management and search for the user to get the User ID.

**Question: What can Department Admins do in JAM and SPM?**

**Answer:** See below for a list of what the admins can change.

**In JAM - Department Admin**

Actions on a nomination/appointment in a pending or draft status:

1. Edit CO, CS QAPOC, ACO
2. Cancel nomination/appointment

Actions on a nomination/appointment in an active status:

1. None - active nomination/appointments that have issues are not editable or able to be canceled

**In SPM - Department Admin**

1. Actions on a nomination/appointment in active and inactive status:
2. Edit CO, CS QAPOC, ACO

**In JAM - DPAP Admin**

Actions on a nomination/appointment in a pending or draft status:

1. Edit CO, CS QAPOC, ACO
2. Edit Type of COR, COR Training Type, Contingency Environment
3. Edit Period of Performance for Monitoring
4. Cancel the nomination/appointment

Actions on a nomination/appointment in an active status:

1. Edit CO, CS QAPOC, ACO
2. Edit Type of COR, COR Training Type, Contingency Environment
3. Edit Period of Performance for Monitoring

**In SPM - DPAP Admin**

Actions on a nomination/appointment in active or inactive status:

1. Edit CO, CS QAPOC, ACO

# JAM/SPM PROCESS

**Question: Can you explain the statuses?**

**Answer:** Status for a SPM user does not equal the status for a nomination. PIEE considers all registered individuals as “users”, but it is within the SPM that each individual is attached to a role(s) (COR, CO, Manager, etc.). During Role Activation, a user’s status may be active, inactive, pending, or archived. Active means the user has been approved for a PIEE Account by the user’s Supervisor and activated by a GAM.

Inactive means user has registered in PIEE, the Supervisor has approved the request, but the GAM has not activated the user’s SPM role(s) yet, so access to SPM has not been granted.

Pending means a user has registered in PIEE and requested a SPM role, but the user’s Supervisor has not approved the role. The GAM cannot approve the user’s role request until the Supervisor approves first.

Archive means an active or inactive user account has been deactivated and moved to an archived status. Access to JAM and SPM has been removed.

A COR/CO/CS can be an inactive user, but have an active nomination/appointment or a COR/CO/CS can be an active user with an inactive nomination/appointment.

**Question:** **The wrong Supervisor, Contract Specialist and/or Contracting Officer are selected? How does one back out of the process?**

**Answer:** The ability to make correction is dependent upon the status of the nomination:

When the nomination is in the “**Draft”, “Rejected by Supervisor” or “Rejected by PCO**” status, the COR can update the names. The Supervisor’s name is corrected in the COR’s PIEE User Profile. If the wrong Contracting Officer or Contract Specialist is selected, the COR can update the nomination with the correct name from the drop menu by the Contracting Officer and Contract Specialist roles.

When the nomination is in the “**Pending Supervisor Review**” status, the Supervisor must reject the nomination and return it to the COR. The COR can change the Supervisor’s name in their PIEE User Profile. If the wrong Contracting Officer or Contract Specialist is selected, the COR can update the nomination with the correct name from the drop menu by the Contracting Officer and Contract Specialist roles.

When the nomination is in the “**Pending PCO Review**” status, the CO/CS must reject the nomination and return it to the COR. The COR shall update his Supervisor’s name in the Profile and save the changes made to the Profile. The Supervisor’s name will be corrected on the nomination and all applicable tables. If the wrong Contracting Officer or Contract Specialist is selected, the COR can update the nomination with the correct name from the drop menu by the Contracting Officer and Contract Specialist roles.

When the nomination is in the “**Active**” **“Inactive**” or “**Terminated**” status, CORs cannot update Contracting Officer or Contract Specialist on an Active nomination. If the wrong Contracting Officer or Contract Specialist is selected, the CO/CS can update the nomination with the correct name from the drop menu by the Contracting Officer and Contract Specialist roles.

Changes may be not made to a cancelled nomination.

**Question: Who can cancel a nomination/appointment?**

**Answer**: A nomination can be cancelled by the Dept Admin, COR, the Supervisor, the Contract Specialist or the Contracting Officer. The ability to cancel is dependent upon the status of the nomination.

**Question: Can the nomination/appointment be cancelled in all “statuses**”?

**Answer**: No. A nomination may only be cancelled when it is in the following status: Draft, Pending Supervisor Approval, Pending PCO Approval, Rejected by Supervisor and Rejected by PCO. A Dept Admin may now cancel a nomination in any status except Inactive and Active.

**Question: How do I delete or cancel a nomination/appointment?**

**Answer**: A nomination/appointment can only be cancelled. Nominations/appointments older than 30 days will then be deleted and removed from view. For the roles mentioned above, there is a “cancel button” at the bottom of each section. When the nomination/appointment is in the “Draft” or “Rejected” status, the COR has ability to cancel the nomination/appointment. When the nomination/appointment is in the “Pending Supervisor Review” status, the Supervisor can cancel the nomination. When the nomination/appointment is in the “Pending PCO Review” status, the Contracting Officer or Contract Specialist may to cancel the nomination/appointment.

**Question: My nomination/appointment has the wrong contract number. How do I change it?**

**Answer:** In CORT Tool, the contract number was editable, but in JAM since contract numbers and task orders are validated by EDA, changing the contract number on an active nomination/ appointment is not available. The only action that can be taken is to change the Period of Performance Monitoring date to send the nomination/appointment inactive and create a new one with the correct contract number.

For nominations/appointments in a Pending PCO Review status, the CO/CS may reassign the Pre-Award Number by pressing the “Reassign of the PreAward Contract”.

**Question: How will nominations/appointments be cancelled if the user is unable to access, i.e., COR has retired or left the DoD?**

**Answer**: Your Dept Admin can cancel the nomination/appointment.

**Question: What causes the status of appointed COR to change from “Active” to “Inactive”**? **How do I change the status of the nomination from “Inactive” back to “Active” or “Active” to “Inactive”?**

**Answer**: Inactive status is automatically sets when the Period of Performance for Monitoring End Date has lapsed. To change end date, the CO/CS needs to open the appointment/ nomination and change the end date to a present or future date. The Contract End date is supplied from EDA and is not editable.

**Question: When I created my registration, I entered an incorrect Home Organization DoDAAC and Department. How do correct?**

**Answer**: Your DA can change your home DoDAAC in Role Activation. If the DoDAAC on your COR role is incorrect, your GAM will need to reject the role and the COR will need to change the DoDAAC and resubmit the role. If the DoDAAC is wrong on other SPM roles, the incorrect DoDAAC role should be archived by your GAM and you can add the role again with the correct DoDAAC.

**Question: I keep getting these daily, annoying emails telling me I have something awaiting approval, how do I turn this feature off?**

**Answer**: Emails are sent to CORs when they have draft nominations that are over 30 days old, to Supervisor when they have nominations/appointments waiting to be approved over 30 days old and to Contracting Officer/Contract Specialist when they have nominations that are over 30 days old. To turn the emails off as COR, you must submit the nominations to the Supervisor to approve. As Supervisor or CO, you must approve or reject the nominations/appointment referenced in the email.

**Question: I am the COR on the nomination. The Supervisor associated with my nomination has retired and is no longer associated with my organization. I would really like to complete this nomination, but it is in Pending Supervisor Review status. How do I get this nomination rejected?**

**Answer:** Log into PIEE and access your User Profile where you can change your Supervisor.

**Question: Can a CO/CS add a QASP to JAM when they are reviewing the COR Nomination Record? This would be especially relevant for CORs who are being nominated/approved and trained before all the contract documents are completed such as the QASP.**

**Answer:** Yes. QASP can also be loaded by CO at the time of the appointment. A QASP may also be loaded by the CS.

**Question:** **Can the COR create their PIEE role and profile to be activated later a new contract?**

**Answer:** Yes, profiles remain in PIEE until archived.

**Question: If a contract is in closeout and a COR is no longer needed, must the CO do a Revocation letter to remove the COR?
Answer:** No, revoking the COR is not a requirement for contract close out. Allow the contract to reach the inactive status. All Inactive actions will then be eligible for closeout.

**Question: Do the contract documents that were loaded by the COR stay in SPM (monthly reports, etc.) and if so, how is it accessed?
Answer:** Documents posted by CORs are maintained in the COR’s File in SPM in accordance with National Archive and Records Management (NARA) policy and procedures on records management. These documents will be kept for a period of 6 years, 3 months after contract closeout. During this period, documents can be accessed via COR Surveillance File in SPM.
**Question: If a COR’s nomination is cancelled, (not revoked) what happens to the contract documents that was loaded by that COR?**
**Answer:** A COR, CS or CO can initiate the cancellation of a nomination/appointment in any status prior to being in an active status. JAM will visibly indicate and store on the nomination/appointment that was cancelled and the status will show ‘Cancelled’. Documents that are associated with a cancelled nomination are available for 30 days. On day 31, those documents are no longer available. Documents associated with Active, Inactive and Terminated nominations are maintained with revoked contract and will be available to any newly appointed COR on the same contract.

**Question: Can I recall a cancelled appointment/nomination?**

**Answer:** A COR, CS or CO can recall a nomination/appointment that is in ‘Cancelled’ status. A recall can happen up to 30 days after cancellation. At the 31st day, the cancelled nomination/appointment will be deleted.A recalled nomination/appointment will be restored in a draft status.

**Question: How do I terminate a COR?**

**Answer:** JAM will allow the COR, CO or CS to initiate a termination, but the CO will have to finalize the termination. As the CO:

1. Log into PIEE and access JAM
2. Under “My Appointment” click on Search for COR Appointments I can Terminate
3. Select Contract Number of appointment wish to terminate
4. Click “Add Termination Letter” to complete termination and sign
5. The CO will be required to provide the reason for termination to include the following reasons:
	1. Administrative Error/Correction
	2. Cause: Lack of performance
	3. Cause:  Ethics violation
	4. Cause:  Performing outside roles and responsibilities
	5. Change in Job
	6. Promotion
	7. Redeployment
	8. Injury/Illness
	9. Other: (Free Text)
6. Click “Request Termination” bottom of appointment
7. An email will be sent to the COR

As the COR:

1. Search COR Appointments where I am the COR
2. Click on contract number of contract being terminated from
3. On Appointment, click on “Signature Required” under Termination Letter section
4. Click on “Approve Termination” on the bottom of the appointment
5. Email with a link to the appointment will be sent to the Supervisor to approve termination

As a Supervisor:

1. Supervisor receives email about COR Termination
2. Click on link in email
3. On Appointment, click on “Signature Required” under Termination Letter section
4. Click “Approve Termination” on the bottom of the appointment

**Question: I terminated the COR and now I need to reappoint him to the same contract. May I appoint the COR twice on the same contract?**

**Answer:** The Contracting Officer can re-appoint a COR and Alternate COR to a contract that is in terminated status. After termination of the COR Appointment, the COR or Alternate COR will be able to be nominated or re-appointed on the same contract.

**Question: When a COR or CO/CS leaves the Command and a new COR or CO/CS
takes over is there a way to link up the reports that the previous COR had loaded to create a situation of continuity? Do we automatically lose all historical data or is there a way to transfer that over?**

**Answer:** Nominations are generated by COR, so if a COR leaves, a new nomination needs to
be started. All historical documents on a contract can be seen in SPM by going to “COR Surveillance File” and searching on the contract number.

**Question: When a COR or CO/CS leaves their Command or obtains a new position within the Command and they are no longer associated with any of the contracts that they had been previously associated with, what is the correct procedure to close out his or her account?**
**Answer:** This depends on who is leaving. If the CO/CS, the Dept Admin should change the name on the appointment/nomination and the GAM deactivate the CO/CS’s role via User Management in PIEE (if not using JAM anymore). If the COR leaves, the CO should terminate their appointment/nomination and the new COR will start their own appointment/nomination. The documents attached to the appointment/nomination will be available under “COR Surveillance File”.

**Question: Is nomination/appointment contract information pulled from another system?**

**Answer:** JAM checks all contracts/orders loaded in the Procurement Business Intelligence Service (PBIS) system. If the contract number entered by the CO is not in PBIS, the contracting officer cannot approve the nomination/appointment.

JAM will automatically default as read only for each nomination/appointment the following contractor information from PBIS, based on the Contract Number defined in the Contracting Information:

* + CAGE Code
	+ DUNS
	+ DUNS+4
	+ Contractor Name
	+ Contractor Address
	+ Contractor Country
	+ Contract Award Date
	+ PSC Code
	+ PSC Description
	+ Contract Completion Date

If no contract is defined then the data elements will not be populated.

**Question: What smart forms are available?**

**Answer:** Smart forms are available to create and maintain the following contract documents:

|  |
| --- |
| * Annual COR File Inspection Checklist
* COR Report to the Contracting Officer (aka Status Report)
* Contract Discrepancy Report
* Trip Report
* Memorandum for the Record
* Contractor Progress Report Review/Update to the COR
* Correspondence Report
* Construction COR Compliance Review
* Surveillance Checklist
* Surveillance Schedule
* Warranty Tracking Information
* Warranty Source of Repair Instructions
* Universal Examination Record
 |
| * Designation Letter
 |
| * Termination Letter
 |
| * QASP Waiver
 |

**Question: How do I add report and documents to the COR’s file?**

**Answer:** Reports and documents are housed in SPM.

1. Log into SPM as COR
2. Click on COR Surveillance and Oversight and search for Contract
3. Click on contract number hyperlink to access the COR’s file
4. Scroll down to the Surveillance File
	1. Click on “Add Documents” or “Add Smart Forms”
	2. Chose type of document, complete fields, and submit

**Question: I’m a user with a Federal Agency, can I use JAM and SPM?**

**Answer:** Yes, JAM and SPM provide assisted acquisition for non-DoD users. External agencies and their users will register in PIEE via their PID card, create user roles in PIEE with the FEDAAC, and enter contracts for which CORs are assigned in JAM.

**Question: Do Federal PIEE users add the non DOD location code to their PIEE profiles?**

**Answer:** DoD users should register with their home DoDAAC and Federal users should register with their FEDAAC. Please see FAQ on FEDAACs if you need assistance.

**Question: I received an error that the contract number was not found in the EDA system using the PDS web services under Contractor Information section. What is this error?**

**Answer:** This error message occurs when the contract number is not available to be passed from EDA or PDS. At the next EDA/JAM update, if the contract has been added to EDA or PDS, then the contract data gets pulled into JAM. If the contract is never added, the informational message remains.

# FOREIGN/LOCAL NATIONAL

**Question: I am a local national located in a foreign country and I do not have a CAC. How can I use PIEE, JAM, and SPM?**

**Answer**: There are currently exemptions for foreign nationals, covered by a Status of Forces Agreement. These users will be granted access via user name and password. These users should contact the PIEE Helpdesk or their agency GAM to apply for CAC exemption.

**Question**: **Who do Foreign Nationals send their name to?**

**Answer**: Please send all requests to the PIEE helpdesk or agency GAM.

**Question:** **My agency has a list of people who will need access? Does each one of them need to contact the helpdesk?**

**Answer:** No. If an agency wants to do a mass exemption contact the agency GAM and/or DPC Administrator for additional information.

# COR TRAINING

**Question: I’m a COR, how do I add my training in JAM?**

**Answer:** After accessing JAM, click on “My Training” on the top menu. You can now add your training certificates by clicking on “Add Training” button located on the bottom left of page.

**Question:** **Is there training on how to use the JAM and SPM**?

**Answer:** On the PIEE home page, there is a link on the right for Help/Training. Follow the links for JAM and SPM WBT (Web Based Training) or click here: <https://wawftraining.eb.mil/wbt/>.

**Question:** **What are the COR Training requirements?**

**Answer**: The recommended COR certification includes specific DAU courses or equivalents.

Type A

* CLC 106 - CORs with a Mission Focus

Type B/C

* COR 222/CLC 222 - Contracting Officer’s Representative Course
* COR 206/CLC 206 - Contracting Officer's Representatives in a Contingency Environment

Type C

* Specialized Training

All CORS

* CLM 003 Overview of Acquisition Ethics or agency equivalent on procurement ethics
* DOD 002 Combatting Human Trafficking for DoD Acquisition Professionals

COR Refresher

* Hours specified, no specific course, after initial training to maintain status as a COR

**Question: Where can I find Equivalent Courses?**

**Answer:** Please contact DAU for information on equivalent courses.

**Question: Will the COR receive an automatic reminder when training is due?**

**Answer:** The system will trigger automatic reminder email notifications to CORs when training and refresher training hours are not met. If COR is Type A, the COR must complete all training within 21 days of COR designation, unless otherwise advised by contracting officer. The reminder notification will be sent 14 days prior to expiration informing the COR that their COR appointment/nomination will terminated if training is not completed by day 21. If training is not completed by day 22, the COR will be automatically terminated. If COR is Type B or C, the COR must complete all training requirements within 35 days of COR designation, unless otherwise advised by contracting officer.  Failure to complete may result in COR termination. The reminder notification will be sent 28 days out informing the COR their appointment will terminated if training is not completed by day 35. The system will automatically terminate the appointment if the training has not been marked as complete by day 36.

**Question: Will Training certificates be imported from DAU?**

**Answer:** Training certificates will not be imported from DAU and are not required for DAU classes obtain from the DAU feed. The only data imported from DAU will be the course name (must be one of the specified seven courses) and the course completion date. For these seven courses, certificates are not required.

* CLC 106, Contracting Officer's Representative with a Mission Focus
* CLC 206, Contracting Officer's Representatives in a Contingency Environment
* COR 206, Contracting Officer's Representatives in a Contingency Environment
* COR 222, Contracting Officer’s Representative Course
* CLC 222, Contracting Officers Representative (COR) Online Training
* CLM 003, Overview of Acquisition Ethics
* DOD 002, Combatting Human Trafficking for DoD Acquisition Professionals

If the course completion date needs to be updated/changed, the COR must go directly to DAU to change the date. Any changes or updates to DAU should be pulled in the daily (or weekly) feed.

Each course is submitted by itself. The match and validation are performed for each course individually. If a matching user cannot be found for the course or the course fails validation, the course is not uploaded into the COR’s profile via the interface.

There could be many reasons why the course was not loaded:

* The EDIPI number cannot be blank.
* The Email Address cannot be blank.
* The EDIPI Number or Email Address must have a match in the User Profiles table.
* The Completion Date cannot be blank.
* The Completion Date musts be a valid date in YYYMMDD format.
* The Course Number cannot be blank.
* The Course number must be CLC 106, CLC 206, COR 206, CLC 222, CLM 003 or DOD 002.
* The Provider cannot be blank.
* The Provider cannot exceed 60 characters in length.
* The user must have a COR role.

If DAU submits the course and the course passes validation then the course is uploaded to the COR’s Profile.

# REPORTS

**Question:** **Will SPM have reports?**

**Answer**: The SPM Reports section has 2 types of reports available:

1. Admin Reports – EDA
* COR Management Report
* COR Training Report
* Contract Document Report
* COR Contract List Status Report
* COR View all Locals Status Report
* User Report
1. Admin Reports – PBIS
* Service Contract with CORs Appointed in DoD JAM
* Submission of Status Report to the Contracting Officer
* Contract 360 Report for a COCOM

If pulling a report from EDA, a screen called Kibana will open. Please reference Appendix C in the User’s Guide for directions on how to use Kibana and run a report. If running a PBIS report, please follow the directions on screen.

**Question: How do I get access to the BI reports?**

**Answer:** To add the BI Tool, follow these steps:

1. Log into PIEE
2. Go to “User” then “Add Roles”
3. Scroll down to “Management Reporting Section” and click on “MRS Role”
4. Enter Location Code and Justification
5. Justification should be that you are a SPM Department Admin that wants to run reports (BI Tool for DAs only)
6. Click Save
7. Email wawfbi@dla.mil and let them know you are a SPM DA and have requested access

**Question:**  **How do I run a report once I have access to the MRS Tool?**

**Answer:** Complete the following steps:

1. Log into PIEE
2. Click on the MRS button
3. Once MRS opens, click on “User Reports”
4. Click on CORT folder to see a list of reports
5. Click on a report, select the parameters and push “Apply”

**Question: What reports are available?**

**Answer:** The following list are the SPM Reports you can ask for. If you need access to a report, email wawfbi@dla.mil.

* COR Document Status Report
* COR Pending Report
* COR Tool User
* CORT Contract List Status Revised Report
* CORT Contracting Staff Registration Report
* CORT COR Training
* CORT CORS Report
* CORT Training CD

**Question**: **Will I be able to run ad hoc reports?**

**Answer**: No, only standard reports are available at this time.

**Question**: **Will reports access be available to users beyond the MAJCOM DAs**?

**Answer:** Individual within theMAJCOM, Commands and subcommand designated as Department Administrators can view and download the standard report from Link to Reports menu**.**

**Question: Are custom reports available?**

**Answer**: No, only standard reports are available.

**Question: Can we incorporate new data fields to meet the customer's needs in the future?**

**Answer**: Yes. However, these fields will have to go through the ORC process or be mandated by policy.

# JAM and SPM TRAINING

**Question: How do I get training on JAM and SPM?**

**Answer:** Training on JAM and SPM is available on the PIEE site. To access, follow these steps:

1. On PIEE Homepage, click on “Help/Training” in upper right corner
2. You will now be on the New User and Training page with many links available
3. Click on “Web Based Training” under “Training”

There is also FAQs, User’s Guide and other documents posted on the JAM and SPM homepage.

# MISCELLANEOUS

**Question: I have some great ideas on ways to improve the system, but I am not sure how to get my ideas submitted.**

**Answer:** You must submit an Engineering Change Proposal (ECP) to your agency Department Administrator for approval before the ECP will be submitted to the SPM PM and PIEE PMO. Please contact your GAM for the ECP template.