User Manual for

Contractor Performance Assessment Reporting System (CPARS)

December 2014

Current Version 4.0.2

HTTPS://WWW.CPARS.GOV

Foreword

The purpose of this manual is to provide working-level procedures for entering, updating, revising, and viewing information in the Contractor Performance Assessment Reporting System (CPARS) Automated Information System (AIS). Detailed requirements of the CPARS business processes are contained in the Guidance for the Contractor Performance Assessment Reporting System. This system was developed to support the electronic processing of Contractor Performance Assessment Reports.

This manual translates business process requirements into detailed step-by-step procedures for individuals utilizing the automated CPARS process. This manual was prepared by Naval Sea Logistics Center Portsmouth (NSLC PTSMH). NSLC PTSMH continually enhances the AIS and the manual to meet the needs of customers.

Please address any recommended modifications or improvements to:

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Suggestions for modifying the CPARS application (problems, enhancements and/or policy) may be submitted via the **Submit Suggestion** feature on the Main Menu of each assigned level in CPARS.

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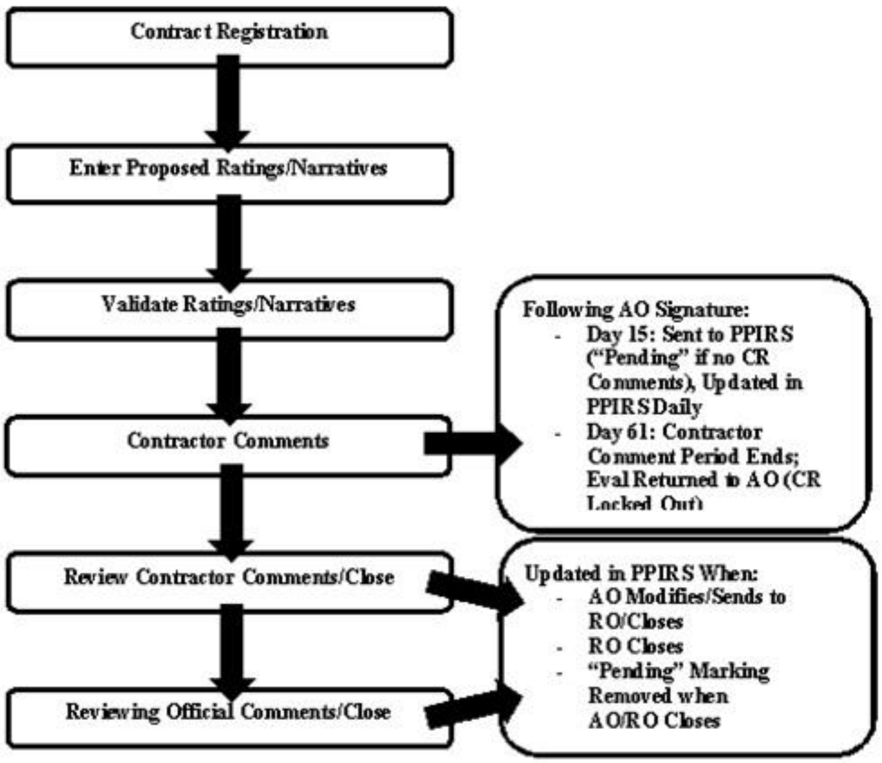
System Overview

The CPARS system is a web-enabled application that is accessed via the Internet website **https://www.cpars.gov**. The application consists of an Internet web server and a dedicated CPARS application server. By definition, CPARS information is Sensitive But Unclassified (SBU). To protect the security of CPARS information, all actual data entered into and retrieved from the application is encrypted using the security features incorporated into the web browser. Access to this system requires a browser, which supports 128-bit encryption (sometimes referred to as strong encryption or U.S. only encryption), such as Microsoft's Internet Explorer 4.01 or higher. Additional details on browser requirements and security are available at **https://www.cpars.gov**.

BASIC WORKFLOW



To support this workflow, each user is assigned a unique level of access by the Focal Point. CPARS Focal Points define a User Access Matrix that restricts access on a contract-by-contract basis, based on an individual's assigned responsibility in the process.

Heads of contracting are responsible for overseeing the implementation of the CPARS process within their respective organizations.

The following paragraphs explain the correlation between defined access levels and the steps in the business process.

Step 1 – **Contract Registration** Contract Registration is the entry of basic contract/order award information, such as Contractor Name, Contractor Address, Product or Service Code (PSC) , Dollar Value, Award Date, etc. into CPARS. The Focal Point (FP) or Alternate Focal Point (AFP) may perform automated contract/order registration using the CPARS Auto Register function. The Auto Register function will populate CPARS with the basic contract/order information contained in the Federal Procurement Data System - Next Generation (FPDS-NG). Contract/order registration may also be performed by manually entering the basic contract/order information contained in the contract file. The Focal Point, Alternate Focal Point, Assessing Official Representative, and Assessing Official may perform manual registration. Contract/order registration should be performed within 30 days following contract/order award.

Step 2 – **Enter Proposed Ratings** Allows the Assessing Official Representative/Assessing Official to enter the proposed ratings and narratives to reflect the contractor's performance during the reporting period. If there is more than one Assessing Official Representative, the Assessing Official Representatives should coordinate to ensure that all proposed ratings and narratives have been entered prior to submitting the proposed evaluation to the Assessing Official.

Step 3 – **Validate Proposed Ratings** Allows the Assessing Official to reviews the proposed ratings and verifies that the narratives are detailed, comprehensive, complete, accurate, and supported by objective evidence wherever possible. The Assessing Official signs the evaluation and sends it to the Contractor Representative.

Step 4 – **Contractor Comments** Allows the Contractor Representative being evaluated to provide comments on the evaluation, indicate if they concur or do not concur with the evaluation, sign, and then return the evaluation to the Assessing Official. The Contractor Rep has a total of 60 days following the Assessing Official's evaluation signature date to send comments. If the Contractor Representative sends comments within the first 14 days following the Assessing Official's signature date and the Assessing Official or Reviewing Official closes the evaluation, the evaluation will become available in the Past Performance Information Retrieval System - Report Card (PPIRS-RC) within one day. On day 15 following the Assessing Official's evaluation signature date, the evaluation will become available in PPIRS-RC with or without Contractor Representative comments and whether or not it has been closed by the Assessing Official or Reviewing Official. If no Contractor Representative comments have been sent and the evaluation has not been closed, it will be marked as "Pending" in PPIRS-RC. If the Contractor Representative sends comments at any time prior to 61 days following the Assessing Official's evaluation signature date, those comments will be reflected in PPIRS-RC within one day. On day 61 following the Assessing Official's evaluation signature date, the Contractor Rep will be "locked out" of the evaluation and may no longer send comments.

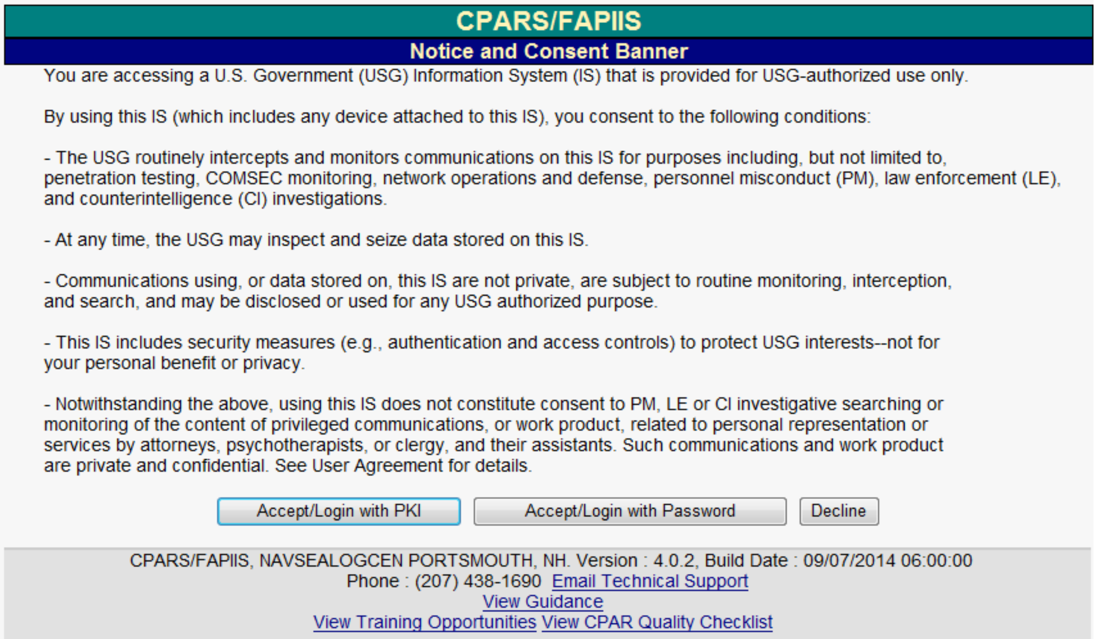
Step 5 – **Review Contractor Comments** Allows the Assessing Official to close the evaluation (available only when Contractor concurs), modify and close the evaluation, send the evaluation to the Reviewing Official, or to modify and send the evaluation to the Reviewing Official. On day 61 following the Assessing Official's evaluation signature date, the evaluation is returned to the Assessing Official and the Contractor Representative may no longer send comments. If the Assessing Official closes the evaluation or modifies and closes the evaluation, the evaluation will be updated in PPIRS-RC within one day and the "Pending" marking will be removed. If the Assessing Official sends the evaluation to the Reviewing Official or modifies the evaluation and sends it to the Reviewing Official, the evaluation will be updated in PPIRS-RC within one day and will retain the "Pending" marking.

Step 6 – **Reviewing Official Comments** Allows the Reviewing Official (if applicable) to review the ratings established by the Assessing Official and the response by the Contractor Representative whenever the Contractor Representative indicates that they do not concur with the Assessing Official's evaluation and when the Assessing Official has sent the evaluation to the Reviewing Official for closure. The Reviewing Official should provide comments, sign, and close the evaluation. When the evaluation is closed by the Reviewing Official, it will be updated in PPIRS-RC within one day and the "Pending" marking will be removed. The Reviewing Official also has the option to return the evaluation to the Assessing Official for additional changes if desired. In such a case, the Assessing Official should make changes as necessary, re-send the evaluation to the Reviewing Official, and the Reviewing Official should provide comments, sign, and close the evaluation.

Once the Reviewing Official completes the actions of step 6, the evaluation is considered complete. Completed evaluations are copied daily to the PPIRS-RC database. PPIRS is a warehouse of all evaluations completed by Federal agencies and is accessed by source selection officials to support future source selections.

Accessing CPARS

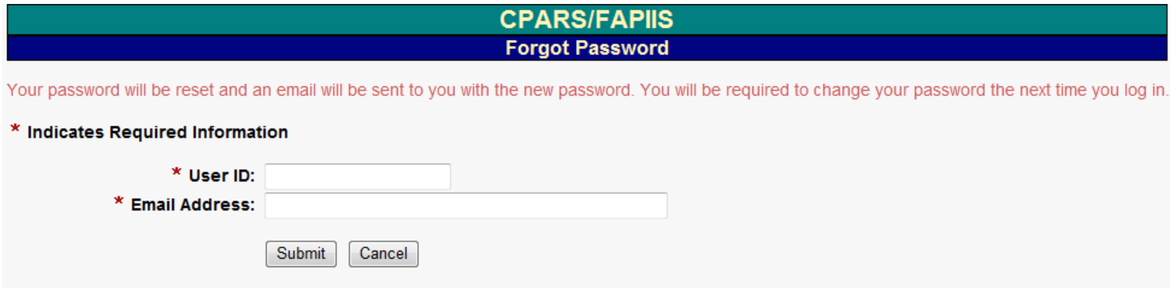
The CPARS application is accessible from **https://www.cpars.gov**. The CPARS website offers links to CPARS and the Federal Awardee Performance and Integrity Information System (FAPIIS) and also provides various items of interest including reference material, training information, frequently asked questions, best practices, as well as other information. To enter the CPARS Production System, click on the **CPARS Logon** button located on the right hand side of the page. The Notice and Consent Banner will display.



Read the Notice and Consent Banner and then click the applicable login category link that describes your Public Key Infrastructure (PKI) status. Either **Accept/Login with PKI** or **Accept/Login with Password** to proceed with the login process. For Department of Defense (DoD) users, the use of PKI Login is Mandatory. Federal and Contractor users can use the PKI login category if they have PKI. The use of PKI certificates is still a DoD requirement that is being waived for industry users only.

NOTE: All first time users will receive a system generated email providing a User ID and instructions to use the **Forgot Password** button to obtain a temporary password, when access has been granted by the Focal Point.

Click on the **Forgot Password** link and the following screen displays.



Enter your User ID and Email Address and click **Submit**. The system will verify that the information entered matches what was entered when the account was created, and will send an email to that address with a temporary password. Return to the Login screen.

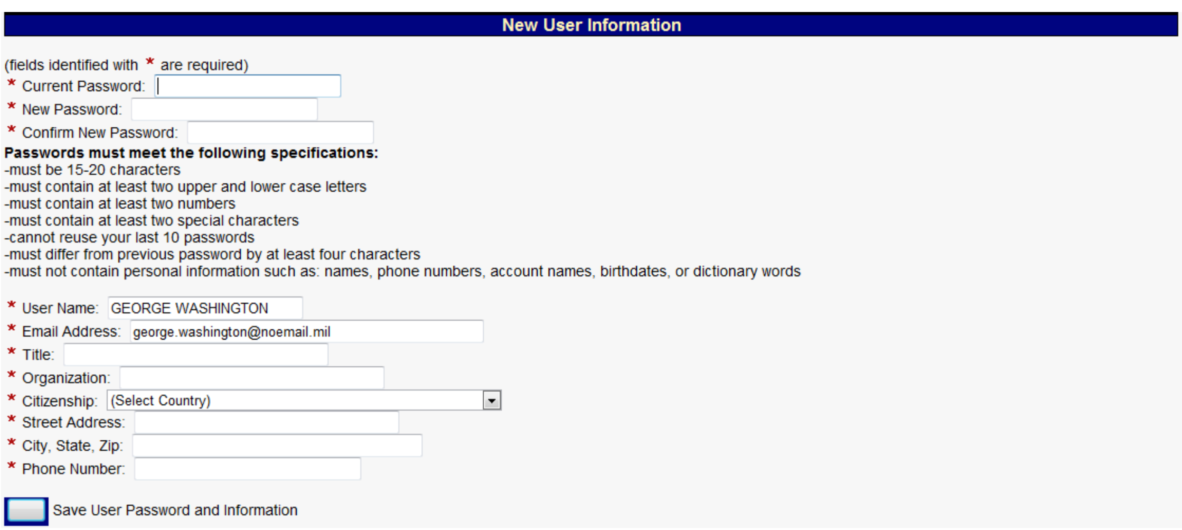
Enter your User ID and the temporary password, and click the applicable **Login** button.

NOTE: Subsequent logons for PKI users will not require the use of a password.

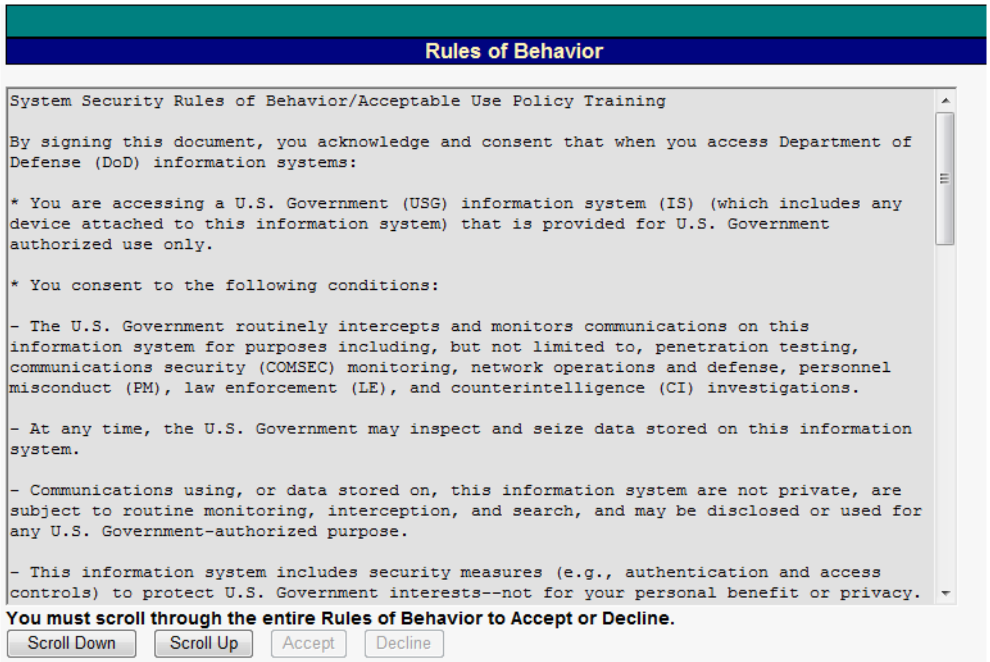
Enter the temporary password in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. The password is case sensitive and must contain 15–20 characters, at least two uppercase letters, two lowercase letters, two numbers, and two special characters. The last ten passwords are kept and may not be reused. Passwords must differ from previous passwords by at least four characters. Passwords must not contain personal information such as: names, phone numbers, account names, birthdates, or dictionary words. Re-enter the new password in the **Confirm New Password** box.

Complete the user information. Care must be taken to keep the user's email address current/correct for the implementation of the electronic notification system. After all required information is entered, click the **Save User Password and Information** button and a confirmation pop-up screen displays. Click the **OK** button.

NOTE: Focal Points logging in for the first time will also be required to identify all Organization(s) which they have cognizance over.

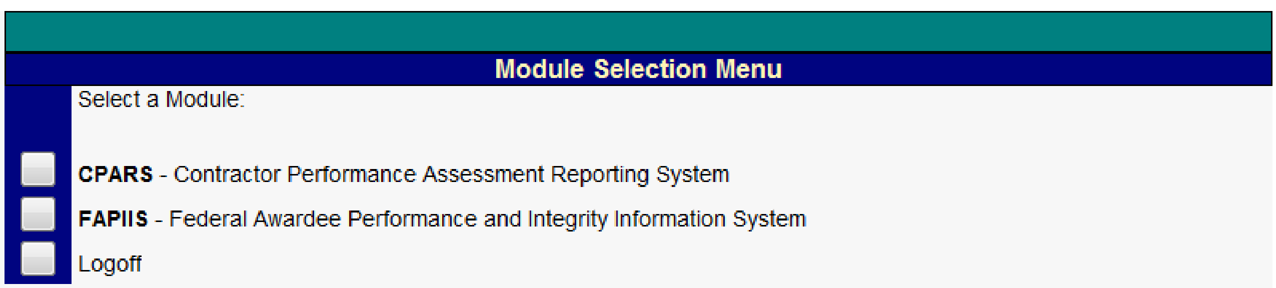


You will be brought to the Rules of Behavior page. Read through the rules and scroll down using either the down arrow on the right, or by using the **Scroll Down** button located under the Rules of Behavior. You can also scroll up using either the up arrow on the right, or by using the **Scroll Up** button located under the Rules of Behavior. Upon reaching the bottom of the rules, the **Accept** and **Decline** buttons will activate.



NOTE: You will be required to review and accept the Rules of Behavior annually.

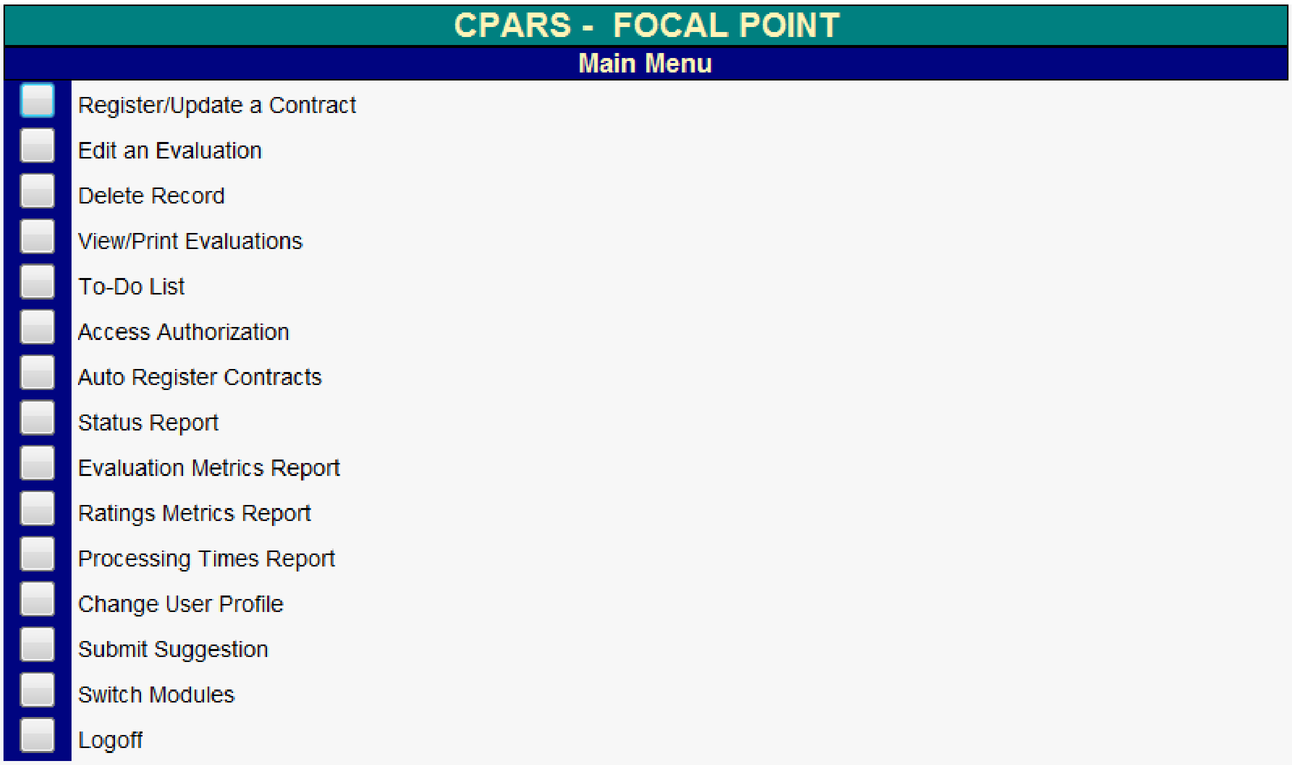
Click **Accept** and the Module Selection Menu will display. Click the **CPARS** button to continue in the CPARS module.



A list of all options available for a specified access level will appear on the user's Main Menu.

Focal Point

The Focal Point is responsible for the collection, distribution, and control of evaluations. Focal Points are key players in the success of the CPARS automated process. Focal Point access is granted only upon the completion of a signed Focal Point User Access Request Form available at **https://www.cpars.gov/accessforms/userforms.htm**. Focal Points coordinate CPARS access (create User IDs/passwords) for a specifically assigned area of responsibility. The Focal Point must be logged onto the correct module (CPARS or FAPIIS) in order to provide access to that module. The Focal Point is also authorized to register contracts/orders that will require a contractor performance evaluation. The Focal Point assists the Assessing Official in implementing the automated CPARS process by providing training and helping with administrative matters to ensure that evaluations are completed in a timely manner and are of high quality.



Register/Update a Contract: This option allows a Focal Point to manually input and update basic contract/order information into CPARS. The contract/order must be registered within 30 days after contract/order award. Registering and updating a contract/order are the only functions that the Focal Point may perform in the automated workflow process. To register or update a contract/order, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **and** the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Data Universal Numbering System (DUNS) or the DUNS +4 that is applicable to the contract/order to be registered. If the DUNS is unknown, click the **Company Name** drop-down box and select one of the options and enter the applicable company name information in the adjacent space. Click the **Continue with Contract Registration** button. If more than one DUNS number is found, a listing of DUNS numbers and associated company names and addresses will be displayed. Click the appropriate DUNS number to continue with the contract/order registration process. The Contract Registration data entry screen displays and will be pre-filled with the contractor's DUNS, name and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*). The blue question mark

(**?**) identifies that online help is available for the data entry field. The **green tabs** provide additional data entry boxes. Click each **green tab** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

NOTE: A contract/order only has to be registered one time.

To update a contract/order that has already been registered enter the contract number in the **Contract Number** box **and** the order number, if applicable, in the **Order Number** box. Click the **Continue** button; the Contract Registration data entry screen displays and will display the previously registered information. Click each **green tab** and update the contract/order registration fields accordingly. Once updated, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

To return to the Focal Point Main Menu, click the **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered.

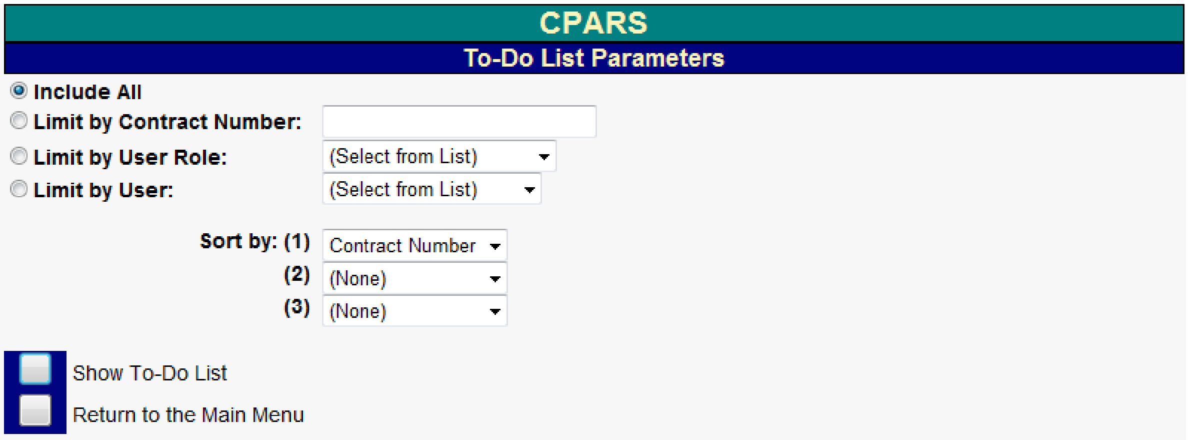
Edit an Evaluation: This option allows the Focal Point to change the Evaluation Type on an in-process or previously completed evaluation. To change the Evaluation Type on an in-process or previously completed evaluation, click the **Edit an Evaluation** button from the Main Menu. The Edit an Evaluation selection screen displays. Enter the contract number in the **Contract Number** box **and** the order number, if applicable, in the **Order Number** box. Click the **Continue** button. The Edit an Evaluation screen will display. Clicking on the Contract Number will display the evaluation. To cancel click **Return to the Main Menu.** To edit the evaluation, click **Edit** and the Edit Evaluation screen will display. Basic information is displayed to help the Focal Point choose the correct evaluation type. Select the correct Evaluation Type from the **Evaluation Type** drop-down. Click on Save Data. A popup will appear stating the evaluation has been saved. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

Delete Record: This option allows the Focal Point to delete registered contracts/orders and/or evaluations at the initiated or drafted status. To delete a registered contract/order or an in-process evaluation, click the **Delete Record** button. The Delete Record selection screen displays. The contracts/orders and evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Contract Confirmation screen will display. Verify the correct contract/order is about to be deleted from the CPARS database. If the contract/order was at registered status indicate if the contract/order should be available in auto-register after deletion. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete Record selection screen. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

NOTE: 1. If a registered contract/order is deleted, all access to the contract/order will be delete. 2. Contracts/orders that have evaluations that are rated, reviewed, finalized, or completed cannot be deleted from the CPARS database and will not appear on the Delete Record selection screen.

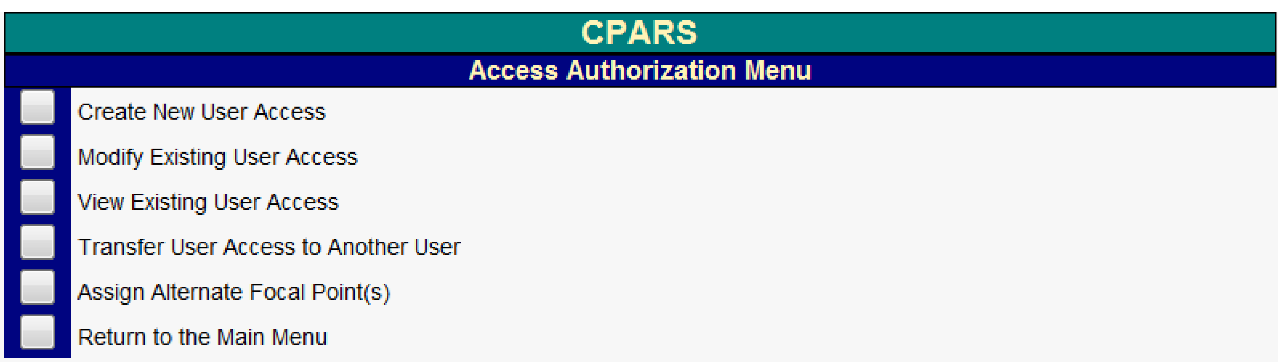
View/Print Evaluations: This option allows the Focal Point to view an evaluation in a read-only format. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button, a list of evaluations will display. Click on the contract number of the evaluation to be viewed, it will open in HTML format. Once the evaluation is displayed, the user is able to view and/or print the evaluation on a local printer. To return to the Focal Point Main Menu, click the **Close** button.

To-Do List: This option is a quick and efficient way for the Focal Point to monitor and check the status of pertinent evaluations in CPARS. Click the **To-Do List** button. A To-Do List Parameters screen displays. The Focal Point can select **Include All** to produce a list of all evaluations that have been started or are due to be started and require action within his/her area of responsibility. Select **Limit by Contract Number** and enter a contract number in the adjacent field to limit the list of evaluations to a specific contract. The Focal Point can also limit the To-Do List to a specific **User Role** or **User** by making the appropriate selections. Select the desired parameter and sort option(s), and then click the **Show To-Do List** button.

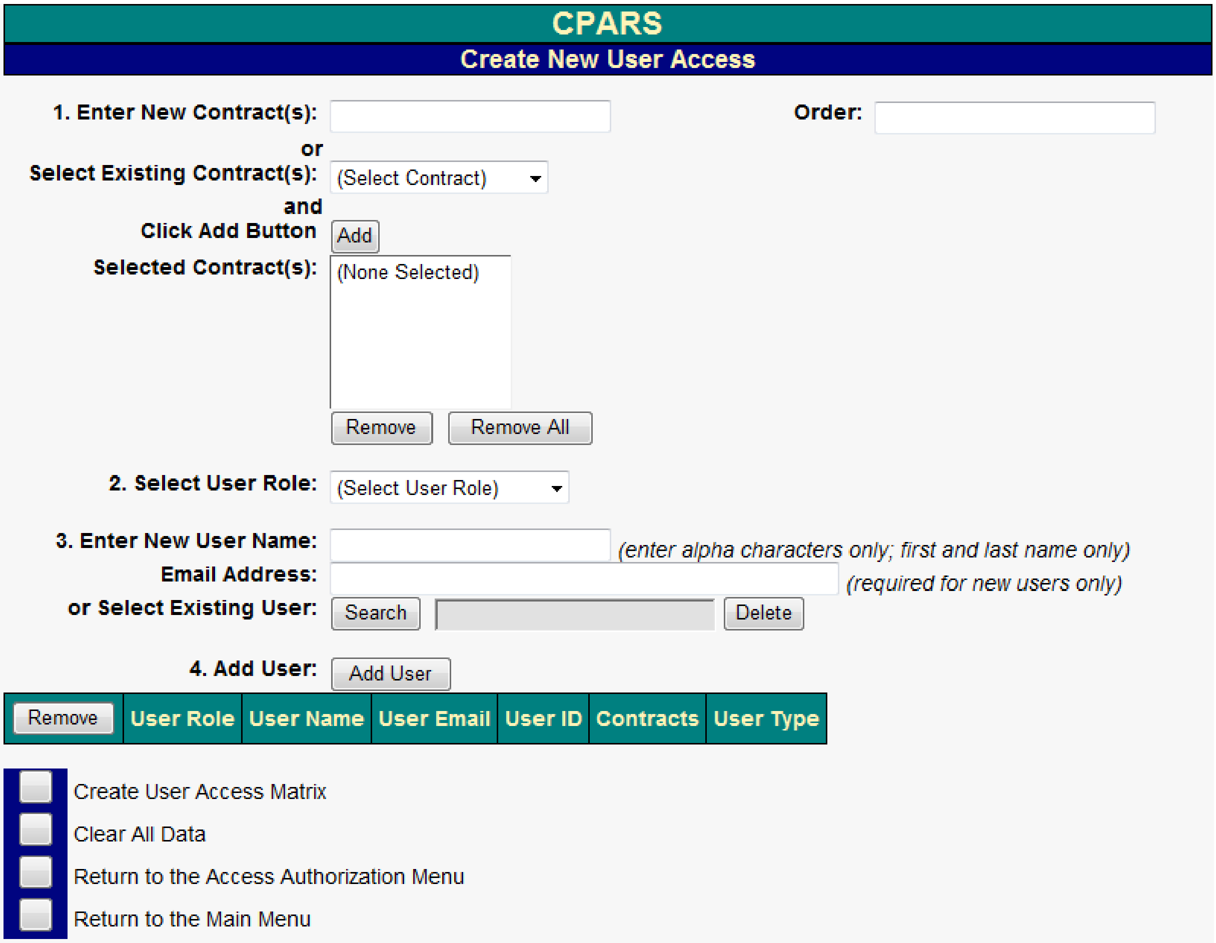


A list of evaluations will display based on the parameters selected by the Focal Point. The To-Do List identifies, for each evaluation, the DUNS, Period of Performance, User Role, the Action Required, the Assigned date, and the name of the individual responsible for completing the action. To return to the To-Do List Parameters screen, click the **Return to the To-Do List Parameters** button. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

Access Authorization: This option is used by Focal Points to provide access to CPARS, to modify existing user accounts, to view a list of existing users, to transfer access from one user to another, and to assign an Alternate Focal Point(s). To provide access to CPARS, the Focal Point must complete an Access Authorization Matrix (described below). An Access Authorization Matrix is required for all personnel involved in the automated workflow for the contracts/orders within the Focal Point's area of control. The “role” or level of access assigned to an individual is based on information that the Focal Point receives from project management teams (and the like) for the contracts/orders that require evaluating contractor performance.



Create New User Access: To create a new user account or to give an existing user access to a new contract/order number, click on the **Access Authorization** button located on the Focal Point Main Menu. Click **Create New User Access**. The Create New User Access screen displays.



In step 1, the Focal Point must enter the **Contract Number** and **Order Number**, if applicable, and then click the **Add** button for each contract/order number entered. If an incorrect contract/order number is entered after clicking **Add**, highlight the incorrect contract/order number and click on the **Remove** button. The **Remove All** button will remove all contracts/orders from the list.

NOTE: If the Focal Point has already registered or granted access to a contract/order, the contract/order can be selected from the **Select Existing Contract(s)** drop-down box.

In step 2, select the user role from the **Select User Role** drop-down box.

In step 3, the Focal Point can enter a **New User Name** (First Name and Last Name only) and **Email Address** (required for new users) or **Select Existing User**. To select an existing user, click the **Search** button and the Search for Existing Users window will display. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select Existing User** box. The **Delete** button removes the selected user name from the **Select Existing User** box.

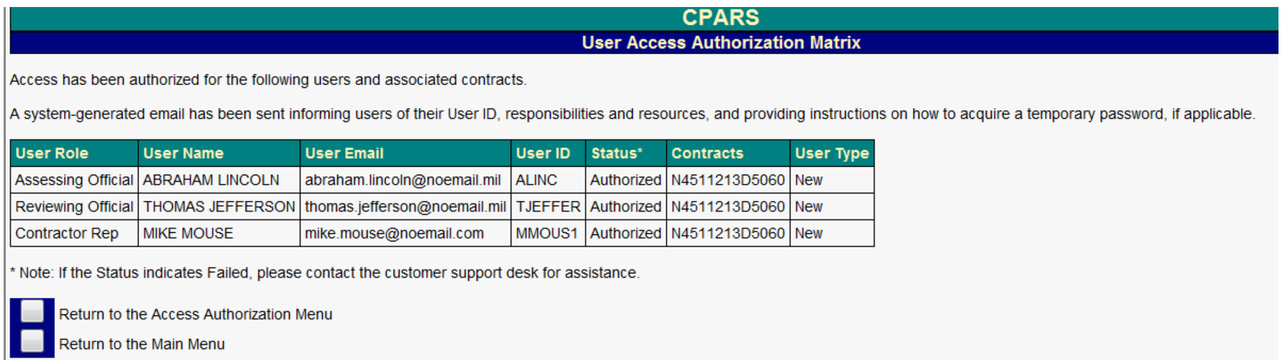
In step 4, click the **Add User** button after entering the information required in steps 1 through 3. The Focal Point can repeat steps 2 through 4 as necessary, to provide access to the contract/orders identified in step 1.

NOTE: If granting access to a Government only user access role (i.e. Assessing Official Rep, Assessing Official, or Reviewing Official) and the email address entered appears to be non-government, the Focal Point will receive a warning to check the entered information.

To remove a user(s) from the matrix, click the box(es) in the **Remove** column and then click the **Remove** button located in the left corner of the matrix. The **Clear All Data** button clears all data entered in the matrix.

NOTES: 1. Giving access at the basic contract level will not result in the user having access to all the delivery orders under the contract. Access must be given for each individual order if access to orders is required. 2. When an evaluation is archived the contract/order number is removed from the dropdown list and all access that was granted for that contract/order is removed. Should the evaluation need to be pulled back into production, the Focal Point will have to reassign users to the contract/order.

The Focal Point should review the information for accuracy. If all information is correct, click the **Create User Access Matrix** button. The completed User Access Authorization Matrix displays providing User Role, User Name, User Email, User ID, Status ("Authorized" indicates the access was created), Contracts/orders, and User Type. A system generated email will be sent to users when they are assigned to a workflow role to inform them of their User ID, temporary password procedures, responsibilities, and resources available. Click on **Return to the Access Authorization Menu** or **Return to the Main Menu**, as applicable.


CPARS

User Access Authorization Matrix

Access has been authorized for the following users and associated contracts.

A system-generated email has been sent informing users of their User ID, responsibilities and resources, and providing instructions on how to acquire a temporary password, if applicable.

User Role	User Name	User Email	User ID	Status*	Contracts	User Type
Assessing Official	ABRAHAM LINCOLN	abraham.lincoln@noemail.mil	ALINC	Authorized	N4511213D5060	New
Reviewing Official	THOMAS JEFFERSON	thomas.jefferson@noemail.mil	TJEFFER	Authorized	N4511213D5060	New
Contractor Rep	MIKE MOUSE	mike.mouse@noemail.com	MMOUS1	Authorized	N4511213D5060	New

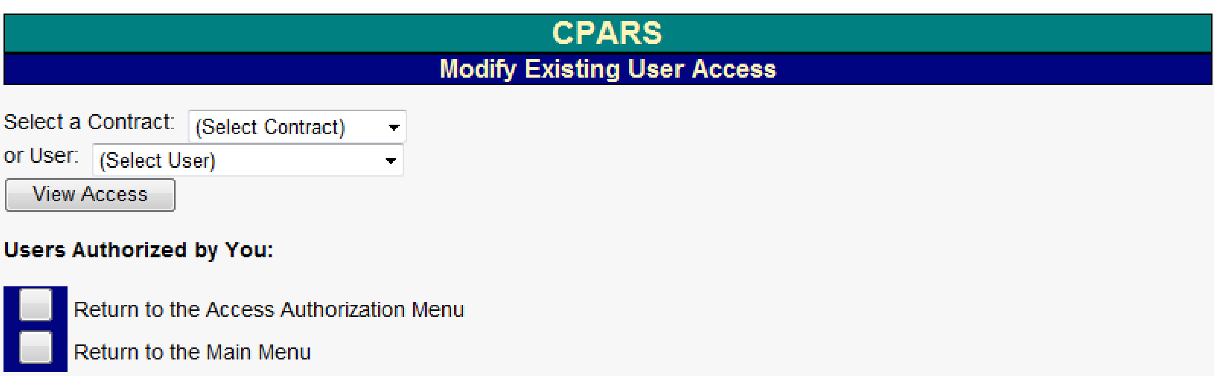
* Note: If the Status indicates Failed, please contact the customer support desk for assistance.

Return to the Access Authorization Menu

Return to the Main Menu

NOTE: If the Focal Point does not complete the workflow access role assignments there will be a system validation to notify the user that the CPAR cannot be sent to the next access level because the role has not been assigned by the Focal Point. This validation will apply for Assessing Official Rep to Assessing Official, Assessing Official to Assessing Official Rep, Assessing Official to Contractor Rep, Contractor Rep to Assessing Official, Assessing Official to Reviewing Official, and Reviewing Official to Assessing Official.

Modify Existing User Access: This option allows the Focal Point to change existing users' access level, to remove users' access to contracts/orders, to reset passwords, to update users' profile information, and to delete users from the CPARS application. To access the **Modify Existing User Access** option, click the **Access Authorization** button on the Focal Point Main Menu. Click **Modify Existing User Access.** The Modify Existing User Access Screen displays.


CPARS

Modify Existing User Access

Select a Contract: (Select Contract)

or User: (Select User)

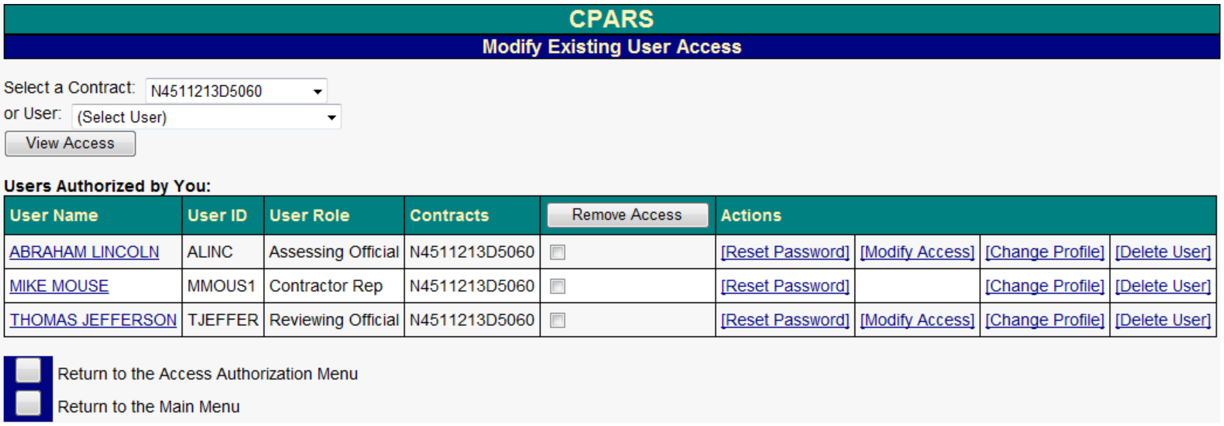
View Access

Users Authorized by You:

Return to the Access Authorization Menu

Return to the Main Menu

To modify existing user access by contract/order, click the **Select a Contract** drop-down box and all contracts/orders authorized by the Focal Point will display. Select the desired contract/order and click the **View Access** button. The Users Authorized by You matrix displays.



A list of all users who have been given access to the specific contract/order will display and the Focal Point can then choose to Remove Access, Reset Password, Modify Access, Change Profile, or Delete User as required.

User Name – Clicking on the user's name allows the Focal Point to view the user's profile information including User ID, name, title, organization, address, email, and phone number.

Remove Access – This option allows the Focal Point to remove user access to the contract/order that was selected from the drop-down. Once the appropriate users have been checked for removal the Focal Point then clicks the **Remove Access** button. A popup will appear asking: "Are you sure you want to remove the selected access?" Click **OK** to continue removing the user(s) access or **Cancel** to return to the list of users. If OK is selected a popup will display indicating that access was removed, click **OK**. The list of users will automatically refresh to exclude the removed user(s).

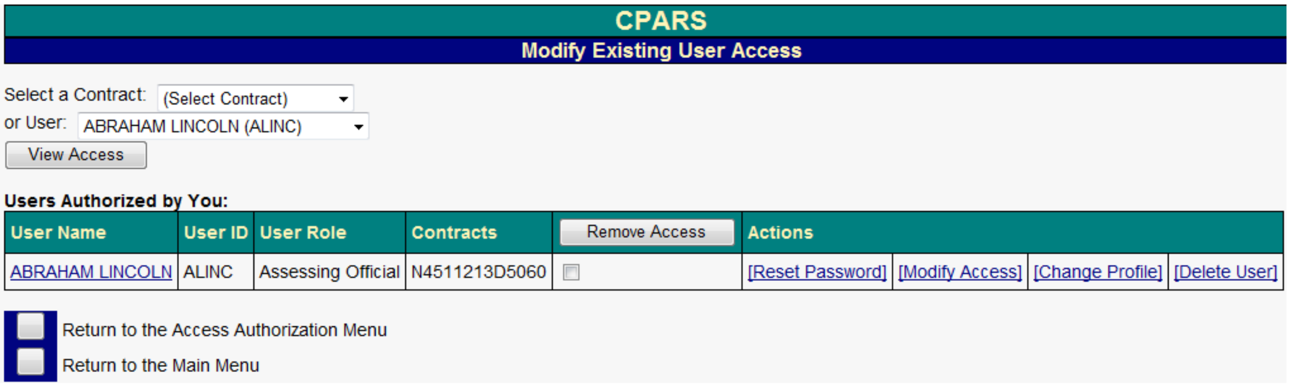
[Reset Password] – This option allows the Focal Point to reset a user's password. Click **[Reset Password]** and the Confirm Password Change pop-up box will display and includes a new temporary, system-generated password. The Focal Point must click the **Submit** button to confirm and establish the new password in CPARS. It is the Focal Point's responsibility to convey the new temporary password to the user. Click the **OK** button and a pop-up message "Password has been reset" displays.

[Modify Access] – Clicking on this option allows the Focal Point to modify the existing user's role. Click **[Modify Access]** and the Modify Existing User Access view displays. Select the current contract(s)/orders(s) from the **Current Contract(s)** box and click **Add** or **Add All** to move to the **Selected Contract(s)** box. Select the new user role from the **New User Role** drop-down box and click the **Modify User Access** button.

[Change Profile] - Clicking on this option allows the Focal Point to update the user's profile information including name, organization, title, address, email, and phone number.

[Delete User] – Clicking on this option allows the Focal Point to completely delete a user from the CPARS database.

To modify an existing user's access by user name, click the **User** drop-down box and all user names that have been authorized access to CPARS by the Focal Point will display. Select the desired user name and click the **View Access** button. The Users Authorized by You matrix displays.



A list of all access levels and the specific contracts/orders they have been given access to will display and the Focal Point can then choose to, Remove Access, Reset Password, Modify Access, Change Profile, or Delete User as required.

User Name – Clicking on the user's name allows the Focal Point to view the user's profile information including User ID, name, title, organization, address, email, and phone number.

Remove Access – This option allows the Focal Point to remove access to one or more contracts/orders for the user that was selected from the drop-down. Once the appropriate contracts/orders have been checked for removal the Focal Point then clicks the **Remove Access** button. A popup will appear asking: "Are you sure you want to remove the selected access?" Click **OK** to continue removing the user(s) access or **Cancel** to return to the list of users. If OK is selected a popup will display indicating that access was removed, click **OK**. The list of users will automatically refresh to exclude the removed user(s).

[Reset Password] – This option allows the Focal Point to reset a user's password. Click **[Reset Password]** and the Confirm Password Change pop-up box will display and includes a new temporary, system-generated password. The Focal Point must click the **Submit** button to confirm and establish the new password in CPARS. It is the Focal Point's responsibility to convey the new temporary password to the user. Click the **OK** button and a pop-up message "Password has been reset" displays.

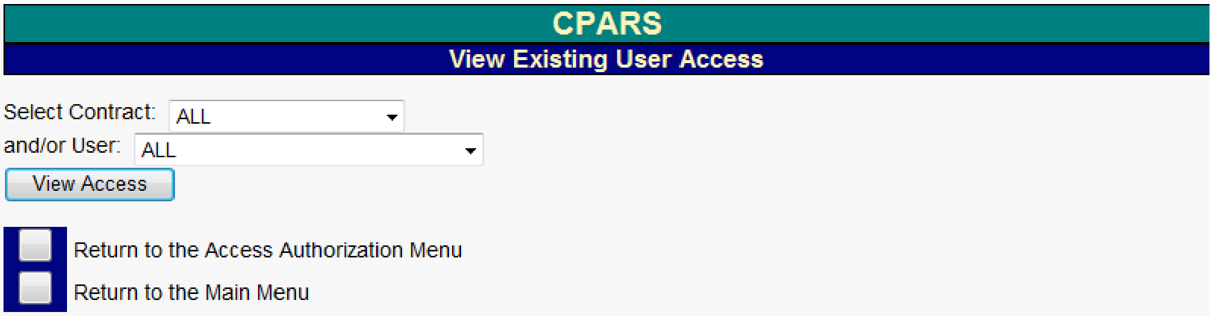
[Modify Access] – Clicking on this option allows the Focal Point to modify the existing user's role. Click **[Modify Access]** and the Modify Existing User Access view displays. Select the current contract(s)/order(s) from the **Current Contract(s)** box and click **Add** or **Add All** to move to the **Selected Contract(s)** box. Select the new user role from the **New User Role** drop-down box and click the **Modify User Access** button.

[Change Profile] - Clicking on this option allows the Focal Point to update the user's profile information including name, organization, title, address, email, and phone number.

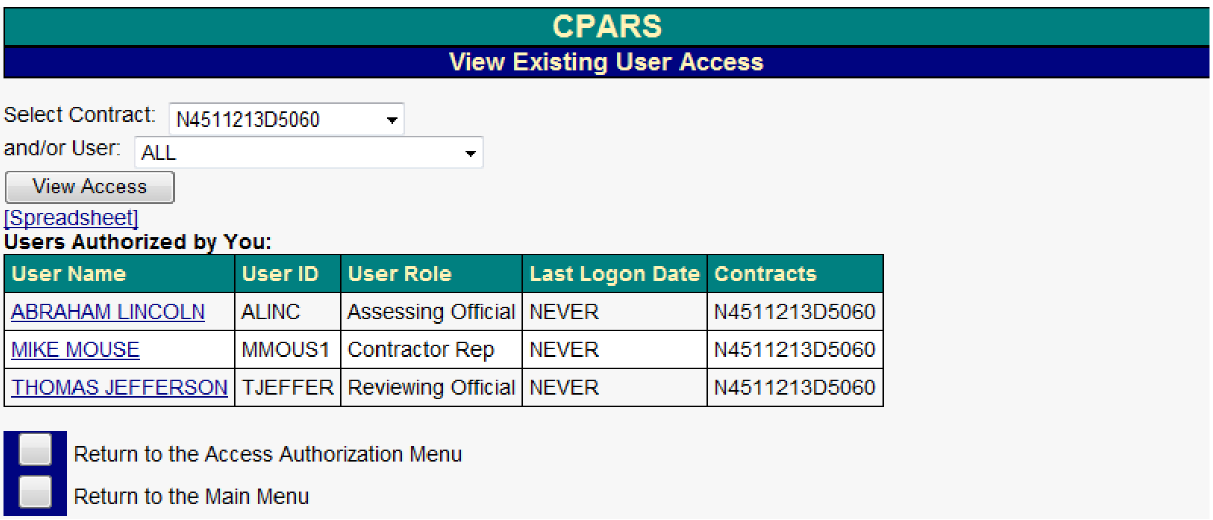
[Delete User] – Clicking on this option allows the Focal Point to completely delete a user from the CPARS database.

Return to the Access Authorization Menu button allows the Focal Point to continue with other access authorization options. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

View Existing User Access: This option produces a list of user names that have been authorized access to CPARS by the Focal Point. To access the **View Existing User Access** option, click the **Access Authorization** button on the Focal Point Main Menu. Click **View Existing User Access**. The View Existing User Access screen displays.

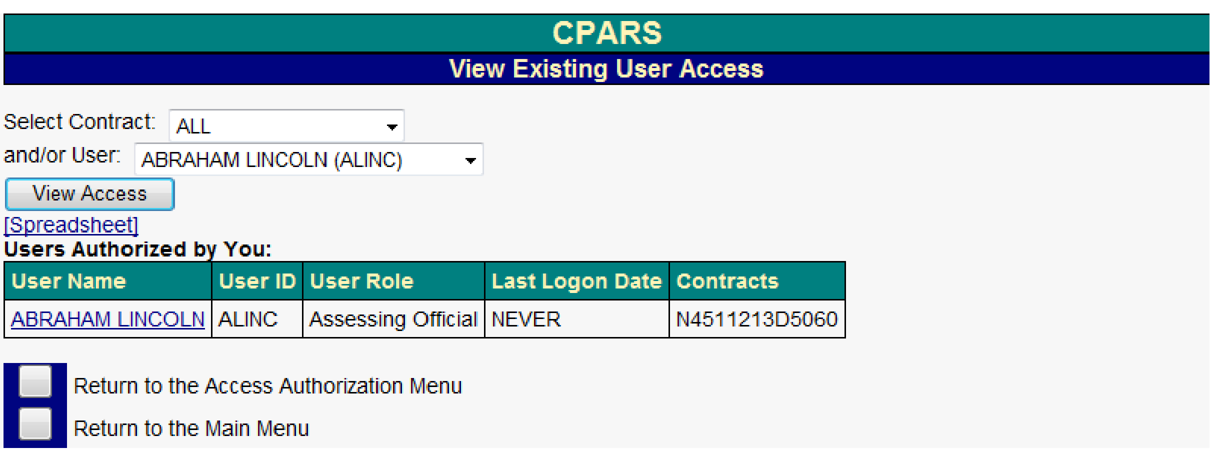


To **View Existing User Access** by contract/order, click the **Contract** drop-down box and all contracts/orders authorized by the Focal Point will display. Select the desired contract number and then click the **View Access** button. A list of users who have been given access to the specified contract/order will display. The User Name, User ID, User Role, and Last Logon Date are also provided. If the Focal Point would like to view the User's profile information, click on the User's Name and the User ID, name, title, organization, address, email, and phone number will display. The [Spreadsheet] function will export the data columns displayed, into a Microsoft Excel Spreadsheet.



User Name	User ID	User Role	Last Logon Date	Contracts
ABRAHAM LINCOLN	ALINC	Assessing Official	NEVER	N4511213D5060
MIKE MOUSE	MMOUS1	Contractor Rep	NEVER	N4511213D5060
THOMAS JEFFERSON	TJEFFER	Reviewing Official	NEVER	N4511213D5060

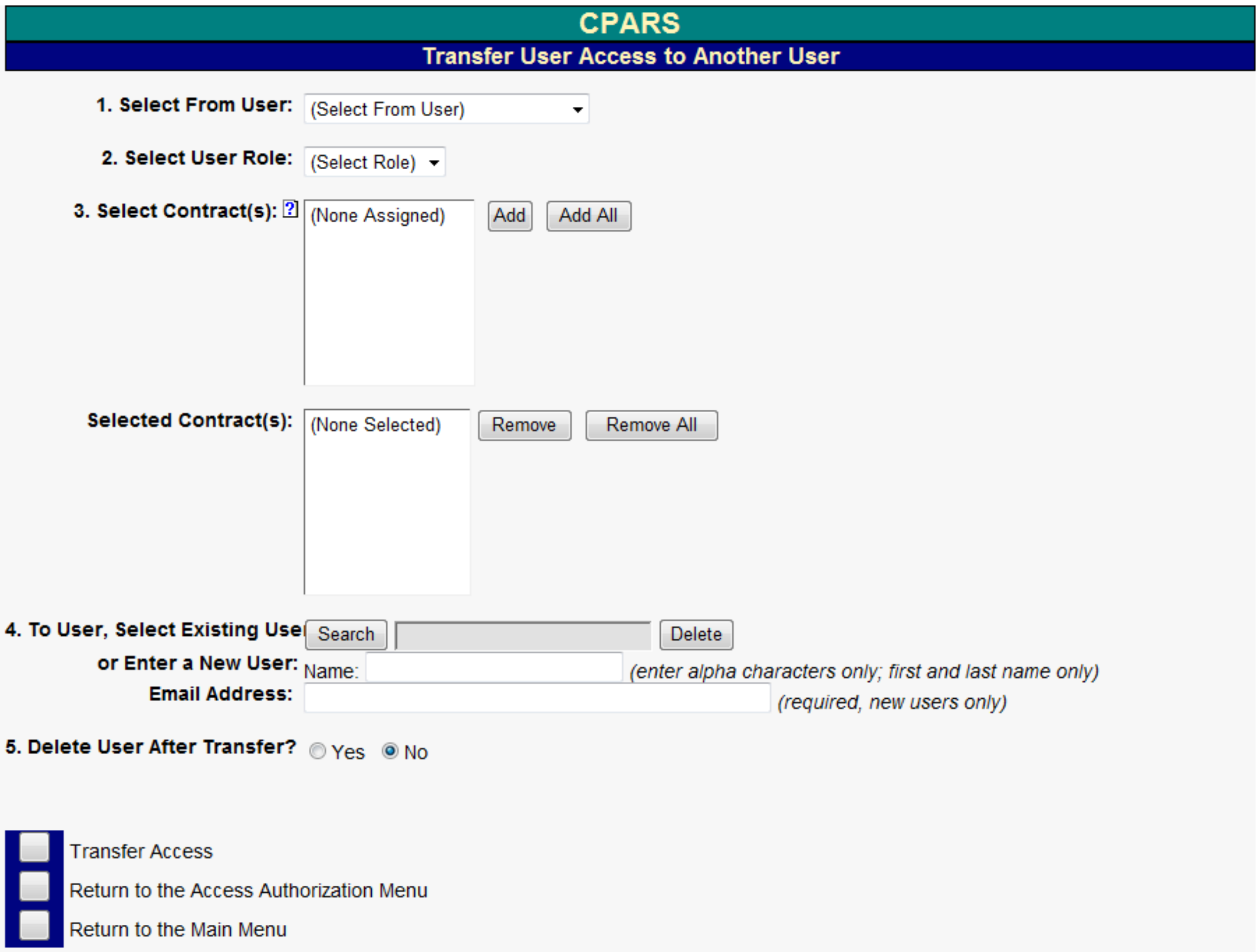
To View Existing User Access by user, click the **User** drop-down box and all users authorized by the Focal Point will display. Select the desired user name and click the **View Access** button. A list of contracts/orders that the user has been given access to, will display. The User Name, User ID, User Role, and Last Logon Date are also provided. If the Focal Point would like to view the User's profile information, click on the User's Name and the User ID, name, title, organization, address, email, and phone number will display.



User Name	User ID	User Role	Last Logon Date	Contracts
ABRAHAM LINCOLN	ALINC	Assessing Official	NEVER	N4511213D5060

Return to the Access Authorization Menu button allows the Focal Point to continue other access authorization options. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

Transfer User Access to Another User: This option allows the Focal Point to transfer CPARS access from one user to another user when needed. This function is particularly useful when individuals are reassigned and no longer involved with initiating or completing evaluations. To transfer user access to another user, click the **Access Authorization** button from the Focal Point Main Menu. Click **Transfer User Access to Another User.** The CPARS Transfer User Access to Another User screen will display.



In Step 1, select a user name from the **Select From User** drop-down box.
In Step 2, select the user role from the **Select User Role** drop-down box.

In Step 3, select the specific contract(s)/order(s) to be transferred from the **Select Contract(s)** box. Multiple contracts/orders can be selected by holding the CTRL key and clicking each contract to be transferred. To select multiple contracts that are adjacent, click on the first contract, hold the SHIFT key, and then click on the last contract to be transferred. Once contracts/orders are selected click **Add** or select **Add All** to transfer all contracts/orders. If an incorrect contract/order is selected after clicking **Add**, highlight the incorrect contract/order in the **Selected Contract(s)** box and click on the **Remove** button. The **Remove All** button will remove all contracts/orders from the **Selected Contract(s)** box.

In Step 4, the Focal Point will identify the transfer "To User". To select a user who already has access to CPARS, click the **Search** button and the Search for Existing Users window displays. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select Existing User** box. The **Delete** button removes the selected user name from the **Select**

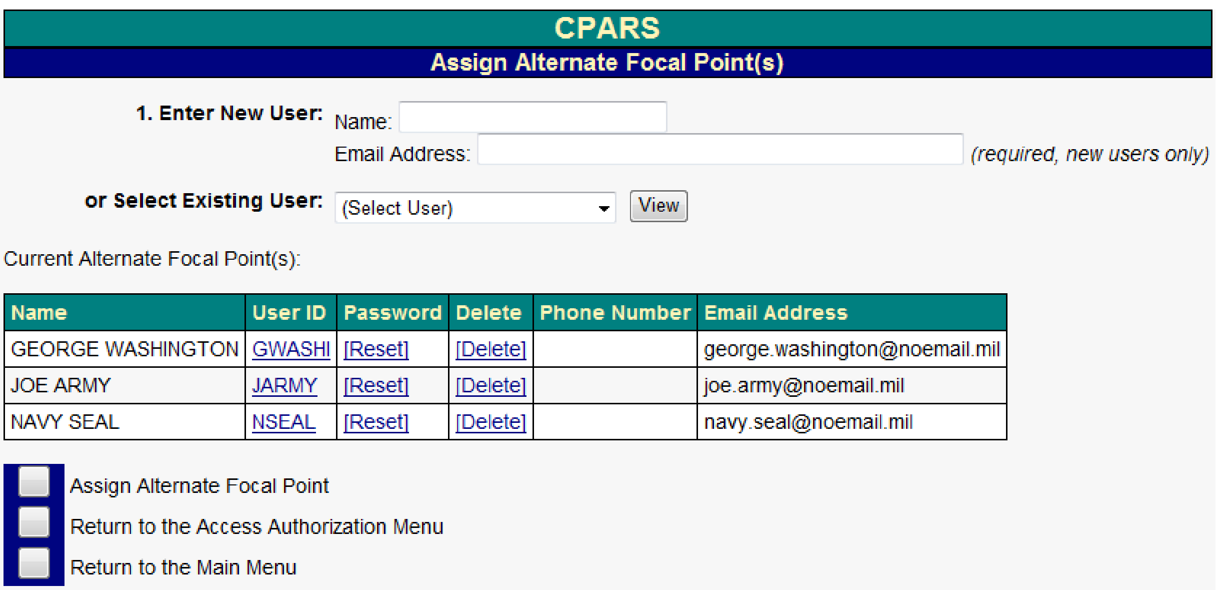
Existing User box. If the “To User” is not an existing user, enter the Name (first and last name only) and Email address of the new user in the spaces provided.

In Step 5, the Focal Point can choose to **Delete User After Transfer**. This action will delete the user from the CPARS database when the Focal Point clicks on the **Transfer Access** button, as long as no other Focal Points have assigned access to that user. Click the **Transfer Access** button to complete the transfer process.

Return to the Access Authorization Menu allows the Focal Point to continue with other access authorization options. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

NOTE: When transferring to a **New User**, CPARS will assign/identify the new user’s User ID. A system generated email will be sent to the user when he/she is assigned to a workflow role to inform the user of their User ID, temporary password procedures, responsibilities, and resources available.

<u>Assign Alternate Focal Point(s):</u> This option allows the Focal Point to assign up to five individuals as an Alternate Focal Point. An Alternate Focal Point has the very same privileges as the Primary Focal Point (except they cannot authorize an Alternate Focal Point from their account). The Primary and Alternate Focal Points are allowed to work in CPARS at the same time to create/manage user accounts and to run reports, etc. To assign an Alternate Focal Point, click the **Access Authorization** button from the Focal Point Main Menu. Click **Assign Alternate Focal Point(s).** The Assign Alternate Focal Point(s) screen displays.


CPARS
Assign Alternate Focal Point(s)

1. Enter New User: Name:
Email Address: (required, new users only)

or Select Existing User: (Select User) View

Current Alternate Focal Point(s):

Name	User ID	Password	Delete	Phone Number	Email Address
GEORGE WASHINGTON	GWASHI	[Reset]	[Delete]		george.washington@noemail.mil
JOE ARMY	JARMY	[Reset]	[Delete]		joe.army@noemail.mil
NAVY SEAL	NSEAL	[Reset]	[Delete]		navy.seal@noemail.mil

Assign Alternate Focal Point
Return to the Access Authorization Menu
Return to the Main Menu

The Focal Point must identify the designated Alternate Focal Point by entering a name (First Name and Last Name only) in the **Enter New User Name** box and an email address in the **Email Address** box, or by selecting an existing user from the **Select Existing User** drop-down box. The drop-down box includes a list of existing users that have been given access to CPARS by the Focal Point. The adjacent **View** button allows the Focal Point to view the existing user’s profile information, including User ID, name, title, organization, address, email, and phone number. Once a new name is entered or an existing user selected, click the **Assign Alternate Focal Point** button.

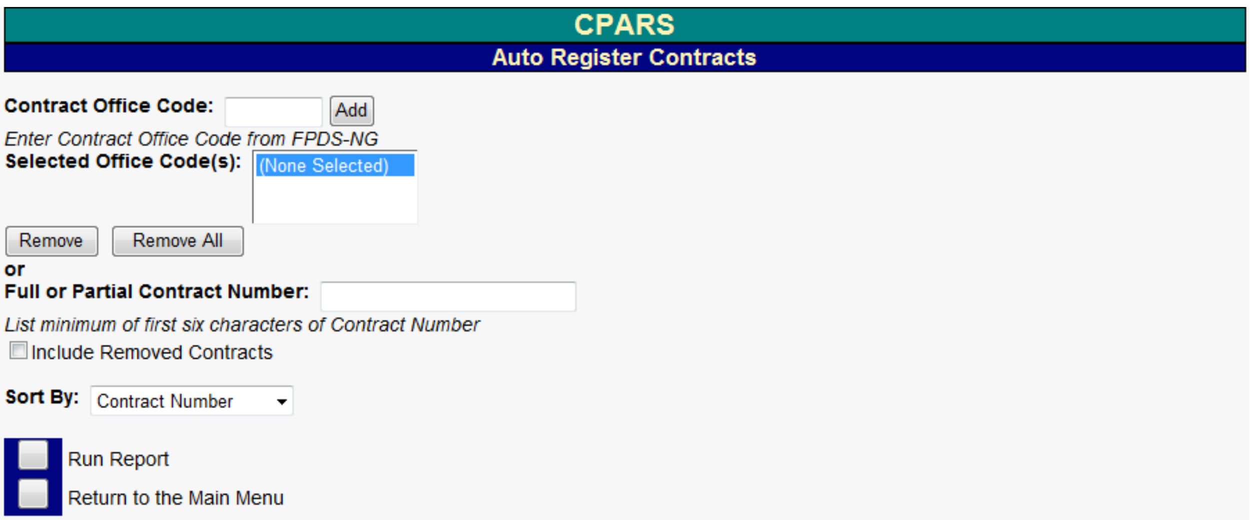
To delete an Alternate Focal Point, click the **[Delete]** option. To reset the Alternate Focal Point's password, click on the **[Reset]** button.

Return to the Access Authorization Menu button allows the Focal Point to continue other access authorization options. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

NOTE: When the Alternate Focal Point is a **New User**, CPARS will assign/identify the new user's User ID. A system generated email will be sent to user when he/she is assigned as an Alternate Focal Point to inform them of their User ID, temporary password procedures, responsibilities, and resources available.

Auto Register Contracts: This feature provides Focal Points the ability to produce and review a list of CPARS-eligible contracts/orders. From the list of eligible contracts/orders, the Focal Point is able to quickly auto-register individual contracts/orders in CPARS. Registering contracts/orders in CPARS is the process of entering basic contract award data and is required prior to initiating a CPAR. In February 2007, CPARS established an interface with FPDS-NG. This daily data feed is the basis for the Auto Register Contracts feature. The most recent three years of contract/order award information is available. Click the **Auto Register Contracts** button. The Auto Register Contracts screen will display.

Focal Points are allowed to query for CPARS-eligible contracts/orders by entering at least one Contract Office Code or by entering the full or partial contract number. Contracts/orders previously removed from the CPARS-eligible list can be viewed and auto-registered by checking the box **Include Removed Contracts**. The Auto Register Report may also be sorted by up to seven sort options. Select the desired option from the **Sort By** drop-down box.

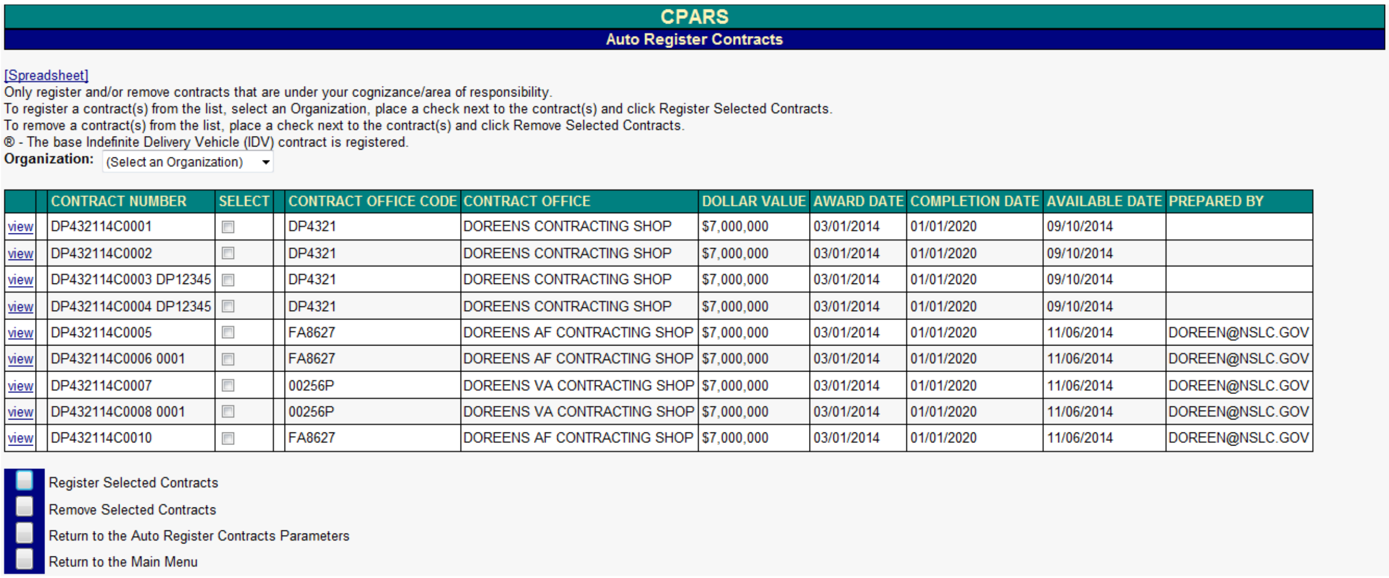


Contract Office Code: To ensure that Focal Points are searching for contracts/orders in Auto Register belonging to them, search by the Contract Office Code. The Contract Office Code is a required field when processing data in FPDS-NG. If Focal Points are unaware of their Contract Office Code, contact their FPDS-NG administrator. Running this query will produce a list of CPARS-eligible contracts/orders that have been sent to FPDS-NG by the applicable Contracting Office(s).

NOTE: Particular care should be taken when registering contracts/orders, as the Focal Point then assumes ownership and responsibility for that contract/order and makes that contract/order inaccessible to other Focal Points.

Full or Partial Contract Number: Focal Points should use this option when searching CPARS for a specific contract/order number or to produce a specific list of CPARS-eligible contracts/orders. For example, if a Focal Point would like to produce a list of CPARS-eligible contracts/orders that begin with DP43211, he/she would enter the value of DP43211.

Auto Register Contracts CPARS-Eligible List Screen: Queries run in the previous parameters screen will result in a list of contracts/orders that are eligible for reporting. The CPARS-eligible list is filtered by Business Sector and applicable minimum dollar threshold. Contracts/orders not meeting the established minimum dollar threshold for CPARS reporting will not be displayed. To register these, use the manual **Register a Contract** button from the Focal Point Main Menu screen. Also, contracts/orders that have already been registered in CPARS will not be displayed. If the base Indefinite Delivery Vehicle (IDV) has been registered in CPARS a ® symbol will be shown next to any task orders for that contract. **Contract Office Code** and **Contract Office** identify the Contracting Office that placed the contract/order. **Dollar Value** is the aggregate value of the base and all options under the contract/order and is used to determine if the contract/order exceeds the minimum reporting dollar thresholds. **Award Date** indicates the date the contract/order was awarded. **Completion Date** indicates the end date of the contract/order. **Available Date** indicates the date that the contract/order became available in Auto Register. **Prepared by** indicates the FPDS-NG user id of the person who prepared the contract action report in FPDS-NG.



CPARS

Auto Register Contracts

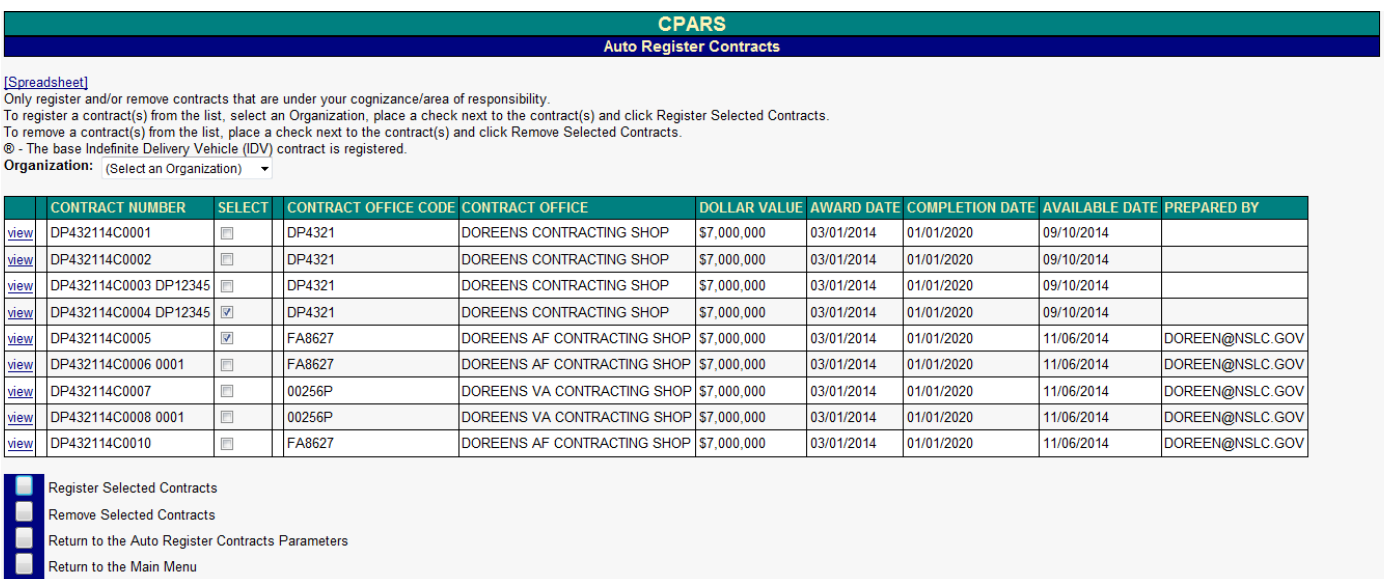
[Spreadsheet]
Only register and/or remove contracts that are under your cognizance/area of responsibility.
To register a contract(s) from the list, select an Organization, place a check next to the contract(s) and click Register Selected Contracts.
To remove a contract(s) from the list, place a check next to the contract(s) and click Remove Selected Contracts.
® - The base Indefinite Delivery Vehicle (IDV) contract is registered.
Organization: (Select an Organization)

	CONTRACT NUMBER	SELECT	CONTRACT OFFICE CODE	CONTRACT OFFICE	DOLLAR VALUE	AWARD DATE	COMPLETION DATE	AVAILABLE DATE	PREPARED BY
view	DP432114C0001	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0002	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0003 DP12345	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0004 DP12345	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0005	☐	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0006 0001	☐	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0007	☐	00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0008 0001	☐	00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0010	☐	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV

Register Selected Contracts
Remove Selected Contracts
Return to the Auto Register Contracts Parameters
Return to the Main Menu

<u>Auto Register Contracts:</u> The Focal Point should review the data and select the appropriate **Organization** from the drop-down list. The Organization identifies the organization responsible for CPARS reporting and is specific to the Focal Point. For example, a Navy Focal Point will see the Navy Systems Commands, while a Department of Energy Focal Point will see their organizations. Clicking **view** adjacent to a contract/order number will display the contract award data.

Check the applicable contracts/orders to be registered in the column labeled **Select**.



CPARS

Auto Register Contracts

[Spreadsheet]
Only register and/or remove contracts that are under your cognizance/area of responsibility.
To register a contract(s) from the list, select an Organization, place a check next to the contract(s) and click Register Selected Contracts.
To remove a contract(s) from the list, place a check next to the contract(s) and click Remove Selected Contracts.
® - The base Indefinite Delivery Vehicle (IDV) contract is registered.
Organization: (Select an Organization)

	CONTRACT NUMBER	SELECT	CONTRACT OFFICE CODE	CONTRACT OFFICE	DOLLAR VALUE	AWARD DATE	COMPLETION DATE	AVAILABLE DATE	PREPARED BY
view	DP432114C0001	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0002	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0003 DP12345	☐	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0004 DP12345	☑	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014	
view	DP432114C0005	☑	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0006 0001	☐	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0007	☐	00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0008 0001	☐	00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV
view	DP432114C0010	☐	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV

Register Selected Contracts
Remove Selected Contracts
Return to the Auto Register Contracts Parameters
Return to the Main Menu

Once the appropriate contracts/orders have been checked for registration, the Focal Point then clicks the **Register Selected Contracts** button. A popup will appear asking you: "Are you sure you want to register the selected contract(s)?" After selecting the **OK** button on the popup, the list of contracts/orders will automatically refresh to exclude the contract(s)/orders(s) that were registered and another popup will appear stating how many contract(s) were registered.

NOTES: 1.Contracting Officer Name and Email data is only available for Army and US Army Corps of Engineers contracts/orders and/or for any other Service/Agency adopting the use of Army Contracting Business Intelligence System (ACBIS). 2. When the contract/order is auto registered, the Contracting Officer name is pre-populated if available. 3. Dollar values for contract/order actions with multiple Contract Action Reports are aggregated in auto register.

Once the Focal Point obtains the list of contract(s)/order(s) available for Auto Registration and the Focal Point desires to have one or more contract(s)/orders(s) removed from this list, the Focal Point checks the contract(s)/order(s) slated for removal from the column labeled **Select**. Once the appropriate contract(s)/order(s) have been checked for removal the Focal Point then clicks the **Remove Selected Contracts** button. A popup will appear asking you: "Are you sure you want to remove the selected contract(s)?" After selecting the **OK** button on the popup, the list of contract(s)/order(s) will automatically refresh to exclude the contract(s)/order(s) that were removed and another popup will appear stating how many contract(s) were removed.

NOTE: This does not delete the data or absolve the Focal Point of reporting responsibility. This feature could be useful in the example of a contract with several orders. The Focal Point could choose to report on the base contract and remove the individual orders from the list. Contracts/orders that are removed from the list can be viewed and registered by checking the **Include Removed Contracts** box on the parameters screen. **Particular care should be taken when removing contracts/orders as this removes visibility on these contracts/orders for all Focal Points.**

To return to the Auto Register Contracts Parameters screen, click the **Return to the Auto Register Contracts Parameters** button. The **Return to the Main Menu** button returns the user to the Focal Point Main Menu.

NOTE: The remaining Focal Point Main Menu options are also applicable at various CPARS access levels. As such, each option is described in more detail in later and separate sections of this user manual. Please refer to the Table of Contents to locate and obtain additional information on the following menu options listed below.

Status Report: This option allows the Focal Point to monitor the status of contracts and evaluations that have been started or completed for each contract/order under the Focal Point's cognizance. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Focal Point read-only access to each. **(See Status Report Section for more specific information)**

Evaluation Metrics Report: This option allows the Focal Point to run a report that identifies the number of contracts that are registered, evaluations in process, and evaluations completed for the Agency/DoD Service. This list displays the Agency and is broken down at the Organization level. **(See Evaluation Metrics Report Section for more specific information)**

Ratings Metrics Report: This option allows the Focal Point to run a report that will identify the distribution of ratings for all completed evaluations under the Focal Point's cognizance. The report can be qualified by date or Organization. **(See Ratings Metrics Report Section for more specific information)**

Processing Times Report: This option allows the Focal Point to monitor the processing times for all evaluations under the Focal Point's cognizance. For example, this report will identify the number of evaluations completed for a specific month and how many were completed within the 120-day objective. **(See Processing Times Report Section for more specific information)**

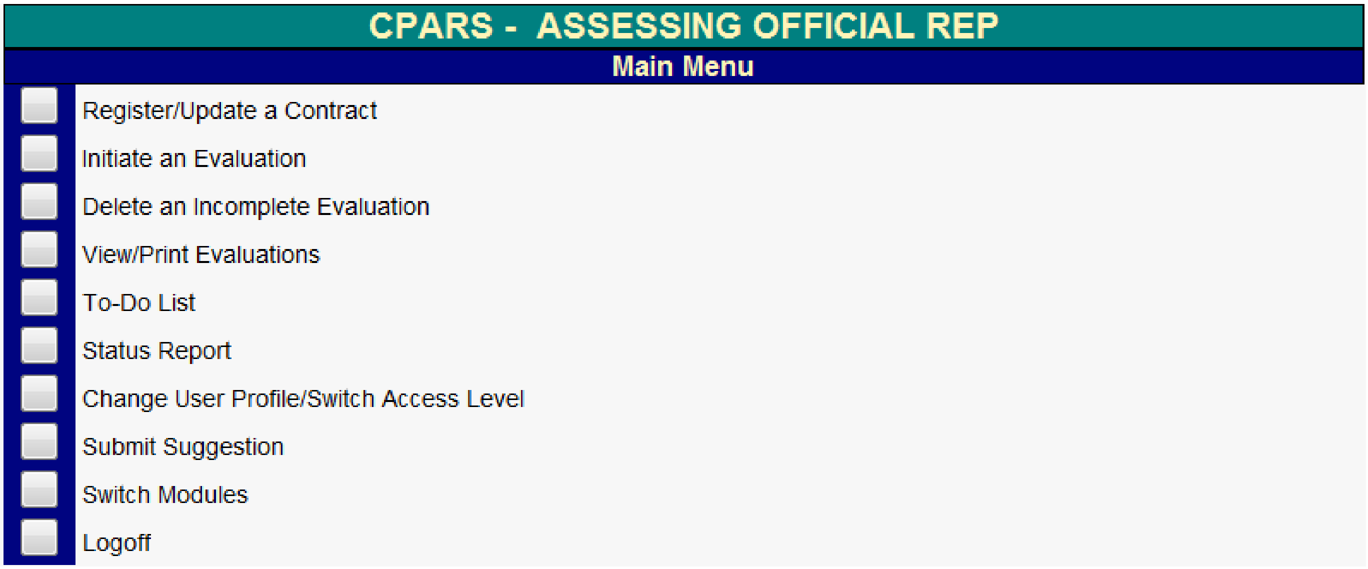
Change User Profile: This option must be used whenever a user's name, email address, address, or phone number changes. Focal Points can also use this option to update the Organization(s) which they have cognizance over. This option also allows users to select additional, optional email notifications and to change their password. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Assessing Official Representative

An Assessing Official Representative has the authority to initiate and update evaluations, but **does not** have the authority to send the evaluation to the Contractor Representative or to finalize an evaluation.



<u>Register/Update a Contract:</u> This option allows an Assessing Official Representative to manually input basic contract/order information into CPARS. The contract/order must be registered within 30 days after contract/order award. To register or update a contract/order, click on **Register/Update a Contract** from the Main Menu. The Register/Update a Contract data entry screen will display.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **<u>and</u>** the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Data Universal Numbering System (DUNS) or the DUNS +4 that is applicable to the contract/order to be registered. If the DUNS is unknown, click the **Company Name** drop-down box and select one of the options and enter the applicable company name information in the adjacent space. Click the **Continue with Contract Registration** button. If more than one DUNS number is found, a listing of DUNS numbers and associated company names and addresses will be displayed. Click the appropriate DUNS to continue with the contract/order registration process. The Contract Registration data entry screen displays and will be pre-filled with the contractor's DUNS, name and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*****). The blue question mark (**?**) identifies that online help is available for the data entry field. The **green tabs** provide additional data entry boxes. Click each **green tab** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

NOTE: A contract/order only has to be registered one time.

To update a contract/order that has already been registered enter the contract number in the **Contract Number** box **<u>and</u>** the order number, if applicable, in the **Order Number** box and click the **Continue** button. The Contract Registration data entry screen displays and will display the previously registered information. Click each **green tab** and update the contract/order registration fields accordingly. Once updated, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

To return to the Assessing Official Representative Main Menu, click the **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered.

Initiate an Evaluation: This option allows the Assessing Official Representative to initiate the evaluation process by entering proposed ratings and narratives. To initiate an evaluation, click on the **Initiate an Evaluation** button from the Main Menu. The Initiate an Evaluation data entry screen will display. When the evaluation is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. If the evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **and** the order number in the **Order Number** box and click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract/order information and any miscellaneous information entered during contract/order registration.

NOTE: The contract/order must be registered before an evaluation can be initiated. The **green tabs** provide additional data entry fields. Click each **green tab** to complete the Initiate an Evaluation process.

The evaluation data entry screens identify required fields with a red asterisk (*). However, the Assessing Official Representative is allowed to save a partially completed evaluation without addressing all the required fields. Clicking the **Save Data** button will save the partially completed evaluation.

NOTE: Report Type and **Period of Performance** must be filled in to save a partially completed evaluation. When the Assessing Official Representative is ready to continue working on the evaluation, simply Logon to CPARS, click on the **To-Do List** (see below) and click on the contract/order number of the evaluation to be completed. The evaluation that was previously initiated and saved will be displayed for additional data entry.

Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field. A red checkmark located within any of the **green rating tabs** indicates at least one element has been rated for the specific performance area.

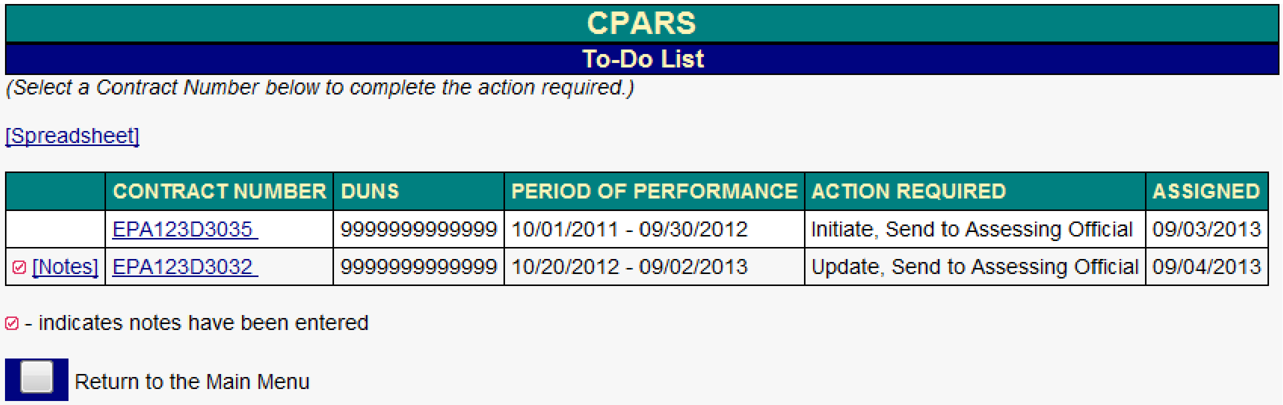
Delete an Incomplete Evaluation: This option allows the Assessing Official Representative to delete an evaluation that has been initiated, but not yet sent to the Assessing Official. To delete an incomplete evaluation, click on the **Delete an Incomplete Evaluation** button from the Main Menu. The Delete an Incomplete Evaluation selection screen displays. The evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Evaluation Confirmation screen will display. Verify the correct evaluation is about to be deleted from the CPARS database. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete an Incomplete Evaluation selection screen. The **Return to the Main Menu** button returns the user to the Assessing Official Representative Main Menu.

View/Print Evaluations: This option allows the Assessing Official Representative to view an evaluation in a read-only format. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button, a list of evaluations will display. Click on the contract number of the evaluation to be viewed, it will open in HTML format. Once the evaluation is displayed, the user is able to view and/or print the evaluation on a local printer. The **Return to the Main Menu** button returns the user to the Assessing Official Representative Main Menu.

To-Do List: This option is a quick and easy method for the Assessing Official Representative to see all evaluations that are awaiting his/her action. Click the **To-Do List** button from the Main Menu. If the Assessing Official Representative has any actions, a list of contract numbers will display. The list includes evaluations that are due to be initiated for the first time, have been started and saved by an Assessing Official Representative, and those that have been returned by the Assessing Official. Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official Representative to complete the required action. Each of the Assessing Official Representative's **Actions Required** from the To-Do List are described in further detail below.

Action Required: “Initiate, Send to Assessing Official”: This option allows the Assessing Official Representative to initiate evaluations that are due to be started and have not been previously initiated by an Assessing Official Representative. The evaluation shown below in the Assessing Officials To-Do List requires the Assessing Official’s action to **Initiate, Send to Assessing Official**.

Action Required: “Update, Send to Assessing Official”: This option allows the Assessing Official Representative to review and process evaluations that have been previously initiated by an Assessing Official Representative or returned by the Assessing Official.


CPARS

To-Do List

(Select a Contract Number below to complete the action required.)

[Spreadsheet]

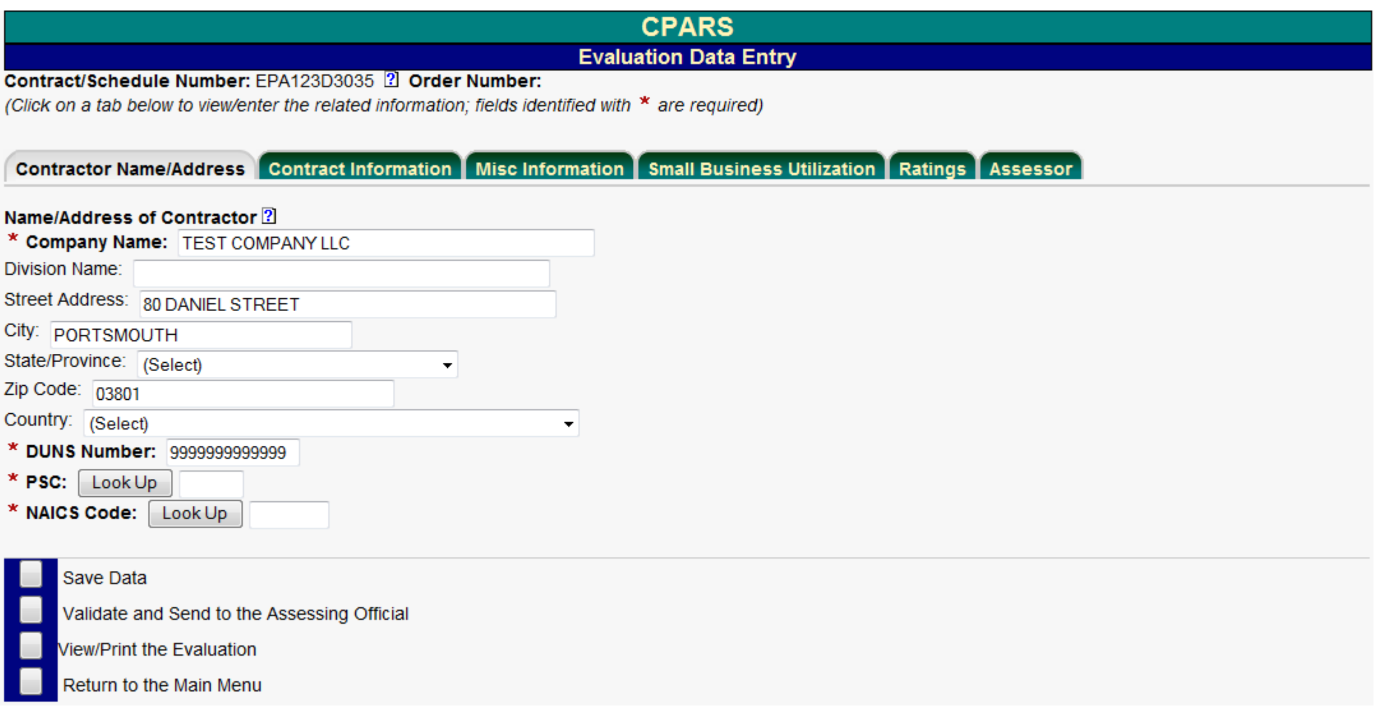
	CONTRACT NUMBER	DUNS	PERIOD OF PERFORMANCE	ACTION REQUIRED	ASSIGNED
	EPA123D3035	9999999999999	10/01/2011 - 09/30/2012	Initiate, Send to Assessing Official	09/03/2013
[Notes]	EPA123D3032	9999999999999	10/20/2012 - 09/02/2013	Update, Send to Assessing Official	09/04/2013

- indicates notes have been entered

Return to the Main Menu

NOTE: A red checkmark next to Notes on the To Do List located next to a Contract/Order Number indicates that a note has been generated for that Evaluation. Notes may be viewed or added by clicking on them.

Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official Representative to complete the required action.


CPARS

Evaluation Data Entry

Contract/Schedule Number: EPA123D3035 **Order Number:**

*(Click on a tab below to view/enter the related information; fields identified with * are required)*

Contractor Name/Address | Contract Information | Misc Information | Small Business Utilization | Ratings | Assessor

Name/Address of Contractor

* **Company Name:** TEST COMPANY LLC

Division Name:

Street Address: 80 DANIEL STREET

City: PORTSMOUTH

State/Province: (Select)

Zip Code: 03801

Country: (Select)

* **DUNS Number:** 9999999999999

* **PSC:** Look Up

* **NAICS Code:** Look Up

Save Data

Validate and Send to the Assessing Official

View/Print the Evaluation

Return to the Main Menu

The Contractor Name/Address Tab is open above. To initiate the evaluation, the Assessing Official Representative will need to fill out all the required tabs and fields. If the Assessing Official Representatives proposed ratings and remarks are ready for the Assessing Official's review, the Assessing Official Representative will click the **Validate and Send to the Assessing Official** button.

NOTE: All required fields must be completed at this time.

The Assessing Official will be notified via email that an evaluation is ready for review. A message will appear stating that the Evaluation has been saved and a notice has been sent to the Assessing Official. Click on the **OK** button to view the Evaluation in HTML or click **Cancel** to close the message from the HTML view. The Assessing Official Representative is now locked out of the evaluation and may now only view the evaluation. To return to the Assessing Official Representative Main Menu, click **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered.

Status Report: This option allows the Assessing Official Representative to monitor the status of contracts and evaluations for each contract/order that he/she has been authorized access to. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Assessing Official Representative read-only access to each. **(See Status Report Section for more specific information)**

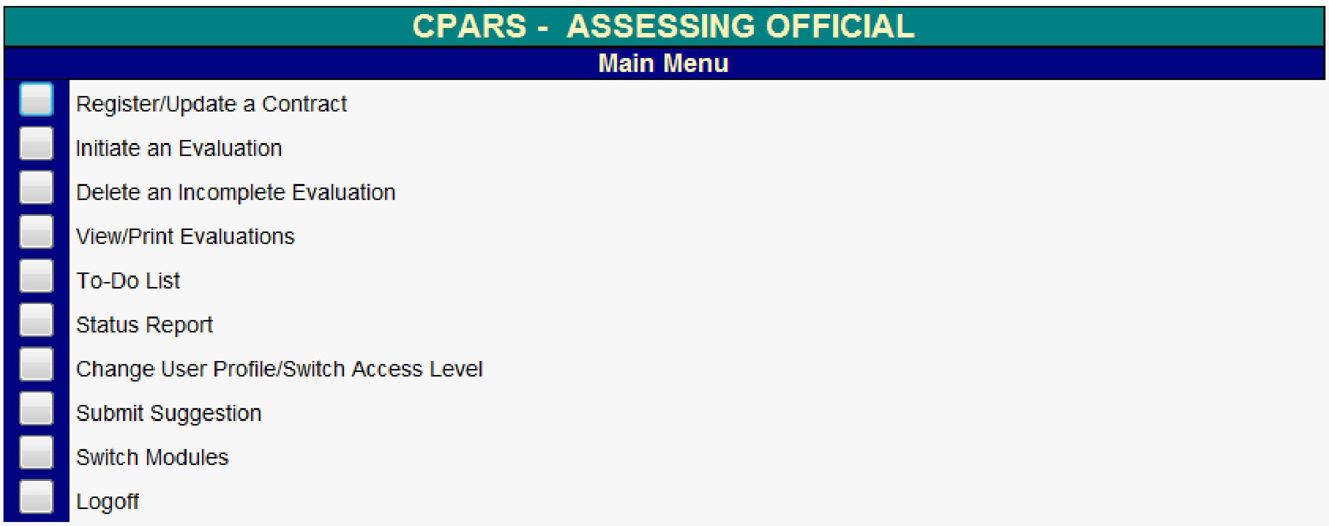
Change User Profile/Switch Access Level: This option must be used whenever a user's name, email address, address, or phone number changes. This option also allows users to select optional email notifications, to change their password, and to switch access levels (roles) if the user has been granted more than one access level in CPARS. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Assessing Official

The Assessing Official is responsible for evaluating contractor performance and for validating the proposed ratings and remarks entered by the Assessing Official Representative(s). Assessing Officials have "signature" authority and are allowed to forward evaluations to the Contractor Representative for review and comment. After receiving and reviewing contractor comments, the Assessing Official has the authority to close, modify, and/or forward the evaluation to the Reviewing Official.



<u>Register/Update a Contract:</u> This option allows an Assessing Official to manually input basic contract/order information into CPARS. The contract/order must be registered within 30 days after contract/order award. To register or update a contract/order, click on **Register/Update a Contract** from the Main Menu. The Register/Update a Contract data entry screen will display.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **<u>and</u>** the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Data Universal Numbering System (DUNS) or the DUNS +4 that is applicable to the contract/order to be registered. If the DUNS is unknown, click the **Company Name** drop-down box and select one of the options and enter the applicable company name information in the adjacent space. Click the **Continue with Contract Registration** button. If more than one DUNS number is found, a listing of DUNS numbers and associated company names and addresses will be displayed. Click the appropriate DUNS to continue with the contract/order registration process. The Contract Registration data entry screen displays and will be pre-filled with the contractor's DUNS, name, and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*****). The blue question mark (**?**) identifies that online help is available for the data entry field. The **green tabs** provide additional data entry boxes. Click each **green tab** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

NOTE: A contract/order only has to be registered one time.

To update a contract/order that has already been registered enter the contract number in the **Contract Number** box **<u>and</u>** the order number, if applicable, in the **Order Number** box and click the **Continue** button. The Contract Registration data entry screen displays and will display the previously registered information. Click each **green tab** and update the contract/order registration fields accordingly. Once updated, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

To return to the Assessing Official Main Menu, click the **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered

<u>Initiate an Evaluation:</u> This option allows the Assessing Official to initiate the evaluation process by entering proposed ratings and remarks. To initiate an evaluation, click on the **Initiate an Evaluation** button from the Main Menu. The Initiate an Evaluation data entry screen will display. When the evaluation is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. If the evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **<u>and</u>** the order number in the **Order Number** box and click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract/order information and any miscellaneous information entered during contract registration.

NOTE: The contract/order must be registered before an evaluation can be initiated. The **green tabs** provide additional data entry fields. Click each **green tab** to complete the Initiate an Evaluation process.

The evaluation data entry screens identify required fields with a red asterisk (*****). However, the Assessing Official is allowed to save a partially completed evaluation without addressing all the required fields. Clicking the **Save Data** button will save the partially completed evaluation.

NOTE: **Report Type** and **Period of Performance** must be filled in to save a partially completed evaluation. When the Assessing Official is ready to continue working on the evaluation, simply login to CPARS, click on the **To-Do List** (see below) and click on the contract/order number of the evaluation to be completed. The evaluation that was previously initiated and saved will be displayed for additional data entry.

Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field. A red checkmark located within any of the **green rating tabs** indicates at least one element has been rated for the specific performance area.

The Assessing Official will click on the **Return to the Assessing Official Representative** button whenever the Assessing Official determines the evaluation requires additional detail and/or clarification from the Assessing Official Representative. The Assessing Official Representative will revise the evaluation as requested. This exchange between the Assessing Official and the Assessing Official Representative may occur until the Assessing Official is satisfied with the level of detail and the quality of the evaluation.

NOTE: The evaluation will not be returned to the Assessing Official Representative if one has not been given access to the contract/order by the Focal Point. In this case, after selecting **Return to the Assessing Official Representative**, the Assessing Official will see a pop-up box stating that the record cannot be sent to the Assessing Official Representative because one has not been assigned and the Focal Point should be contacted to resolve the situation.

Prior to forwarding the evaluation to the Contractor Representative, the Assessing Official must enter their identifying information. Click the **Sign Now** button on the Assessor Tab to populate the data from the User Profile. When the proposed ratings and remarks are ready for the Contractor Representative's review and comment, click the **Validate and Send to the Contractor** button. All required fields must be completed at this time.

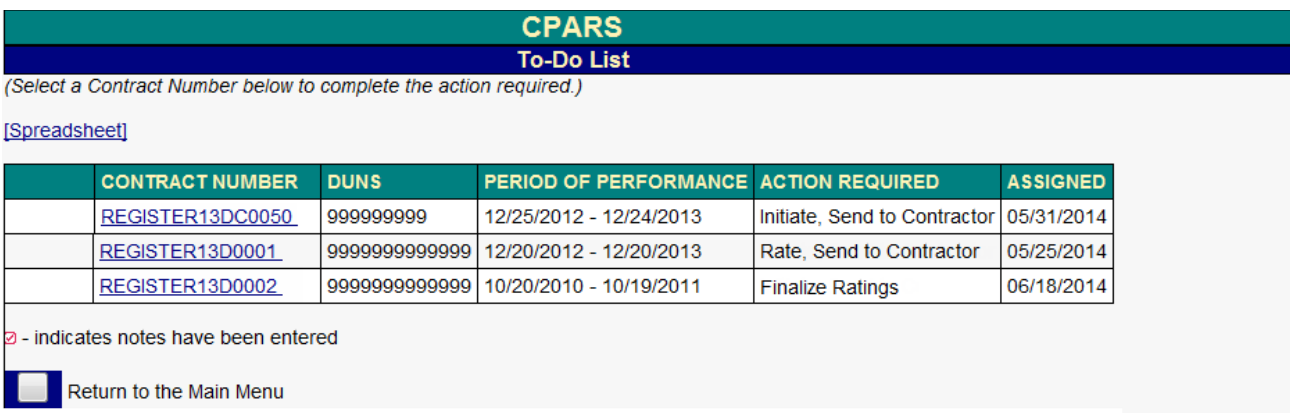
If the Assessing Official would like to receive a copy of the Contractor Transmittal Letter, the adjacent check box should be checked. The Contractor Representative will be notified via email that an evaluation is ready for review and comment. A message will appear stating that the Evaluation has been saved and a notice has been sent to the Contractor Representative. Click on the **OK** button to view the Evaluation in HTML or click **Cancel** to close the message from the HTML view. The Assessing Official is now locked out of the evaluation and may only view the evaluation. To return to the Assessing Official Main Menu, click **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered.

NOTE: The evaluation will not be forwarded if a Contractor Representative (with email address) has not been given access to the contract/order by the Focal Point. In this case, after selecting **Validate and Send to the Contractor**, the Assessing Official will see a pop-up box stating that a Contractor Representative has not been assigned and the Focal Point should be contacted to resolve the situation.

<u>Delete an Incomplete Evaluation:</u> This option allows the Assessing Official to delete an evaluation that has been drafted, but not yet sent to the Contractor Representative. To delete an incomplete evaluation, click on the **Delete an Incomplete Evaluation** button from the Main Menu. The Delete an Incomplete Evaluation selection screen displays. The evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Evaluation Confirmation screen will display. Verify the correct evaluation is about to be deleted from the CPARS database. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete an Incomplete Evaluation selection screen. The **Return to the Main Menu** button returns the user to the Assessing Official Main Menu.

<u>View/Print Evaluations:</u> This option allows the Assessing Official to view an evaluation in a read-only format. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button, a list of evaluations will display. Click on the contract number of the evaluation to be viewed, it will open in HTML format. Once the evaluation is displayed, the user is able to view and/or print the evaluation on a local printer. The **Return to the Main Menu** button returns the user to the Assessing Official Main Menu.

<u>To-Do List:</u> This option is a quick and easy method for the Assessing Official to see all evaluations that are awaiting his/her action. Click the **To-Do List** button from the Main Menu. If the Assessing Official has any actions, a list of contract numbers will display.


CPARS

To-Do List

(Select a Contract Number below to complete the action required.)

[Spreadsheet]

	CONTRACT NUMBER	DUNS	PERIOD OF PERFORMANCE	ACTION REQUIRED	ASSIGNED
	REGISTER13DC0050	999999999	12/25/2012 - 12/24/2013	Initiate, Send to Contractor	05/31/2014
	REGISTER13D0001	9999999999999	12/20/2012 - 12/20/2013	Rate, Send to Contractor	05/25/2014
	REGISTER13D0002	9999999999999	10/20/2010 - 10/19/2011	Finalize Ratings	06/18/2014

- indicates notes have been entered

Return to the Main Menu

The list includes evaluations that are due to be initiated and have not been previously initiated by an Assessing Official, evaluations that have been forwarded by the Assessing Official Representative, evaluations returned by the Contractor Representative, evaluations that have not been returned by the Contractor Representative within the 60-day comment period, and evaluations that have been returned by the Review Official. Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official to complete the required action. The evaluation status will determine the **To-Do Lists Action Required.** Each of the Assessing Official's **Actions Required** are described in further detail below.

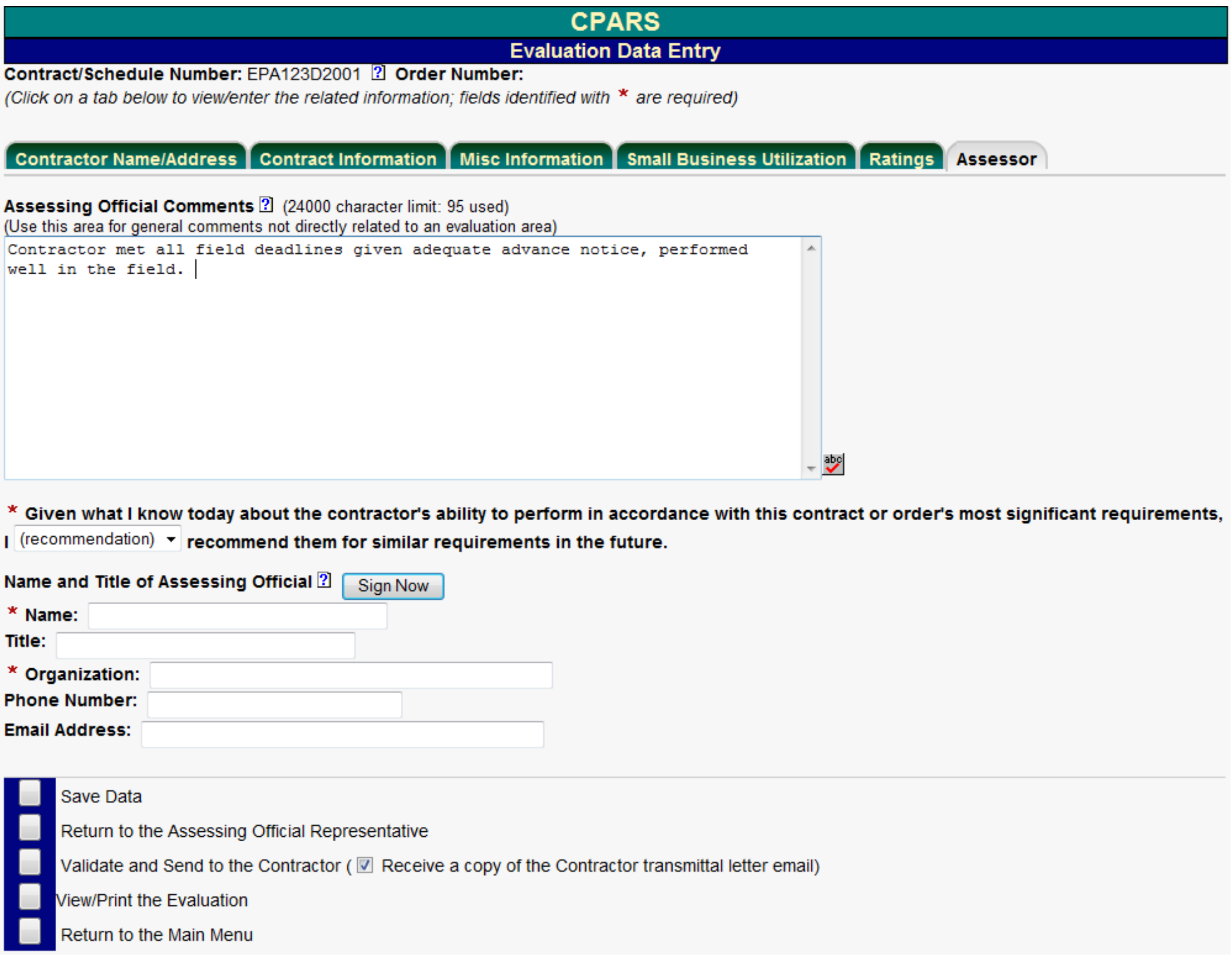
<u>Action Required: "Initiate, Send to Contractor":</u> This option allows the Assessing Official to initiate evaluations that are due to be started by the Assessing Official and has not been previously initiated by an Assessing Official. The evaluation shown below in the Assessing Officials To-Do List requires the Assessing Official's action to **Initiate, Send to Contractor**.

<u>Action Required: "Rate, Send to Contractor":</u> This option allows the Assessing Official to review evaluations that have been forwarded by the Assessing Official Representative or previously saved by the Assessing Official. To save a partially complete evaluation, the Report Type and Period of Performance must have been filled in and saved.

Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official to complete the required action.

NOTE: A red checkmark next to Notes on the To Do List located next to a contract/order number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

The evaluation screen shot below has the **Assessor Tab** selected. Should this evaluation have been forwarded by an Assessing Official Representative then the Assessing Official could return it for further input by selecting the **Return to the Assessing Official Representative** button. If the Assessing Official is satisfied with the Assessing Official Representative's ratings and remarks or has made his/her final edits and validations to the evaluation, then he/she will fill out all the required tabs and fields below and select the **Validate and Send to the Contractor** button.

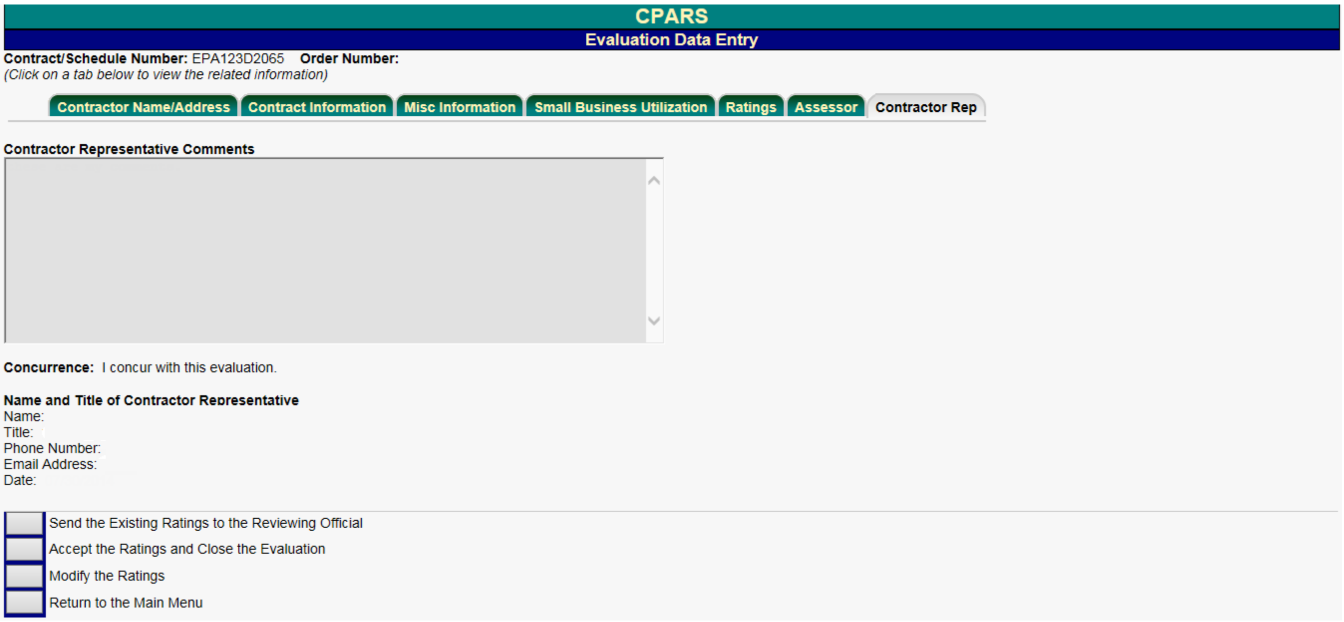


<u>**Action Required: "Finalize Ratings":**</u> This option allows the Assessing Official to review evaluations that have been returned by the Contractor Representative, are overdue from the Contractor Representative (60 day comment period expired), or have been returned by the Reviewing Official. The Assessing Official has the option to **Send the Existing Ratings to the Reviewing Official, Accept the Ratings and Close the Evaluation** (if not contentious) or **Modify the Ratings**.

Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official to complete the required action.

NOTE: A red checkmark next to Notes on the To Do List located next to a contract/order number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

The evaluation screen shot below has the **Contractor Rep Tab** selected. The Assessing Official reviews the entire evaluation by clicking on each **green tab**. Review contractor comments by clicking on the ratings tabs and/or Contractor Rep tab.



Evaluations completed without contractor comment will be automatically annotated in the Contractor Comments section of the HTML view, with the following system-generated statement: "The report was delivered/received by the contractor on MM/DD/YYYY. The contractor neither signed nor offered comment in response to this assessment." If the Contractor enters comments but does not return the evaluation within 60 days, the action required will reflect; "Finalize Ratings" and the Contractor Representative will no longer have access to enter comments. Partial contractor comments will be automatically removed from the evaluation and the system generated statement: "The report was delivered/received by the contractor on MM/DD/YYYY. The contractor neither signed nor offered comment in response to this assessment," will be placed in the Contractor Comments section. The Assessing Official can close the evaluation or send it to the Reviewing Official.

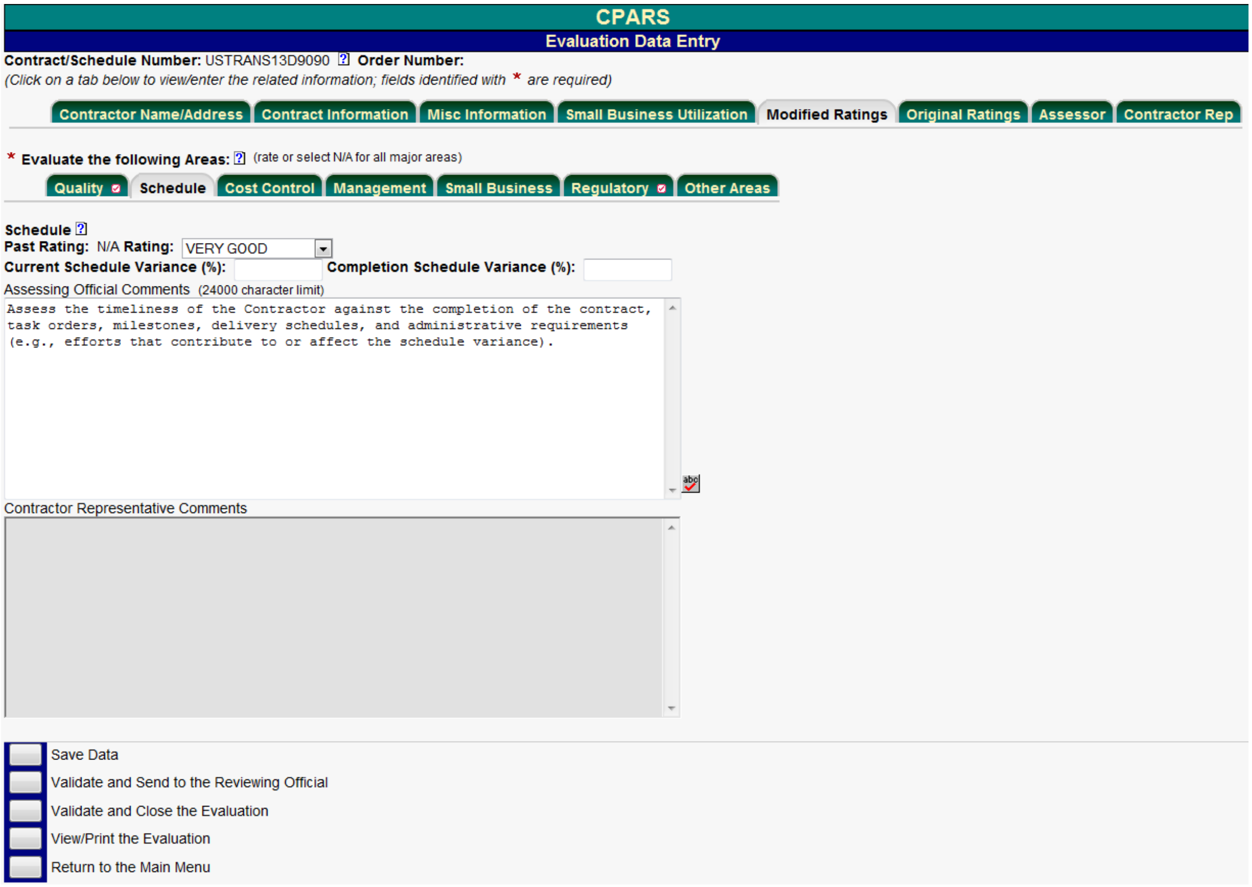
After the Assessing Official reviews the entire CPAR he/she has the option to **Send the Existing Ratings to the Reviewing Official, Accept the Ratings and Close the Evaluation** (if not contentious) or **Modify the Ratings**.

When the **Send the Existing Ratings to the Reviewing Official** button is selected, the Reviewing Official will be notified via email that an evaluation is ready for review and comment. A message asking if you are sure you want to "Send the Existing Ratings to the Reviewing Official" appears. Click the **OK** button. A message indicating that a notice was sent to the Reviewing Official appears. Click the **OK** button

When the **Accept the Ratings and Close the Evaluation** button is selected, a message asking if you are sure you want to "Accept the ratings and Close the Evaluation" appears. Click the **OK** button. A message indicating that the evaluation was closed appears. Click the **OK** button. The Contractor Representative will receive an automated email whenever an evaluation is completed and can subsequently retrieve the completed evaluation from CPARS.

If Modify the Ratings is selected, both the original evaluation (including contractor comments) and the modified evaluation are stored in CPARS (notice tabs in example below). Whenever a modified evaluation is viewed, users have the option to view/print the original evaluation (Original Ratings). If Modify the Ratings is selected, the Assessing Official will make the desired changes on the Modified Ratings tab and provide supporting narratives in the white spaces provided. Once completed with the Modified Ratings, the Assessing Official has the option to

Validate and Send to the Reviewing Official or **Validate and Close the Evaluation** (if not contentious). The Contractor Representative will receive an automated email whenever an evaluation is completed and can subsequently retrieve the completed evaluation from CPARS.



<u>Status Report</u>: This option allows the Assessing Official to monitor the status of contracts and evaluations for each contract/order that he/she has been authorized access to. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Assessing Official read-only access to each. **(See Status Report Section for more specific information)**

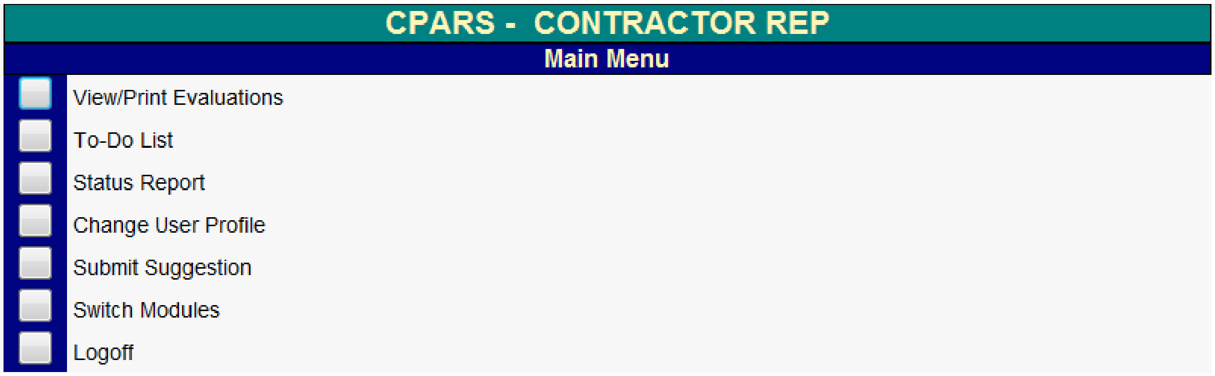
<u>Change User Profile/Switch Access Level:</u> This option must be used whenever a user's name, email address, address, or phone number changes. This option also allows users to select optional email notifications, to change their password, and to switch access levels (roles) if the user has been granted more than one access level in CPARS. **(See User Profile Section for more specific information)**

<u>Submit Suggestion:</u> This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

<u>Switch Modules:</u> This option allows users to switch between CPARS and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Contractor Representative

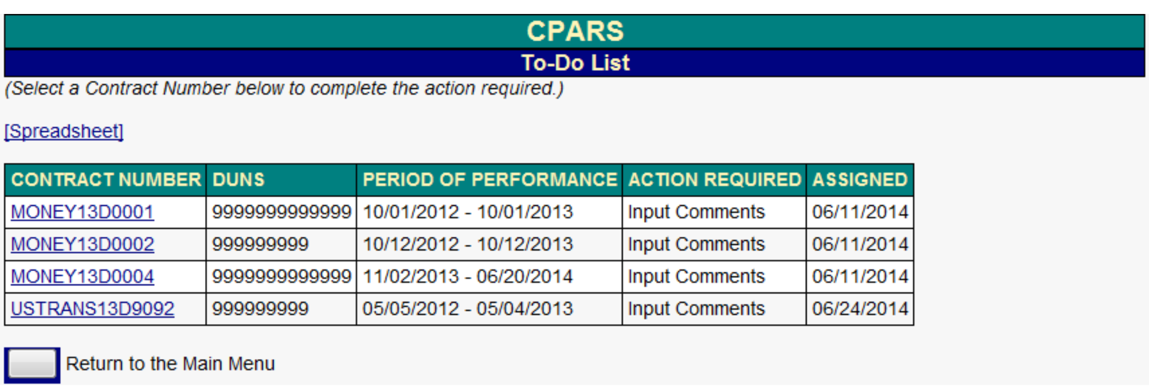
The Contractor Representative is responsible for reviewing and commenting on proposed ratings and remarks for all evaluations forwarded by the Assessing Official. An evaluation is required to be prepared by the Government to document contractor performance for each contract/order that exceeds specified dollar values. The Contractor Representative is allotted 60 days to review and comment on each evaluation forwarded to his/her company.



<u>View/Print Evaluations:</u> This option allows the Contractor Representative to view/print an evaluation that has been forwarded for comment or that has been previously completed in CPARS. This option does not allow Contractor Representatives to enter comments on the evaluation. See the **To-Do List** below to determine how to enter comments on an evaluation. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button. If more than one evaluation exists for the contract number, a list of evaluations will display. Click on the contract/order number of the evaluation to be viewed and/or printed. The evaluation will display in HTML format. Once the evaluation has been displayed, the user is able to scroll through the report and/or print it on a local printer. To return to the Contractor Representative Main Menu, click the **Close** button and then click on the **Return to the Main Menu** button.

<u>To-Do List:</u> This option is used by the Contractor Representative to review and input comments on evaluations that have been forwarded by the Assessing Official. **<u>Action Required: "Input Comments",</u>** the Contractor Representative is allotted a 60-day review/comment period starting from the date the Assessing Official forwarded the evaluation. If the Contractor Representative does not provide comments within the 60-day period, the evaluation is then returned to the Assessing Official and the Contractor Representative no longer has access to enter comments. The Government will have to complete the evaluation without the Contractor Representative comments. Within the first seven days of the comment period, the Contractor Representative may request a meeting with the Assessing Official to discuss the evaluation.

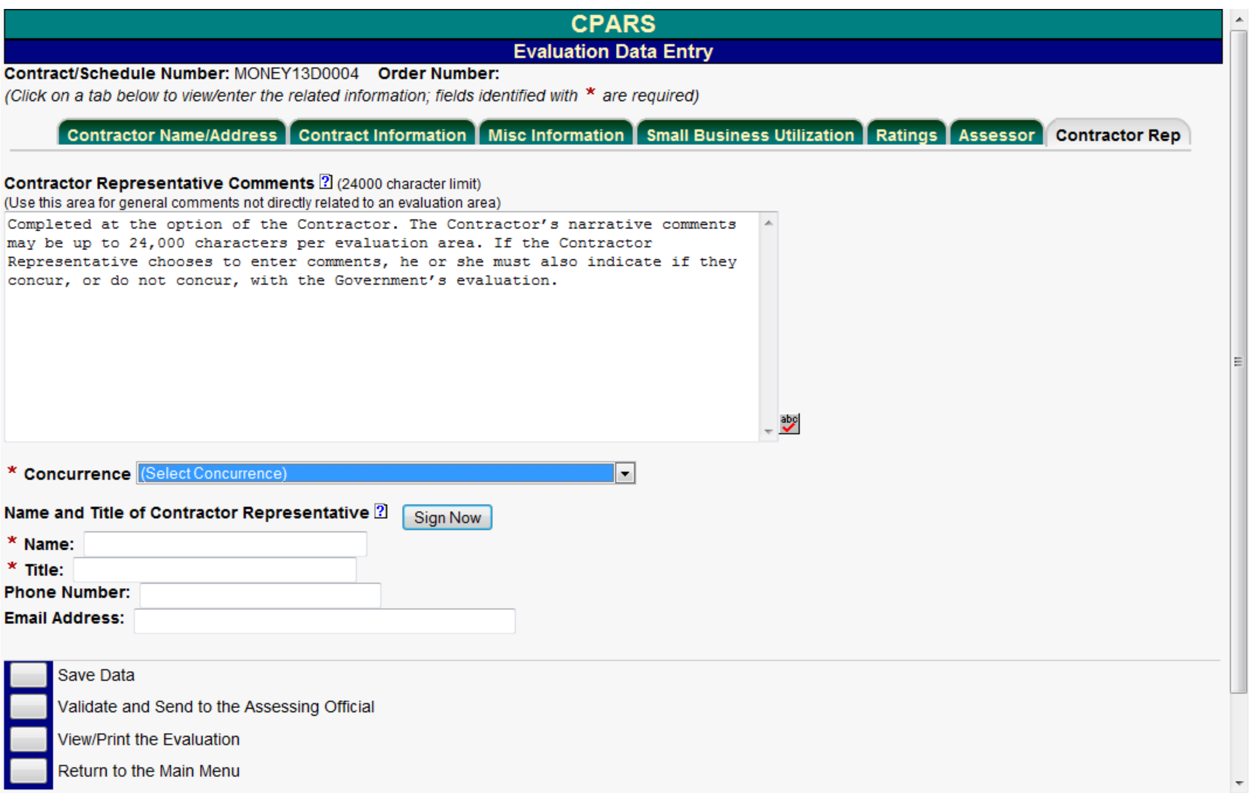
Click on the **To-Do List** button from the Main Menu. Then locate and click on the contract/order number of the evaluation that has been forwarded for review and comment.



CONTRACT NUMBER	DUNS	PERIOD OF PERFORMANCE	ACTION REQUIRED	ASSIGNED
MONEY13D0001	9999999999999	10/01/2012 - 10/01/2013	Input Comments	06/11/2014
MONEY13D0002	999999999	10/12/2012 - 10/12/2013	Input Comments	06/11/2014
MONEY13D0004	9999999999999	11/02/2013 - 06/20/2014	Input Comments	06/11/2014
USTRANS13D9092	999999999	05/05/2012 - 05/04/2013	Input Comments	06/24/2014

The evaluation will open in read-only format except for specific fields located on the **Ratings** and **Contractor Rep** tabs. A red checkmark located within any of the **Green Rating Tabs** indicates at least one element has been rated for the specific performance area. Click on each of the **Green Tabs** to review the proposed ratings and remarks. After the evaluation has been reviewed, the Contractor Representative clicks the Contractor Rep Tab and enters their comments in the **Contractor Representative Comments** field and selects a Concurrence from the **Concurrence** drop-down box. Fields on the Contractor Rep tab that are identified with a red asterisk (*****) are mandatory and must be completed by the Contractor Representative. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field. To save partially completed remarks and information, click the **Save Data** button. To return to the Contractor Representative Main Menu, click **Return to the Main Menu**. **Return to the Main Menu** button does not save any of the information that has been entered.

Prior to forwarding, the Contractor Representative must enter their identifying information. Click on the **Sign Now** button to populate the data from the User Profile. When all required information located on the Contractor Rep Tab has been completed, click the **Validate and Send to the Assessing Official** button to save the information and to return the evaluation to the Assessing Official. A notice will be sent to the Assessing Official. Click the **OK** button. A notice that the evaluation has been sent to the Assessing Official will appear with an option to **View the Evaluation**. Click **OK** to view the evaluation in HTML or **Cancel** to return to the Main Menu.



<u>Status Report</u>: This option allows the Contractor Representative to monitor the status of contracts and evaluations for each contract/order that he/she has been authorized access to. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Contractor Representative read-only access for evaluations that are Rated or Completed. **(See CPAR Status Report Section for more specific information)**

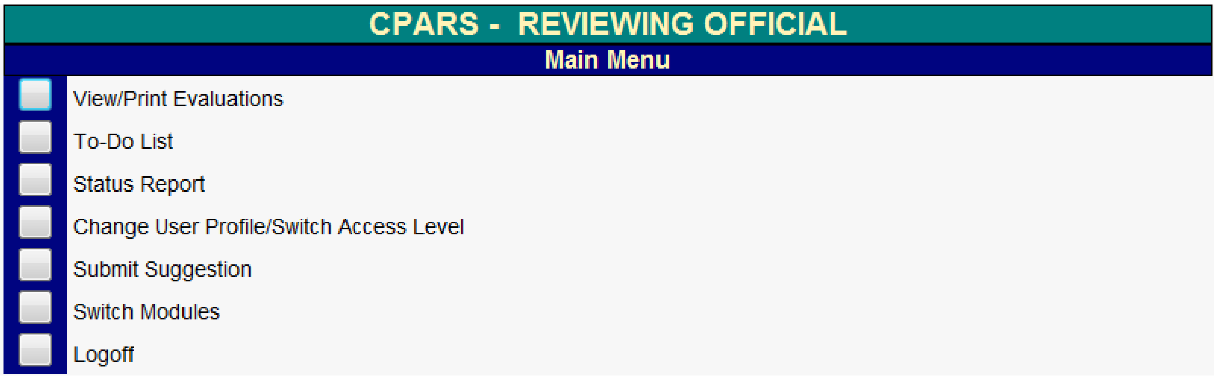
<u>Change User Profile:</u> This option must be used whenever a user's name, email address, address, or phone number changes. This option also allows users to select optional email notifications and to change their CPARS password. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off, however, Contractor Representatives are not granted access to the FAPIIS module. To review and comment on completed FAPIIS records for their company, Contractors will require access to PPIRS at **https://www.ppirs.gov** **See Switch Modules Section for more specific information)**

Reviewing Official

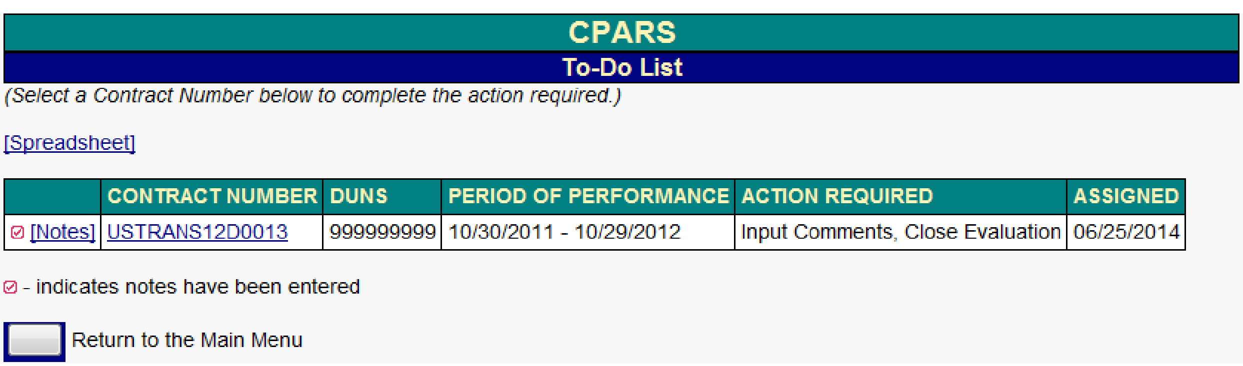
The Reviewing Official is responsible for ensuring that the evaluation is a fair and accurate evaluation of the Contractor's performance for the specific contract/order and performance period. The Reviewing Official must acknowledge consideration of any significant discrepancies between the Assessing Official's evaluation and the Contractor's remarks.



<u>View/Print Evaluations:</u> This option allows the Reviewing Official to view/print an evaluation, but not modify or change any of the information on the form. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button, a list of evaluations will display. Click on the contract number of the evaluation to be viewed, it will open in HTML format. Once the evaluation is displayed, the user is able to view and/or print the evaluation on a local printer. The **Return to the Main Menu** button returns the user to the Reviewing Official Main Menu, click the **Close** button and then click on the **Return to the Main Menu** button.

<u>To-Do List:</u> This option is used by the Reviewing Official to complete the evaluation process for all evaluations forwarded by the Assessing Official. Click on the **To-Do List** button from the Main Menu.

<u>Action Required: "Input Comments, Close Evaluation".</u> Locate and click on the contract/order number of the evaluation that has been forwarded for review, comment, and completion. The evaluation will open in read-only format except for the fields located on the Reviewer Tab. Fields on the Reviewer Tab that are identified with a red asterisk (*****) are mandatory and must be completed by the Reviewing Official. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field. A red checkmark located within any of the **Green Rating Tabs** indicates at least one element has been rated for the specific performance area.



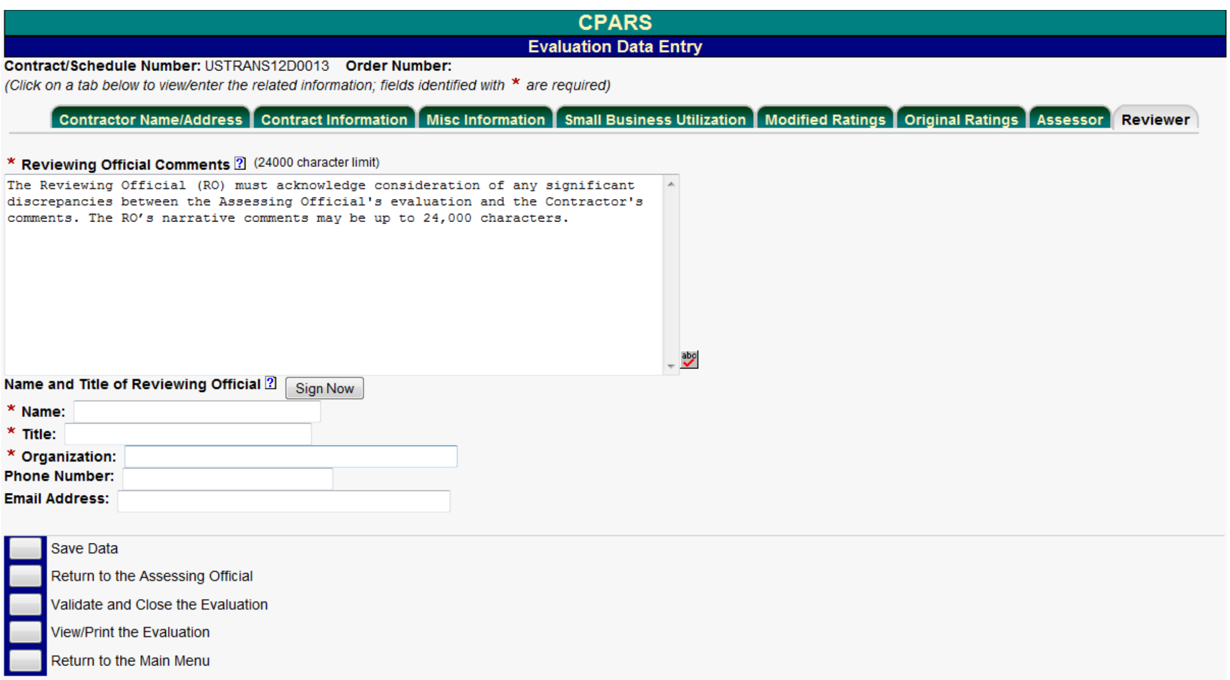
NOTE: A red checkmark next to Notes on the To-Do List located next to a contract/order number indicates that a note has been generated for that CPAR. Notes may be viewed or added by clicking on them.

Click on each of the **Green Tabs** to review the entire evaluation. The Reviewing Official has the option to click on the **Return to the Assessing Official** button whenever the Reviewing Official determines the evaluation requires additional detail and/or clarification from the Assessing Official. The Assessing Official will revise the evaluation as requested. This exchange between the Reviewing Official and the Assessing Official may occur until the Reviewing Official is satisfied with the level of detail and the quality of the evaluation.
After the evaluation has been reviewed, the Reviewing Official clicks the Reviewer Tab and enters their comments in the **Reviewing Official Comments** field. The Reviewing Official must acknowledge consideration of any significant discrepancies between the Assessing Official's evaluation and the Contractor's remarks. To save partially completed remarks and information, click the **Save Data** button.

To return to the Reviewing Official Main Menu, click **Return to the Main Menu**. The **Return to the Main Menu** button does not save any of the information that has been entered.

Prior to closing the evaluation, the Reviewing Official must enter their identifying information. Click on the **Sign Now** button to populate the data from the User Profile. When all required information located on the Reviewer Tab has been completed, click the **Validate and Close the Evaluation** button to save and close the evaluation. A notice that the evaluation has been closed will appear with an option to **View the Evaluation**. Click **OK** to view the evaluation in HTML or **Cancel** to **Return to the Main Menu**. Click the **OK** button to confirm that the evaluation was closed. An automatic email notice is sent to the Contractor Representative. Click the **Return to the Main Menu** button to return to the Reviewing Official Main Menu.

NOTE: If the Assessing Official Modified the CPAR, the Contractor tab is moved to the Original Ratings tab.



NOTE: Completed evaluations are copied to the Federal Past Performance Information Retrieval System (PPIRS) to support future source selections.

Status Report: This option allows the Reviewing Official to monitor the status of contracts and evaluations for each contract/order that he/she has been authorized access to. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Reviewing Official read-only access to each. **(See Status Report Section for more specific information)**

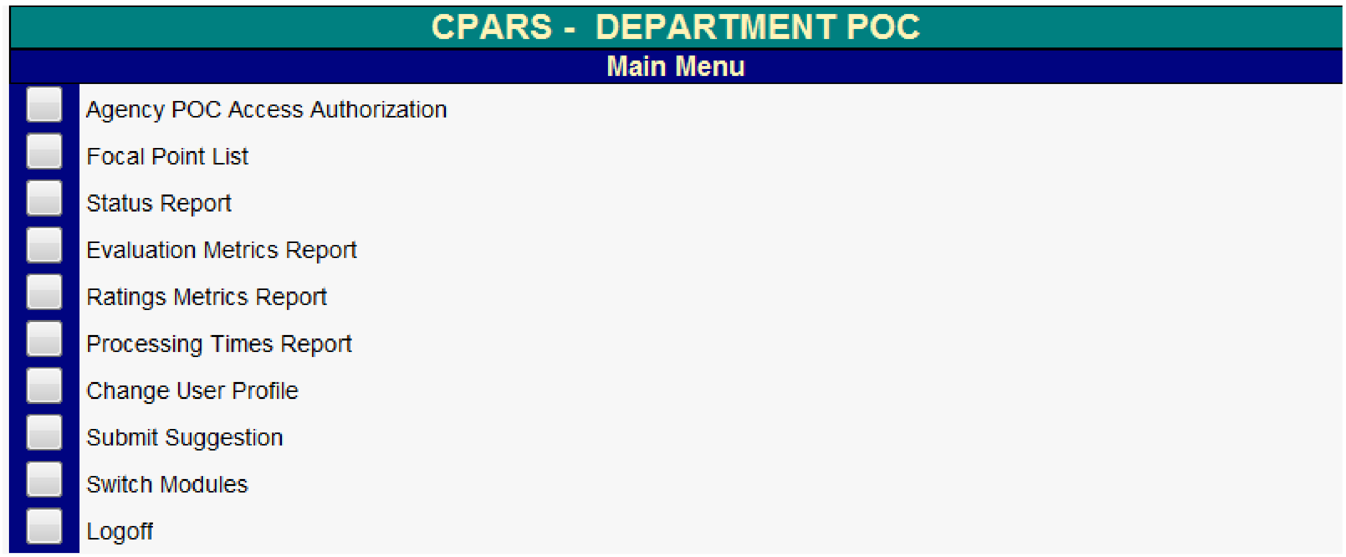
Change User Profile/Switch Access Level: This option must be used whenever a user's name, email address, address, or phone number changes. This option also allows users to select optional email notifications, to change their password, and to switch access levels (roles) if the user has been granted more than one access level in CPARS. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

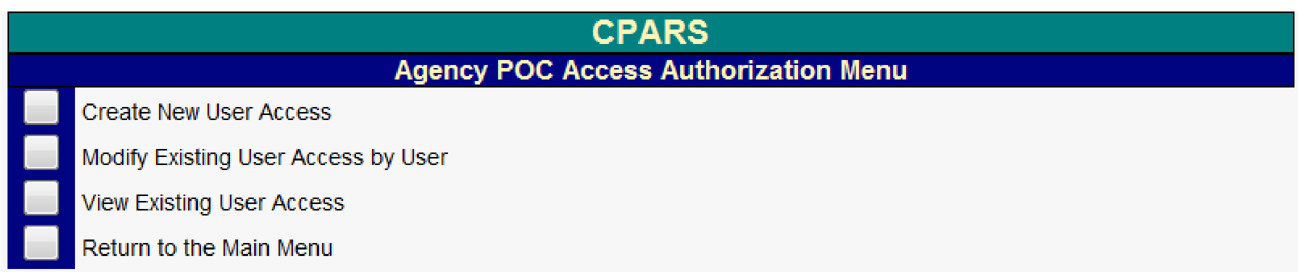
Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Department Point of Contact

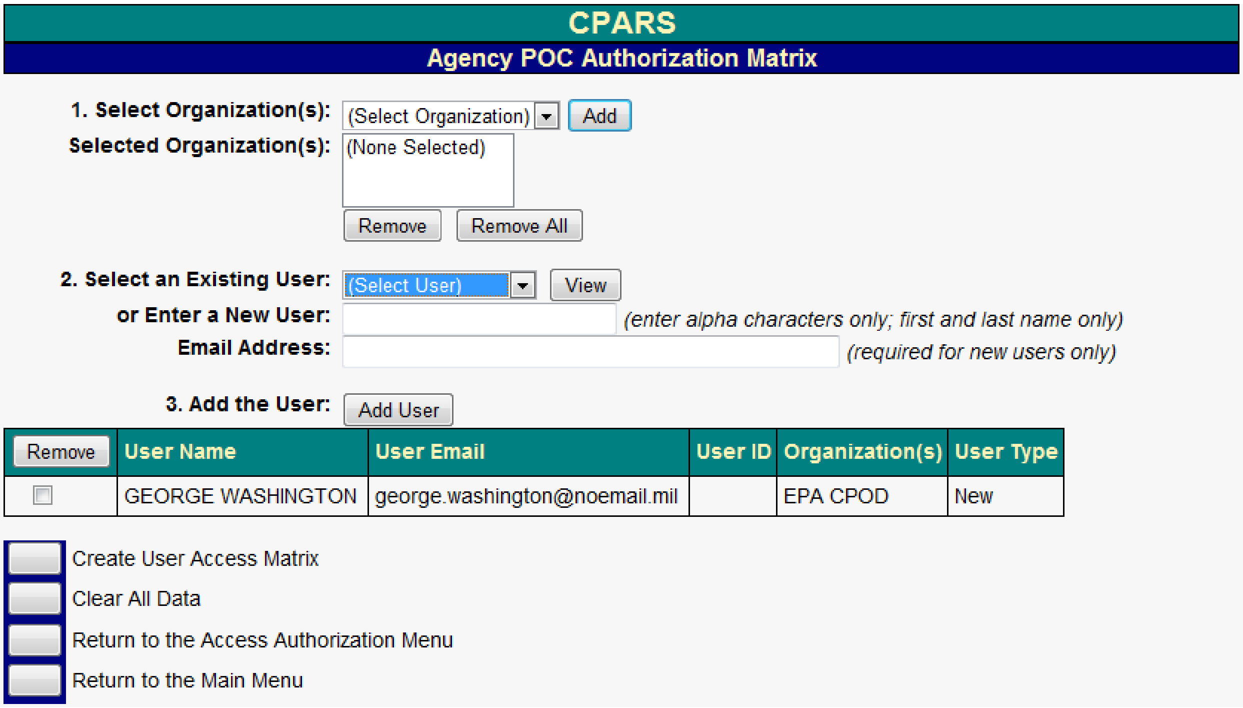
This access level offers manager complete visibility of the CPARS process across an entire department. In addition, this level is used to give access to Agency Points of Contact (POC) who require oversight of the CPARS process for specific organizations within the department. The Department Point of Contact (POC) is also able to view Status Reports, Evaluation Metrics Reports, Ratings Metrics Reports, and Processing Times Reports. Department POC access is granted only upon completion of a signed CPARS Department POC Access Request Form obtained from contacting CPARS Customer Support.



Agency POC Access Authorization: This option is used by the Department POC to create and manage all Agency POC user accounts within the applicable department. Each Agency POC will be given access to an "Organization" or "Organizations" within the department. To provide access to CPARS, the Department POC clicks on the **Agency POC Access Authorization** button from the Main Menu. The Agency Access Authorization Menu will display.



Create New User Access: To provide access to a new Agency POC, the Department POC clicks on the **Create New User Access** button located at the Agency POC Access Authorization Menu. The CPARS Agency POC Authorization Matrix displays.



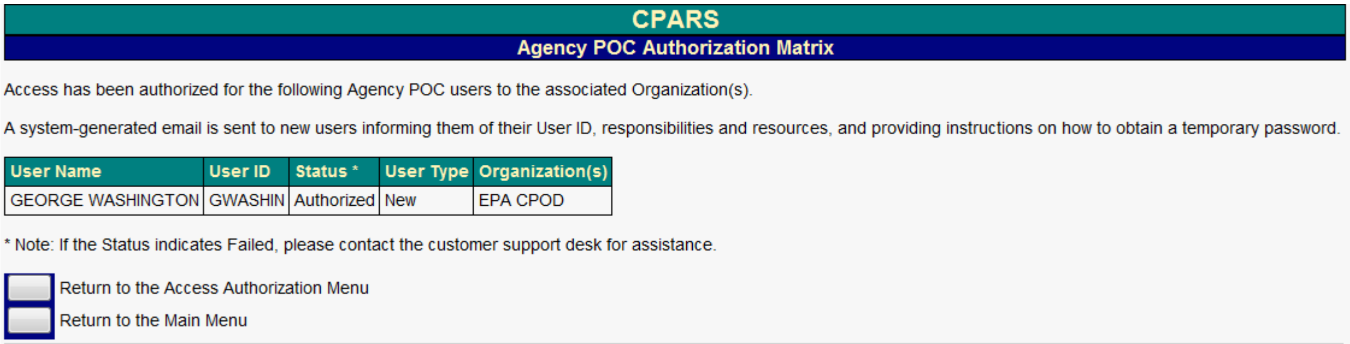
Assign Organization Access To An Existing User: In step 1, select an Organization from the **Select Organization(s)** drop-down box and then click the **Add** button. To delete an Organization from the **Selected Organization(s)** box, highlight the Organization and then click the **Remove** button. To delete all Organizations in box click **Remove All**. In Step 2, the Department POC selects an existing user from the **Select User** drop-down box and then clicks the **Add User** button in Step 3. Repeat steps 1 and 2 as necessary.

Assign Organization Access To A New User: In step 1, the Department POC selects an Organization from the **Select Organization(s)** drop down box and then clicks the **Add** button. To delete an Organization from the **Selected Organization(s)** box, highlight the Organization and then click the **Remove** button. To delete all Organizations in box click **Remove All**. In Step 2, the Department POC enters the new user name (first and last name only) and email address. In step 3, click the **Add User** button to give the user access to the Organization(s). Steps 1 and 2 can be repeated as necessary.

NOTE: If granting access to an Agency POC, which is a Government only user access role, and the email address entered appears to be non-government, the Department POC will receive a warning to check the entered information.

The **View** button allows the Department POC to view the existing user's name, organization, address, email address, and phone number. The Department POC can remove a user from Step 3 by clicking in the box adjacent to the name to be removed and then click **Remove**. The **Clear All Data** button clears ALL names and Organizations entered on the Agency POC Authorization Matrix.

After entering the User Names and Organization(s), the Department POC should review the matrix carefully for accuracy. If the information is correct, the Department POC clicks the **Create User Access Matrix** button and an Agency POC Authorization Matrix displays providing User Name, User ID, Status, User Type, and Organization(s). A system generated email will be sent to users when they are assigned to inform them of their User ID, temporary password procedures, responsibilities, and resources available. Click the **Return to the Access Authorization Menu button** to create or modify additional user accounts or click on the **Return to the Main Menu** button to return to the Department POC Main Menu.



CPARS

Agency POC Authorization Matrix

Access has been authorized for the following Agency POC users to the associated Organization(s).

A system-generated email is sent to new users informing them of their User ID, responsibilities and resources, and providing instructions on how to obtain a temporary password.

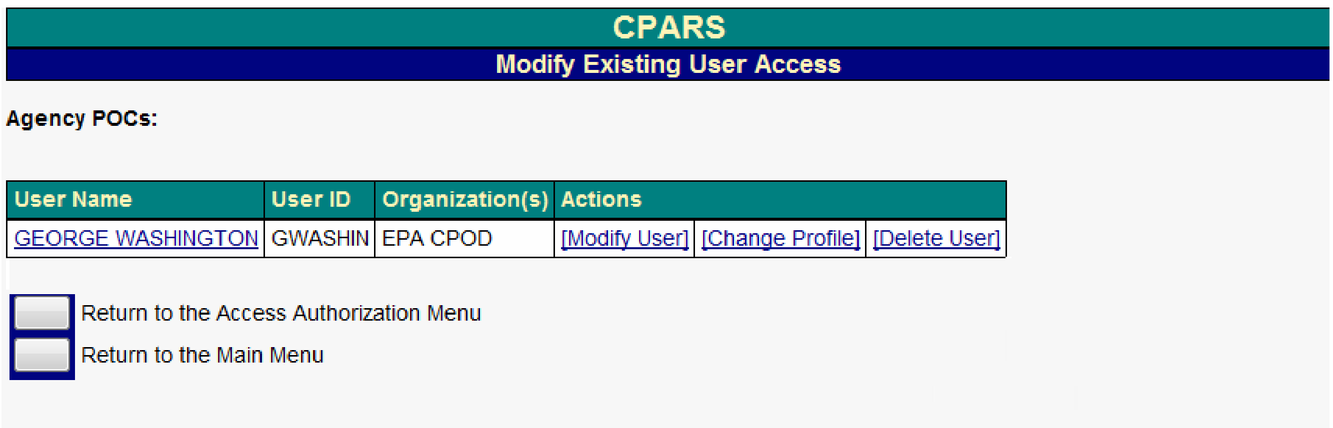
User Name	User ID	Status *	User Type	Organization(s)
GEORGE WASHINGTON	GWASHIN	Authorized	New	EPA CPOD

* Note: If the Status indicates Failed, please contact the customer support desk for assistance.

Return to the Access Authorization Menu

Return to the Main Menu

<u>Modify Existing User Access by User:</u> This option allows the Department POC to modify the access of his/her designated Agency POC(s). The Modify Existing User Access by User allows the Department POC to add or delete Organization(s) for an Agency POC or the Agency POC's user account can be deleted from CPARS when access is no longer required. Click the **Modify Existing User Access by User** button and the Modify Existing User Access screen displays.



CPARS

Modify Existing User Access

Agency POCs:

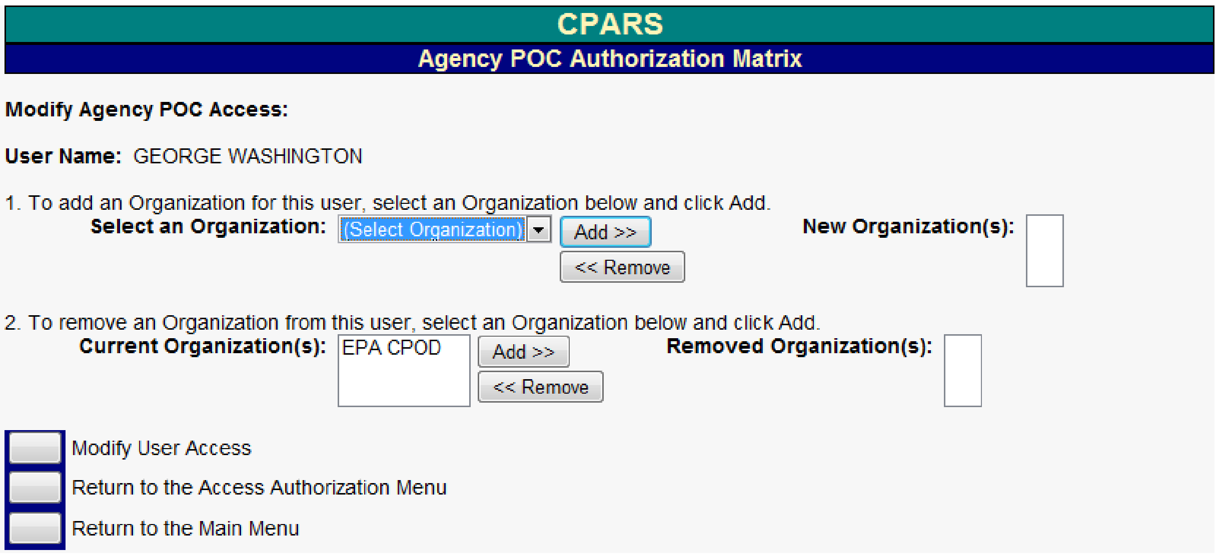
User Name	User ID	Organization(s)	Actions		
GEORGE WASHINGTON	GWASHIN	EPA CPOD	[Modify User]	[Change Profile]	[Delete User]

Return to the Access Authorization Menu

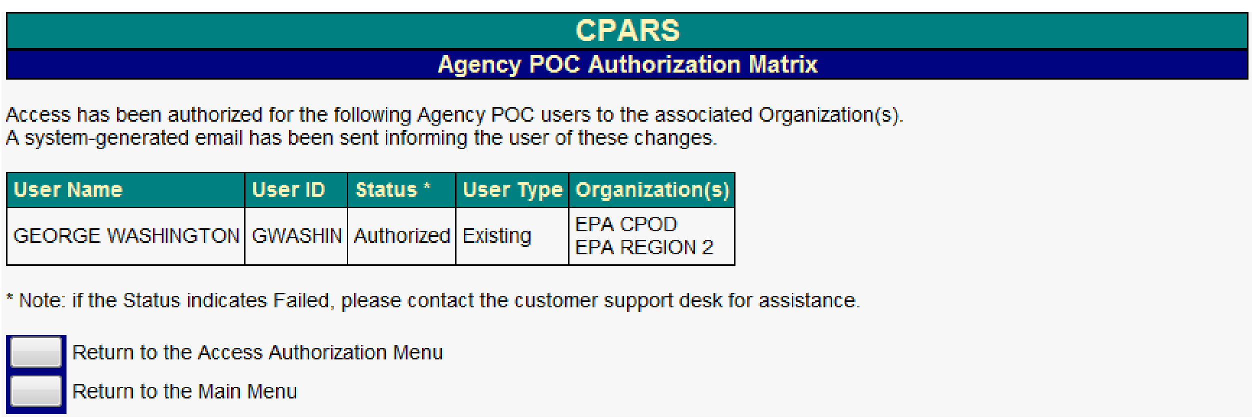
Return to the Main Menu

User Name – Click on the user's name to view the user's profile information, including name, title, organization, address, email address, and phone number. Click the **Close** button to return to previous screen.

[Modify User] – This option allows the Department POC to add or delete Organization(s) for an existing Agency POC. Click the **[Modify User]** button and the Agency POC screen displays. In step 1, Select an Organization from the **Select an Organization** drop-down box and click the **Add** button to give the Agency POC access to the selected Organization. The selected Organization will appear in the **New Organization(s)** box. If an incorrect Organization was added, highlight it in the **New Organization(s)** box and click the **Remove** button. Select the correct Organization from the **Select an Organization** drop-down box and click the **Add** button. In step 2, if the Agency POC has access to an Organization that is no longer required, highlight the Organization in the **Current Organization(s)** box and click the **Add** button. The removed Organization will appear in the **Removed Organization(s)** box. If the wrong Organization was selected for removal, highlight it in the **Removed Organization(s)** box and click the **Remove** button. The Organization will reappear in the **Current Organization(s)** box.

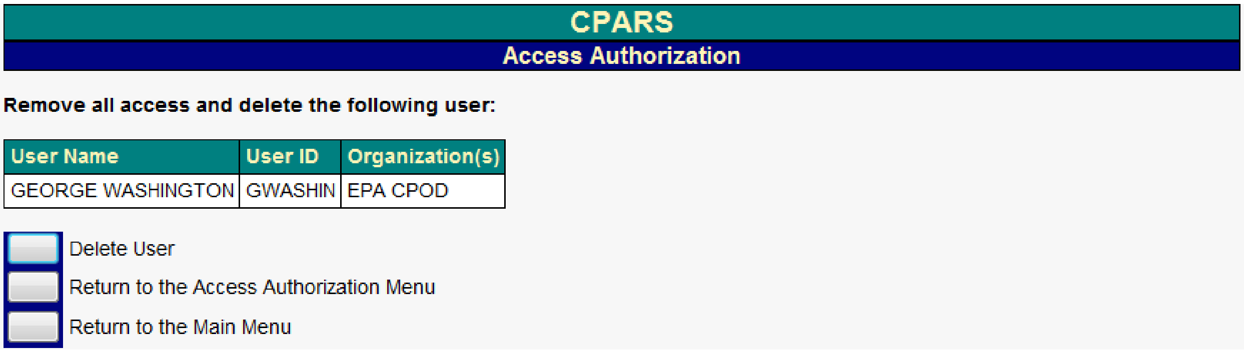


Review the authorization matrix to verify the information is correct. If the information is correct click the **Modify User Access** button. A confirmation screen will display identifying the Organization(s) the Agency POC has been authorized access to, and an email notification will be sent to the user notifying them of the change. The **Return to the Main Menu** button returns the user to the Department POC Main Menu.



[Change Profile] – This option is used to update an Agency POC's profile. The Department POC can update the user's profile information including name, organization, title, address, email, and phone number. The Department POC must click the **OK** button after the change(s) are made in order for them to take effect.

[Delete User] – This option is used to delete an Agency POC from CPARS. Click the **[Delete User]** button and the following screen displays:



CPARS

Access Authorization

Remove all access and delete the following user:

User Name	User ID	Organization(s)
GEORGE WASHINGTON	GWASHIN	EPA CPOD

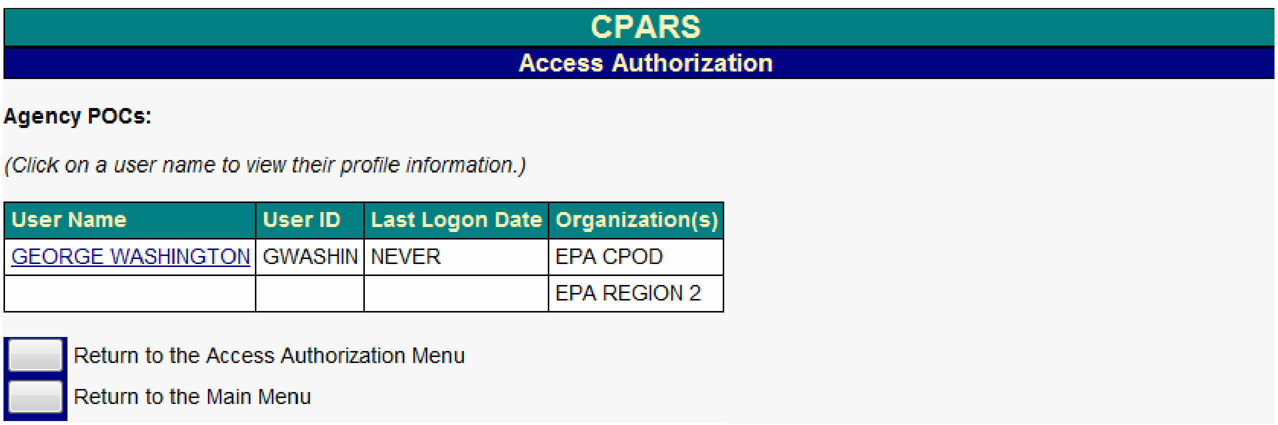
Delete User

Return to the Access Authorization Menu

Return to the Main Menu

Click the **Delete User** button and a pop-up message displays confirming that the Agency POC has been deleted from CPARS. Click the **OK** button. The **Return to the Access Authorization Menu** button allows the Department POC to continue with additional access authorization work. The **Return to the Main Menu** button returns the user to the Department POC Main Menu.

View Existing User Access: This option produces a list of the Agency POCs who have been given access to CPARS by the Department POC. Click the **View Existing User Access** button and the following screen displays.



CPARS

Access Authorization

Agency POCs:

(Click on a user name to view their profile information.)

User Name	User ID	Last Logon Date	Organization(s)
GEORGE WASHINGTON	GWASHIN	NEVER	EPA CPOD
			EPA REGION 2

Return to the Access Authorization Menu

Return to the Main Menu

The report displays the Agency POC's name, User ID, Last Logon Date, and Organization(s).

User Name – Allows the Department POC to view the user's profile information, including name, title, organization, address, email address and phone number. Click the **User Name** to see the user profile information. Click the **Close** button to return to previous screen.

Return to the Access Authorization Menu allows the Department POC to perform other access authorization options. The **Return to the Main Menu** button returns the user to the Department POC Main Menu.

Focal Point List: This option allows the Department POC to view a list of the organizations, Focal Points, and their Alternates. The list will display: the Organization(s) the Focal Point has cognizance over, Focal Point name, Phone Number, Email Address, Created Date, Last Accessed Date, and the system(s) they are Active In.

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Focal Point List.

CPARS

Focal Point List - 06/27/2014

[Spreadsheet]

Organization	Role	User Name	Phone Number	Email Address	Created Date	Last Accessed Date	Active In *	
							CPARS	FAPIIS
(-None Selected-)	Focal Point	AMANDA TREASURY	555-555-5555	amanda.treasury@noemail.mil	04/22/2014		N	N
FMS	Focal Point	AMANDA GRONKOWSKI	555-555-5555	amanda.travis@noemail.mil	04/22/2014	06/27/2014	Y	N
	Alternate	THOMAS JEFFERSON	222-222-2222	thomas.jefferson@noemail.mil	04/22/2014	06/22/2014		
GCERC	Focal Point	AMANDA MONEY	555-555-5555	amanda.money@noemail.mil	04/22/2014	06/27/2014	Y	N
	Alternate	AMANDA ORANGE	4445556666	amanda.travis@noemail.mil	05/08/2014	06/23/2014		

* **Active In**
Y - Under CPARS: indicates that user(s) have been assigned access. Under FAPIIS: indicates a record(s) has been entered.
N - Under CPARS: indicates that no users have been assigned access. Under FAPIIS: indicates no records have been entered.

Return to the Main Menu

The **Return to the Main Menu** button returns the user to the Department POC Main Menu.

Status Report: This option allows the Department POC to monitor the status of contracts and evaluations for each contract/order within the respective department. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Department POC read-only access to each. **(See Status Report Section for more specific information)**

Evaluation Metrics Report: This option allows the Department POC to run a report that identifies the number of contracts that are registered, evaluations in process, and evaluations completed under the Department POC's cognizance. This list displays the Agency and is broken down at the Organization level. **(See Evaluation Metrics Report Section for more specific information)**

Ratings Metrics Report: This option allows the Department POC to run a report that will identify the distribution of ratings for all completed evaluations within the department. The report can be qualified by date, Focal Point, or Organization. **(See Ratings Metrics Report Section for more specific information)**

Processing Times Report: This option allows the Department POC to monitor the processing times for all evaluations within the department. For example, this report will identify the number of evaluations completed for a specific month and how many were completed within the 120-day objective. **(See Processing Times Report Section for more specific information)**

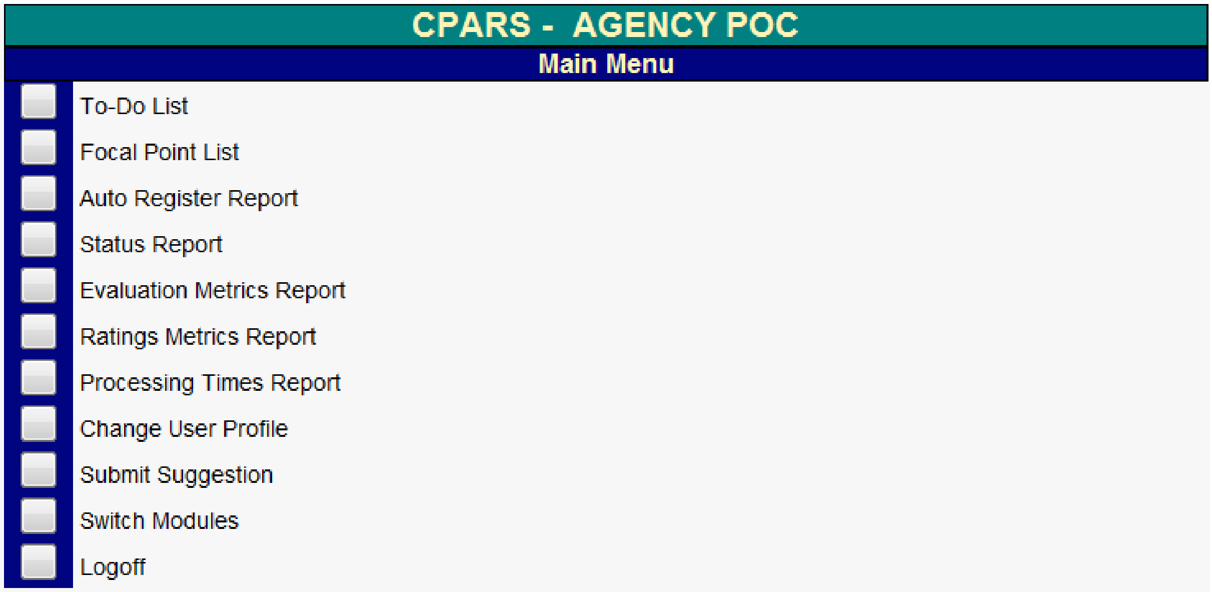
Change User Profile: This option must be used whenever a Department POC's name, email address, address, or phone number changes. This option also allows users to change their CPARS password. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

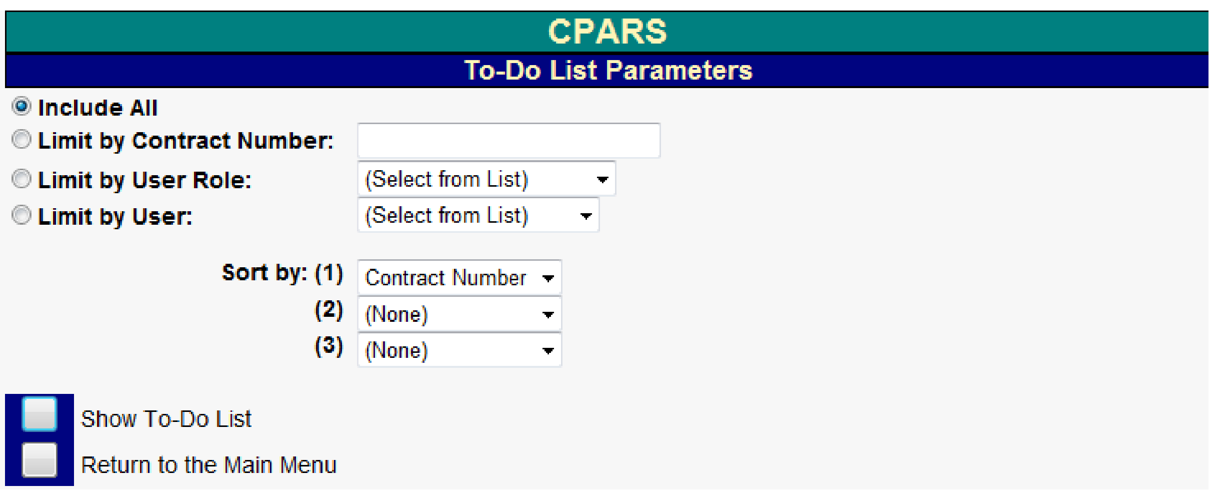
Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Agency Point of Contact

An Agency Point of Contact (POC) is a senior level employee (or designated representative) who is a proponent of the CPARS application and process. This access level allows Agency POCs to quickly identify the status of contracts/orders and evaluations within their respective organization.



<u>To-Do List:</u> This option allows the Agency POC to quickly identify the actions within the organization that need to be taken to complete in-process evaluations. Click the **To-Do List** button from the Main Menu and a To-Do List Parameters screen displays. Select the desired parameter and sort options, if required, and click the **Show To-Do List** button. The **Return to the Main Menu** button returns the user to the Agency POC Main Menu.



A list of evaluations for the Agency POC's organization will display.

CPARS

To-Do List

[Spreadsheet]

CONTRACT NUMBER	DUNS	PERIOD OF PERFORMANCE	ROLE	ACTION REQUIRED	ASSIGNED	USER
EPA123D2001	999999999	10/20/2012 - 08/23/2013	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA ORANGE
EPA123D2001	999999999	10/20/2012 - 08/23/2013	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA BLUE
EPA123D2001	999999999	10/20/2012 - 08/23/2013	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA BLUE
EPA123D3030	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA ORANGE
EPA123D3030	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA BLUE
EPA123D3030	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA BLUE
EPA123D3031	999999999	10/02/2011 - 10/01/2012	Contractor	Input Comments	06/13/2014	AMANDA PURPLE
EPA123D3031	999999999	10/02/2011 - 10/01/2012	Contractor	Input Comments	06/13/2014	AMANDA ORANGE
EPA123D3035	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA ORANGE
EPA123D3035	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA BLUE
EPA123D3035	9999999999999	10/01/2011 - 09/29/2012	Assessing Official Rep	Initiate, Send to Assessing Official	09/03/2013	AMANDA BLUE
EPA123D3036	999999999	10/20/2011 - 10/19/2012	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA YELLOW
EPA123D3036	999999999	10/20/2011 - 10/19/2012	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA ORANGE
EPA123D3036	999999999	10/20/2011 - 10/19/2012	Assessing Official	Rate, Send to Contractor	09/04/2013	AMANDA BLUE
TEST1234D0414 0001	999999999	04/14/2013 - 04/14/2014	Reviewing Official	Input Comments, Close Evaluation	05/30/2014	AMANDA BLUE

Return to the To-Do List Parameters

Return to the Main Menu

This report displays the Contract Number, DUNS, Period of Performance, User Role, Action Required, Date Assigned, and the name of the person responsible for the action.

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Agency POC To-Do List.

User Name – Allows the Agency POC to view the user's profile information, including name, title, organization, address, email address and phone number. Click the **User Name** to see the user profile information. Click the **Close** button to return to the previous screen.

The **Return to the To-Do List Parameters** button allows the Agency POC to change the To-Do List Parameters and run additional reports. The **Return to the Main Menu** button returns the user to the Agency POC Main Menu.

Focal Point List: This option allows the Agency POC to view a list of the Focal Points and their Alternates for the organization(s) that the Agency POC has cognizance over. The list will display: the Organization(s) the Focal Point has cognizance over, Focal Point name, Phone Number, Email Address, Created Date, Last Accessed Date, and the system(s) they are Active In.

CPARS

Focal Point List - 06/27/2014

[Spreadsheet]

Organization	Role	User Name	Phone Number	Email Address	Created Date	Last Accessed Date	Active In *	
							CPARS	FAPIIS
FMS	Focal Point	AMANDA GRONKOWSKI	555-555-5555	amanda.travis@noemail.mil	04/22/2014	06/27/2014	Y	N
	Alternate	THOMAS JEFFERSON	222-222-2222	thomas.jefferson@noemail.mil	04/22/2014	06/22/2014		
GCERC	Focal Point	AMANDA MONEY	555-555-5555	amanda.money@noemail.mil	04/22/2014	06/27/2014	Y	N
	Alternate	AMANDA ORANGE	4445556666	amanda.travis@noemail.mil	05/08/2014	06/23/2014		

* **Active In**

Y - Under CPARS: indicates that user(s) have been assigned access. Under FAPIIS: indicates a record(s) has been entered.

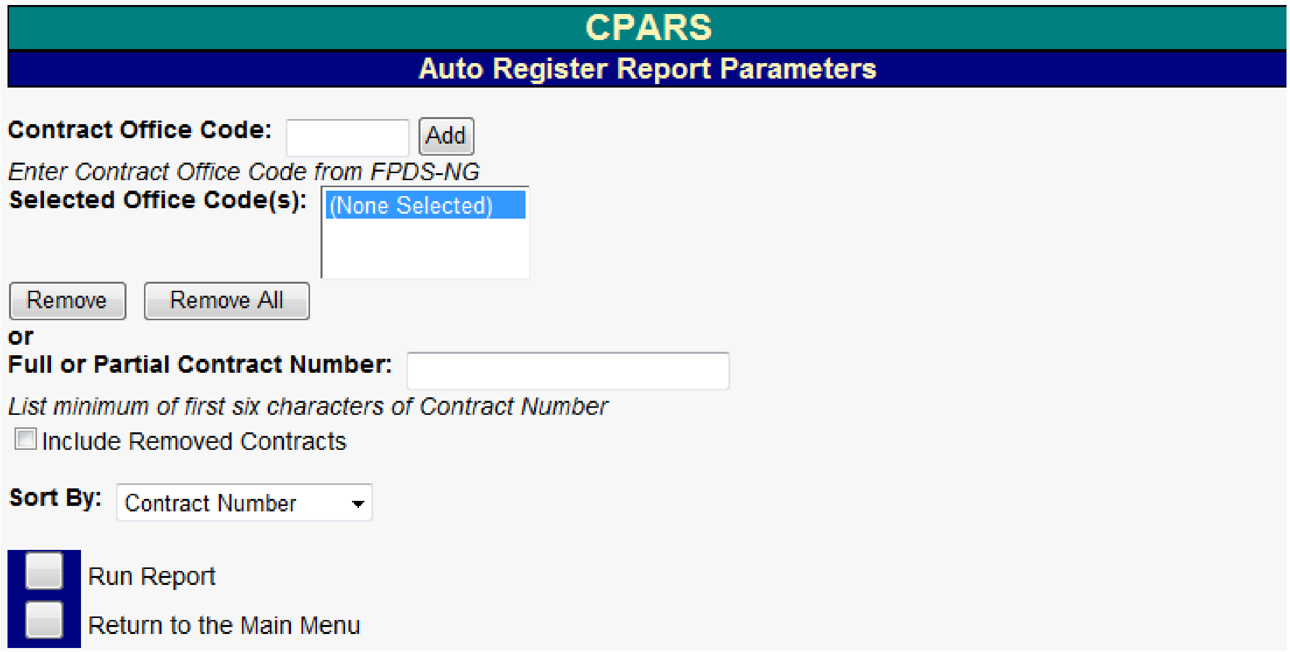
N - Under CPARS: indicates that no users have been assigned access. Under FAPIIS: indicates no records have been entered.

Return to the Main Menu

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Focal Point List.

The **Return to the Main Menu** button returns the user to the Agency POC Main Menu.

Auto Register Report: This option allows the Agency POC to view a list of contracts/orders that are eligible for CPARS reporting by their Focal Point(s) within the 30 day registration parameter. The CPARS-eligible list is filtered by Business Sector and applicable minimum dollar threshold as displayed below. Contracts/orders not exceeding the established minimum dollar thresholds for reporting will not be displayed. Contracts/orders that have already been registered in CPARS will not be displayed.



After selecting the **Auto Register Report** from the Main Menu, enter a contract office code or a full or partial contract number in the space provided. If you wish to see the removed contracts you must select/check the **Include Removed Contracts** check box. The Auto Register Report may be sorted by up to seven sort options. Select the desired option from the **Sort By** drop-down box.

Click the **Run Report** button at the bottom of this screen the list will run as shown below (a partial list is shown as an example).

CPARS

Auto Register Report

[Spreadsheet]

CONTRACT NUMBER	ORDER NUMBER	CONTRACT OFFICE CODE	CONTRACT OFFICE	DOLLAR VALUE	AWARD DATE	COMPLETION DATE	AVAILABLE DATE	PREPARED BY	REMOVED BY
DP432114C0001		DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014		AMY JONES
DP432114C0002		DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014		
DP432114C0003	DP12345	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014		AMY JONES
DP432114C0004	DP12345	DP4321	DOREENS CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	09/10/2014		
DP432114C0005		FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV	
DP432114C0006	0001	FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV	
DP432114C0007		00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV	
DP432114C0008	0001	00256P	DOREENS VA CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV	
DP432114C0010		FA8627	DOREENS AF CONTRACTING SHOP	$7,000,000	03/01/2014	01/01/2020	11/06/2014	DOREEN@NSLC.GOV	

Return to the Auto Register Report Parameters

Return to the Main Menu

The example above includes removed contracts. The **Removed By** column identifies the Focal Point who removed each contract/order, click on the Focal Point's name to view the Focal Point's profile information, including name, title, organization, address, email address, and phone number. Click the **Close button to return to the list of contracts.**

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Auto Register Report list.

Status Report: This option allows the Agency POC to monitor the status of contracts and evaluations for all contracts/orders within the respective organization. The CPAR Status Report will display information as counts or as a list of evaluations that allows the Agency POC read-only access to each evaluation. **(See Status Report Section for more specific information)**

Evaluation Metrics Report: This option allows the Agency POC to run a report that identifies the number of contracts that are registered, evaluations in process, and evaluations completed for the Agency/DoD Service. This list displays the Agency and is broken down at the Organization level. **(See Evaluation Metrics Report Section for more specific information)**

Ratings Metrics Report: This option allows the Agency POC to run a report that will identify the distribution of ratings for all completed evaluations within the organization. The report can be qualified by date or organization. **(See Ratings Metrics Report Section for more specific information)**

Processing Times Report: This option allows the Agency POC to monitor the processing times for all evaluations within the respective organization. For example, this report will identify the number of evaluations completed for a specific month and how many were completed within the 120-day objective. **(See Processing Times Report Section for more specific information)**

Change User Profile: This option must be used whenever a user's name, email address, address, or phone number changes. This option also allows the Agency POC to elect to receive an optional email notification that would be sent whenever an evaluation is "Due" to be initiated. The Change User Profile option also allows the Agency POC to change his/her CPARS password. **(See User Profile Section for more specific information)**

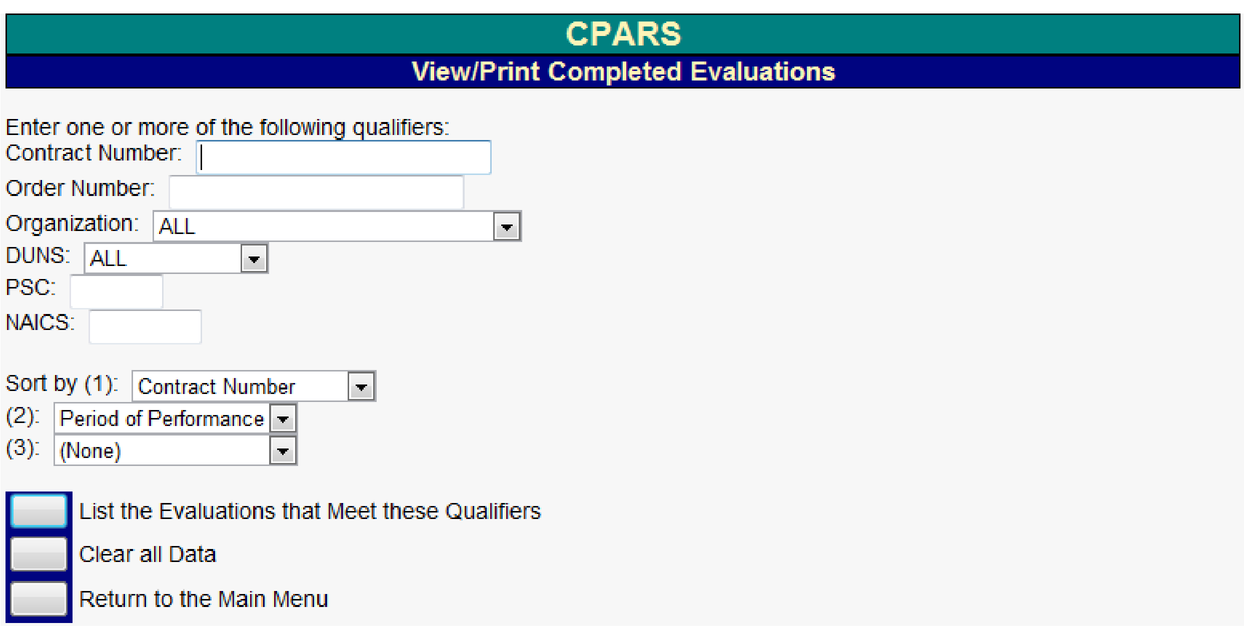
Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. Currently, Agency POCs do not have a role in FAPIIS. **(See Switch Modules Section for more specific information)**

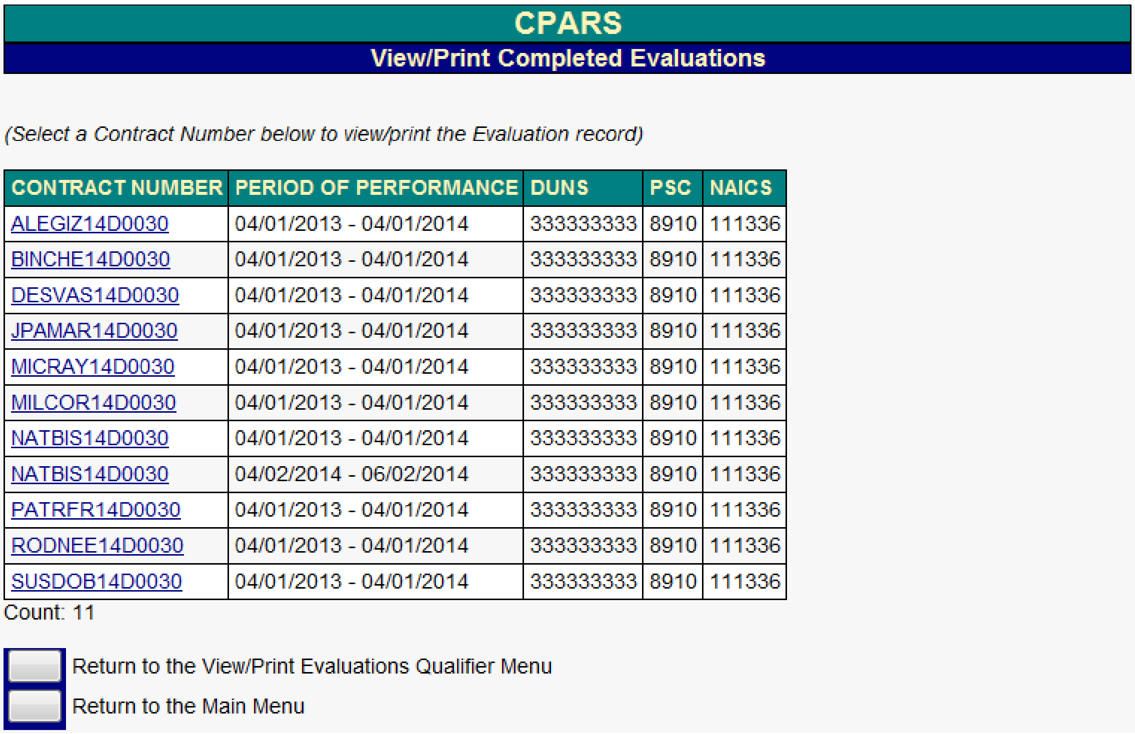
Senior Contractor Representative

The Senior Contractor Representative access level allows a designated corporate official to view in-process evaluations when statused at the Contractor Representative level, and all completed evaluations. Additional features at this level allow the Senior Contractor Representative to quickly identify evaluations that have been sent to the company for comment. Senior Contractor Representative access is provided by the Naval Sea Logistics Center Detachment Portsmouth, New Hampshire, upon receipt of a completed Senior Contractor Representative User Access Request Form.

<u>View/Print Completed Evaluations:</u> This option allows the Senior Contractor Representative to view evaluations that have been completed by the Government for contracts/orders awarded to the corporation or any of its divisions or subsidiaries. To view an evaluation, click the **View/Print Completed Evaluations** button from the Main Menu and the View/Print Completed Evaluations screen displays.



The Senior Contractor Representative can search for completed evaluations by Contract Number/Order Number, Organization, DUNS, Product or Service Code (PSC), and North American Industrial Classification System (NAICS). Select the appropriate qualifiers and then click the **List the Evaluations that Meet these Qualifiers** button. A list of completed evaluations will display. Click on the contract/order number of the evaluation to be viewed and a new window opens and displays the evaluation in HTML format. Once the evaluation is displayed, the user is able to scroll through the entire evaluation and/or print the evaluation on a local printer. The **Return to the View/Print Evaluations Qualifier Menu** button allows the Senior Contractor Representative to select new qualifiers and run another report. The **Return to the Main Menu** button returns the user to the Senior Contractor Representative Main Menu.



CPARS

View/Print Completed Evaluations

(Select a Contract Number below to view/print the Evaluation record)

CONTRACT NUMBER	PERIOD OF PERFORMANCE	DUNS	PSC	NAICS
ALEGIZ14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
BINCHE14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
DESVAS14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
JPAMAR14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
MICRAY14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
MILCOR14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
NATBIS14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
NATBIS14D0030	04/02/2014 - 06/02/2014	333333333	8910	111336
PATRFR14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
RODNEE14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336
SUSDOB14D0030	04/01/2013 - 04/01/2014	333333333	8910	111336

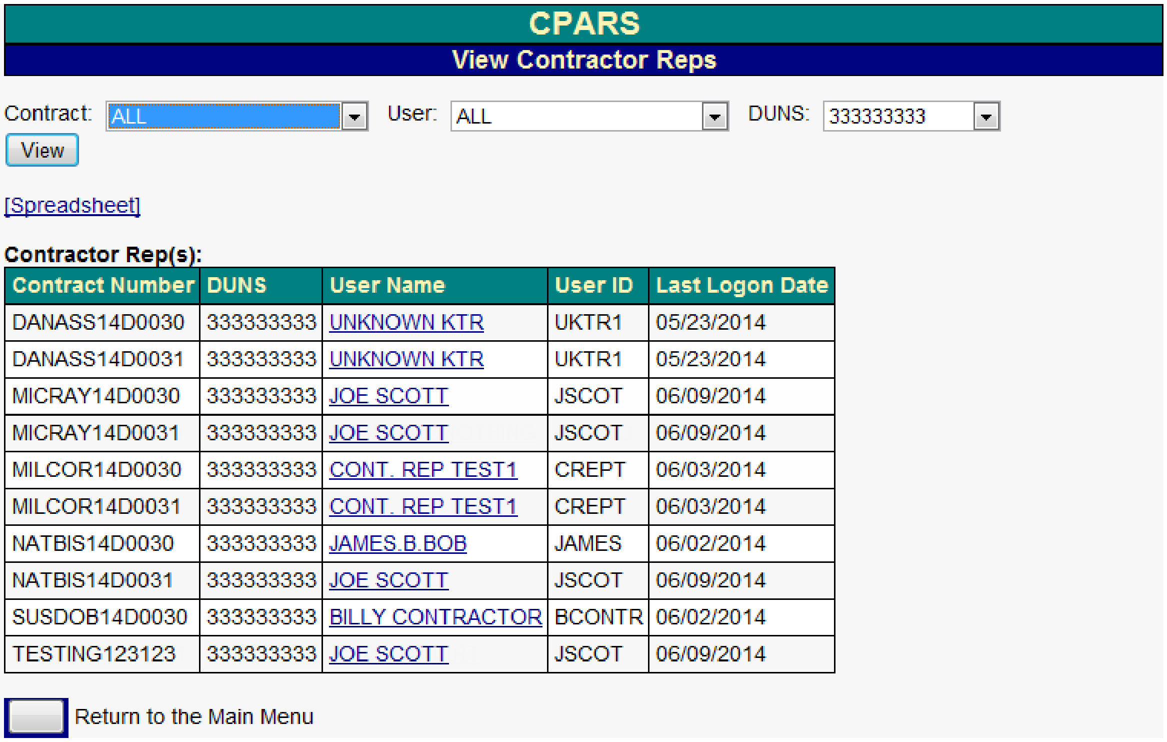
Count: 11

Return to the View/Print Evaluations Qualifier Menu

Return to the Main Menu

View Contractor Reps: This option allows the Senior Contractor Representative to quickly identify all Contractor Representatives (and view their contact information) within the corporation who have been authorized to enter comments in CPARS evaluations. Click **View Contractor Reps** from the Main Menu**.** The View Contractor Reps screen displays. The Senior Contractor Representative can view Contractor Representatives by Contract, User, or DUNS. Select the desired option(s) and click **View**. A list of Contractor Reps with the Contract Number(s) assigned, DUNS, User Name, User ID, and Last Logon Date displays. Click on the **User Name** to view the individual's profile information including name, title, organization, address, email address, and phone number. The **Return to the Main Menu** button returns the user to the Senior Contractor Representative Main Menu.

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Contractor Rep(s) list.



CPARS
View Contractor Reps

Contract: ALL User: ALL DUNS: 333333333

View

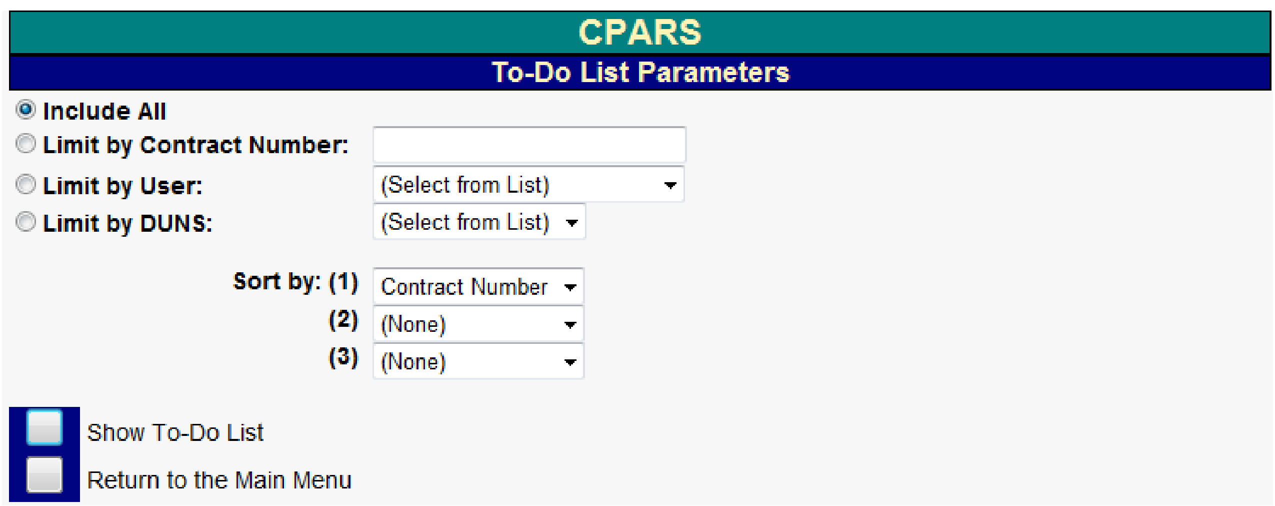
[Spreadsheet]

Contractor Rep(s):

Contract Number	DUNS	User Name	User ID	Last Logon Date
DANASS14D0030	333333333	UNKNOWN KTR	UKTR1	05/23/2014
DANASS14D0031	333333333	UNKNOWN KTR	UKTR1	05/23/2014
MICRAY14D0030	333333333	JOE SCOTT	JSCOT	06/09/2014
MICRAY14D0031	333333333	JOE SCOTT	JSCOT	06/09/2014
MILCOR14D0030	333333333	CONT. REP TEST1	CREPT	06/03/2014
MILCOR14D0031	333333333	CONT. REP TEST1	CREPT	06/03/2014
NATBIS14D0030	333333333	JAMES.B.BOB	JAMES	06/02/2014
NATBIS14D0031	333333333	JOE SCOTT	JSCOT	06/09/2014
SUSDOB14D0030	333333333	BILLY CONTRACTOR	BCONTR	06/02/2014
TESTING123123	333333333	JOE SCOTT	JSCOT	06/09/2014

Return to the Main Menu

<u>To-Do List:</u> This option allows the Senior Contractor Representative to identify all evaluations that have been forwarded to the corporation, its divisions or subsidiaries, for contractor review and comment. The evaluations identified on this list require contractor review and comment and should be returned to the Government by the required due date or they will be closed by the Government without contractor review and comment. Click the **To-Do List** from the Main Menu. A To-Do List Parameters screen displays.



CPARS
To-Do List Parameters

Include All
Limit by Contract Number:
Limit by User: (Select from List)
Limit by DUNS: (Select from List)

Sort by: (1) Contract Number
(2) (None)
(3) (None)

Show To-Do List
Return to the Main Menu

To view a list of all evaluations within the Senior Contractor Representative's area of responsibility, the Senior Contractor Representative selects **Include All**. Select **Limit by Contract Number** and enter a specific contract number to limit the search to one contract. The Senior Contractor Representative can limit the To-Do List to a specific Contractor Representative by selecting **Limit by User** and selecting the appropriate name from the drop-down box. Finally, the To-Do List can be limited to one of the corporation's assigned DUNS numbers by selecting **Limit by DUNS** and selecting the DUNS from the drop-down box. Select the desired parameter and the sort option(s) and then click the **Show To-Do List** button. A list of evaluations will display.

CPARS

To-Do List

[Spreadsheet]

CONTRACT NUMBER	DUNS	PERIOD OF PERFORMANCE	ACTION REQUIRED	ASSIGNED	DUE DATE	USER
USDA12D0023	999999999	10/09/2011 - 10/08/2012	Input Comments	06/02/2014	08/01/2014	RAMON FOSTER
USDA12D0023	999999999	10/09/2011 - 10/08/2012	Input Comments	06/02/2014	08/01/2014	ANTWON BLAKE
USDA12D0044	999999999	10/01/2010 - 10/01/2011	Input Comments	06/02/2014	08/01/2014	RAMON FOSTER
USDA12D0044	999999999	10/01/2010 - 10/01/2011	Input Comments	06/02/2014	08/01/2014	ANTWON BLAKE
USDA12D0044	999999999	10/01/2010 - 10/01/2011	Input Comments	06/02/2014	08/01/2014	HEATH MILLER
USDA12D0045	999999999	10/01/2010 - 01/01/2011	Input Comments	06/02/2014	08/01/2014	RAMON FOSTER
USDA12D0045	999999999	10/01/2010 - 01/01/2011	Input Comments	06/02/2014	08/01/2014	ANTWON BLAKE
USDA12D0045	999999999	10/01/2010 - 01/01/2011	Input Comments	06/02/2014	08/01/2014	HEATH MILLER

Return to the To-Do List Parameters

Return to the Main Menu

This report displays Contract Number, DUNS, Period of Performance, Action Required, Date Assigned, Due Date and User Name.

[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the To-Do List.

User Name – Allows the Senior Contractor Representative to view the Contractor Representative's profile information, including name, title, organization, address, email address, and phone number. Click the **User Name** to see the user profile information. Click the **Close** button to return to previous screen.

Return to the To-Do List Parameters button allows the Senior Contractor Representative to select new qualifiers and run another report. The **Return to the Main Menu** button returns the user to the Senior Contractor Representative Main Menu.

Status Report: This option allows the Senior Contractor Representative to monitor the status of contracts and evaluations for each contract/orders within their respective corporation. The Status Report will display information as counts or as a list of contracts and evaluations that allows the Senior Contractor Representative read-only access to each evaluation that is rated or completed. **(See the Status Report Section for more specific information)**

Ratings Metrics Report: This option allows the Senior Contractor Representative to run a report that will identify the distribution of ratings for all completed evaluations within the corporation. The report can be qualified by date or DUNS. **(See Ratings Metrics Report Section for more specific information)**

Change User Profile: This option must be used whenever a user's name, email address, address, or phone number changes. The Change User Profile option also allows the Senior Contractor Representative to change his/her password. **(See User Profile Section for more specific information)**

Submit Suggestion: This option allows users to communicate suggested CPARS improvements, policy comments, and problems to system administrators and the Change Control Board. **(See Submit Suggestion Section for more specific information)**

Switch Modules: This option allows users to switch between CPARS and FAPIIS without having to log off. However**,** Senior Contractor Representatives are not granted access to the FAPIIS module. To review and comment on completed FAPIIS records for their company, Contractors will require access to PPIRS at **https://www.ppirs.gov**. **(See Switch Modules Section for more specific information)**

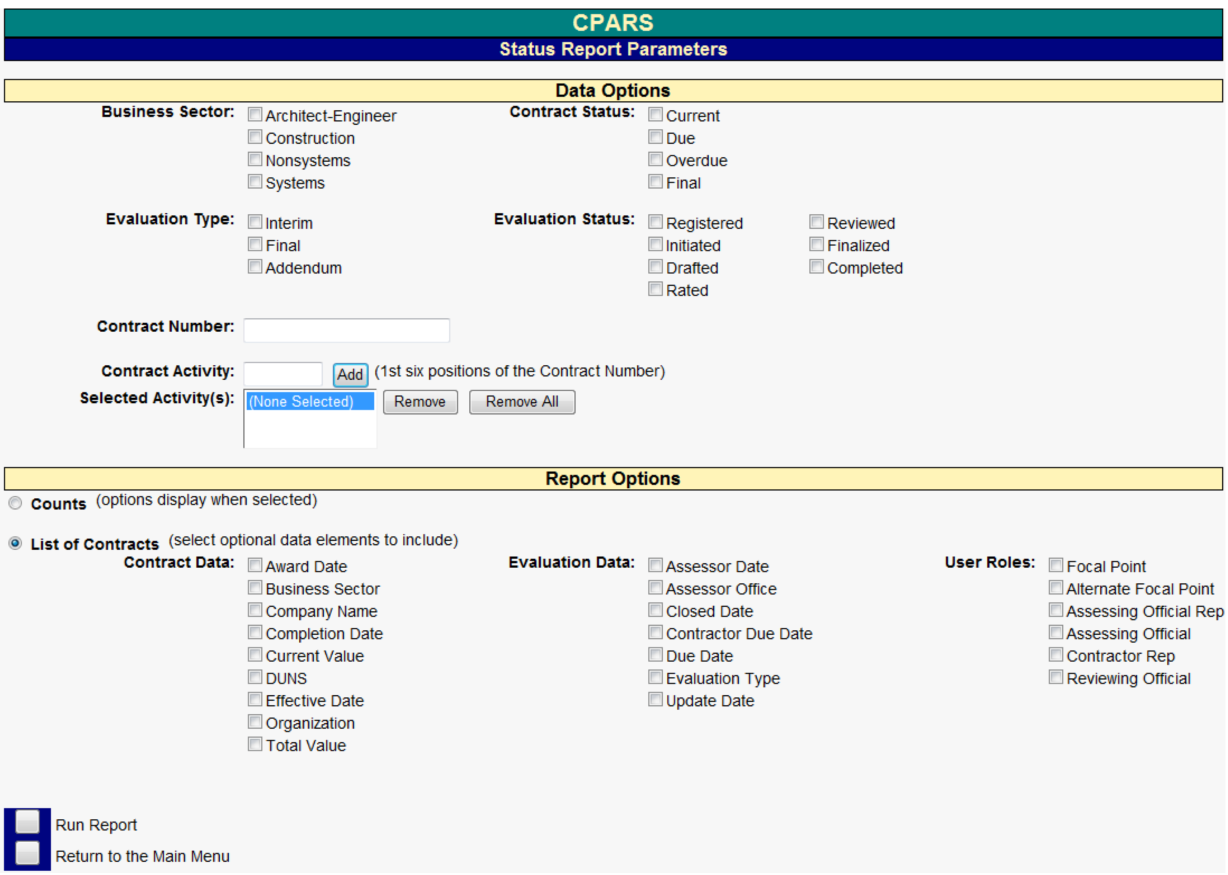
CPARS Reports

The CPARS application provides the functionality of a variety of reports (Status Report, Evaluation Metrics Report, Ratings Metrics Report, and Processing Times Report) depending on the user's access level. These reports are used to help users monitor the status of the CPARS processes. You will note some of the report parameters or options vary slightly depending on the user's access level, but the reports function the same and as described in the following sections.

Status Report

The Assessing Official Representative, Assessing Official, Contractor Representative, and the Reviewing Official Status Report screens are displayed in the following examples. As previously mentioned, slight variations of this report occur at different access levels and are described as applicable.

The Status Report allows users to monitor the status of contracts and evaluations within their purview. The Status Report will display information as counts (e.g., number of evaluations complete, number of contracts/orders due for an evaluation) or as a list of contracts and evaluations that identifies the status of each contract/order available that provides the user read-only access to each evaluation. To run a Status Report, click the **Status Report** button from the Main Menu. The Status Report Parameters menu will display.



If the user leaves the default value of **List of Contracts** (under Report Options) selected and then clicks on the **Run Report** button, the report results in a list of all the user's contracts and evaluations that includes the following column names; Notes, Viewed, Contract Number, Contract Status, Contract Due Date, Period of Performance, Evaluation Status, and Activity Log.

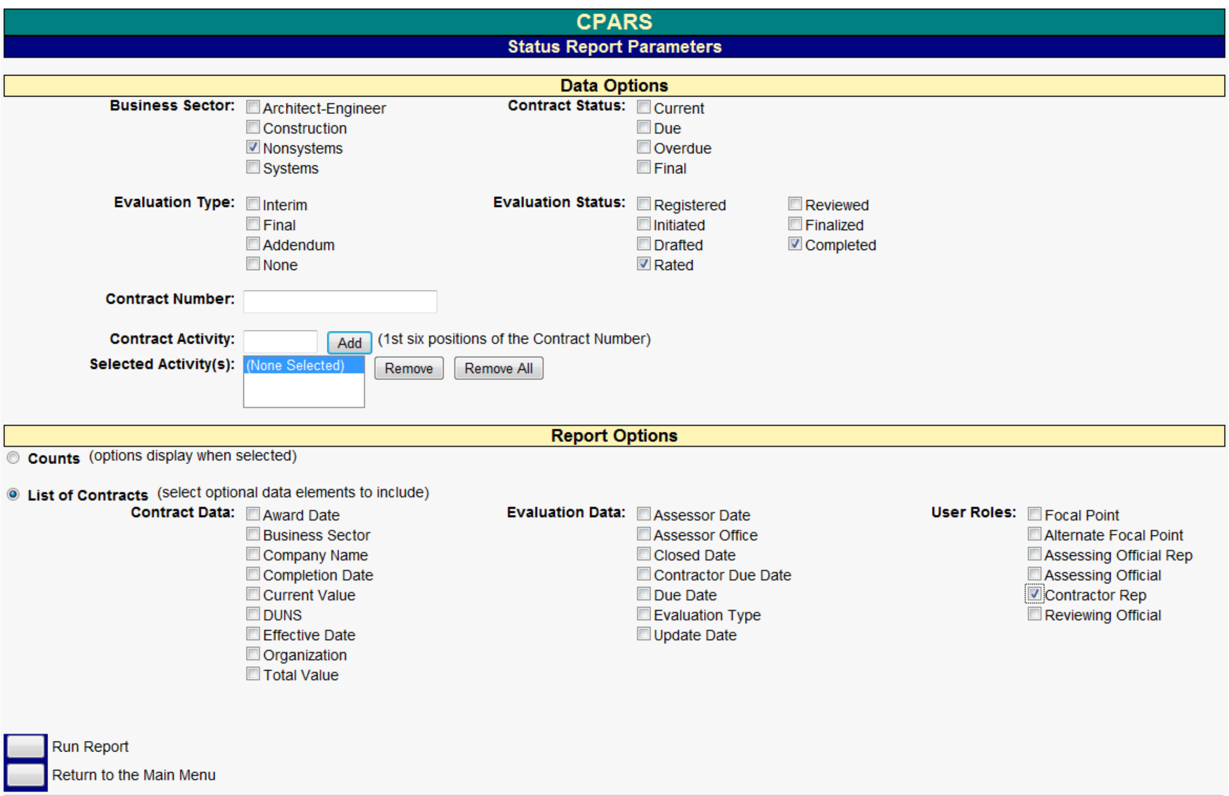
NOTE: Default column names for reports for **Department POC**, **Agency POC**, **Contractor Representative** and **Senior Contractor Representative** access levels **do not** include Notes. **Contractor Representative** and **Senior Contractor Representative** access levels **do not** include Activity Log.

The Status Report may be further qualified by selecting desired parameters under **Data Options.** The user limits the status report by clicking the box(es) adjacent to the desired parameter. A checkmark will display in the box. If a report by Contract Activity is desired, enter the specific Contract Activity in the **Contract Activity** box. A report for multiple Contract Activities can be run by entering a Contract Activity in the **Contract Activity** box and then clicking the **Add** button for each Contract Activity. Contract Activities can be removed by highlighting a Contract Activity and clicking the **Remove** button. Click **Remove All** to remove all Contract Activities from the list. The report can also be run for a specific contract number by entering the contract number in the **Contract Number** box.

The user can choose to include additional data columns and user roles by clicking the box(es) adjacent to the column name under **Report Options**. A checkmark will display in the box adjacent to the column name(s) selected.

NOTE: **Contractor Representative** access level **does not** include the User Roles of Assessing Official Rep, Assessing Official, Contractor Rep, or Reviewing Official. **Senior Contractor Representative** access level **does not** include the User Roles of Assessing Official Rep, Assessing Official, or Reviewing Official.

In the example below, the user is limiting the status report to display only rated and completed evaluations that have the Business Sector of Nonsystems, and has chosen to include the user role of Contractor Rep.



Click the **Run Report** button

NOTE: The **Focal Point**, **Department POC,** and **Agency POC** access levels may also limit their reports by Organization; **Senior Contractor Representative** access level may also limit their reports by DUNS.

The Status Report shown below contains the selections Data Options - Business Sector: Nonsystems, Eval Status: Rated and Completed and the User Role: Contractor Rep.

CPARS

Status Report - 06/27/2014

DATA: Business Sector: Nonsystems; Eval Status: Rated; Completed;
[Spreadsheet]
(Click on a column name to re-sort the report.)

	Viewed	Contract Number	Contract Status *	Contract Due Date	Period of Performance	Evaluation Status **	User Name	User Role	Phone Number	Email Address	Access Granted Date	Activity Log
		USTRANS12D0009	CURRENT	08/19/2015	04/21/2013 - 04/21/2014	Completed	AMANDA PURPLE	Contractor Rep	555-666-7878	amanda.purple@nonavy.mil	05/08/2014	[Log]
[Notes]		USTRANS12D0002	DUE	08/13/2014	04/15/2013 - 04/15/2014	Rated	AMANDA PURPLE	Contractor Rep	555-666-7878	amanda.purple@nonavy.mil	05/08/2014	[Log]
		JPAMAR14D0030	OVERDUE	04/18/2014	12/20/2011 - 12/19/2012	Completed	AMANDA PURPLE	Contractor Rep	555-666-7878	amanda.purple@nonavy.mil	05/08/2014	[Log]

Count: 3

x - indicates the record has been selected for viewing
☑ - indicates notes have been entered

* **CONTRACT STATUS**
Current: All required Evaluations for this contract have been completed or are not yet due.
Due: The latest Evaluation for this contract should be in progress at this time.
Overdue: The latest Evaluation for this contract has not been completed within the 120 day period.
Final: The Final Evaluation for this contract has been completed, no further Evaluations are due.

** **EVALUATION STATUS**
Registered: The contract is registered, no Evaluations have been initiated.
Initiated: Evaluation initiated; waiting for Assessing Official Rep to send to Assessing Official.
Drafted: Evaluation initiated; waiting for Assessing Official signature.
Rated: Signed by Assessing Official; waiting for Contractor Rep comments.
Reviewed: Signed by Contractor Rep or Contractor Rep comment period expired; waiting for Assessing Official to finalize.
Finalized: Ratings finalized; waiting for Reviewing Official comments.
Completed: The Evaluation has been completed.

Run Another Status Report
Return to the Main Menu

[Spreadsheet] – Click on **[Spreadsheet]** in the upper left hand corner of the page to create a Microsoft Excel version of the report.

[Notes] – This option serves as "post-it notes" for each evaluation that has been started, but not completed. Click on the **[Notes]** to enter or view notes that have been entered by the Assessing Official Representative, Assessing Official, Reviewing Official, or Focal Point (this feature is only available at these levels). Click the **Save** button to save the new note. A red check mark ☑ indicates notes have been entered in the Notes field. Click the **Close** button to return to the list of evaluations without saving new notes.

STATUS NOTES

Contract: USTRANS12D0009 Period of Performance: 12/20/2012 - 12/20/2013

New Notes:

Save Close

From	Notes	Received
AMANDA USTRAN	Notes entered	06/27/2014 10:05

Contract Number - Click on the specific Contract/Order Number and the evaluation will display in HTML format. If the Assessing Official modified the evaluation after it was returned from the Contractor Rep, the window contains a **View Original CPAR** button or a **View Modified CPAR** button. Click the **View Original CPAR** button to view the original evaluation and click on the **View Modified CPAR** button to view the modified evaluation. Click the **Print** button to print the evaluation on a local printer. Click the **Close** button to return to the list of evaluations. A **green x** appears in the Viewed column adjacent to the contract number for the evaluation that was just viewed.

User Name – Displays all the users assigned to the contract/order. Clicking on the user's name allows the Focal Point to view the user's profile information including User ID, name, title, organization, address, email, and phone number.

User Role – Displays the user role assigned to that contract/order for the adjacent user name.

Phone Number – Displays the phone number for the adjacent user name. The phone number is populated from the user's profile.

Email Address – Displays the email address for the adjacent user name. The email address is populated from the user's profile. Clicking on the user's email address will open an email to the user.

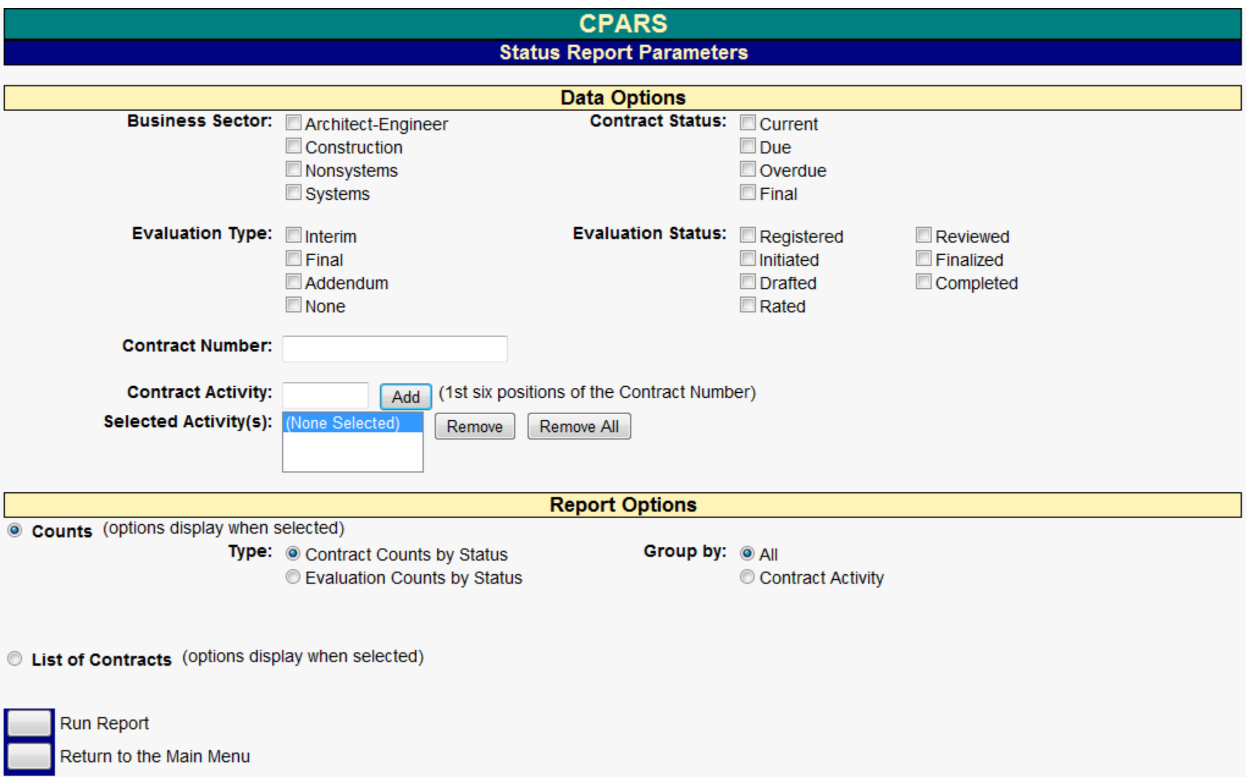
Access Granted Date – Displays the date access was granted to the contract/order for the adjacent user name.

[Log] – Click on **[Log]** and a new window opens and presents the Activity Log. The Activity Log provides an audit trail of the history of actions taken on the evaluation. For example, it identifies when the applicable contract/order was registered, when the evaluation was initiated, and who took the action(s).

To run a new Status Report, click the **Run Another Status Report** button. The **Return to the Main Menu** button returns the user to the Main Menu.

To display the Status Report as Counts, click on the **Counts** radio button under **Report Options** on the Status Report Parameters screen. **Counts** can be grouped by All or Contract Activity.

NOTE: Focal Point Group By options include All, Contract Activity, and Organization; **Department POC** Group By options include All, Contract Activity, Organization, and Focal Point; **Agency POC** Group By options include All, Contract Activity, and Focal Point; **Senior Contractor Representative** Group By options include All, Contract Activity, Organization, and DUNS. **All** is the default value.



If the user leaves the default value of **Contract Counts by Status** (under Report Options) selected and then clicks on the **Run Report** button, the report results in the status of all the user's contracts/orders by counting the number of contracts/orders that are current, due, overdue, or have a final evaluation. Percentages are also provided.

CPARS

Status Report - 06/27/2014

DATA: All Grouped By: All

All	Current	Due	Overdue	Final	Undetermined	Totals
Counts	4	12	15	4	0	35
	11%	34%	43%	11%	0%	
TOTALS:	**4**	**12**	**15**	**4**	**0**	**35**
	11%	**34%**	**43%**	**11%**	**0%**	

* **STATUS**
Current: All required Evaluations for this contract have been completed or are not yet due.
Due: The latest Evaluation for this contract should be in progress at this time.
Overdue: The latest Evaluation for this contract has not been completed within the 120 day period.
Final: The Final Evaluation for this contract has been completed, no further Evaluations are due.

Run Another Status Report
Return to the Main Menu

To display a list of evaluations as counts, click the **Run Another Status Report** button. Select the option of **Evaluation Counts by Status** (under Report Options) and then click the **Run Report** button. The report results in the status of the user's evaluations by displaying the number of evaluations statused at each step of the automated workflow process (shown below). Percentages are also provided.

CPARS

Status Report - 06/27/2014

DATA: All Grouped By: All

All	Registered	Initiated	Drafted	Rated	Reviewed	Finalized	Completed	Totals
Counts	12	2	11	2	0	1	9	37
	32%	5%	30%	5%	0%	3%	24%	
TOTALS:	**12**	**2**	**11**	**2**	**0**	**1**	**9**	**37**
	32%	5%	30%	5%	0%	3%	24%	

* **STATUS**
Registered: The contract is registered, no Evaluations have been initiated.
Initiated: Evaluation initiated; waiting for Assessing Official Rep to send to Assessing Official.
Drafted: Evaluation initiated; waiting for Assessing Official signature.
Rated: Signed by Assessing Official; waiting for Contractor Rep comments.
Reviewed: Signed by Contractor Rep or Contractor Rep comment period expired; waiting for Assessing Official to finalize.
Finalized: Ratings finalized; waiting for Reviewing Official comments.
Completed: The Evaluation has been completed.

Run Another Status Report
Return to the Main Menu

Evaluation Metrics Report

The Evaluations Metrics Report option is available to **Focal Points**, **Department POCs**, and **Agency POCs.** This report is provided to help users identify the number of contracts, in process, completed, and total completed and in process, broken down by Agency/DoD Service to the organization level.

To run the Evaluation Metrics Report, click the **Evaluation Metrics Report** button from the Main Menu. The Evaluation Metrics Report will display.

CPARS

Evaluation Metrics Report - 03/17/2014

[Spreadsheet]

Agency Name	Organization	Contracts(1)	In-Process(2)	Completed(3)	Total(4)
EPA	EPA CPOD	10	7	2	9
EPA	EPA HPOD	4	4	0	4
EPA	EPA REGION 1	4	3	1	4
EPA	EPA REGION 4	1	0	1	1
EPA	EPA REGION 5	1	1	0	1
EPA	EPA REGION 6	1	1	0	1
EPA	EPA REGION 7	2	1	0	1
EPA	EPA REGION 9	3	2	1	3
EPA	EPA RTPPOD	1	0	1	1
EPA	EPA SRRPOD	3	0	3	3

(1) Contracting Actions Registered in CPARS.
(2) Evaluations In-Process.
(3) Evaluations Complete.
(4) Total Evaluations In-Process and Complete.

Return to the Main Menu

The Evaluation Metrics report allows users to view a count of number of contracts, in process, completed, and total completed and in process, broken down by Agency/DoD Service to the contract office level.

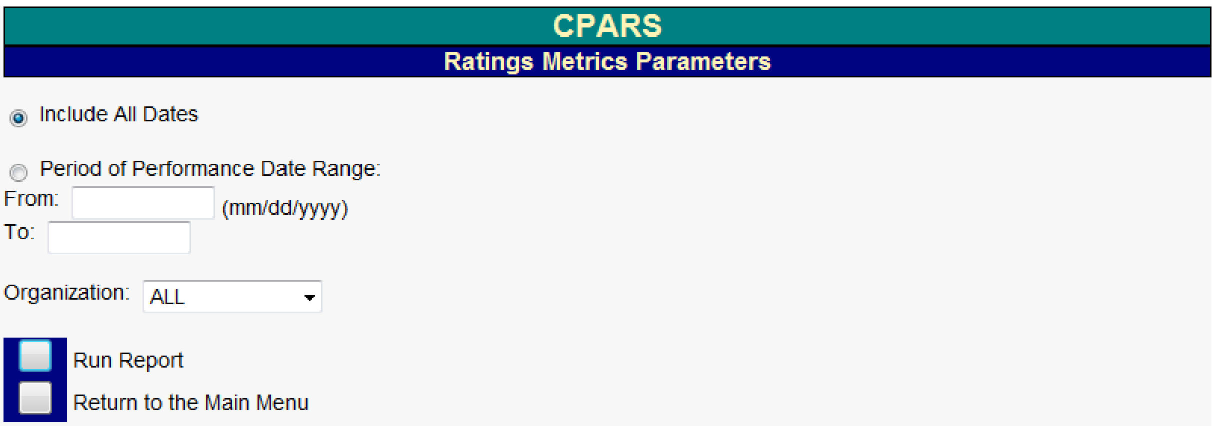
[Spreadsheet] – Click on **[Spreadsheet]** in the upper left hand corner of the page to create a Microsoft Excel version of the Evaluation Metrics report.

Ratings Metrics Report

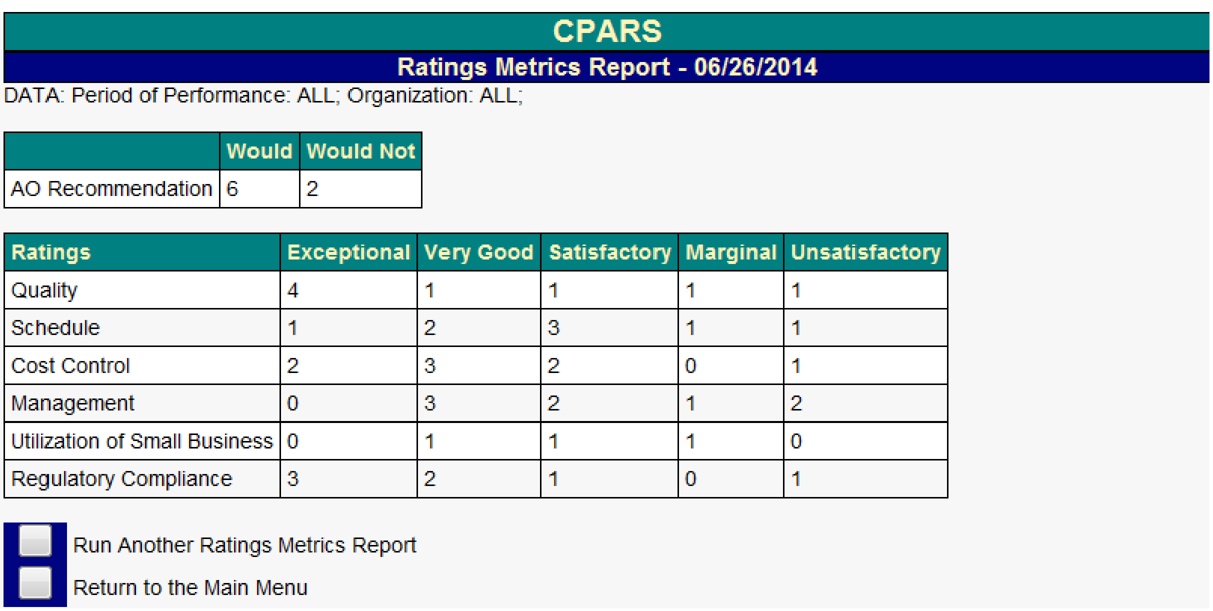
The Ratings Metrics Report option is available to **Focal Points**, **Department POCs**, **Agency POCs,** and **Senior Contractor Representatives**. This report is provided to help users monitor the distribution of ratings for completed evaluations.

To run a Ratings Metrics Report, click the **Ratings Metrics Report** button from the Main Menu. A Ratings Metrics Parameters screen will display. The Ratings Metrics Report can be run to include all completed evaluations by selecting **Include All Dates** or can be limited to a specific date range by selecting **Period of Performance Date Range** and entering the dates in the specified format.

NOTE: Focal Points and **Agency POCs** may also limit the report to a specific Organization; **Department POC** may limit the report to a specific Organization or Focal Point; **Senior Contractor Representatives** may limit reports to a specific DUNS.



Click the **Run Report** button. The Ratings Metrics Report will display.


CPARS

Ratings Metrics Report - 06/26/2014

DATA: Period of Performance: ALL; Organization: ALL;

	Would	Would Not
AO Recommendation	6	2

Ratings	Exceptional	Very Good	Satisfactory	Marginal	Unsatisfactory
Quality	4	1	1	1	1
Schedule	1	2	3	1	1
Cost Control	2	3	2	0	1
Management	0	3	2	1	2
Utilization of Small Business	0	1	1	1	0
Regulatory Compliance	3	2	1	0	1

Run Another Ratings Metrics Report

Return to the Main Menu

To run a new Ratings Metrics Report, click the **Run Another Ratings Metrics Report** button. The **Return to the Main Menu** button returns the user to the Main Menu.

Processing Times Report

The **Processing Times Report** option is available to **Focal Points**, **Department POCs,** and **Agency POCs**. This report is provided to help users monitor the evaluation processing times for evaluations completed within their organization.

To run a Processing Times Report, click the **Processing Times Report** button on the Main Menu. The Processing Times Report displays.

CPARS

Processing Times Report - 06/27/2014

				Average Processing Times (Days)				
Month	Number of Evaluations	<= 120 Days	> 120 Days	Total	Rate	Contractor Comments	Finalize	Review
2013-JUN	0	0	0	0	0	0	0	0
2013-JUL	0	0	0	0	0	0	0	0
2013-AUG	0	0	0	0	0	0	0	0
2013-SEP	0	0	0	0	0	0	0	0
2013-OCT	0	0	0	0	0	0	0	0
2013-NOV	0	0	0	0	0	0	0	0
2013-DEC	0	0	0	0	0	0	0	0
2014-JAN	0	0	0	0	0	0	0	0
2014-FEB	0	0	0	0	0	0	0	0
2014-MAR	0	0	0	0	0	0	0	0
2014-APR	2	0	2	433	432	1	2	0
2014-MAY	1	1	0	48	48	0	1	0

Select: Contract Activity and click on a month above to see further details below.

Return to the Main Menu

The Processing Times Report presents one year of data. The months displayed in **blue** indicate that evaluations were completed during the month. For each month, the report identifies the number of evaluations completed, the number of evaluations completed within the 120-day objective, and the number of evaluations that exceeded the 120-day objective. In addition, the total average processing times are provided as well as the average processing times for each major step of the automated workflow process. The **Select** drop-down box allows users to "break out" each month by Contract Activity, Organization, or by Focal Point. Contract Activity is the default. Choose a selection from the drop down box, if applicable, and click on the desired month to view a more detailed report.

Month: 2014-APR

				Average Processing Times (Days)				
Contract Activity	Number of Evaluations	<= 120 Days	> 120 Days	Total	Rate	Contractor Comments	Finalize	Review
TEST12	2	2	0	2	2	0	1	1

Click on a Contract Activity above to see further details below.

Return to the Main Menu

In this particular example, only one Contract Activity (TEST12) applies to the user. To view the six evaluations completed for the month, click on the **TEST12** link under Contract Activity and the report displays processing times information at the evaluation level.

Month: 2014-APR Contract Activity: TEST12

				Processing Times (Days)				
Contract Number	Period of Performance	Focal Point	Organization	Total	Rate	Contractor Comments	Finalize	Review
TEST1234D0414	04/14/2013-04/14/2014	AMANDA TRAVIS (ATRAV)	EPA CPOD	3	3	0	1	0
TEST1234D0414 0001	04/15/2014-04/22/2014	AMANDA TRAVIS (ATRAV)	EPA CPOD	0	0	0	1	1

Return to the Main Menu

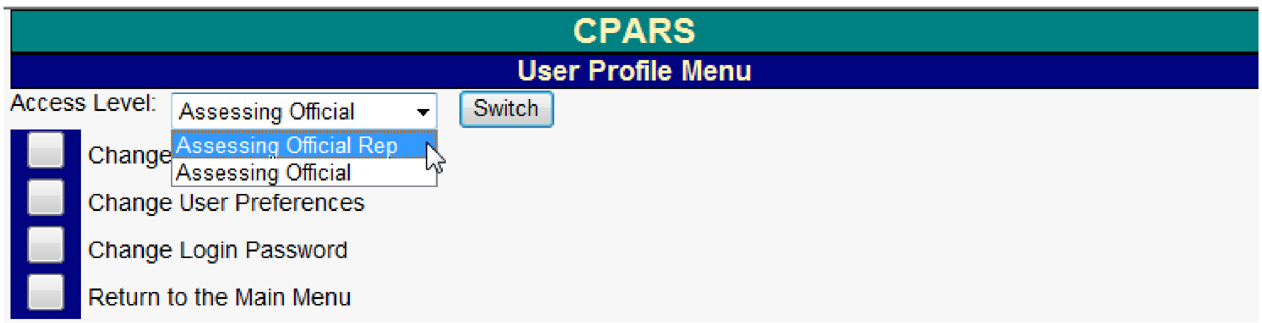
The **Return to the Main Menu** button returns the user to the Main Menu.

Change User Profile/Switch Access Level

<u>Change User Profile/Switch Access Level:</u> The Change User Profile/Switch Access Level option is very important as it is the primary method that users, at all access levels, keep their profile information up-to-date. For example, if a user's email address changes, the user would access the **Change User Profile/Switch Access Level** button to update the email address in CPARS. This option is also used to change user preferences (receive optional email notifications), to change a user's password, and to switch access levels, when necessary. To update user information, click the **Change User Profile/Switch Access Level** button from the Main Menu. The User Profile Menu will display.

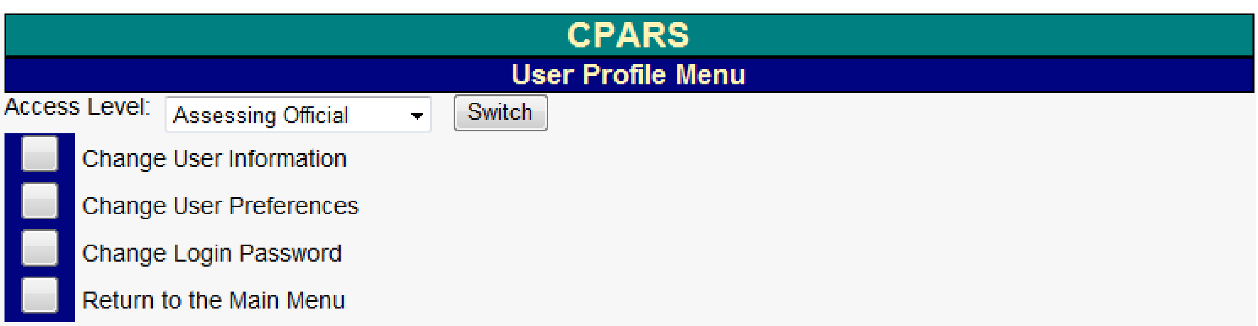
NOTE: This option is identified as **Change User Profile** at the Focal Point, Contractor Representative, Senior Contractor Representative, Department POC, and Agency POC access levels as they are not allowed to switch access levels.

The **Switch Access Level** option is available at the Assessing Official Representative, Assessing Official, Reviewing Official, and Alternate Focal Point access levels. **Switch Access Level** allows the user to switch between two or more roles when the Focal Point has provided the user with multiple access levels. To switch access levels, click on the **Change User Profile/Switch Access Level** button from the Main Menu. The User Profile Menu will display.

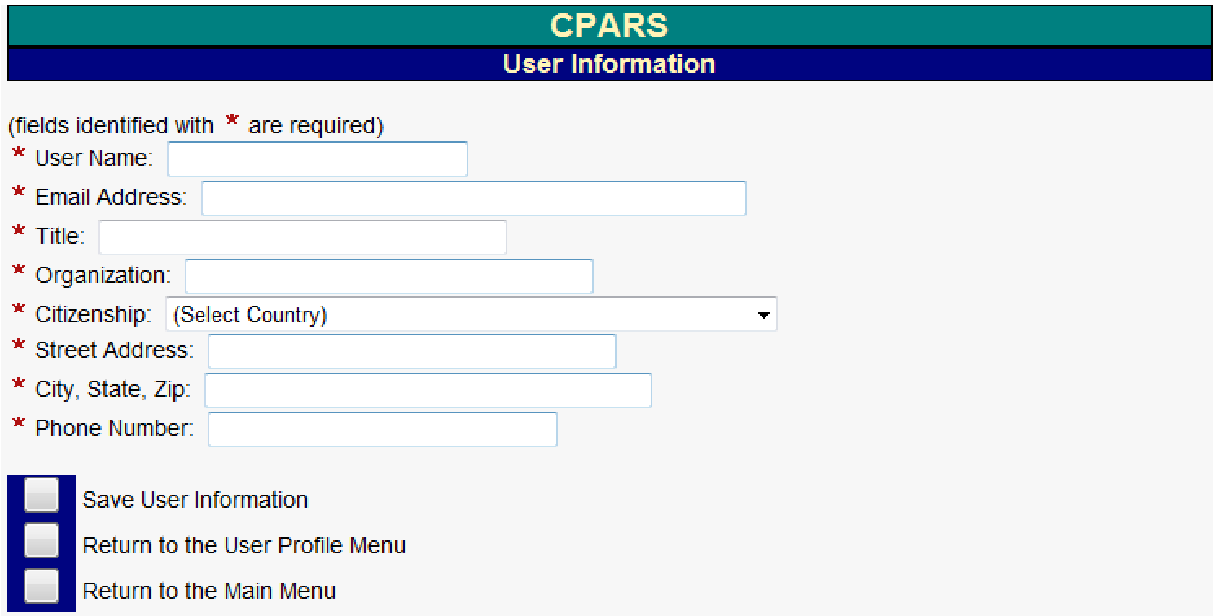


The **Access Level** drop-down box identifies each of the access levels the Focal Point has authorized. To switch levels, select the desired access level from the **Access Level** drop-down box and click on the **Switch** button. The user will be taken to the Main Menu of the switched access level. The user will only have access to the contracts and evaluations that have been authorized by the Focal Point for the switched level.

NOTE: The switched access level will remain in effect until the user switches to a different access level.



Click the **Change User Information** button and the User Information screen displays.



CPARS

User Information

(fields identified with * are required)

* User Name:

* Email Address:

* Title:

* Organization:

* Citizenship: (Select Country)

* Street Address:

* City, State, Zip:

* Phone Number:

Save User Information

Return to the User Profile Menu

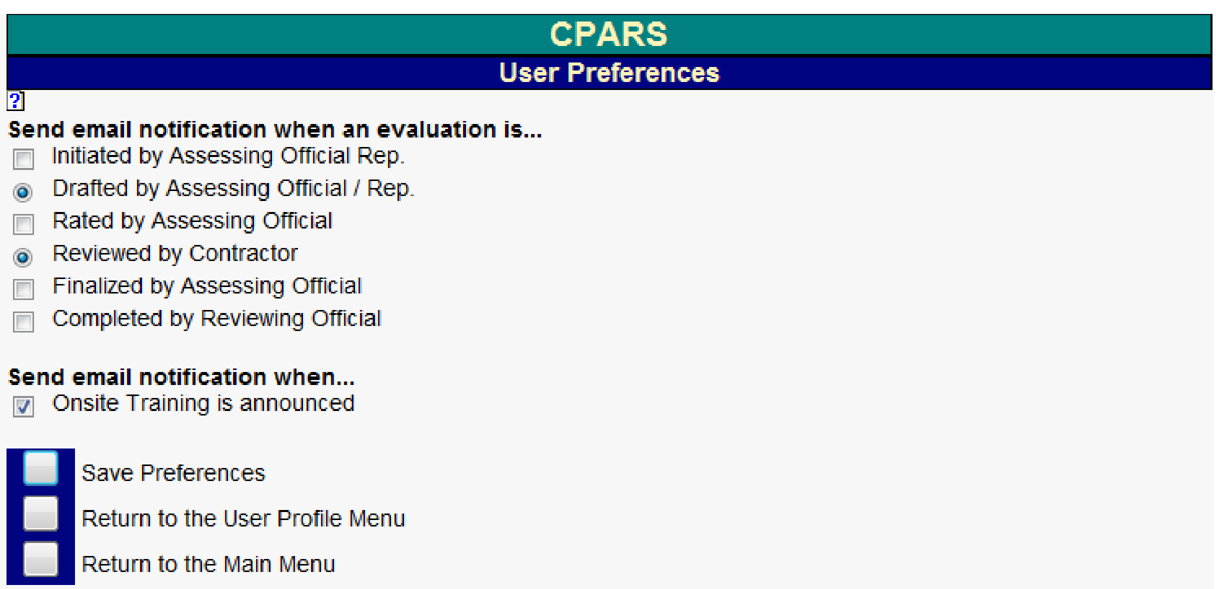
Return to the Main Menu

The user is able to update any of the profile information fields noted above. Fields identified with a red asterisk **(*)** are required. After all necessary changes are made, click the **Save User Information** button and a confirmation pop-up screen displays. Click the **OK** button.

NOTE: Focal Points can also update the Organization(s) which they have cognizance over using this option.

The **Return to the User Profile Menu** button allows the user to continue with other User Profile options. The **Return to the Main Menu** button returns the user to the Main Menu.

A user may want to receive optional email notifications as evaluations move through each step of the workflow process. To receive optional email notifications, click the **Change User Profile/Switch Access Level** button from the Main Menu and the User Profile Menu will display. Click the **Change User Preferences** button and the User Preferences screen displays.



CPARS

User Preferences

?

Send email notification when an evaluation is...

- Initiated by Assessing Official Rep.
- Drafted by Assessing Official / Rep.
- Rated by Assessing Official
- Reviewed by Contractor
- Finalized by Assessing Official
- Completed by Reviewing Official

Send email notification when...

- Onsite Training is announced

Save Preferences

Return to the User Profile Menu

Return to the Main Menu

The user can select to receive optional email notifications by clicking on the box adjacent to the emails they would like to receive. A checkmark will appear in all the boxes selected. Some email options are mandatory and cannot be de-selected. All mandatory emails are identified with a 'radio button' rather than a box, click on the blue question mark (**?**) adjacent to the User Preferences title screen above to obtain additional information.

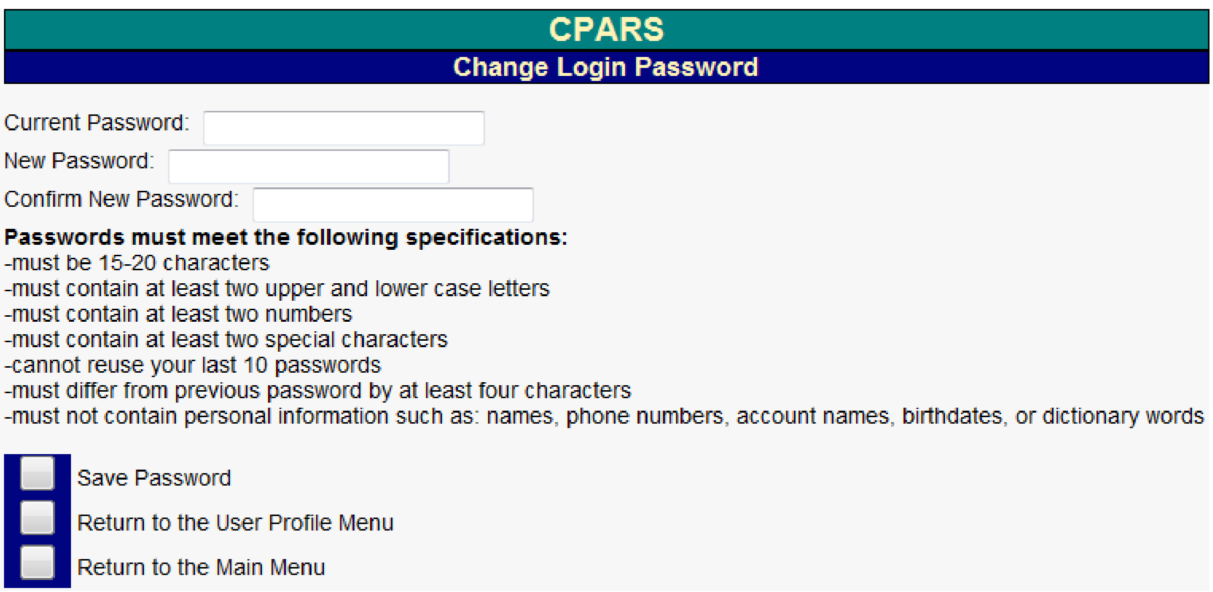
NOTES: 1. The User Preferences menu and its optional emails are not available at the Senior Contractor Representative or Department POC access levels. 2. Focal Points have the ability to select Send Due notifications to both Assessing Official Representatives and Assessing Officials.

Click the **Save Preferences** button and a confirmation pop-up will display. Click the **OK** button.

The **Return to the User Profile Menu** button allows the user to continue with other User Profile options. The **Return to the Main Menu** button returns the user to the Main Menu.

To change a CPARS login password, click the **Change User Profile/Switch Access Level** button from the Main Menu and the User Profile Menu will display. Click the **Change Login Password** button and the Change Login Password screen displays.

NOTE: Passwords cannot be changed more than once in a 24 hour period. If the password needs to be changed within a 24 hour period of time please contact the Focal Point or the Customer Support Desk.



Enter the current password in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. Re-type the password in the **Confirm New Password** box.

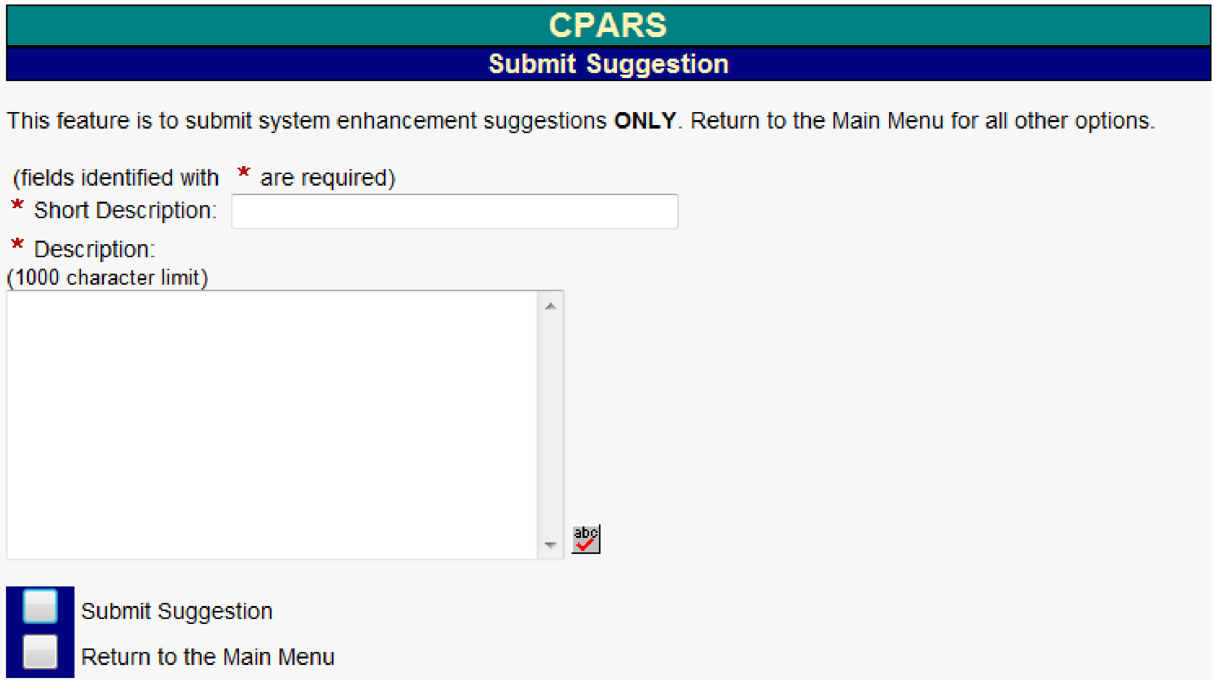
NOTE: The password is case sensitive and must contain 15–20 characters, at least two uppercase letters, two lowercase letters, two numbers, and two special characters. The last ten passwords are kept and may not be reused. Passwords must differ from previous passwords by at least four characters. Passwords must not contain personal information such as: names, phone numbers, account names, birthdates, or dictionary words. If a user logs onto CPARS with an expired password, the Change Login Password screen is presented and the user will be required to establish a new password.

Click the **Save Password** button and a confirmation pop-up will display. Click the **OK** button.

The **Return to the User Profile Menu** button allows the user to continue with other User Profile options. The **Return to the Main Menu** button returns the user to the Main Menu. Clicking on this button does not save any information that has been entered.

Submit Suggestion

The **Submit Suggestion** feature is available at all access levels and allows CPARS users to do such things as identify and submit system problems, make suggestions for system improvements, or recommend changes in policy. To submit comments, click the **Submit Suggestion** button from the Main Menu and the Submit Suggestion screen will display.



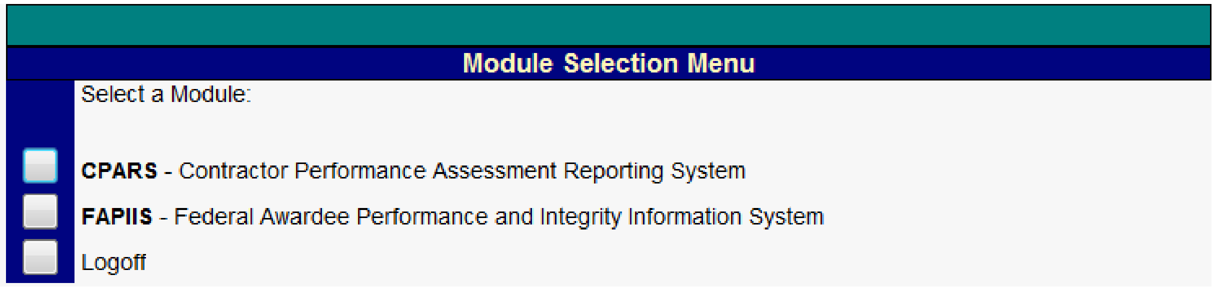
Enter a brief description in the **Short Description** box and a complete description in the **Description** box.

NOTE: The system limitation for Submit Suggestion is 1000 characters.

Click the **Submit Suggestion** button. Click **OK** when the confirmation message displays. The Customer Support Desk monitors CPARS for all suggestions submitted. Requests for enhancements and policy changes are routed through the Change Control Board (CCB) for review, discussion, and disposition. The **Return to the Main Menu** button returns the user to the Main Menu.

Switch Modules

The **Switch Modules** feature is available at all access levels and allows users to switch between the CPARS and FAPIIS modules without logging out of the system. To switch to another module, click the **Switch Modules** button from the Main Menu. The Module Selection Menu displays.



Click the applicable button **CPARS** or **FAPIIS** to access that module.

NOTE: Although the CPARS and FAPIIS module buttons are visible on the Module Selection Screen, access to those modules may be restricted based on the user's access level. Contractor Representatives and Agency POC levels of access currently do not have a role in FAPIIS.

CPARS Email Notifications

The CPARS application will send the following email notifications:

- An automatic notification is sent to users when they are assigned access to CPARS.
- An automatic notification is sent whenever the Focal Point provides access to new or existing users. Users will also receive an email when the Focal Point transfers user access to another user.
- An automatic notification is sent to the Assessing Official Representative, Assessing Official, Alternate Focal Point, and Focal Point 30 days before the evaluation is due to be started. This email is weekly and continues until the evaluation is started.
- An automatic notification is sent to the Assessing Official, Alternate Focal Point, and Focal Point when an evaluation is not completed within the 120-day objective (overdue). This email is weekly and continues until the evaluation is completed.
- When the Focal Point or Alternate Focal Point registers a contract/order, but no Assessing Officials or Contractor Representative users have been assigned. This email is weekly and continues until users are assigned to the contract/order.
- When the Focal Point or Alternate Focal Point assigns users to a contract/order and the contract/order is available in auto-register, but has not been registered. This email is weekly and continues until the contract/order is registered.
- When the Assessing Official Representative initiates an evaluation. (Optional)
- When the Assessing Official Representative forwards an evaluation to the Assessing Official.
- When the Assessing Official returns an evaluation to the Assessing Official Representative.
- When the Assessing Official drafts an evaluation. (Optional)
- When the Assessing Official forwards an evaluation to the Contractor Representative.
- When the Contractor Representative returns an evaluation to the Assessing Official.
- When the Assessing Official sends an evaluation to the Reviewing Official.
- When the Reviewing Official returns an evaluation to the Assessing Official.
- The Contractor Representative receives an email notification when the evaluation is completed.
- An automatic notification is sent to the Contractor Representative identifying evaluations that have been forwarded to the Contractor Representative for comment, but the Contractor has not started entering comments. This email is daily and continues until the Contractor enters comments or until the evaluation is sent to PPIRS after 14 days.
- An automatic notification is sent to the Contractor Representative identifying evaluations that have been forwarded to the Contractor Representative for comment, but the Contractor Representative has not responded. This email is weekly, starts 15 days after the evaluation is sent to the Contractor Representative and continues until the Contractor Representative enters comments or until the evaluation returns to the Assessing Official after 60 days.
- An automatic notification is sent to the Assessing Official when the Contractor 60-day comment period expires. This email is weekly and continues until the evaluation is closed by the Assessing Official.
- An automatic notification is sent to the Focal Point identifying evaluations that have been archived because the contract/order had a Final evaluation completed at least three years ago. This email is sent weekly.
- An automatic notification will be sent to the Focal Point and Department POC identifying their users who have not logged into CPARS for over two years. This email is sent quarterly.
- An automatic notification is sent to Agency POC(s) when the Department POC provides access to new/existing Organization(s).
- An automatic notification is sent to Agency POC(s) when the Department POC provides access to additional Organization(s).
- An automatic notification will be sent to all users that have not logged in within two years, notifying them to log into the system to retain their account. The Focal Point and the Department POC will also be notified.

Using CPARS Effectively

When Registering Contracts/Orders or Working on Evaluations:

- The blue question mark (**?**) indicates online help is available for the adjacent field. Click on the blue question mark and the online help window opens.

- The ABC button located next to data entry fields offers a spell checker. When clicked, possible misspellings in the block of text are identified and replacement options are offered.

- A red asterisk (*****) designates a required field. All required fields must be completed to register a contract/order. However, evaluations can be started and saved without all required fields being completed. Required fields must be completed whenever evaluations are validated and sent to the next workflow step.

- A small calendar located adjacent to a date field allows the user to populate the date field with the use of a mouse. Click on the calendar and select the correct date. This will assure the date is entered in the correct format.

- There is a character counter located at the top of data entry screens that help users identify how many characters they have entered in text fields. Keep an eye on the character field to determine how many characters have been entered.

- CPARS has a time-out feature of 20 minutes. The time-out clock is located at the bottom of data entry screens and appears whenever the system is idle (user not typing). If the user has a data entry screen open and no work is performed for 20 minutes, the system will perform an automatic save. The time-out clock is re-set whenever the user performs a save or clicks on any of the green tabs.

- A red checkmark next to Notes on the To-Do List located next to a Contract/Order Number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

- A red checkmark located within any of the **Green Rating Tabs** indicates that element has been rated for the specific performance area.

General System Information:

- At the bottom of every page in the CPARS application there are links to the CPARS Guidance, training opportunities and quality checklist.

- Use the To-Do List to open and work on all evaluations requiring your action.

- Use the Forgot Password feature to receive a system-generated, temporary password. You will still have to remember your User ID. Your Focal Point and the Customer Support Desk also have the ability to reset passwords.

- Use the Forgot User Id feature to receive a system-generated email with your User ID. The system will verify that the information matches what was entered when your account was created, and will send an email to that address with your User ID(s).

- The Status Report is available to help monitor the status of contracts and evaluations, to identify who has access to a contract, or to find out the history of the evaluation (Activity Log).

Frequently Asked Questions

General

1. How do I obtain access to the system?

A: Access is granted by a network of government Focal Points. Typically there are many Focal Points assigned to the agency. If you require assistance with identifying your Focal Point, please email the Customer Support Desk with the contract/order number you are trying to access and they will provide you with the Focal Point name and contact information.

2. I received a system email with a User ID, but how do I obtain a password or have my password reset when I'm locked out of my account?

A: Please use the Forgot Password button at the login screen to reset your password.

3. I can't figure out some of the special characters or symbols in the temporary password?

A: Please copy and paste the temporary password into the password field. To do this, use your mouse to highlight the temporary password. Right click on the highlighted password and choose copy. Go to the login screen and place the cursor in the password field then perform a right click and choose the paste option.

4. Our activity uses Macintosh computers. Can the CPARS AIS be used on a Macintosh system?

A: Yes. The CPARS AIS is web-based so most actions are completed directly from your browser. All data inputs may be completed on a Macintosh system.

5. How do I cut and paste an MSWord document into the CPAR without having characters change or disappear?

A: There are a complete set of step by step instructions explaining this process. Follow this link for the instruction page.

6. I am receiving emails stating that I have been granted access to CPARS and more emails stating I must perform an action on an evaluation. Why?

A: A government Focal Point has given you access to CPARS. Please contact the Focal Point for questions regarding system access. If you are unable to determine who the Focal Point is, please contact the Customer Support Desk and they can provide the name and contact information.

7. When I use To-Do List or View/Print options to view an evaluation I don't see any contractor comments and I know they responded.

A: The evaluation was modified by the Assessing Official after the contractor commented. When you open the evaluation from the "To-Do List," click on the "Original Ratings" tab and the contractor's comments are included there. If you use "View/Print Evaluation" button on the Main Menu, once the evaluation opens, click on "View Original CPAR" at the top of the record and the contractor comments will be visible. The contractor's comments remain with the original record since the comments were based on the original ratings and narratives.

8. I received an email stating that I have an evaluation to work on, but when I log into the system I do not have access to that contract.

A: Please make sure that you are entering the contract number and order number correctly. e.g., no typos and in the right fields. If you still do not have access, please make sure that you are logged into the system at the correct access level. The access level you are logged in as is at the top of the Main Menu in the green bar. To switch access levels, use the "Change User Profile/ Switch Access Level" button at the Main Menu. Choose the correct level from the drop down and click "Switch."

9. I am receiving an error message stating I cannot forward the evaluation onto the next level because no one is assigned to the level.

A: Please contact your Focal Point to have them add a user to the system for that level. The Focal Point name and contact information can be obtained by running the Status Report, choosing the "List of Contracts" option and checking off the “Focal Point” User Role.

10. My Contracting Officer issued a modification that extends the contract completion date. How can I update this contract, which is already registered in the system?

A: If the contract was Auto Registered, you should update the contract completion date in the Federal Procurement Data System - Next Generation (FPDS-NG). The updated contract completion date will be transmitted from FPDS-NG to CPARS. If the contract was manually registered, login to the system and click on the “Register/Update a Contract” button. Enter the contract number in the contract number field and the task order number if applicable in the task order number field and click "Continue." The previously registered contract/order appears and any of the data elements can be updated and saved.

11. I am using Internet Explorer and I am trying to print my evaluation. The text is not wrapping on the page. How do I get the text to wrap?

A: In Internet Explorer, click File or click the dropdown arrow next to the printer icon. Click Page Setup. Check the Enable Shrink-to-Fit box. Click OK. Click the Print button in CPARS.

12. Where do I go if I have other questions on the CPARS Automated Information System?

A: Contact our Customer Support Desk:
Comm: 207-438-1690
Fax: 207-438-6535
E-mail: webptsmh@navy.mil

Certificate/PKI

1. Why do I still need a User ID if I have a PKI certificate?

A: A User ID is required because many users have more than one User ID for the system because they have more than one access level. The system needs to be able to distinguish which level of access a user is logging into so the user can perform the required actions.

2. What type of PKI certificate should I purchase?

A: At least an ECA certificate of Medium Assurance should be purchased. This should be a Department of Defense (DoD) identity certificate, not an email certificate.

3. I’m attempting to login, but am receiving an error message stating that the User ID I entered does not match the PKI certification information.

A: If you have received a new CAC or PKI certificate since your last login, you will need to contact the Customer Support Desk to remove your certificate from the system.

4. When I go to the website I am getting an error message that indicates "There is a problem with this website's security certificate."

A: Please click on the option to “Continue to this website (not recommended).” The error is due to a security setting in Internet Explorer 7.

Focal Point

1. I received an email stating that I granted access to contracts/orders that are available for Auto Register, but when I go to Auto Register those contracts/orders are not there.

A: It’s likely the contracts/orders have been removed from the Auto Register Contracts listing. To see what’s been removed, click on "Auto Register" from the Main Menu. At the next screen, you can search by Contract Office Code or Full or Partial Contract Number. You’ll want to place a check in the box adjacent to Include Removed Contracts and then run the report. Click on the contract/order number to register the contract/order.

Assessing Official

1. I've entered a proposed CPAR. When I click on "Save," I receive a message "Period of Performance Start Date Missing or Invalid." I've checked the format of the start date and it looks fine to me. What's wrong?

A: Check the format of the ending date. Both dates must be in the MM/DD/YYYY format. Usually the error is caused by failing to enter a leading "0" (zero) for the months January through September (01 - 09) or inadvertently omitting one of the "/" (slash) characters. In order to prevent this problem, it is recommended that you enter the date using the pop-up calendar. The date will automatically be formatted properly when the calendar is used.

2. I received an email stating that the evaluation has not been completed in 120 days and is overdue. I logged in, but I have no actions for that evaluation in my "To-Do List." The email states it is Finalized. What is my action?

A: Finalized means that the Reviewing Official has the action to sign and close the evaluation. You will want to contact the Reviewing Official and have them close the evaluation. You can use the Status Report to obtain the Reviewing Official's name by running a report, choosing “List of Contracts” and then checking the “Reviewing Official” User Role. If a Reviewing Official is not assigned to the evaluation please contact the Focal Point so that they may assign one.

3. I have entered my supporting narrative, but it is over the character limit. Is there anything I can do?

A: There is no way to extend the character limitation or upload a file with additional narrative. You will need to revise your comments to 24,000 or fewer characters per evaluation area and 24,000 characters for general comments on the Assessor tab.

4. I received an email stating that the CPAR is overdue for a specific period of performance. I know that I have previously completed a CPAR for that period of performance. Why am I receiving this email?

A: You are likely receiving this email because the CPAR report type was marked incorrectly or the contract completion date was not updated. To check the CPAR report type, use the Status Report. Run the report selecting “List of Contracts” and choosing Evaluation Type. If the evaluation type is marked correctly, check the contract completion date on the most recent CPAR. To check the contract completion date, click on the contract/order number. If the contract completion date is erroneously entered and the contract was Auto Registered, correct the contract completion date in the Federal Procurement Data System – Next Generation (FPDS-NG) and it will be updated in CPARS automatically. If the contract completion date was erroneously entered and the contract was manually registered, use the Register a Contract function located on the Main Menu to correct the date.

5. I have a contract that is only one year long. What type of CPAR do I write, an Interim or a Final?

A: If the contract/order is only one year long, a Final CPAR should be written.

Contractor Rep

1. I received an email stating that I've been given access to a contract/order. When I log into the system, click View/Print Evaluation and input the contract/order number, I receive an error message that states "You do not have access to contract number XXX."

A: The email you received was a system generated email letting you know that you were granted access to the system. You will receive an additional email when you have an action to view and comment on an evaluation. As a Contractor Representative you can only view an evaluation when it is in the Rated or Completed status. You can run a Status Report to determine the status of your contracts/evaluations.

2. I received an email stating that I had an evaluation to review and comment on, where do I find my evaluation so that I can review it and enter comments?

A: In order to review and comment on an evaluation go to www.cpars.gov. On the right side of the page, click on the System Logon link. Read the Notice and Consent Banner and click Accept. If you have a PKI certificate, click "Accept/Login with PKI". If you do not have PKI Certificate, click "Accept/Login with Password". Enter your User ID and Password (note that if you are using a PKI certificate, you will only need to enter a User ID once you have logged in for the first time using a Password). If this is your first time logging in, use the Forgot Password button to reset your password. Once you have logged in, click the CPARS button. Next click on the "To-Do List." Next click on the contract number and the evaluation will open. Once you review and comment, click on the "Contractor Rep" tab and enter the required information—and don't forget to click on Validate and Send to the Assessing Official to complete the process.

3. I received an email stating that I had an evaluation to review and comment on. I logged into the system clicked View/Print Evaluation, and entered the contract number but there is no place for me to enter my comments.

A: In order to review and comment on an evaluation just click on the "To-Do List." Next click on the contract number and the evaluation will open. Once you review and comment, click on the "Contractor Rep" tab and enter the required information—and don't forget to click on Validate and Send to the Assessing Official to complete the process.

4. My company received an email that states that we have an evaluation to review and comment on. When I log into the system, the evaluation does not appear on my To-Do List. When I click View/Print Evaluation, and enter the contract number the system states I don't have access to the evaluation.

A: Only the Contractor Representative who received the email has access to the evaluation. If you require access to the evaluation you will need to contact the government Focal Point. If you are unable to determine who the Focal Point is please contact the Customer Support Desk and they can provide the name and contact information.

Frequently Asked Questions (Policy)

1. If I have a contract that meets all the requirements for preparing a CPAR, but the contract has recently closed, do I still have to do a CPAR?

A: Per the Guidance for CPARS document, paragraph 3.5.4, it is a best practice for the Assessing Official to "use all means available, to include the contract file, to assist in documenting and evaluating performance for periods during which the Assessing Official was not a participant in the contract performance.”

2. Do I have to do a CPAR for RDT&E contracts?

A: For Department of Defense users, if the RDT&E contracts are funded with 6.1 (Basic Research), 6.2 (Exploratory Development), or 6.3 (Advanced Technology Development) funds a CPAR is not required although you are encouraged to manually register and report on these contracts if they exceed $1,000,000. Refer to the CPARS Guidance Attachment 1 for details. For other Agency users, CPARs are required for RDT&E contracts.

Download Adobe Acrobat Reader

3. Who prepares a CPAR on an order under a Federal Supply Schedule?

A: CPARs for orders against Federal Supply Schedules are not prepared by GSA. It is the responsibility of the Assessing Official at the requiring activity or contracting activity to complete a separate CPAR for each order placed against a Federal Supply Schedule when the individual order exceeds the CPARS reporting thresholds. For these CPARs, the period of performance for the evaluation shall be based on the effective date/award date of the individual order.

4. Are outside CONUS contracting offices and contractors exempt from CPARS requirements?

A: There is no exemption for outside CONUS contracting offices or contractors.

5. How do I make note of a prime contractor's compliance with the sub-contractor performance plan submitted for the contract?

A: The CPAR contains a rating element for Utilization of Small Business. This element is used to assess compliance with all terms and conditions in the contract relating to small business participation including achievement on each individual goal stated in the contract or subcontracting plan. Attachment 3 of the CPARS Guidance contains specific instructions for assessing this rating element. Download Adobe Acrobat Reader

6. Are there forms available for completing CPARs containing classified information? Can I enter that information into the CPARS application?

A: Forms are available from the CPARS Customer Support Desk at 207-438-1690. **Classified information is not to be entered into the CPARS automated application.** Use the on-line automated application for unclassified use only. CPARs on classified programs will be processed in accordance with program security requirements. Copies of classified CPARs will be maintained and distributed in accordance with agency procedures.

7. Are CPARs releasable under the Freedom of Information Act (FOIA)?

A: Contractor performance information is privileged source selection information. It is also protected by the Privacy Act and is not releasable under the Freedom of Information Act. Performance evaluations may be withheld from public disclosure under Exemption 5 of the Freedom of Information Act. Further, Federal Acquisition Regulation (FAR) Subpart 42.1503 (b) states: "The completed evaluation shall not be released to other than Government personnel and the contractor whose performance is being evaluated during the period the information may be used to provide source selection information." When a FOIA request is received for CPAR records, the unit FOIA office must refer the request to the CPAR Focal Point for coordination. The CPARS Program Manager at the Naval Sea Logistics Center, Portsmouth, NH, must also be notified via the Customer Support Desk at Com: 207-438-1690 or email to: webptsmh@navy.mil