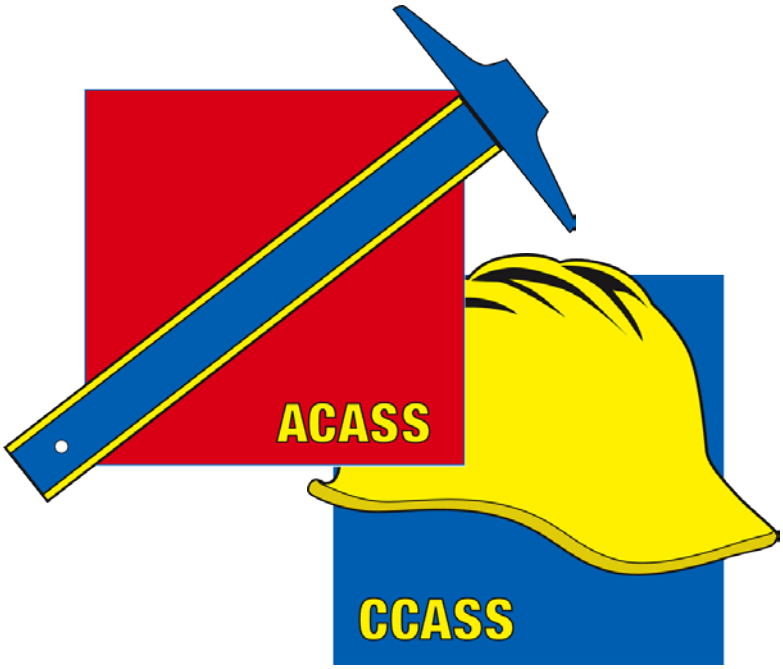
User Manual for

Architect-Engineer Contract Administration Support System (ACASS) And Construction Contractor Appraisal Support System (CCASS)



May 2012

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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 Architect-Engineer Contract Administration Support System (ACASS) and the Construction Contractor Appraisal Support System (CCASS) Automated Information Systems (AISs). Detailed requirements of the ACASS and CCASS business processes are contained in the ACASS and CCASS policy guides. These systems were developed to support the electronic processing of Architect-Engineer Contractor Performance Evaluations (DD2631) and Construction Contractor Performance Evaluations (DD2626).

This manual translates business process requirements into detailed step-by-step procedures for individuals utilizing the automated ACASS/CCASS process. This manual was prepared by Naval Sea Logistics Center Portsmouth (NSLC PTSMH). NSLC PTSMH continuously enhances the Automated Information Systems and the manual to meet the needs of customers.

Please address any recommended modifications or improvements to:

ACASS/CCASS Project Manager
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Bldg. 153, 2nd Floor
Portsmouth Naval Shipyard
Portsmouth, NH 03804-5000
E-mail: webptsmh@navy.mil
Phone: Customer Support at (207) 438-1690
Fax: (207) 438-6535

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

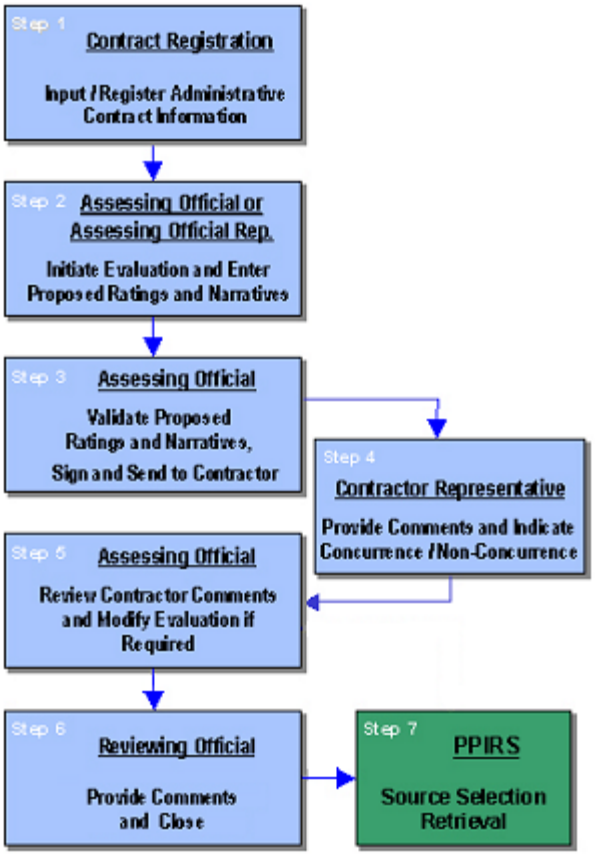
Table of Contents

System Overview....4
Accessing ACASS and CCASS....6
Focal Point....11
Contract Data Entry....24
Assessing Official Representative....26
Assessing Official....30
Contractor Representative....37
Reviewing Official....40
Department Point of Contact....43
Agency Point of Contact....49
Senior Contractor Representative....53
Business Analysis Reports....57
ACASS/CCASS Reports....59
  Evaluation Status Report....59
  Contract Status Report....64
  Ratings Metrics Report....70
  Processing Times Report....71
Change User Profile/Switch Access Level....73
Submit Suggestion....76
Switch Modules....77
ACASS/CCASS Email Notifications....78
Using ACASS/CCASS Effectively....79
Frequently Asked Questions....80

System Overview

The ACASS and CCASS systems are web-enabled applications that are accessed via the Internet website, **https://www.cpars.gov**. The applications consist of an Internet web server and a dedicated ACASS/CCASS application server. By definition, ACASS/CCASS information is Sensitive But Unclassified (SBU). To protect the security of ACASS/CCASS information, all actual data entered into and retrieved from the applications are encrypted using the security features incorporated into the web browser. Access to these systems requires a browser, which supports 128-bit encryption (sometimes referred to as strong encryption or U.S. only encryption), **Netscape Communicator 6.1 or higher or 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. ACASS and CCASS 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 ACASS/CCASS 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**. Allows general contract information to be entered by anyone assigned those responsibilities. Contracts must be registered within 30 days after contract award.

Step 2 – **Enter Proposed Ratings**. Allows Assessing Official Rep/Assessing Official assigned to management of specific contracts by a Focal Point to enter proposed ratings and supporting narrative or remarks. These ratings are relative to the contractor's performance for a specific contract.

Step 3 – **Validate Proposed Ratings**. Allows the Assessing Official (i.e. Evaluator or Rating Official) to establish performance ratings and/or modify proposed ratings for specific contracts. The Assessing Official is required to enter their name, title, organization, etc and forward the evaluation to the Contractor Rep for review.

Step 4 – **Contractor Comments**. Allows the Contractor Rep being evaluated to review the proposed ratings and comment on any elements that may require further review or explanation. After review, the Contractor Rep returns the evaluation to the Assessing Official to continue with the workflow process.

Step 5 – **Review Contractor Comments.** Allows the Assessing Official to modify the proposed ratings and narrative and/or forward the evaluation to the Reviewing Official. If ratings are modified, the original proposed ratings are archived and then both ratings are forwarded to the Reviewing Official for review, comment and closure.

Step 6 – **Reviewing Official Comments**. Allows the Reviewing Official to review the proposed ratings recommended by the Assessing Official and the response by the Contractor Rep to ensure that the ratings are fair and supported by objective evidence. The Reviewing Official is required to comment and close the evaluation.

Once the Reviewing Official completes the actions of step 6, the evaluation is considered complete. Completed evaluations are copied weekly to the Federal Past Performance Information Retrieval System (PPIRS) database. PPIRS is a warehouse of all evaluations completed by Federal agencies and is accessed by source selection officials to support future source selections and best value decisions.

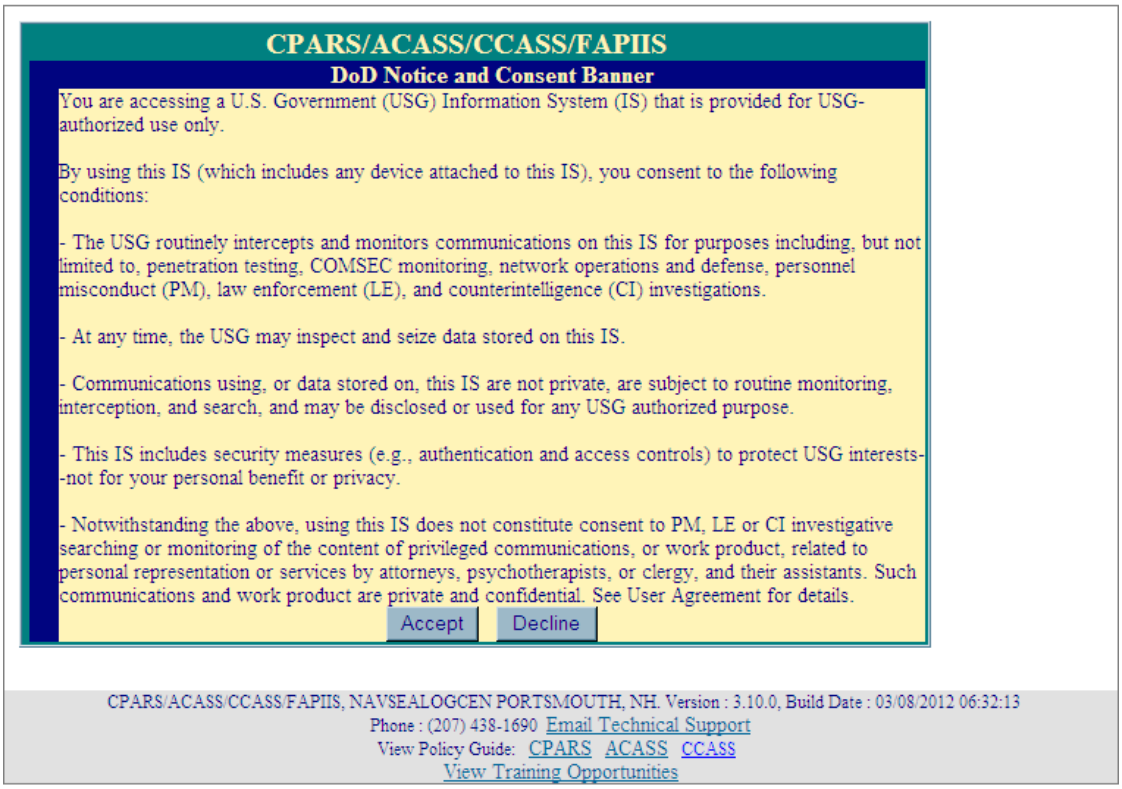
Accessing ACASS and CCASS

The ACASS and CCASS application is accessible from **https://www.cpars.gov**. The CPARS website offers links to CPARS, ACASS, CCASS, and 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 ACASS or CCASS Production System, click on the **ACASS** or **CCASS Logon** button located on the left hand side of the page.

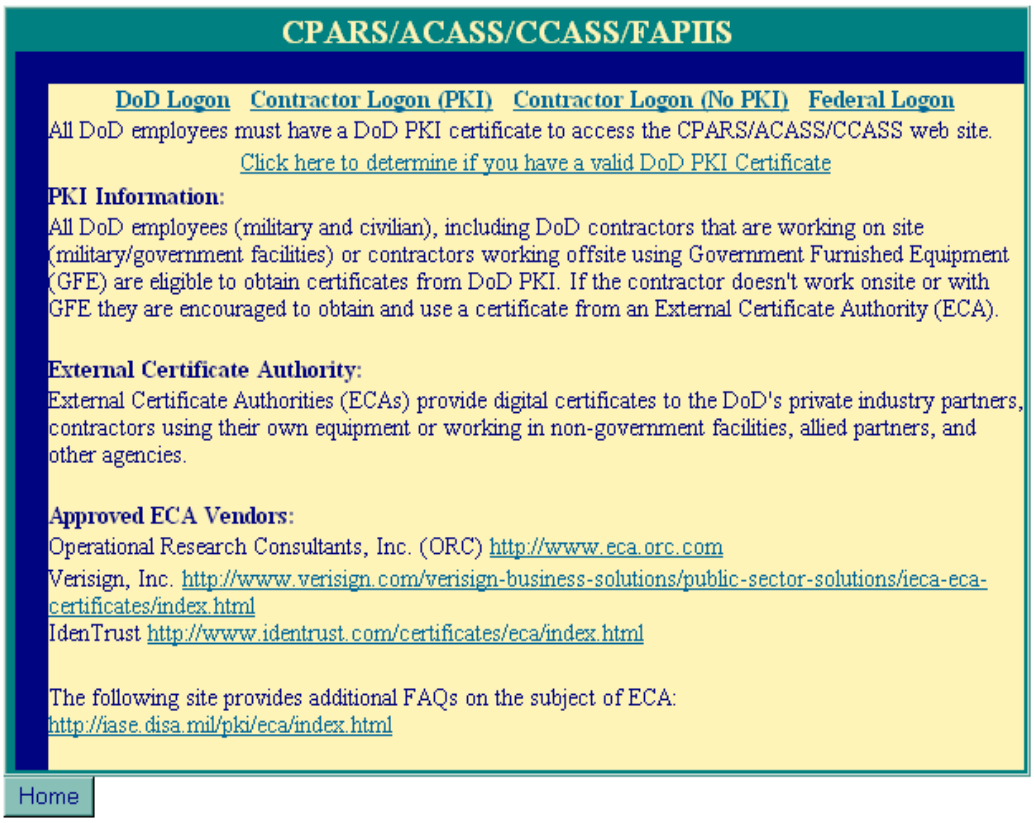
A Practice System is also available to help users practice, learn, and understand their roles. To use the Practice System, click on the **Practice System** button. Follow the instructions provided to gain access to the Practice System. Practice System access is only granted upon request and for a limited duration.

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.

Read the DoD Notice and Consent Banner and then click **Accept** to proceed with the login process.



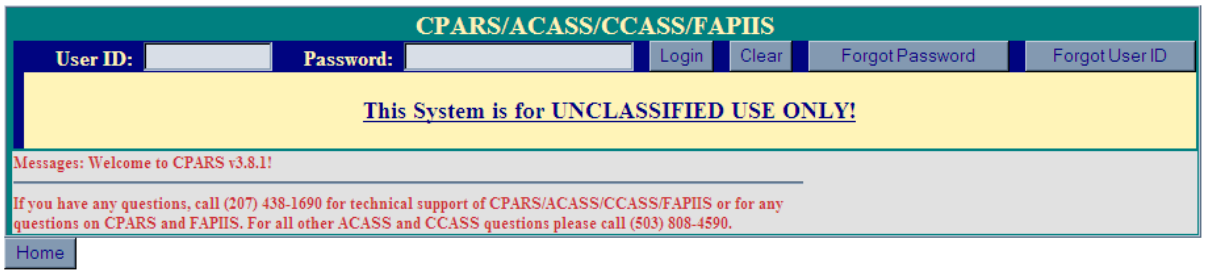
Choose the logon category link that describes your employment status, for government users choose either DoD Logon or Federal Logon and for Contractors, choose the appropriate logon link that indicates if you have a Public Key Infrastructure (PKI) Certificate installed on your computer; PKI or No PKI. For DoD users and Contractors with a PKI, the system will first validate that the user has a valid Department of Defense (DoD) or Commercially available Public Key Infrastructure (PKI) Certificate.



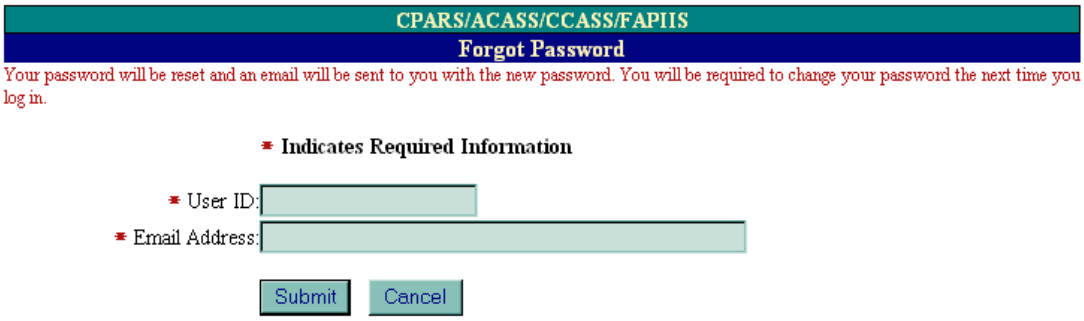
The use of PKI certificates is still a DoD requirement that is being waived for industry users only. DoD Government employees will continue to use their Common Access Cards (CAC) when accessing FAPIIS.

If you have any questions, please don't hesitate to contact CPARS Customer Support at 207.438.1690 or webptsmh@navy.mil.

All first time users will have to use the **Forgot Password** button to obtain a temporary password.



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



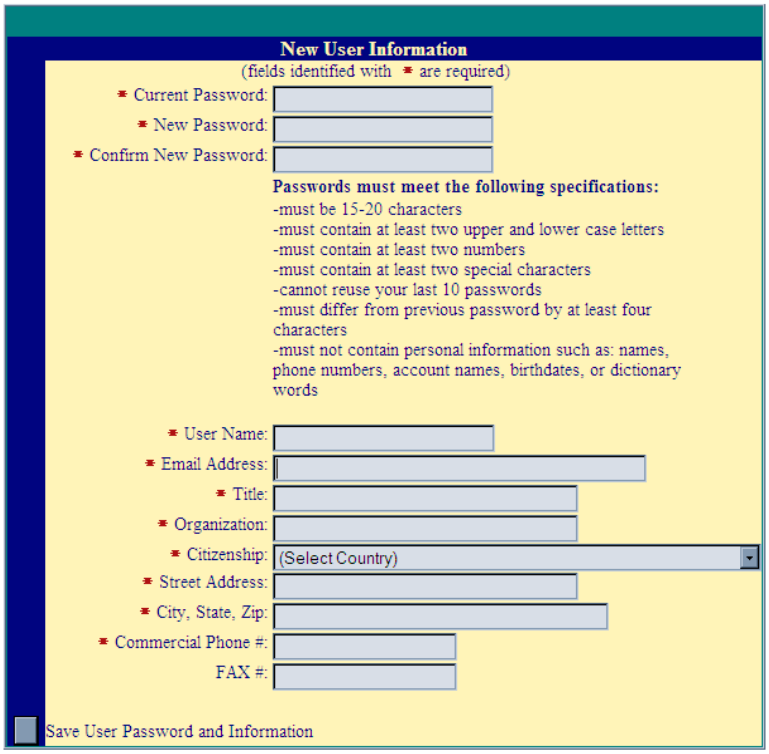
Enter your User ID and Email Address and click **Submit**. The system will verify that the information matches what was entered when your account was created, and will send an email to that address with a temporary password. After you enter your User ID and the temporary password, click **Login**.

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

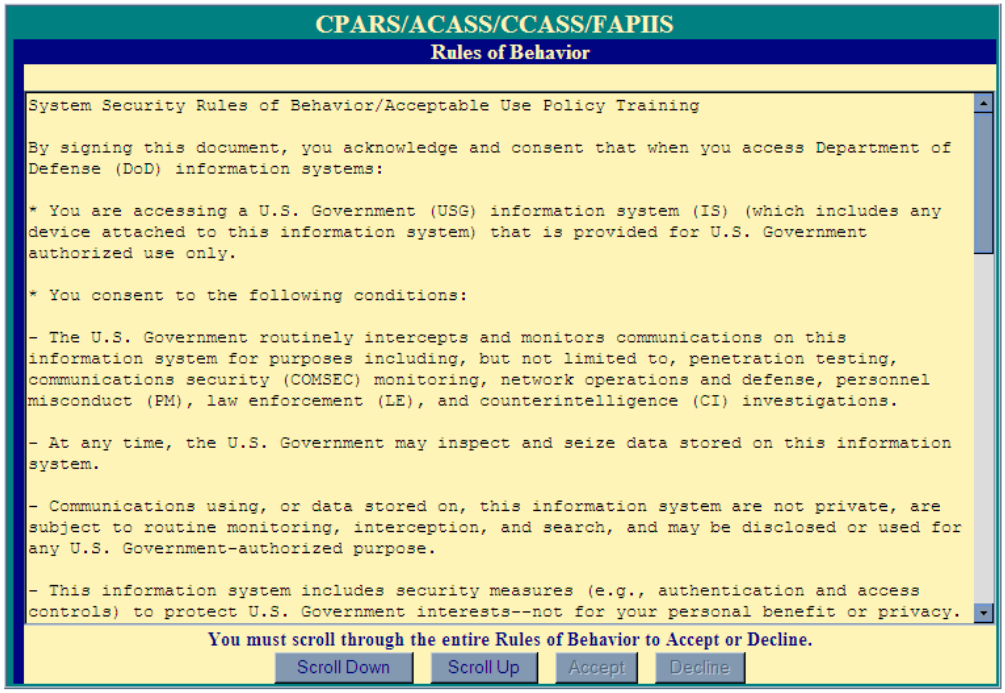
Enter the temporary password in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. The password is case sensitive and must contain 15–20 characters, at least two uppercase letters, two lowercase letters, two numbers, and two special 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 will also be required to identify all Organization(s) which they have cognizance over.

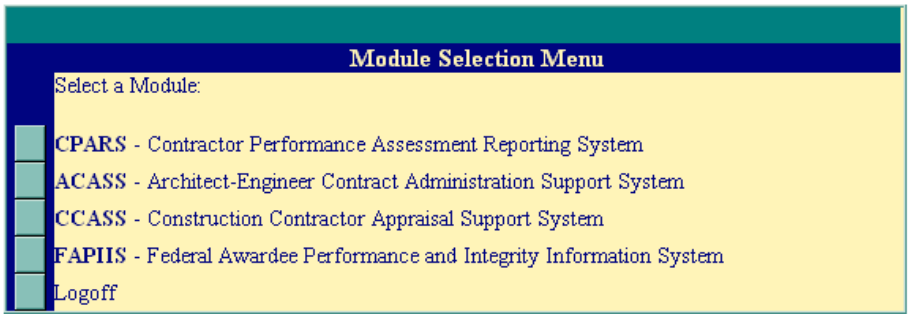


You will be brought to the Rules of Behavior page. Read through the rules and scroll down using either the down arrow on the right, or by using the **Scroll Down** button located under the Rules of Behavior. You can also scroll up using either the up arrow on the right, or by using the **Scroll Up**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



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

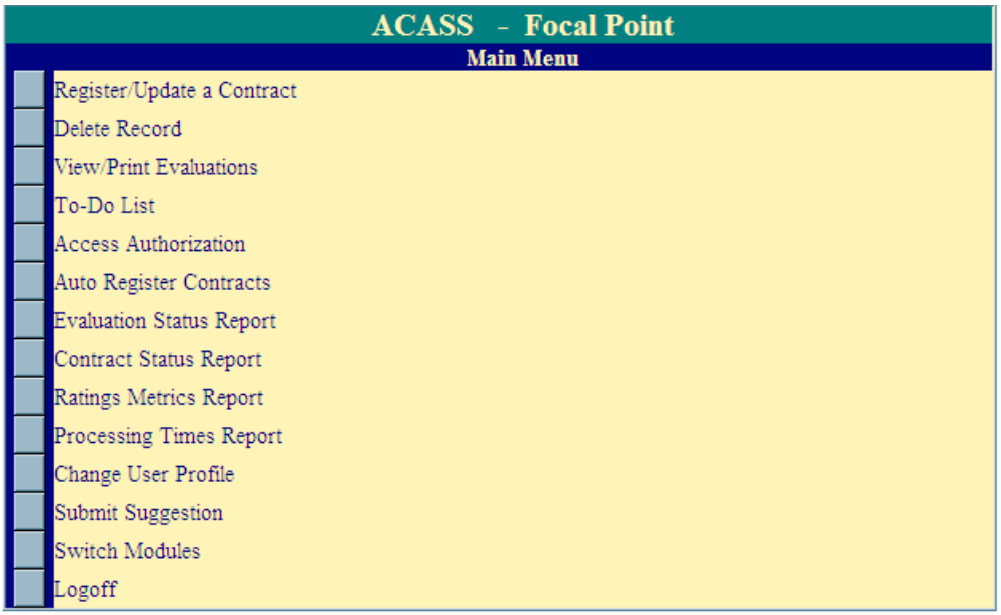
Click **Accept** and the Module Selection Menu will display. Click the **ACASS** or **CCASS** button to continue.



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 ACASS and CCASS automated processes. Focal Point access is granted only upon the completion of a signed Focal Point User Access Request Form available at **https://www.cpars.gov**. Focal Points coordinate ACASS and CCASS access (create User IDs/passwords) for a specifically assigned area of responsibility. The Focal Point is also authorized to register contracts that will require a contractor performance evaluation. The Focal Point will assist the Assessing Official in implementing the automated ACASS/CCASS 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 input basic contract information into ACASS or CCASS. The contract must be registered within 30 days after contract award. Registering and updating a contract are the **only** functions that the Focal Point may perform in the automated workflow process. . To register or update a contract, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an evaluation is to be completed at the contract level, enter the contract number in the **Contract #** 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 #** box **and** the order number in the **Order #** 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 DUNS +4 that is applicable to the contract 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 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 registration process by entering basic contract 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 all of the required fields (*****) to register and save the contract. 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 that has already been registered enter the contract number in the **Contract #** box **and** the order number, if applicable, in the **Order #** 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 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.

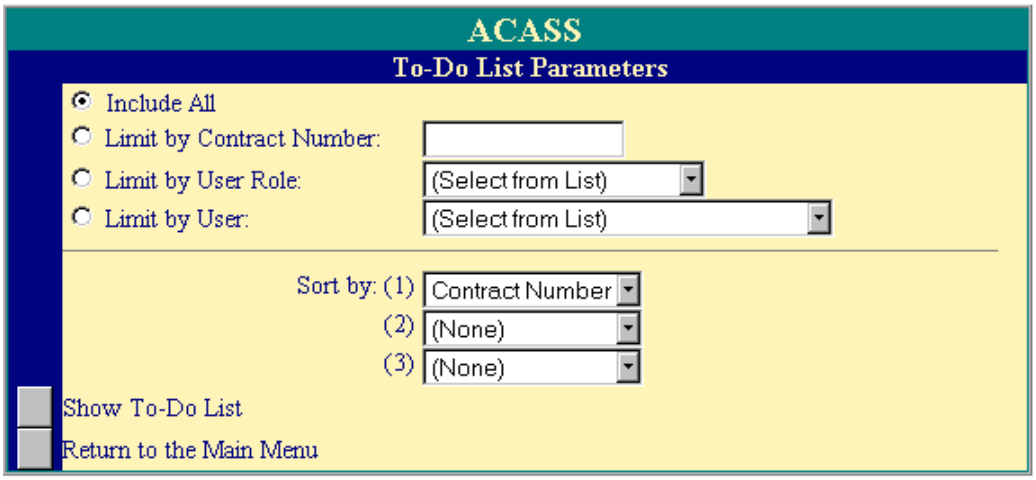
To return to the Focal Point Main Menu, click the **Return to the Main Menu** button. **Return to the Main Menu** button does not save any information that has been entered.

Delete Record: This option allows the Focal Point to delete registered contracts and/or evaluations at the initiated or drafted status. To delete a registered contract or an in-process evaluation, click the **Delete Record** button. The Delete Record selection screen displays. The contracts and evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract number to be deleted. The Delete Contract Confirmation screen will display. Verify the correct contract is about to be deleted from the ACASS/CCASS database. If the contract was at registered status indicate if the contract 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 is deleted, all access to the contract will be delete. 2. Contracts that have evaluations that are rated, reviewed, finalized, or completed cannot be deleted from the ACASS/CCASS database.

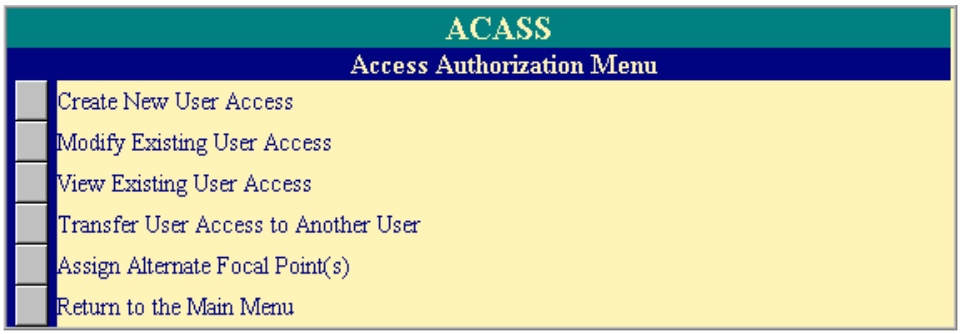
View/Print Evaluations: This option allows the Focal Point to view an evaluation in a read-only format. To view an evaluation, click the **View/Print Evaluations** button and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract #** box and the order number, if applicable, in the **Order #** box, and click the **Continue** button, the evaluation will display in HTML format. If more than one evaluation exists for the same contract (and order, if applicable), a list of evaluations will display. Click on the contract number of the evaluation to be viewed in HTML format. Click the **View Evaluation as PDF** button to view the evaluation using Adobe Acrobat Reader. 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 and then click on the **Return to the Main Menu** 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 ACASS and CCASS. 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 and require action within his or 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 sort option(s) if required. Click the **Show To-Do List** button.

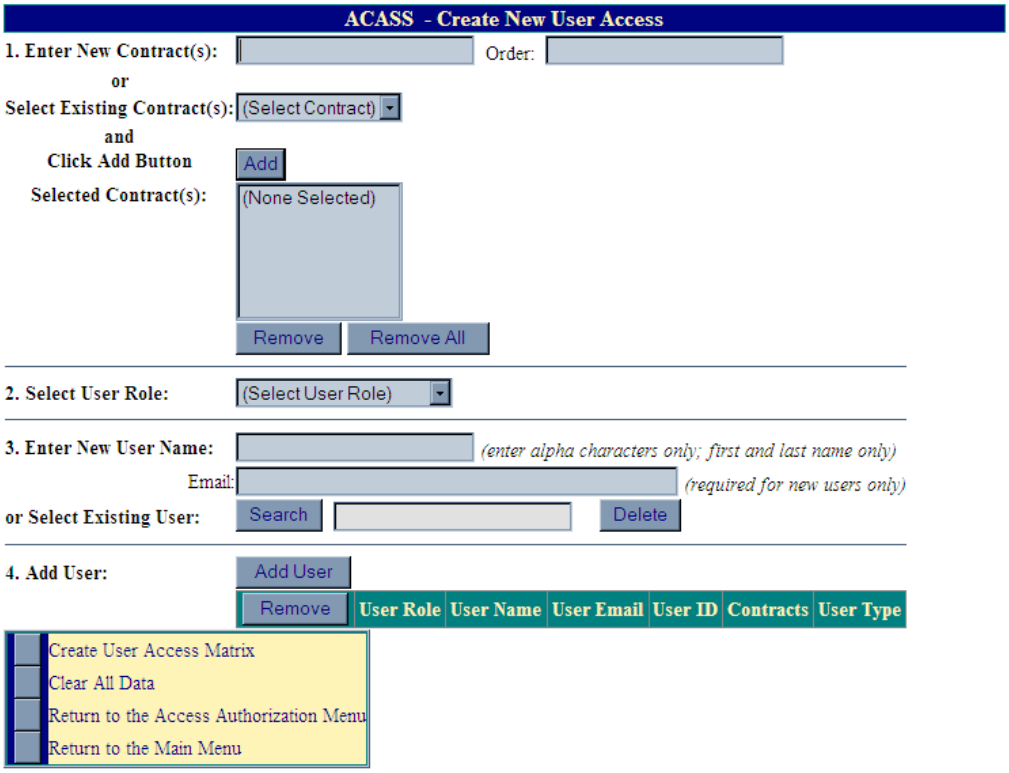


A list of evaluations will display based on the parameters selected by the Focal Point. The To Do List identifies, for each evaluation, the action required and the name of the individual responsible for completing the action. To return to the To-Do List Parameters screen, click the **Return to the To-Do 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 ACASS and CCASS, to modify existing user accounts, to view a list of existing users, to transfer access from one user to another and to assign up to three Alternate Focal Points. To provide access to ACASS and/or CCASS, 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 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 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 number, click on the **Access Authorization** button located on the Focal Point Main Menu. Click the **Create New User Access** button. 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 and order number entered. If an incorrect contract or order number is entered after clicking **Add**, highlight the incorrect contract number and click on the **Remove** button. The **Remove All** button will remove all contracts 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 Contracts** 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** (required for new users) or **Select Existing User**. To select an existing user, click the **Search** button and the Search for Existing Government (or Contractor) 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 contracts and order numbers identified in Step 1.

NOTE: If granting access to a Government only user access role (i.e. Assessing Official Representative, 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 number is removed from the dropdown list and all access that was granted for that contract is removed. Should the evaluation need to be pulled back into production the Focal Point will have to reassign users to the contract.

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 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.

ACASS - 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.

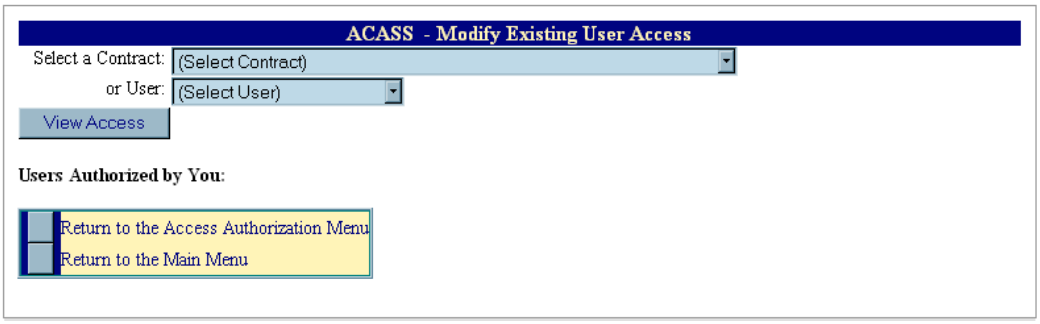
User Role	User Name	User Email	User ID	Status*	Contracts	User Type
Assessing Official Rep	GEORGE WASHINGTON	g.washington@president.mil	GWASH	Authorized	N4511270S0001	Existing
Assessing Official	ABE LINCOLN	a.lincoln@president.mil	ALINCO	Authorized	N4511270S0001	Existing

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

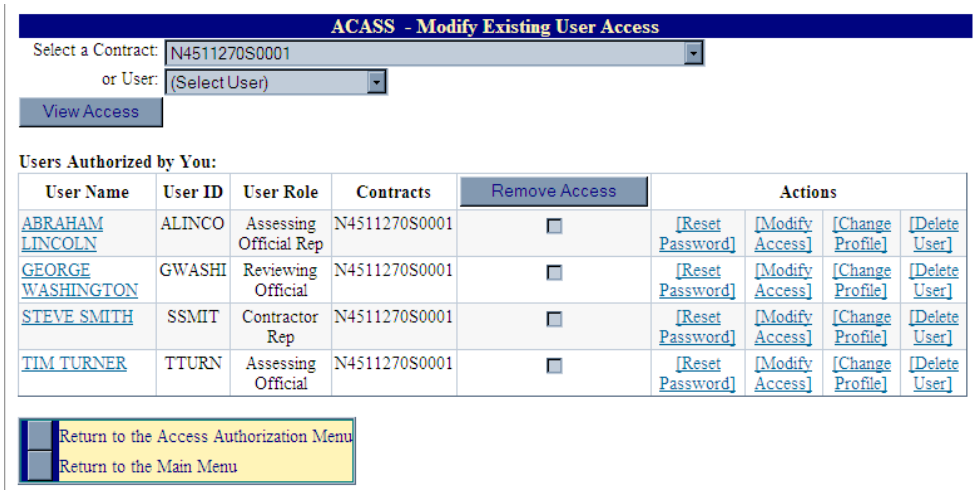
Return to the Access Authorization Menu
Return to the Main Menu

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 evaluation 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 Representative to Assessing Official, Assessing Official to Assessing Official Representative, Assessing Official to Contractor Representative, Contractor Representative to Assessing Official, and Assessing Official to Reviewing Official.

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



To modify existing user access by contract, click the **Select a Contract** drop-down box and all contracts authorized by the Focal Point will display. Select the desired contract 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 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(s).

Remove Access – This option allows the Focal Point to remove user access to the contract 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).

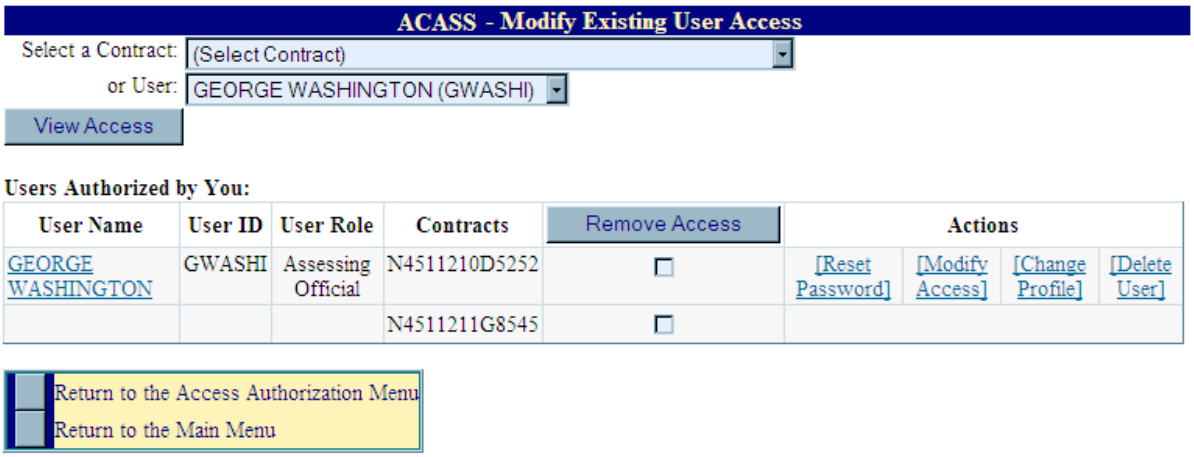
[Reset Password] – This option allows the Focal Point to reset a user's password. Click **[Reset Password]** and the Confirm Password Change pop-up box will appear and includes a new temporary, system-generated password. The Focal Point must click the **OK** button to confirm and establish the new password in ACASS and/or CCASS. 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 User Access view displays. Select the current contract(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, title, organization, address, email, and phone number(s).

[Delete User] – Clicking on this option allows the Focal Point to delete a user from ACASS and/or CCASS.

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 ACASS or CCASS 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 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(s).

Remove Access – This option allows the Focal Point to remove access to one or more contracts for the user that was selected from the drop-down. Once the appropriate contracts 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 appear and includes a new temporary, system-generated password. The Focal Point must click the **OK** button to confirm and establish the new password in ACASS and/or CCASS. 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.

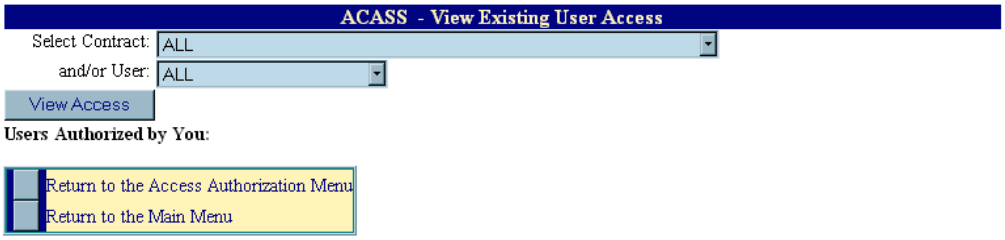
[Modify Access] – Clicking on this option allows the Focal Point to modify the existing user's role. Click **[Modify Access]** and the Modify User Access view displays. Select the current contract(s) from the **Current Contract(s)** box and click **ADD** or **Add All** to move to the **Selected Contract(s)** 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, title, organization, address, email, and phone number(s).

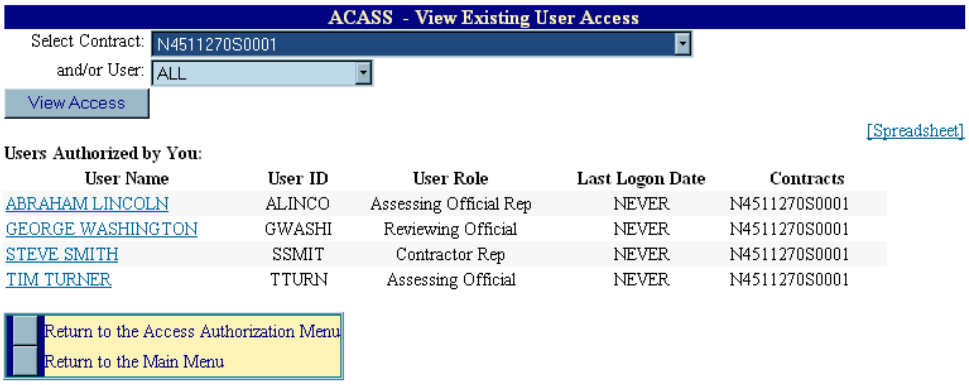
[Delete User] – Clicking on this option allows the Focal Point to delete a user from ACASS and/or CCASS.

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.

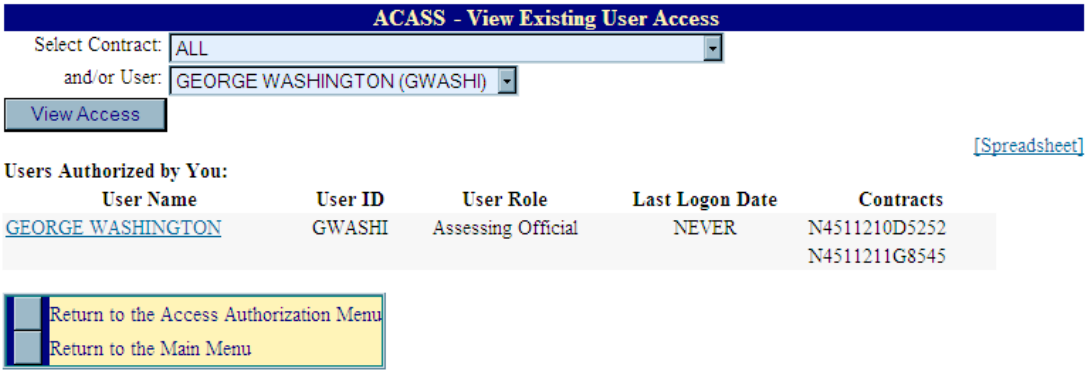
View Existing User Access: This option produces a list of user names that have been authorized access to ACASS and/or CCASS by the Focal Point. To access the **View Existing User Access** option, click the **Access Authorization** button on the Focal Point Main Menu. Click the **View Existing User Access**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



To View Existing User Access by contract, click the **Contract** drop-down box and all contracts 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 will display. The 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, title, name, organization, address, email, and phone number(s) will appear. The [Spreadsheet] function will export the data columns displayed into a Microsoft Excel Spreadsheet.

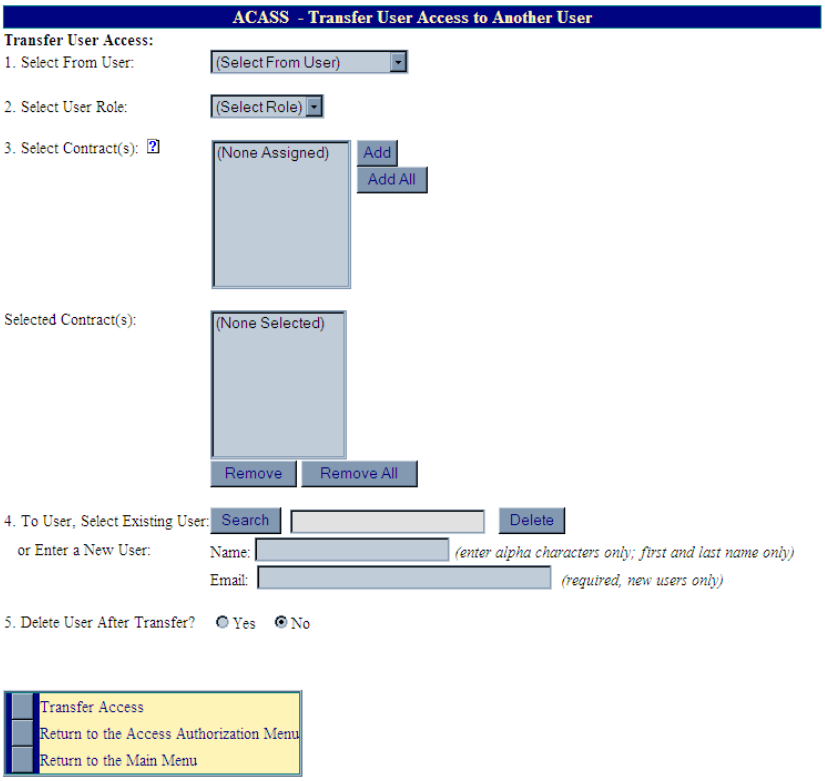


To View Existing User Access by user, click the **User** drop-down box and all users authorized by the Focal Point will display. Select the desired user name and click the **View Access** button. A list of contracts that the user has been given access to will display. The User ID, User Role and Last 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(s) will appear.



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.

<u>Transfer User Access to Another User:</u> This option allows the Focal Point to transfer ACASS and/or CCASS access from one user to another user as the need arises. 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 the **Transfer User Access to another User** button and the ACASS or CCASS Transfer User Access 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) to be transferred from the **Select Contract(s)** box. Multiple contracts 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 are selected click **Add** or select **Add All** to transfer all contracts. If an incorrect contract is selected after clicking **Add**, highlight the incorrect contract in the **Selected Contract(s)** box and click on the **Remove** button. The **Remove All** button will remove all contracts from the box.

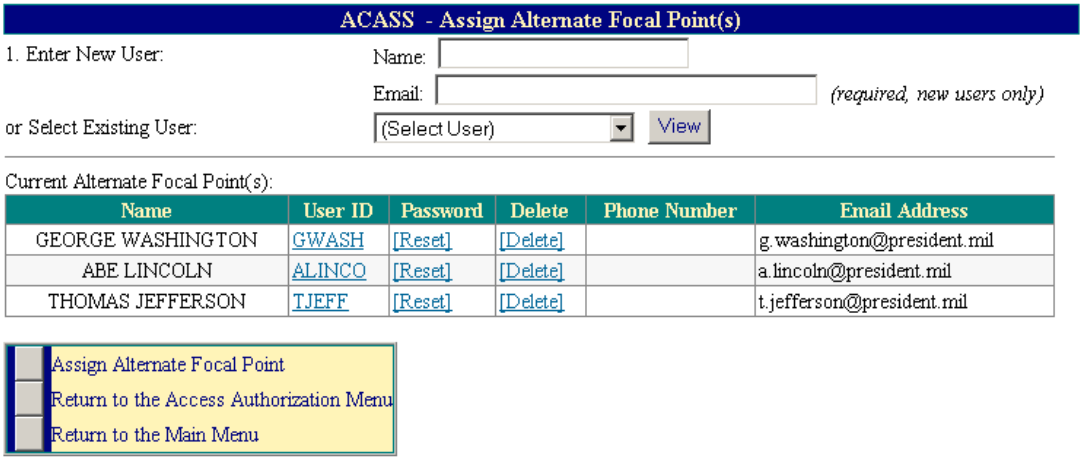
In Step 4, the Focal Point will identify the transfer "To User". To select a user who already has access to ACASS/CCASS, click the **Search** button and the Search for Existing Government/Contractor Users window displays. Enter the full or partial last name and click on the **Search** button. A list 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 ACASS/CCASS database when the Focal Point clicks on the **Transfer Access** button, as long as no other Focal Points have assigned access to the 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**, ACASS/CCASS will assign/identify the new user's User ID. 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.

Assign Alternate Focal Point(s): This option allows the Focal Point to assign up to five individuals as the 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 ACASS and/or CCASS 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 the **Assign Alternate Focal Point(s)** button and the Assign Alternate Focal Point screen displays.



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** 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 ACASS and/or CCASS 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(s). Once a new name is entered or an existing user selected, the Focal Point will click the **Assign Alternate Focal Point** button.

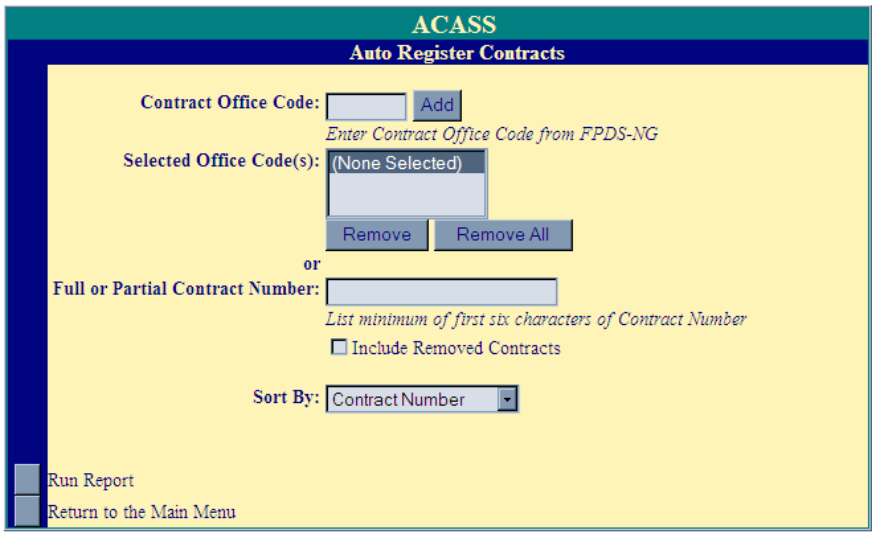
To delete an Alternate Focal Point, click the **Delete** option. To reset the Alternate Focal Point's password, click on the **Reset** option.

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**, ACASS and/or CCASS will assign/identify the new user's User ID. A system generated email will be sent to users 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 ACASS or CCASS-eligible contracts. From the list of eligible contracts, the Focal Point is able to quickly auto-register individual contracts/orders in ACASS or CCASS. Registering contracts in ACASS or CCASS is the process of entering basic contract award data and is required prior to initiating an evaluation. In February 2007, ACASS/CCASS established an interface with the Federal Procurement Data System-Next Generation (FPDS-NG). This daily data feed is the basis for the Auto Register Contracts feature. The most recent three years of contract award information is available. Click the **Auto Register Contracts** button. The Auto Register Contracts Parameters Screen will display.

Auto Register Contracts Parameters Screen. Focal Points are allowed to query for ACASS/CCASS-eligible contracts by entering at least one Contract Office Code or by entering the full or partial contract number. Contracts previously removed from the ACASS/CCASS-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 in Auto Register belonging to them, search by the Contract Office Code. The Contract Office Code is a required field when processing data in the Federal Procurement Data System - Next Generation (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 ACASS/CCASS for a specific contract number or to produce a specific list of ACASS/CCASS-eligible contracts. For example, if a Focal Point would like to produce a list of CPARS-eligible contracts that begin with N45112, he/she would enter the value of N45112.

Auto Register Contracts ACASS/CCASS-Eligible List Screen: Queries run in the previous parameters screen will result in a list of contracts/orders that are eligible for reporting. The ACASS or CCASS-eligible list is filtered by Business Sector and applicable minimum dollar threshold. So, contracts/orders not meeting the established minimum dollar threshold for ACASS or CCASS reporting will not be displayed. To register these, use the manual **Register a Contract** button on the Focal Point Main Menu. Also, contracts/orders that have already been registered in ACASS/CCASS will not be displayed. If the base Indefinite Delivery Vehicle (IDV) has been registered in ACASS/CCASS a ® symbol will be shown next to any task orders for that contract. Contracts/orders that have already been registered in ACASS or CCASS will not be displayed. **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 meets the minimum reporting dollar thresholds. **Award Date** indicates the date the contract/order was awarded. **Completion Date** indicates the end date of the contract. **Available Date** indicates the date that the contract became available in Auto Register. The **Remove** button allows the Focal Point to remove a contract/order from view.

ACASS - 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
view	DEF1234 NAVF0110F0004	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	® DEF12345 NAVF0110F0005	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 NAVF0110F0005	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 USMC0110F0006	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 USMC0110F0006	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12345 ARMY0110F0005	☐	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 ARMY0110F0005	☐	T20000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 NAVF0110F0006	☐	T30000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 NAVF0110F0006	☐	T40000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12345 USMC0110F0005	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 USMC0110F0005	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 ARMY0110F0006	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 ARMY0110F0006	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010

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

Auto Register Contracts : The Focal Point should review the data and select the appropriate **Organization** from the drop-down list. The Organization identifies the organization responsible for ACASS or CCASS 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 to be registered in the column labeled **Select**.

ACASS - 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: OGP

	CONTRACT NUMBER	SELECT	CONTRACT OFFICE CODE	CONTRACT OFFICE	DOLLAR VALUE	AWARD DATE	COMPLETION DATE	AVAILABLE DATE
view	DEF1234 NAVF0110F0004	☑	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view ®	DEF12345 NAVF0110F0005	☑	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 NAVF0110F0005	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 USMC0110F0006	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 USMC0110F0006	☐	NAVF01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12345 ARMY0110F0005	☐	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 ARMY0110F0005	☐	T20000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 NAVF0110F0006	☐	T30000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 NAVF0110F0006	☐	T40000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12345 USMC0110F0005	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12346 USMC0110F0005	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12347 ARMY0110F0006	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010
view	DEF12348 ARMY0110F0006	☐	USMC01	NAVAL SEA LOGISTICS CENTER	$5,000,000	01/01/2010	01/01/2020	04/30/2010

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

Once the appropriate contracts 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 will automatically refresh to exclude the contract(s) that were registered and another popup will appear stating how many contract(s) were registered.

NOTE: 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 the Army Contracting Business Intelligence System (ACBIS). 2. When the contract is auto registered, the Contracting Officer name is pre-populated if available. 3. "USA" will automatically be pre-populated in auto registration if a record comes over from FPDS-NG with a blank country code and a US state appearing in the state code. 4. Dollar values for contract actions with multiple Contract Action Reports are aggregated in auto register.

Once the Focal Point obtains the list of contracts available for Auto Registration and the Focal Point desires to have one or more contract(s) removed from this list, the Focal Point checks the contract(s) slated for removal from the column labeled **Select**. Once the appropriate contracts 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 contracts will automatically refresh to exclude the contract(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 (Check with your organization for specific guidance on how task orders are to be handled). 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 ACASS and/or CCASS 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.

Evaluation Status Report: This option allows the Focal Point to monitor the status of evaluations that have been started or completed for each contract the Focal Point has given access to. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations that allows the Focal Point read-only access to each evaluation. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Focal Point to monitor the status of contracts that he/she has given access to. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status 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 his or her 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)**

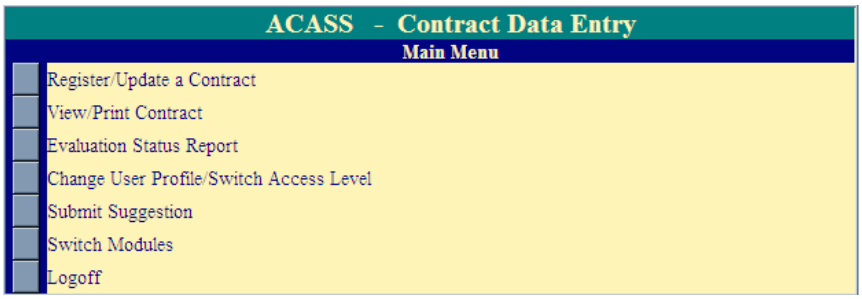
Change User Profile: This option must be used whenever a user's name, address, email address or phone number(s) changes. Focal Points can also use this option to update the Organization(s) which they have cognizance over. This option also allows users to select additional, optional email notifications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

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

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

Contract Data Entry

The Contract Data Entry access level is authorized by the Focal Point to register and update basic contract information. The contract must be registered in ACASS and/or CCASS within 30 days after contract award.



Register/Update a Contract: This option allows a user to input basic contract information into ACASS and/or CCASS. Registering a contract is the only function that the Contract Data Entry user may perform in the automated workflow process. The contract must be registered within 30 days after contract award. To register or update a contract, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an assessment that is to be completed at the contract level, enter the contract number in the **Contract #** box and click the **Continue** button. When an assessment is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract #** box **and** the order number in the **Order #** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the DUNS number (DUNS +4, if applicable) applicable to the contract 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 registration process. The Contract Registration data entry data entry screen displays and will be pre-filled with the contractor's DUNS, name and address. Continue with the contract registration process by entering basic contract 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 all of the required fields (*****) to register and save the contract. 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 that has already been registered enter the contract number in the **Contract #** box **and** the order number, if applicable, in the **Order #** 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 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 Contract Data Entry 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.

View/Print Contract: This option allows the Contract Data Entry user to view registered contracts in a read-only format. To view a contract, click the **View/Print Contracts** button and the View/Print Contracts data entry screen displays. Enter the contract number in the **Contract #** box and the order number, if applicable, in the **Order #** box, and click the **Continue** button. The contract will be displayed in read only format and the user has the option to print the contract to a local printer. To return to the Contract Data Entry Main Menu, click the **Return to Main Menu** button.

Evaluation Status Report: The Evaluation Status Report at the Contract Data Entry level is unique in that the status of the evaluation(s) is provided, but the evaluation cannot be viewed. Evaluations are not accessible at the Contract Data Entry level because this is the only level in the automated workflow process that can be granted to a support contractor. Support contractors are not permitted to view another contractor's past performance evaluations. Click the **Evaluation Status Report** button. A list of evaluations and the current status of each will display. Click on the contract number of an evaluation and only the basic contract information will display in a read-only format. Click **Close** to select another contract number to view. The **Return to the Main Menu** button returns the user to the Contract Data Entry Main Menu.

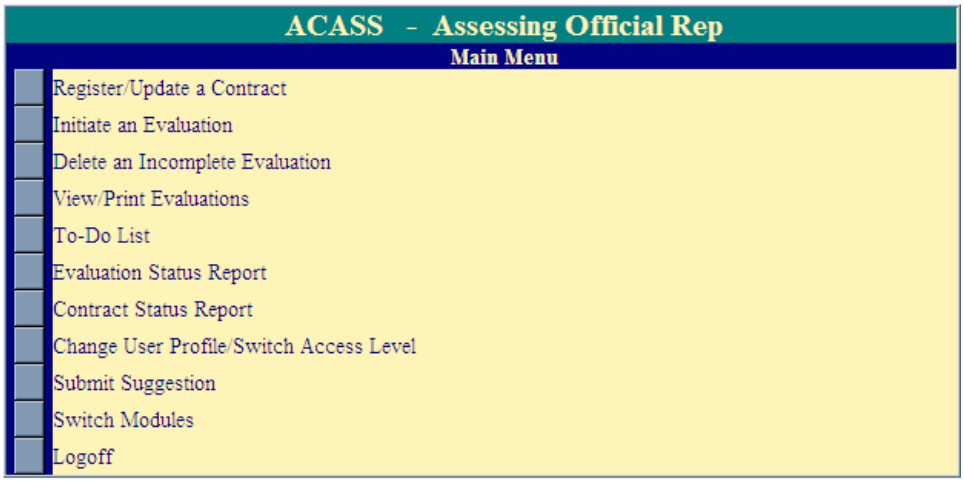
Change User Profile/Switch Access Level: This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows users to change their ACASS and /or CCASS password. The Switch Access Level feature is available when users are assigned more than one level in the workflow process. **(See User Profile Section for more specific information)**

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

Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, CCASS, 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.



Register/Update a Contract: This option allows an Assessing Official Representative to manually input basic contract information into ACASS and/or CCASS. The contract must be registered within 30 days after contract award. To register or update a contract, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an assessment that is to be completed at the contract level, enter the contract number in the **Contract #** box and click the **Continue** button. When an assessment is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract #** box **and** the order number in the **Order #** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the DUNS number (DUNS +4, if applicable) applicable to the contract 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 registration process. The Contract Registration data entry data entry screen displays and will be pre-filled with the contractor's DUNS, name and address. Continue with the contract registration process by entering basic contract 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 all of the required fields (*****) to register and save the contract. 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 that has already been registered enter the contract number in the **Contract #** box **and** the order number, if applicable, in the **Order #** 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 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 Rep 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 remarks. To initiate an evaluation, click on the **Initiate an Evaluation** button.

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 #** 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 #** box **and** the order number in the **Order #** box and click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract information and any miscellaneous information entered during contract registration.

NOTE: The contract 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 and close a partially completed evaluation without addressing all the required fields. Clicking the **Save Data** button will save the partially completed evaluation.

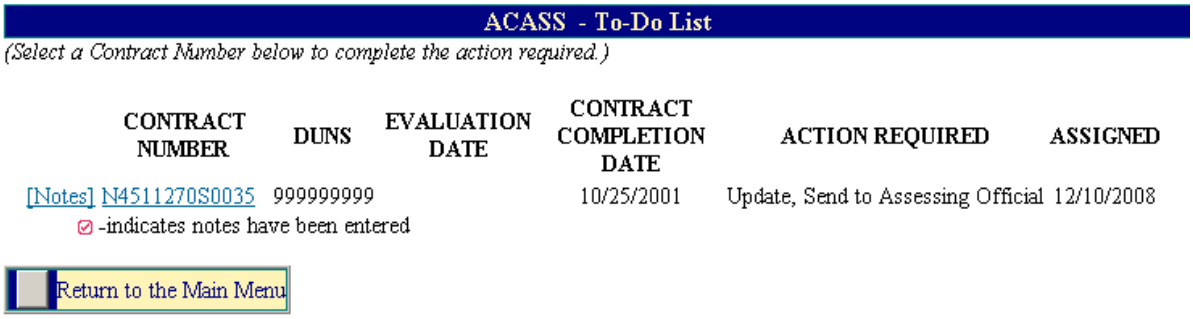
NOTE: DUNS, Phase of Completion and Completion Type (ACASS Only) or DUNS and Type of Evaluation (CCASS Only) must be filled in to save and close a partially completed evaluation. When the Assessing Official Representative is ready to continue working on the evaluation, simply login to ACASS or CCASS, 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, but was saved and closed, will be displayed for additional data entry.

Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicate 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. 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 number to be deleted. The Delete Record Confirmation screen will display. Verify the correct record is about to be deleted from the ACASS/CCASS 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.

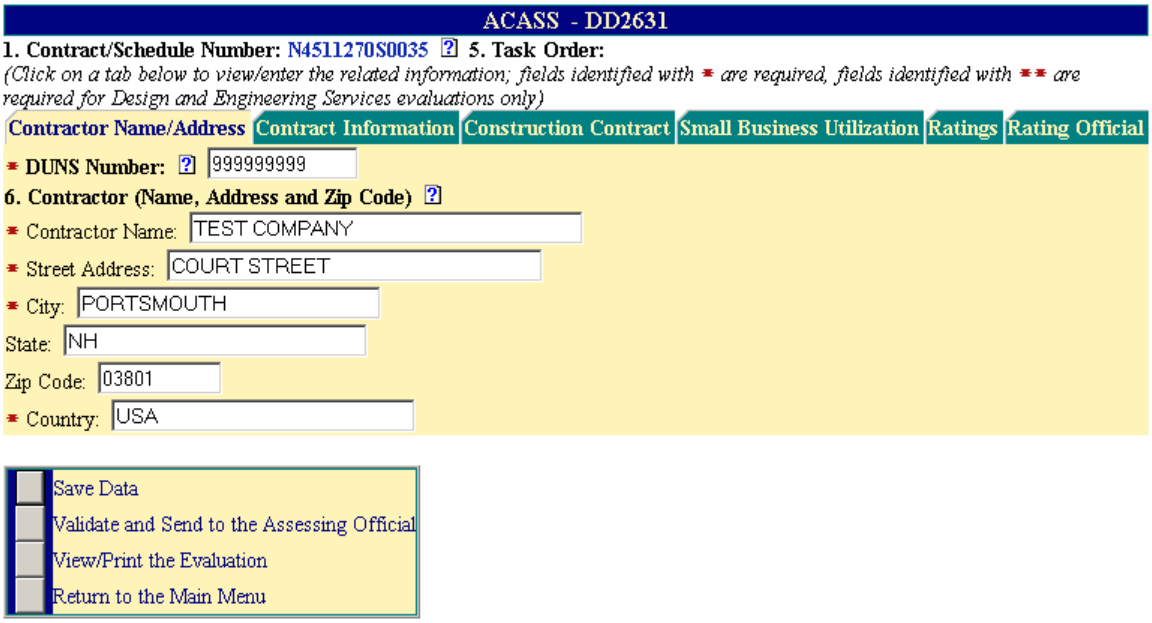
View/Print Evaluations: This option allows the Assessing Official Representative to view/print an evaluation, but not modify or change any of the information on the form. To view an evaluation, click the **View/Print Evaluations** button. The View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract #** box and the order number, if applicable, in the **Order #** box, and click the **Continue** button. The evaluation will display in HTML format. If more than one evaluation exists for the contract number, a list of evaluations will display. Click on the contract number of the evaluation to be viewed. The evaluation will display in HTML format. Click **View Evaluation as PDF** to view the evaluation using Adobe Acrobat Reader. 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 Assessing Official Rep Main Menu, click the **Close** button and then click on the **Return to the Main Menu** button.

To-Do List: This option is a quick and easy method for the Assessing Official Representative to see all the evaluations that he or she needs to update and send to the Assessing Official for validation. The To-Do List will also include evaluations that have been returned by the Assessing Official for rework. Click the **To-Do List** button. A list of evaluations will display



NOTE: A red checkmark next to Notes on the To Do List located next to a Contract 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 number and the evaluation is opened in data entry format ready for the Assessing Official Representative to complete the required action.



If the Assessing Official Representative's 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 the **OK** button to view the evaluation in HTML or click **Cancel** to close the message. 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. In order to save entered information click the **Save Data** button, prior to returning to the main menu.

Evaluation Status Report: This option allows the Assessing Official Representative to monitor the status of evaluations that have been started or completed for each contract that he or she has been authorized access to. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of

evaluations that provides the Assessing Official Representative read-only access to each evaluation. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Assessing Official Representative to monitor the status of contracts that he/she has given access to. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status Report Section for more specific information)**

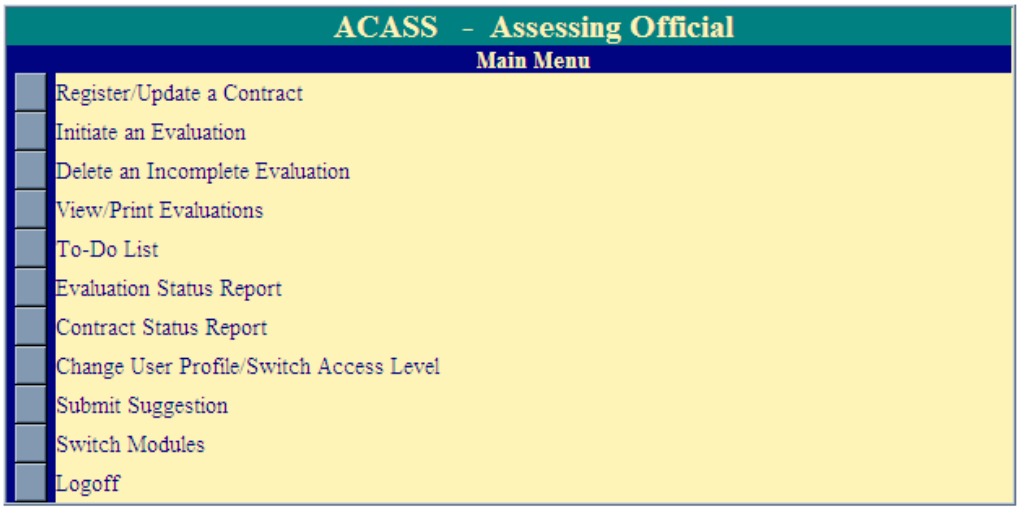
Change User Profile/Switch Access Level: This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows users to select additional, optional email notifications and to change their ACASS and /or CCASS password. This option also allows users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

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

Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, CCASS, 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 modify the evaluation, and to forward the evaluation to the Reviewing Official.



Register/Update a Contract: This option allows an Assessing Official to input basic contract information into ACASS and/or CCASS. The contract must be registered within 30 days after contract award. To register or update a contract, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an assessment that is to be completed at the contract level, enter the contract number in the **Contract #** box and click the **Continue** button. When an assessment is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract #** box **and** the order number in the **Order #** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the DUNS number (DUNS +4, if applicable) applicable to the contract 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 registration process. The Contract Registration data entry data entry screen displays and will be pre-filled with the contractor's DUNS, name and address. Continue with the contract registration process by entering basic contract 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 all of the required fields (*****) to register and save the contract. 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 that has already been registered enter the contract number in the **Contract #** box **and** the order number, if applicable, in the **Order #** 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 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.

Initiate an Evaluation: 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. 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 #** 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 #** box **and** the order number in the **Order #** box and click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract information and any miscellaneous information entered during contract registration

NOTE: The contract 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 and close a partially completed evaluation without addressing all the required fields. Clicking the **Save Data** button will save the partially completed evaluation.

NOTE: DUNS, Phase of Completion and Completion Type (ACASS Only) or DUNS and Type of evaluation (CCASS Only) must be filled in to save and close a partially completed evaluation. When the Assessing Official is ready to continue working on the evaluation, simply login to ACASS or CCASS, 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, but was saved and closed, will be displayed for additional data entry.

Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicate 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 on the **Sign Now** button, on the Rating Official 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 e-mail 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 the **OK** button to view the evaluation in HTML or click **Cancel** to close the message from the HTML view, click the **View Evaluation as PDF** button to open and view the evaluation using Adobe Acrobat Reader. The Assessing Official is now locked out of the evaluation and may now 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.

Delete an Incomplete Evaluation: 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. 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 number to be deleted. The Delete Record Confirmation screen will display. Verify the correct record is about to be deleted from the ACASS/CCASS 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.

View/Print Evaluations: This option allows the Assessing 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. The View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract #** box and the order number, if applicable, in the **Order #** box, and click the **Continue** button. The evaluation will display in HTML format. If more than one evaluation exists for the contract number, a list of evaluations will display. Click on the contract number of the evaluation to be viewed. The evaluation will display in HTML format. Click **View Evaluation as PDF** to view the evaluation using Adobe Acrobat Reader. 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 Assessing Official Rep Main Menu, click the **Close** button and then click on the **Return to the Main Menu** button.

To-Do List: This option is a quick and easy method for the Assessing Official to see all evaluations that are awaiting his or her action. Click the **To-Do List** button. A list of evaluations will display. The list includes evaluations that have been started and saved by the Assessing Official, those that have been forwarded by the Assessing Official Representative, evaluations returned by the Contractor Representative and finally, evaluations that have not been returned by the Contractor Representative within the 30-day comment period. Click on the appropriate contract number and the evaluation is opened in data entry format ready for the Assessing Official to complete the required action. The evaluation's status will determine the **To-Do List's Action Required**. Each of the Assessing Official's **Actions Required** are described in further detail with complementary screen shots below.

Please review the examples below taken from the **To Do List** of an Assessing Official in the ACASS/CCASS Practice System for each of the **Action(s) Required**.

Action Required: "Rate, Send to Contractor": 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 completed evaluation, the DUNS, Phase of Completion, and Completion type (ACASS only) or DUNS and Type of Evaluation must have been filled in and saved. The last two evaluations shown below in the Assessing Official's **To-Do List** both require the Assessing Official's action to **Rate and Send to the Contractor**. To open the first contract, click on the contract number and the evaluation opens as below to be reviewed and rated by the Assessing Official.

ACASS - To-Do List

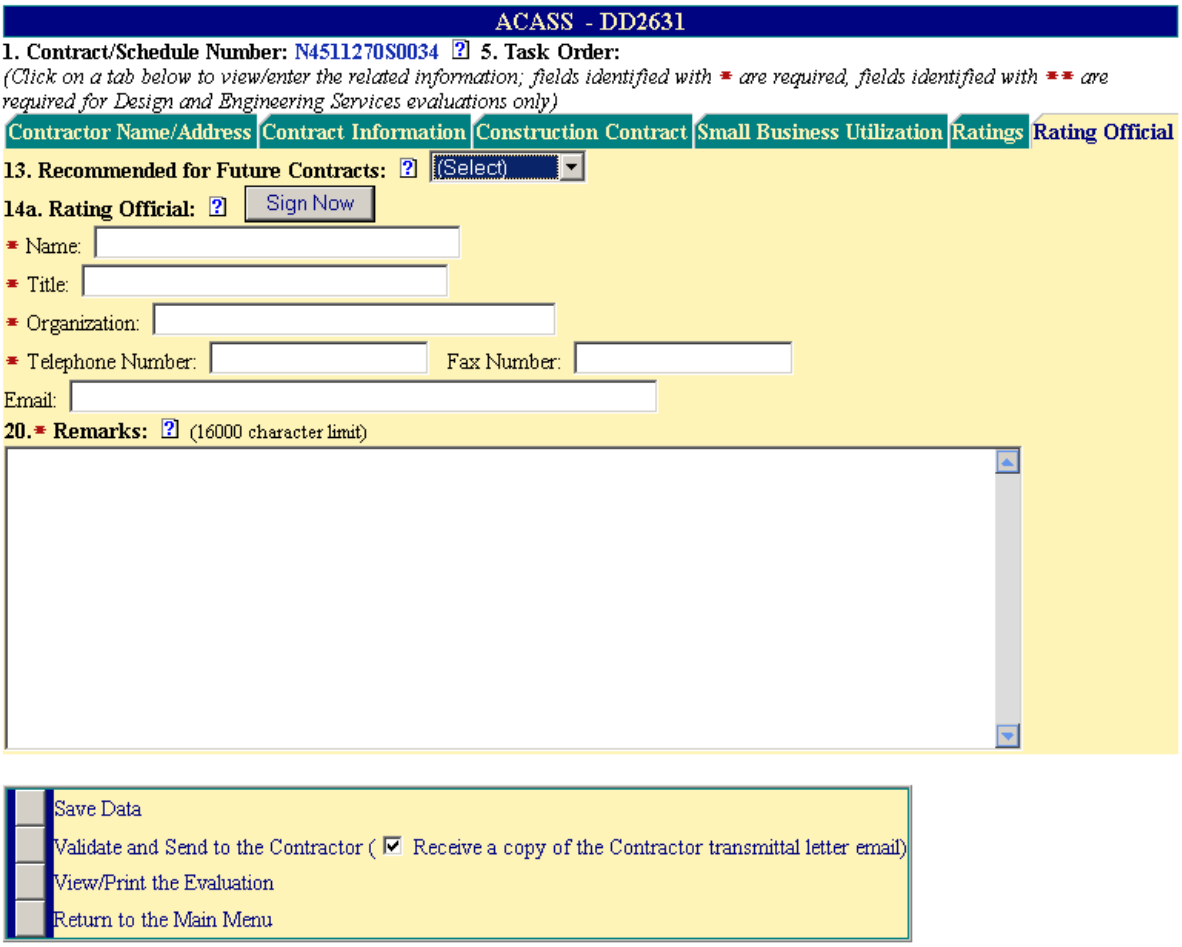
(Select a Contract Number below to complete the action required.)

	CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ACTION REQUIRED	ASSIGNED
[Notes]	N4511270S0054	999999999	12/18/2008	12/17/2008	Contractor Overdue, Finalize Ratings	01/17/2009
[Notes]	N4511270S0062	999999999	12/01/2008	12/20/2008	Contractor Overdue, Finalize Ratings	12/31/2008
[Notes]	N4511270S0053	999999999	12/18/2008	10/22/2008	Finalize Ratings	12/30/2008
[Notes]	N4511270S0034	999999999		10/25/2001	Rate, Send to Contractor	12/10/2008
[Notes]	N4511270S0057	999999999		06/28/2008	Rate, Send to Contractor	12/30/2008

-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 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 **Rating Official 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 Narratives 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 (30 Day Comment period expired), or have been returned by the Reviewing Official. The Assessing Official has the option to **Accept the Ratings and Send to the Reviewing Official,** or **Modify the Ratings**. If Modify the Ratings is selected, both the original evaluation (including contractor comments) and the modified evaluation are stored in ACASS/CCASS. Whenever a modified evaluation is viewed, users have the option to view/print the original evaluation.

ACASS - To-Do List

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

	CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ACTION REQUIRED	ASSIGNED
[Notes]	N4511270S0054	999999999	12/18/2008	12/17/2008	Contractor Overdue, Finalize Ratings	01/17/2009
[Notes]	N4511270S0062	999999999	12/01/2008	12/20/2008	Contractor Overdue, Finalize Ratings	12/31/2008
[Notes]	N4511270S0053	999999999	12/18/2008	10/22/2008	Finalize Ratings	12/30/2008
[Notes]	N4511270S0034	999999999		10/25/2001	Finalize Ratings	12/10/2008
[Notes]	N4511270S0057	999999999		06/28/2008	Rate, Send to Contractor	12/30/2008

-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 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 is taken from the Assessing Official's **To-Do List** above by clicking on Contract Number N4511270S0034. The Assessing Official selects the contract and reviews the entire evaluation by clicking on each green tab. Review Contractor comments by clicking on the Contractor Rep tab.

ACASS - DD2631

1. Contract/Schedule Number: N4511270S0034 **5. Task Order:**

(Click on a tab below to view the related information)

Contractor Name/Address | Contract Information | Construction Contract | Small Business Utilization | Ratings | Rating Official | Contractor Rep

Contractor Representative:
Name: ACASS CONTRACTOR
Title: TEST
Telephone Number: test Fax Number:
Email: contractor@company.com
Concurrence: I concur with this evaluation.
Date: 01/21/2009

Remarks:

```
Contractor agrees with the ratings, thank you.
```

Accept the Ratings and Send to the Reviewing Official
Modify the Ratings
Return to the Main Menu

<u>Action Required: "Contractor Overdue, Finalize Ratings":</u> The Assessing Official will use the To-Do List to retrieve evaluations that are not returned by the Contractor Representative within the allotted 30-day comment period (Action Required is "Contractor Overdue, Finalize Ratings") as contract N4511270S0062 shows below. However, it is recommended that the Assessing Official contact the Contractor Representative to determine if extenuating circumstances prevented them from commenting within the allotted time. The Assessing Official will evaluate whether the 30-day comment period should be extended or if the evaluation will be completed without contractor comments.

ACASS - To-Do List

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

	CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ACTION REQUIRED	ASSIGNED
[Notes]	N4511270S0054	999999999	12/18/2008	12/17/2008	Contractor Overdue, Finalize Ratings	01/17/2009
[Notes]	N4511270S0062	999999999	12/01/2008	12/20/2008	Contractor Overdue, Finalize Ratings	12/31/2008
[Notes]	N4511270S0053	999999999	12/18/2008	10/22/2008	Finalize Ratings	12/30/2008
[Notes]	N4511270S0034	999999999		10/25/2001	Rate, Send to Contractor	12/10/2008
[Notes]	N4511270S0057	999999999		06/28/2008	Rate, Send to Contractor	12/30/2008

-indicates notes have been entered

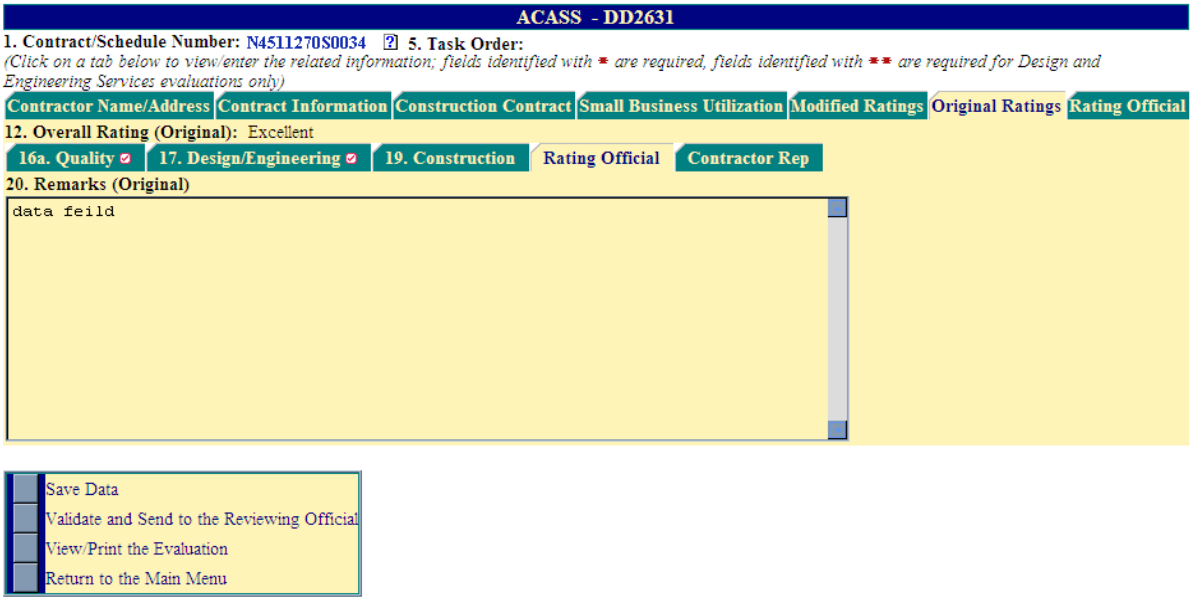
NOTE: A red checkmark next to Notes on the To Do List located next to a Contract Number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

Evaluations completed without contractor comment will be automatically annotated in the Remarks 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 evaluation.” If the Contractor enters comments but does not return the evaluation within 30 days, the action required will reflect, "Contractor Overdue (Started), Finalize Ratings". It is recommended that the Assessing Official Contact the Contractor Representative to determine if the evaluation will be returned by the Contractor. If not, the Assessing Official can continue to finalize the evaluation. The Contractor's partial 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 evaluation,” will be placed in the comment field. The Assessing Official has the option to **Accept the Ratings and Send to the Reviewing Official** or **Modify the Ratings**. Modify the Ratings is explained in more detail in later paragraphs.

When the **Accept the Ratings and Send 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 "Accept the ratings and send 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. An evaluation Process Feedback screen appears. Select a rating (scale of 1 to 10) from the drop-down box to rate the effectiveness of the evaluation process in improving communication between the organization and the contractor evaluated. Note that specific comments, questions, and suggestions on the CPARS process can be entered in the **Submit Suggestion** feature available from the Main Menu. Click **Save Feedback and Return to the Main Menu** to return to the Assessing Official Main Menu.

If **Modify the Ratings** is selected, both the original evaluation (including contractor comments) and the modified evaluation are stored in ACASS/CCASS. Whenever a modified evaluation is viewed, users have the option to view/print the original evaluation (Original Ratings tab). If the evaluation is modified the Assessing Official will make the desired modified ratings from the Modified Ratings tab and provide a supporting narrative in the Rating Official tab. Once the modification is completed the assessing official will click the **Accept the Ratings and Send to the Reviewing Official** button.

NOTE: If Modify the Ratings is selected, the Contractor tab is moved to the Original Ratings tab.



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

<u>Contract Status Report:</u> This option allows the Assessing Official to monitor the status of contracts that he or she has been authorized access to. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status Report Section for more specific information)**

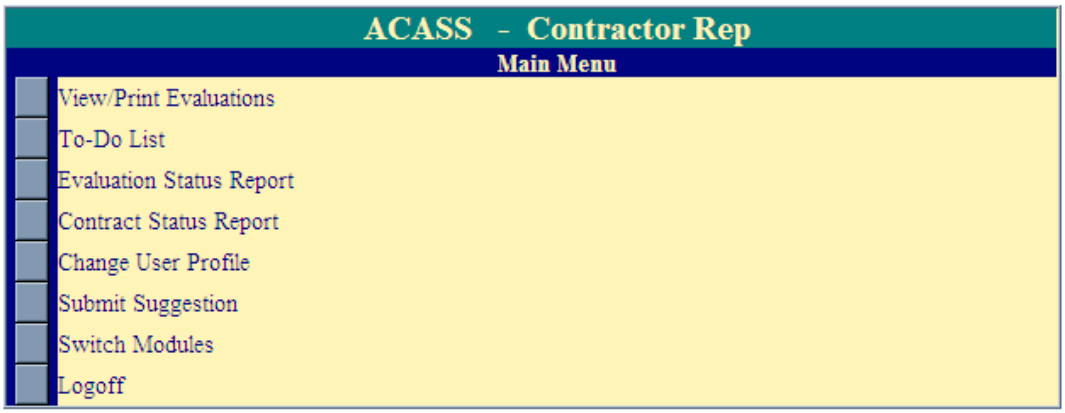
<u>Change User Profile/Switch Access Level:</u> This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows users to select additional, optional email notifications and to change their ACASS/CCASS password. This option also allows users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

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

<u>Switch Modules:</u> This option allows users to switch between the different modules CPARS, ACASS, CCASS, 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 Government Assessing Official. An evaluation is required to be prepared by the Government to document contractor performance for each contract/order that meets specified dollar values. The Contractor Representative is allotted 30 days to review and comment on each evaluation forwarded to his/her company.



View/Print Evaluations: This option allows the Contractor Representative to view/print an evaluation that has been forwarded for comment or that has been previously completed in ACASS and/or CCASS. 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 #** box and the order number, if applicable, in the **Order #** 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 number of the evaluation to be viewed and/or printed. The evaluation will display in HTML format. Click **View Evaluation as PDF** to view the evaluation using Adobe Acrobat Reader. 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.

To-Do List: This option is used by the Contractor Representative to review and comment on evaluations that have been forwarded by the Assessing Official. The Contractor Representative is allotted a 30-day review/comment period starting from the date the Assessing Official forwarded the evaluation. If the Contractor Representative does not provide comments within the 30-day period, the Government may complete the evaluation without Contractor Representative comments. Contractor Representatives are encouraged to contact the Assessing Official to request an extension to the 30-day comment period whenever extenuating circumstances arise. Within the first seven days of the comment period, the Contractor Representative may request a meeting with the Assessing Official to discuss the evaluation. To input comments, the Contractor Representative must be logged into ACASS or CCASS and the Contractor Representative Main Menu must be displayed.

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

ACASS - To-Do List

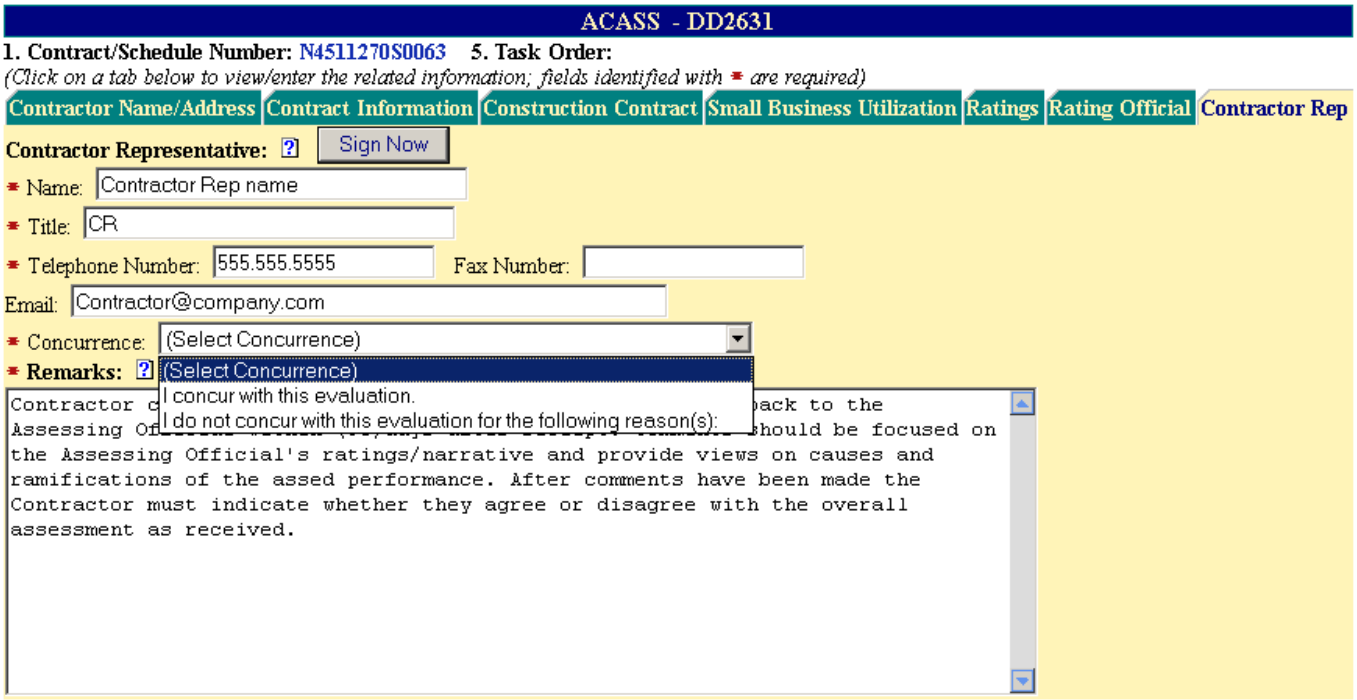
(Select a Contract Number below to complete the action required.)

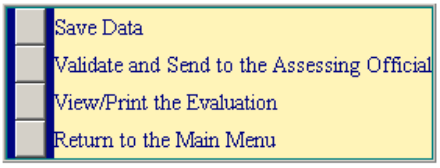
CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ACTION REQUIRED	ASSIGNED
N4511270S0018	999999999	01/15/2009	10/25/2008	Input Comments	01/15/2009
N4511270S0063	999999999	12/31/2008	12/20/2008	Input Comments	12/31/2008
N4511270S0064	999999999	12/31/2008	12/20/2008	Input Comments	12/31/2008
N4511270S0065	999999999	12/31/2008	12/20/2008	Input Comments	12/31/2008
N4511270S0054	999999999	12/18/2008	12/17/2008	Input Comments (Overdue)	12/18/2008
N4511270S0062	999999999	12/01/2008	12/20/2008	Input Comments (Overdue)	12/01/2008

Return to the Main Menu

The evaluation will open in read-only format except for the fields located on the **Contractor Rep** tab. 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 and a Process Feedback screen displays. Select a rating from 1 to 10 from the drop-down box to rate the effectiveness of the evaluation process in improving communication between your company and the Government office that is evaluating performance. Note that specific comments, questions and suggestions on the ACASS/CCASS process can be entered in the **Submit Suggestion** feature available from the Main Menu. Click **Save Feedback and View the Evaluation** or **Save Feedback and Return to the Main Menu**.





Evaluation Status Report: This option allows the Contractor Representative to monitor the status of evaluations that have been started or completed for each contract the Contractor Representative has been given access to. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations that allows the Contractor Representative read-only access for evaluations that are Rated or Completed. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Contractor Representative to monitor the status of contracts that he/she has been given access to. The Contract Status Report will display information as counts (e.g. number of contracts due for an evaluation) or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status Report Section for more specific information)**

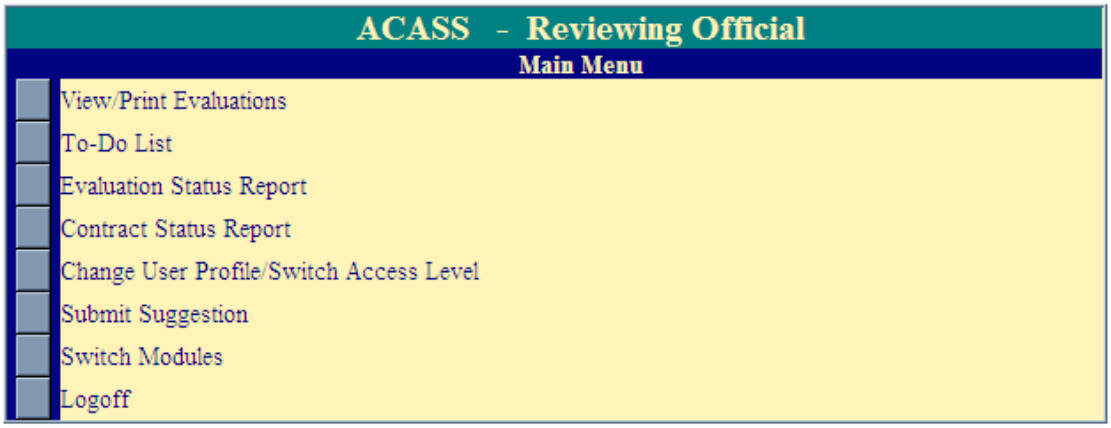
Change User Profile: This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows users to select optional email notifications and to change their ACASS /CCASS password. **(See User Profile Section for more specific information)**

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

Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, and CCASS without having to log off. **NOTE:** Contractors 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 assessment 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.



View/Print Evaluations: 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 #** box and the order number, if applicable, in the **Order #** box. Click the **Continue** button. If more than one evaluation exists for the contract number, a list of evaluations will display. Click on the contract number of the evaluation to be viewed. The evaluation will display in HTML format. Click **View Evaluation as PDF** to view the evaluation using Adobe Acrobat Reader. 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 Reviewing Official Main Menu, click the **Close** button.

To-Do List: 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. Then locate and click on the contract 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.

ACASS - To-Do List

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

	CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ACTION REQUIRED	ASSIGNED
[Notes]	N4511270S0014	999999999	12/30/2008	10/25/2008	Input Comments, Close Evaluation	12/30/2008
[Notes]	N4511270S0029	999999999	12/08/2008	12/08/2008	Input Comments, Close Evaluation	12/08/2008
☑ [Notes]	N4511270S0048	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511270S0057	999999999	12/30/2008	06/28/2008	Input Comments, Close Evaluation	12/30/2008
[Notes]	N4511370S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511470S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511570S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511670S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511770S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511870S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4511970S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008
[Notes]	N4512070S0048 0001	999999999	12/15/2008	12/25/2008	Input Comments, Close Evaluation	12/16/2008

☑ -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 Number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

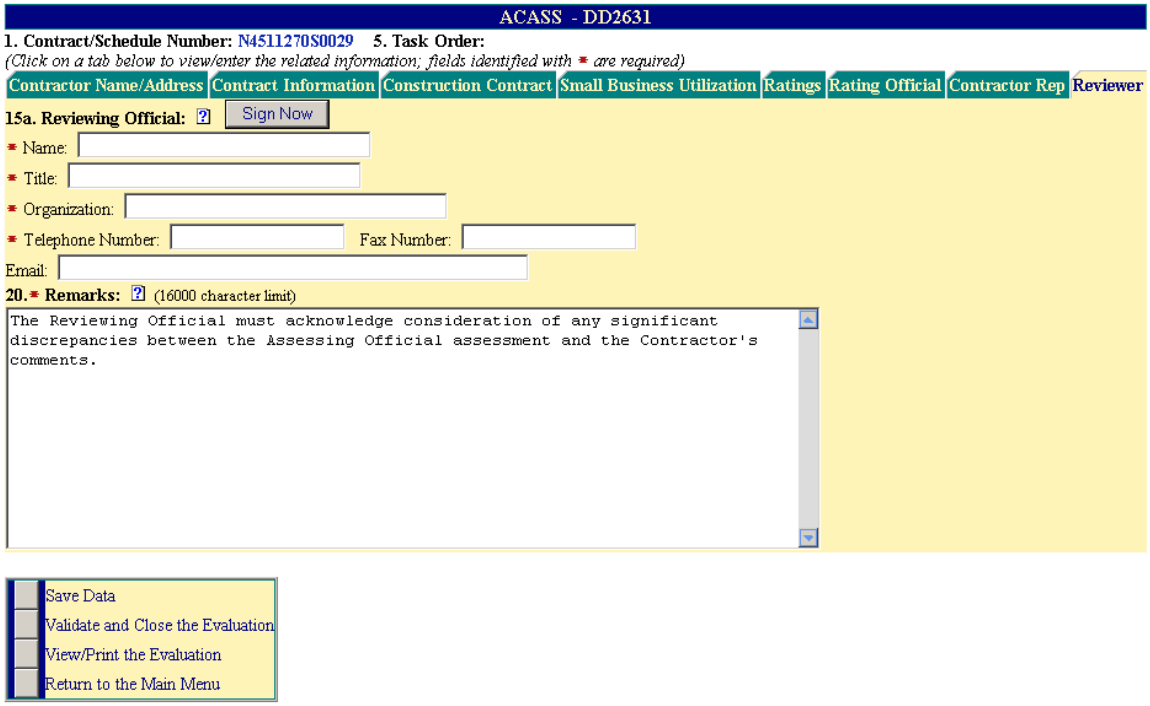
Click on each of the **Green Tabs** to review the entire evaluation. The Reviewing Official has the option to click on the **Return to the Assessing Official** button whenever the Reviewing Official determines the evaluation requires additional detail and/or clarification from the Assessing Official. 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 assessment 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**. **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. In the HTML view, click **View Evaluation as PDF** using Adobe Acrobat Reader or click **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 evaluation, the Contractor tab is moved to the Original Ratings tab.



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

Evaluation Status Report: This option allows the Reviewing Official to monitor the status of evaluations that have been started or completed for each contract the Reviewing Official has been given access to. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or a list of evaluations that allows the Reviewing Official read-only access for each evaluation. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Reviewing Official to monitor the status of contracts that he/she has been given access to. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status Report Section for more specific information)**

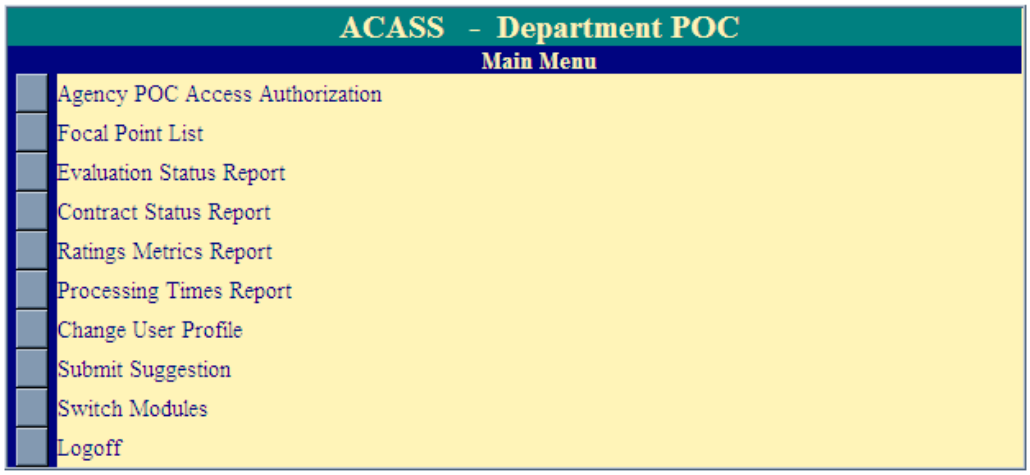
Change User Profile/Switch Access Level: This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows users to select optional email notifications and to change their ACASS /CCASS password. This option also allows users to switch access levels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

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

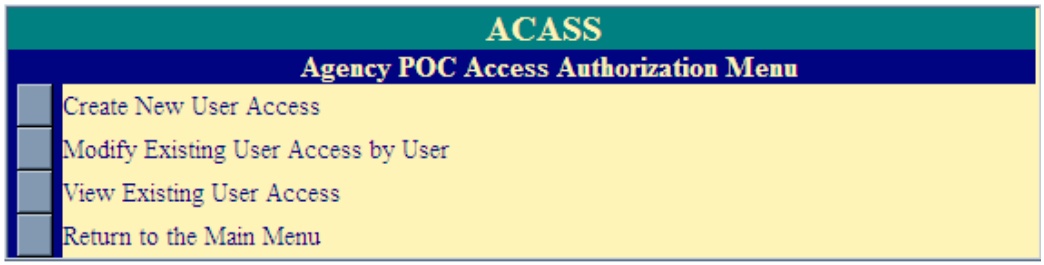
Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, CCASS, and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Department Point of Contact

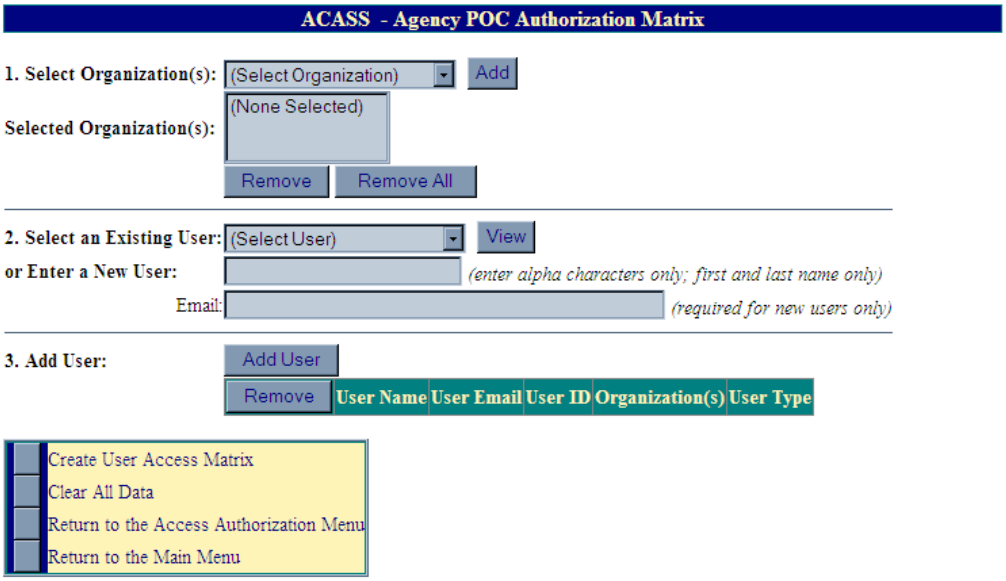
This access level offers managers complete visibility of the CPARS process across an entire department. In addition, this level is used to give access to Agency POCs who require oversight of the CPARS process for specific organizations within the department. The Department POC is also able to view Status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



Agency Point of Contact 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 ACASS/CCASS, the Department POC clicks on the **Agency POC Access Authorization** button. The Agency POC 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 ACASS or CCASS 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(s). 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

ACASS - 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	GWASHI	Authorized	New	DOE-05/OAKRIDSC

* 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

Modify Existing User Access by User: This option allows the Department POC to modify the access of his/her designated Agency POCs. 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 ACASS/CCASS when access is no longer required. Click the **Modify Existing User Access by User** button and the Access Authorization screen displays.

ACASS - Access Authorization

Agency POCs:

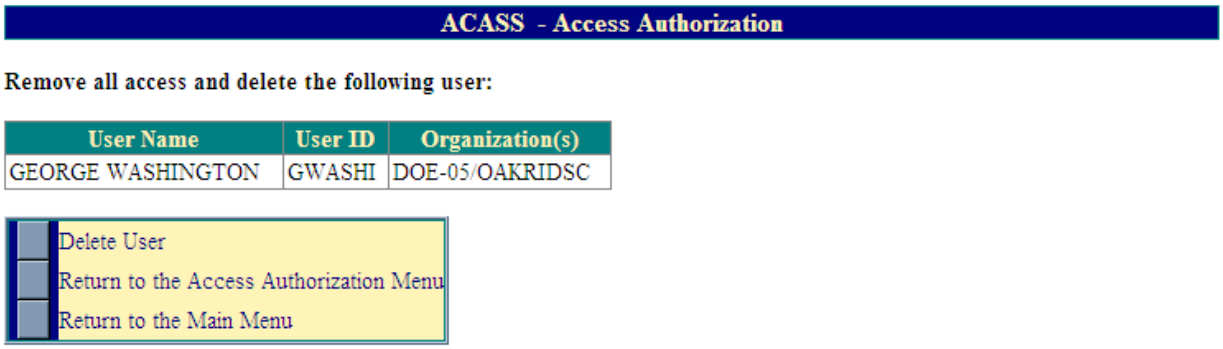
			User Name	User ID	Organization(s)
[Delete User]	[Modify User]	[Change Profile]	GEORGE WASHINGTON	GWASHI	DOE-05/OAKRIDSC

Return to the Access Authorization Menu
Return to the 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, title, organization, address, email, and Phone Number(s). The Department POC must click the **OK** button after the change(s) are made in order for them to take effect.

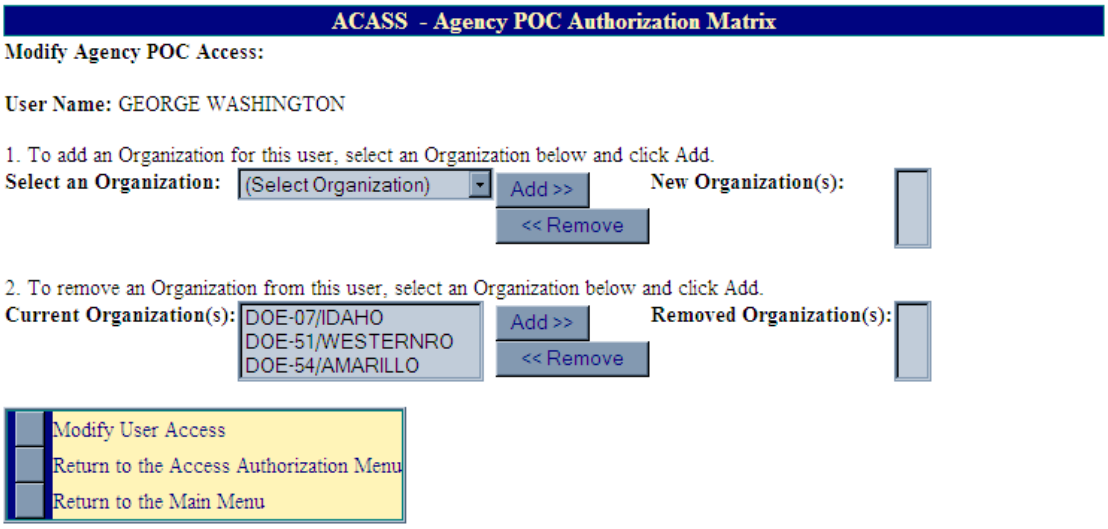
User Name – Click on the user's name to view the user's profile information, including name, title, organization, address, email address, and phone numbers. Click the **Close** button to return to previous screen.

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



Click the **Delete User** button and a pop-up message displays confirming that the Agency POC has been deleted from ACASS/CCASS. 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.

[Modify User] – This option allows the Department POC to add or delete one or more Organizations for an existing Agency POC. Click the **[Modify User]** button and the Agency POC Authorization Matrix 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. After all changes have been entered, click the **Modify User Access** button. The Agency POC Authorization Matrix displays identifying the Organization(s) the Agency POC has been authorized access to and an email notification will be sent to the users notifying them of the change. The **Return to the Main Menu** button returns the user to the Department POC Main Menu.

ACASS - Agency POC Authorization Matrix

Access has been authorized for the following Agency POC users to the associated Organization(s).
A system-generated email has been sent informing the user of these changes.

User Name	User ID	Status *	User Type	Organization(s)
GEORGE WASHINGTON	GWASHI	Authorized	Existing	DOE-07/IDAHO DOE-51/WESTERNRO DOE-54/AMARILLO

* 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

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

ACASS - 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	GWASHI	NEVER	DOE-07/IDAHO DOE-51/WESTERNRO DOE-54/AMARILLO

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(s). 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 organization's 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.

Focal Point List - 02/21/2012

[Spreadsheet]

Organization	Role	User Name	Phone Number	Email Address	Created Date	Last Accessed Date	Active In *			
							CPARS	ACASS	CCASS	FAPIIS
KSC	Focal Point	FRANKLIN PIERCE	x	franklin.pierce@noemail.mil	02/21/2012	02/21/2012	Y	N	N	N
	Alternate	HERBERT HOOVER		herbert.hoover@noemail.mil	02/21/2012					
NMO	Focal Point	THOMAS JEFFERSON	888-999-8686	thomas.jefferson@noemail.mil	02/14/2012	02/14/2012	N	N	N	Y
	Alternate	HAPPY RABBIT	222 RABBIT	happyrabbit@noemail.mil	08/16/2010	01/10/2011				

Count: 4

*** Active In**

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

N- Under CPARS, ACASS, and CCASS: 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.

Evaluation Status Report: This option allows the Department POC to monitor the status of evaluations that have been started or completed for all contracts within the respective department. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations that allows the Department POC read-only access to each evaluation. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Department POC to monitor the status of contracts within the respective department. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status 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)**

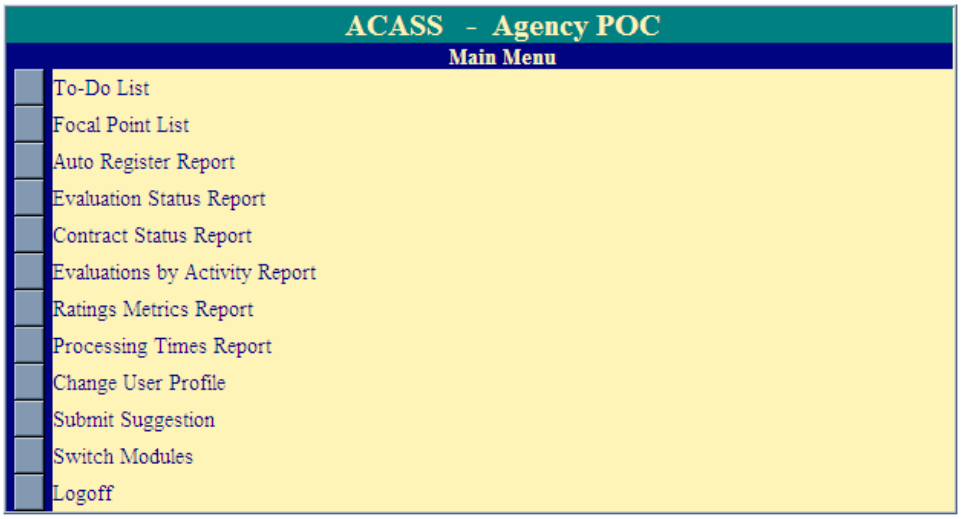
Change User Profile: This option must be used whenever a Department POC's name, address, email address or phone number(s) changes. This option also allows users to change their ACASS/CCASS password. **(See User Profile Section for more specific information)**

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

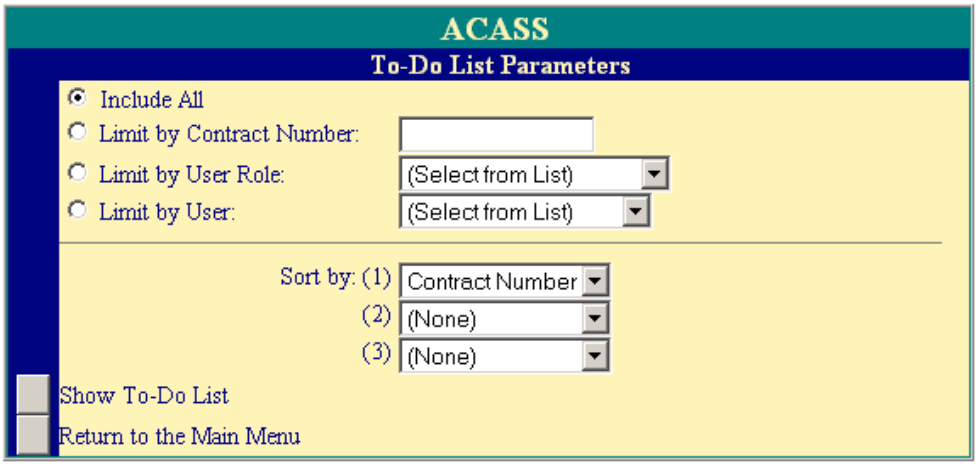
Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, CCASS, and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Agency Point of Contact

An Agency Point of Contact (POC) is a senior level employee (or designated representative) who is a proponent of the ACASS/CCASS applications and process. This access level allows Agency POC's to quickly identify the status of contracts and assessments 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**. 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(s) will display.

ACASS - To-Do List

CONTRACT NUMBER	DUNS	EVALUATION DATE	CONTRACT COMPLETION DATE	ROLE	ACTION REQUIRED	ASSIGNED	USER
N4511275C0067	999999999	11/18/2008	11/18/2008	Assessing Official	Finalize Ratings		GREEN BUNNY

Return to the To-Do List Parameters
Return to the Main Menu

This report displays the Contract Number, DUNS, Evaluation Date, Contract Completion Date, User Role, Action Required, Date Assigned and the name of the user responsible for the action.

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

Focal Point List - 02/21/2012

[Spreadsheet]

Organization	Role	User Name	Phone Number	Email Address	Created Date	Last Accessed Date	Active In *			
							CPARS	ACASS	CCASS	FAPIIS
KSC	Focal Point	FRANKLIN PIERCE	x	franklin.pierce@noemail.mil	02/21/2012	02/21/2012	Y	N	N	N
	Alternate	HERBERT HOOVER		herbert.hoover@noemail.mil	02/21/2012					
NMO	Focal Point	THOMAS JEFFERSON	888-999-8686	thomas.jefferson@noemail.mil	02/14/2012	02/14/2012	N	N	N	Y
	Alternate	HAPPY RABBIT	222 RABBIT	happyrabbit@noemail.mil	08/16/2010	01/10/2011				

Count: 4

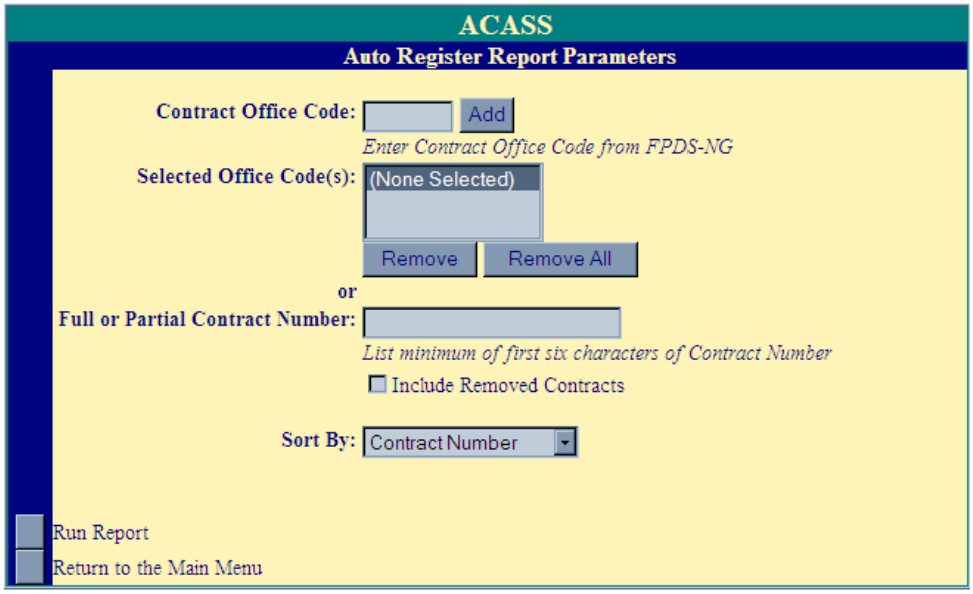
*** Active In**

Y- Under CPARS, ACASS, and CCASS: indicates that user(s) have been assigned access. Under FAPIIS: indicates a record(s) has been entered.
N- Under CPARS, ACASS, and CCASS: indicates that no users have been assigned access. Under FAPIIS: indicates no records have been entered.

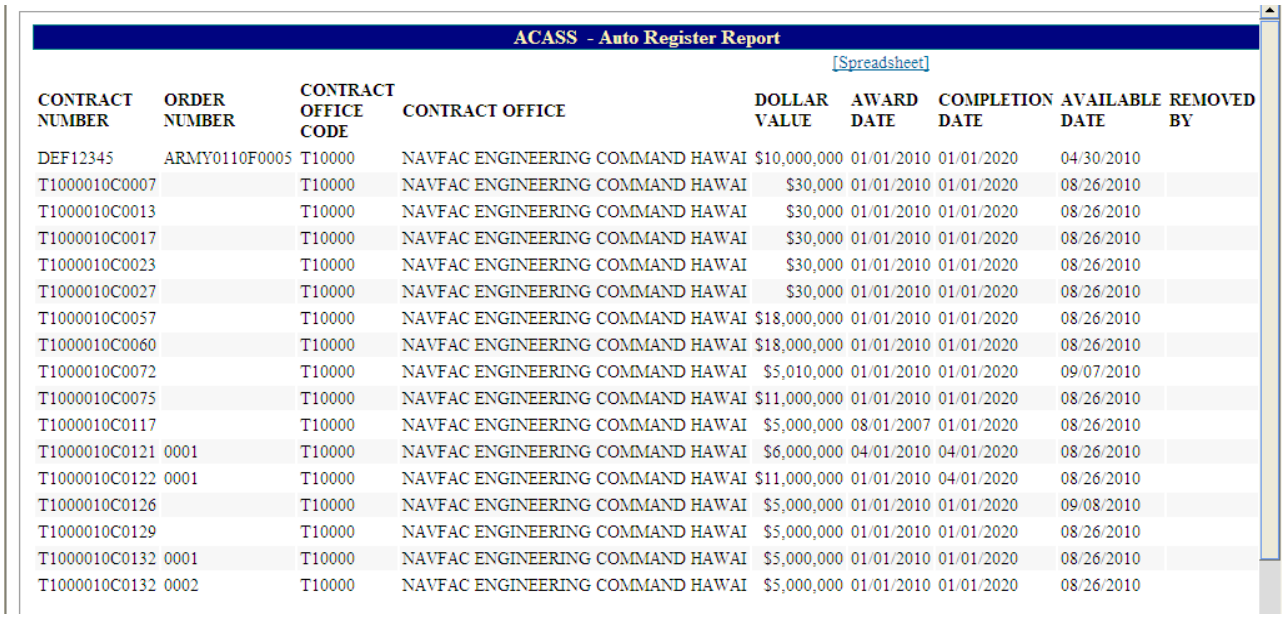
Return to the Main Menu

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

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



After selecting the **Auto Register Report** from the main menu, enter a contract office code(s) 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** checkbox. The Auto Register Report may be sorted by up to seven sort options. Select the desired option from the **Sort By** drop-down box. Once you've selected 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).



ACASS - Auto Register Report

[Spreadsheet]

CONTRACT NUMBER	ORDER NUMBER	CONTRACT OFFICE CODE	CONTRACT OFFICE	DOLLAR VALUE	AWARD DATE	COMPLETION DATE	AVAILABLE DATE	REMOVED BY
DEF12345	ARMY0110F0005	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$10,000,000	01/01/2010	01/01/2020	04/30/2010	
T1000010C0007		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$30,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0013		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$30,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0017		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$30,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0023		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$30,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0027		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$30,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0057		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$18,000,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0060		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$18,000,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0072		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,010,000	01/01/2010	01/01/2020	09/07/2010	
T1000010C0075		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$11,000,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0117		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,000,000	08/01/2007	01/01/2020	08/26/2010	
T1000010C0121	0001	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$6,000,000	04/01/2010	04/01/2020	08/26/2010	
T1000010C0122	0001	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$11,000,000	01/01/2010	04/01/2020	08/26/2010	
T1000010C0126		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,000,000	01/01/2010	01/01/2020	09/08/2010	
T1000010C0129		T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,000,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0132	0001	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,000,000	01/01/2010	01/01/2020	08/26/2010	
T1000010C0132	0002	T10000	NAVFAC ENGINEERING COMMAND HAWAI	$5,000,000	01/01/2010	01/01/2020	08/26/2010	

The example above does not include removed contracts. If the example was run to include removed contracts, the **Removed By** column would identify the Focal Point who removed each contract. Click on the Focal Point's name to view the Focal Point's profile information, including name, title, organization, address, email address, and phone numbers. Click the **Close** button to return to the list of contracts.

[Spreadsheet] – Click on the **[Spreadsheet]** icon in the upper right hand corner to create a Microsoft Excel version of the list.

Evaluation Status Report: This option allows the Agency POC to monitor the status of evaluations that have been started or completed for all contracts within the respective Organization. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations that allows the Agency POC read-only access to each evaluation. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Agency POC to monitor the status of contracts within the respective Organization. The Contract Status Report will display information as counts (e.g. number of contracts due for an assessment), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract Status 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)**

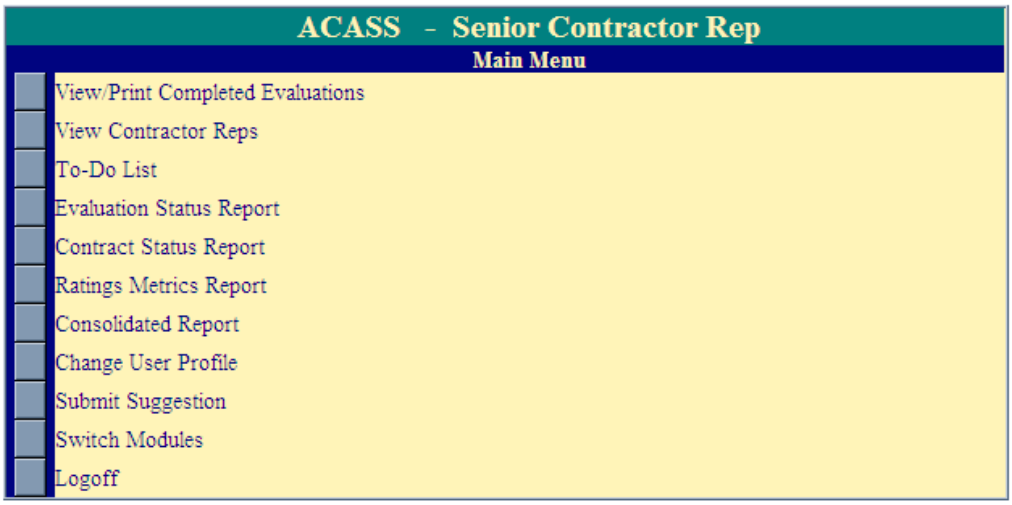
Change User Profile: This option must be used whenever a user's name, address, email address or phone number(s) changes. This option also allows the Agency POC to elect to receive an optional email notification that would be sent whenever an evaluation is "Due" to be initiated. The Change User Profile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

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

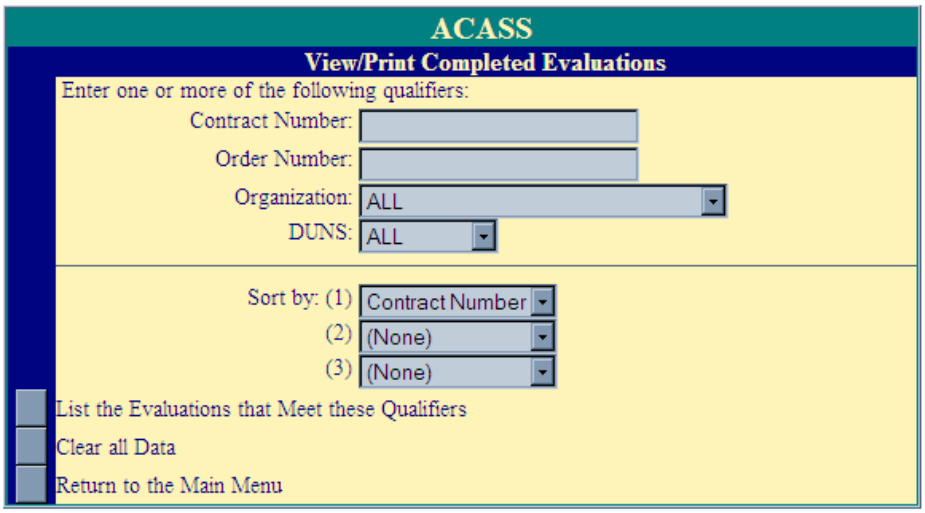
Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, CCASS, and FAPIIS without having to log off. **(See Switch Modules Section for more specific information)**

Senior Contractor Representative

The Senior Contractor Representative access level allows a designated corporate official to view specific in-process evaluations when statused at the Contractor Representative level and completed ACASS/CCASS 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 awarded to the corporation or any of its divisions or subsidiaries. To view a completed evaluation, the user must log into ACASS/CCASS as a Senior Contractor Representative and the Senior Contractor Representative Menu must be displayed. Click the **View/Print Completed Evaluations** button and the View/Print Completed Evaluations qualifier screen displays.



The Senior Contractor Representative can search for completed evaluations by Contract Number/Order Number, Organization, DUNS and North American Industrial Classification System (NAICS) (CCASS only). 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 number of the evaluation to be viewed and a new window opens and displays the evaluation in HTML format. Click the **View Evaluation as PDF** button to view evaluation in Adobe Acrobat Reader. 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 Main Menu** button returns the user to the Senior Contractor Representative Main Menu.

ACASS - View/Print Completed Evaluations

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

CONTRACT NUMBER	DUNS	PHASE OF COMPLETION	EVALUATION TYPE	EVALUATION DATE	CONTRACT COMPLETION DATE
N4511207A9969	999999999	Design	Interim	12/05/2008	11/01/2008
N4511255A0017	999999999	Construction	Final	11/07/2008	11/02/2008
N4511270S0018	999999999	Engineering Services	Interim	11/13/2008	10/25/2008
N4511270S0023	999999999	Design	Interim	12/02/2008	10/25/2008
N4511270S0026	999999999	Engineering Services	Interim	12/04/2008	10/25/2008
N4511275C0026	999999999	Design	Interim	11/07/2008	01/01/2010
N4511275C0080	999999999	Design	Interim	01/08/2009	01/01/2008
N4511275C0084	999999999	Design	Interim	01/07/2009	01/01/2008
N4511275C0086	999999999	Engineering Services	Interim	01/14/2009	01/01/2008
N4511275C0095	999999999	Design	Interim	01/14/2009	01/01/2008
N4511275C0098	999999999	Construction	Interim	01/23/2009	01/01/2008
N4511275C0102	999999999	Design	Final	01/14/2009	01/01/2008
NONDOD09C5605	999999999	Design	Interim	01/25/2009	12/31/2008

Count: 13

Return to the View/Print Evaluations Qualifier Menu
Return to the Main Menu

<u>View Contractor Reps:</u> 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 ACASS/CCASS evaluations. Click **View Contractor Reps** from the Senior Contractor Representative Main Menu and the View Contractor Reps screen displays. The Senior Contractor Representative can view Contractor Representatives by Contract Number, User Name or DUNS. Select the desired option(s) and click **View**. A list of contractor reps with 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(s). The **Return to the Main Menu** button returns the user to the Senior Contractor Representative Main Menu.

ACASS - View Contractor Reps

Contract: ALL User: SAM GABLE DUNS: ALL

View

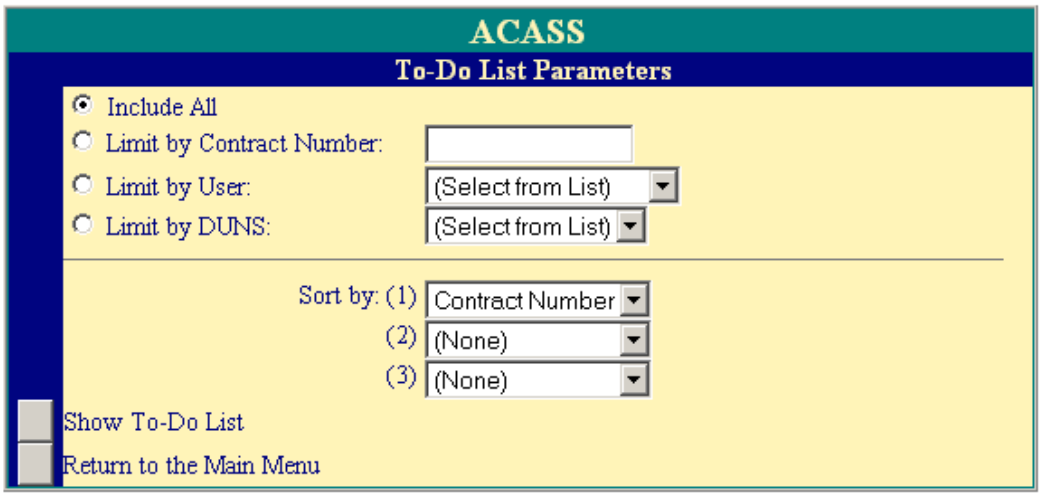
Contractor Rep(s):

User Name	User ID	Last Logon Date	Contracts
SAM GABLE	SGABL	12/23/2008	N4511255A0013 N4511284A0010

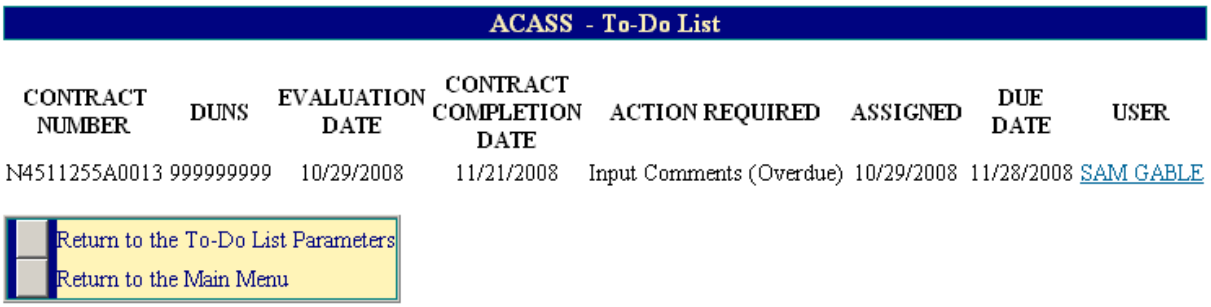
Return to the Main Menu

<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 may be closed by the Government without contractor review and comment. Click the **To-Do List** button. A To-Do List Parameters screen displays.



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.



This report displays Contract Number, DUNS, Evaluation Date, Contract Completion Date, Action Required, Date Assigned, Due Date and User Name.

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(s). 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 create additional To-Do Lists. The **Return to the Main Menu** button returns the user to the Senior Contractor Representative Main Menu.

Evaluation Status Report: This option allows the Senior Contractor Representative to monitor the status of evaluations that have been started or completed for all contracts within the respective corporation. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations

that allows the Senior Contractor Representative read-only access to each evaluation that is rated or completed. **(See Evaluation Status Report Section for more specific information)**

Contract Status Report: This option allows the Senior Contractor Representative to monitor the status of contracts within the respective corporation. The Contract Status Report will display information as counts (e.g. number of contracts due for an evaluation) or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue). **(See Contract 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)**

Consolidated Report: This option allows the Senior Contractor Representative to run a report that will identify all completed evaluations, contract award information and for ACASS, the firm's A-E qualifications (from the SF 330 Part II). **(See Business Analysis Reports Section for more specific information)**

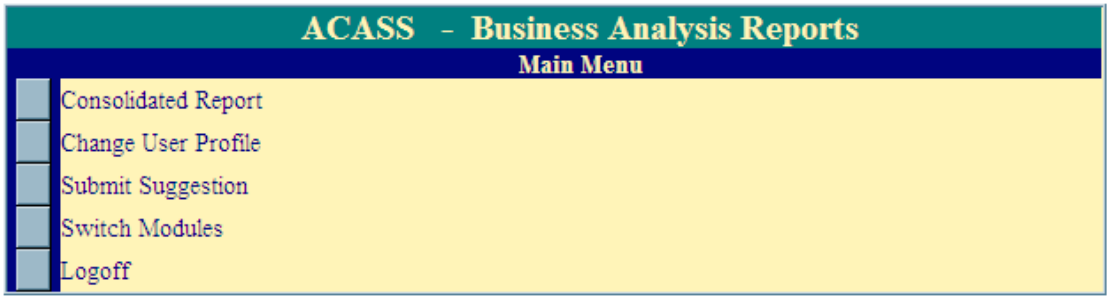
Change User Profile: This option must be used whenever a user's name, address, email address or phone number(s) changes. The Change User Profile option also allows the Senior Contractor Representative to change his/her ACASS/CCASS password. **(See User Profile Section for more specific information)**

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

Switch Modules: This option allows users to switch between the different modules CPARS, ACASS, and CCASS, without having to log off. **NOTE:** Contractors 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)**

Business Analysis Reports

The Business Analysis Reports access level is available to Government personnel only. The **Consolidated Report** (ACASS and CCASS) allows users to retrieve completed past performance evaluations, contract award information and Architect-Engineering (A-E) qualifications (ACASS only). Business Analysis Reports access is granted only upon the completion of a signed Business Analysis Reports User Access Request Form available at **https://www.cpars.gov**.

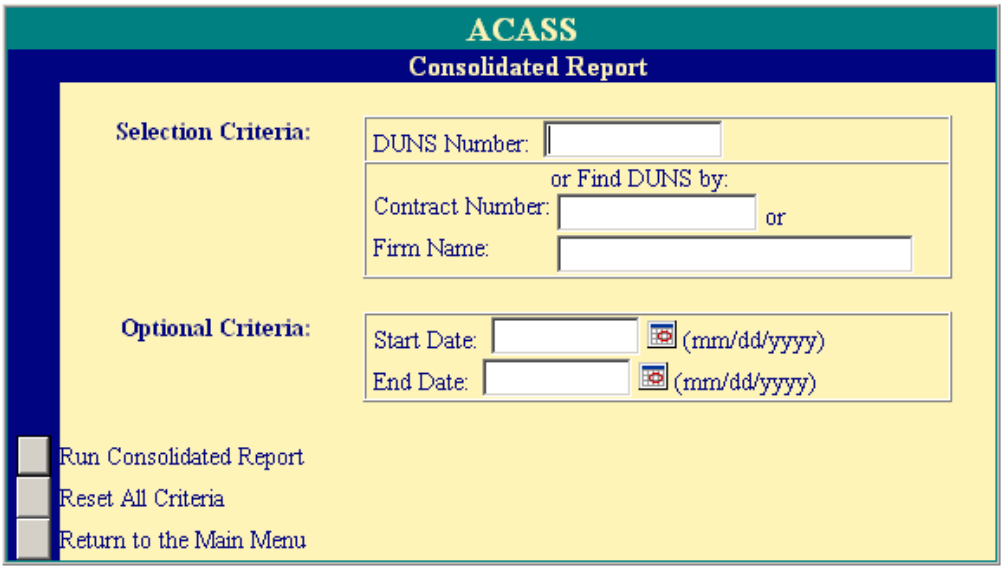


Consolidated Report: The Consolidated Report is used to retrieve firms' completed performance evaluations and contract award history. To run the Consolidated Report, the user must be logged into ACASS/CCASS at the Business Analysis Reports access level. Click on **Consolidated Report** and the Consolidated Report search screen displays.

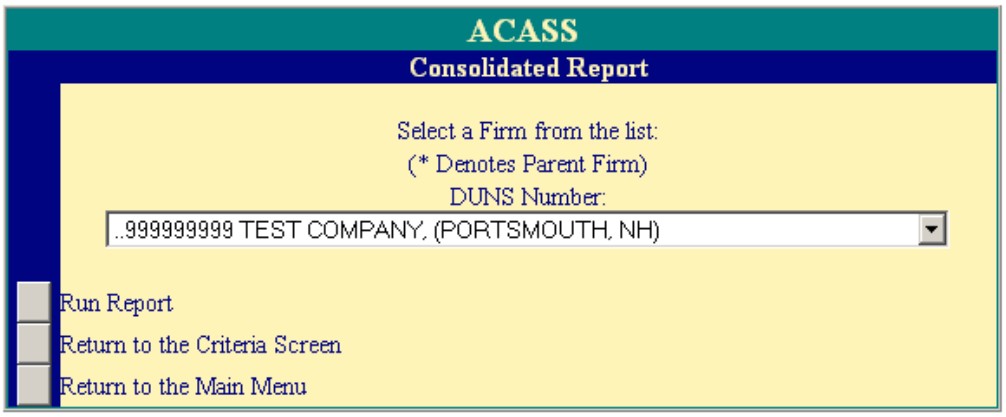
If the user has a valid DUNS Number, enter it in the **DUNS Number:** box. This report can also be used to meet a specific date range (optional) by entering a **Start Date** and an **End Date** in the spaces provided. The small calendars adjacent to the date fields can be used to populate the Start and End dates. Use of the calendars will assure that dates are entered in the correct format (mm/dd/yyyy).

NOTE: The Consolidated Report is also available at the Senior Contractor Representative access level. However, the Senior Contractor Representative can only run the Consolidated Report for DUNS numbers that are assigned to the corporation.

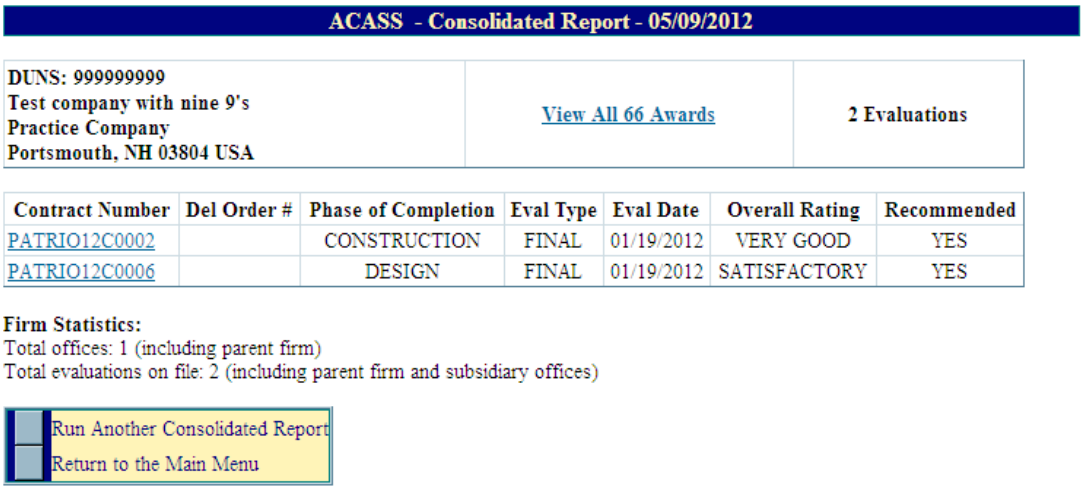
If the DUNS number is unknown, the user can search for the firm's DUNS by entering a partial or complete contract number or a partial or complete firm name in the spaces beneath **Find DUNS by**. Click the **Run Consolidated Report** button. The next screen will provide a drop-down box listing all firms that met the **Find DUNS by** search criteria.



Select the correct firm from the drop-down box and click the **Run Consolidated Report** button. If the correct firm is not listed in the drop-down box, click the **Return to the Criteria Screen** button to return to the Consolidated Report search screen. Click on the **Return to Main Menu** button to return to the Business Analysis Reports Main Menu.



NOTE: If a date-range (optional) is entered when using the **Find DUNS by** feature, the drop-down box will only contain the firms that have evaluations completed within the specified date range.



The Consolidated Report, for the DUNS selected, allows users to view the Architect-Engineer Qualifications (ACASS only), Contract Awards for the past three years and all evaluations completed within the past six years. Click the **View All Awards** to see a listing of all contract awards within the past three years. Individual evaluations can be viewed by clicking on the **Contract Number** of each evaluation.

NOTE: If the user runs a Consolidated Report for a parent (headquarters) DUNS number, ACASS/CCASS will also display Contract Awards and Evaluations for the firm's related or subsidiary DUNS numbers.

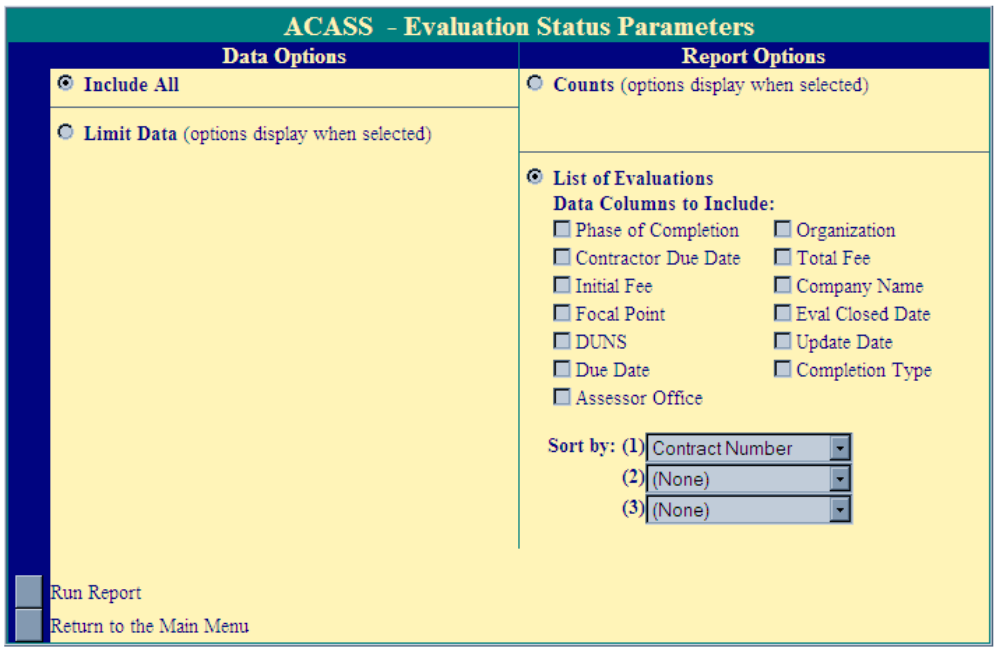
ACASS/CCASS Reports

The ACASS and CCASS applications provide a variety of reports (Evaluation Status Report, Contract Status 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 ACASS/CCASS 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.

Evaluation Status Report

The Assessing Official Representative, Assessing Official, Contractor Representative and the Reviewing Official Evaluation 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 Evaluation Status Report allows users to monitor the status of evaluations within their purview. The Evaluation Status Report will display information as counts (e.g. number of evaluations complete) or as a list of evaluations that provides the user with read-only access to each evaluation. To run an Evaluation Status Report, click the **Evaluation Status Report** button from the Main Menu. An Evaluation Status Report Parameters menu will display.



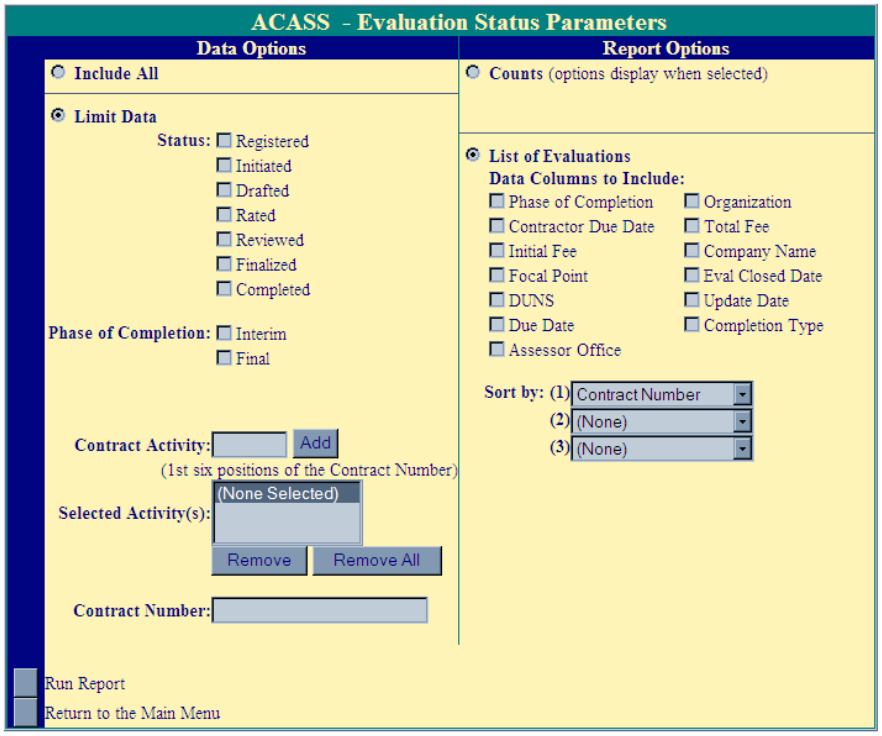
If the user leaves the default values as **Include All** (under Data Options) and **List of Evaluations** (under Report Options) and then clicks on the **Run Report** button, the report results in a list of all the user's evaluations that includes the following column names; Viewed, Contract Number, Evaluation Date, Current Status, User List 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, User List or Activity Log.

The user can choose to include additional data columns by clicking the box(s) adjacent to the column name. A checkmark will display in the box adjacent to the column name(s) selected. The Evaluation Status Report may be sorted by up to three sort options. Select the desired option(s) from the **Sort By** drop-down boxes.

The Evaluation Status Report may be further qualified by selecting **Limit Data** under **Data Options.** Limit Data allows the user to focus in on or limit the report to desired parameters. The user limits the status report by clicking

the box(s) 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.



Click the **Run Report** button.

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

The Evaluation Status Report shown on the following page contains the Data Options and Report Options selected on the Evaluation Status Parameters screen displayed above.

Evaluation Status Report - 01/27/2009

DATA: STATUS: Registered; Initiated; Drafted; Reviewed; Completed; SORTED BY: Contract Number; [Spreadsheet]

(Click on a column name to re-sort the report.)

	Viewed	Contract Number	Evaluation Date	Current Status *	User List	Activity Log
		N4511270S0018	11/13/2008	Completed	[Users]	[Log]
		N4511270S0023	12/02/2008	Completed	[Users]	[Log]
		N4511270S0026	12/04/2008	Completed	[Users]	[Log]
[Notes]		N4511270S0034	01/21/2009	Reviewed	[Users]	[Log]
[Notes]		N4511270S0035	-	Initiated	[Users]	[Log]
[Notes]		N4511270S0053	12/18/2008	Reviewed	[Users]	[Log]
[Notes]		N4511270S0057	-	Drafted	[Users]	[Log]

Count: 7

x -indicates the record has been selected for viewing

☑ -indicates notes have been entered

* **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; waiting for Assessing Official to finalize.

Finalized: Ratings finalized; waiting for Reviewing Official comments.

Completed: The evaluation has been completed.

Run Another Evaluation Status Report

Return to the Main Menu

[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 on **[Notes]** and a Notes pop-up displays. Enter notes in the New Notes field. Click the **Save** button to save the new note. Click the **Close** button to return to the list of evaluations without saving new notes. A red checkmark ☑ indicates that notes have been entered.

ACASS - Notes

Contract: N4511270S0018

New Note:

Save Close

From	Notes	Received
GEORGE WASHINGTON	Gave contractor 4 day review extention	01/27/2009 11:07

Contract Number - Click on the specific Contract Number and the evaluation will display in HTML format. Click the **View Evaluation as PDF** button to view the evaluation in Adobe Acrobat Reader. If the Assessing Official modified the evaluation after it was returned from the Contractor Rep, the window contains a **View Original**

Evaluation button or a **View Modified Evaluation button**. Click the **View Original Evaluation** button to view the original evaluation and click on the **View Modified Evaluation** 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.

Focal Point – 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(s). Click the **Close** button to return to the list of evaluations.

Users – Click on **Users** and a new window opens and presents the User List. The User List identifies all users who have been given access to that evaluation.

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

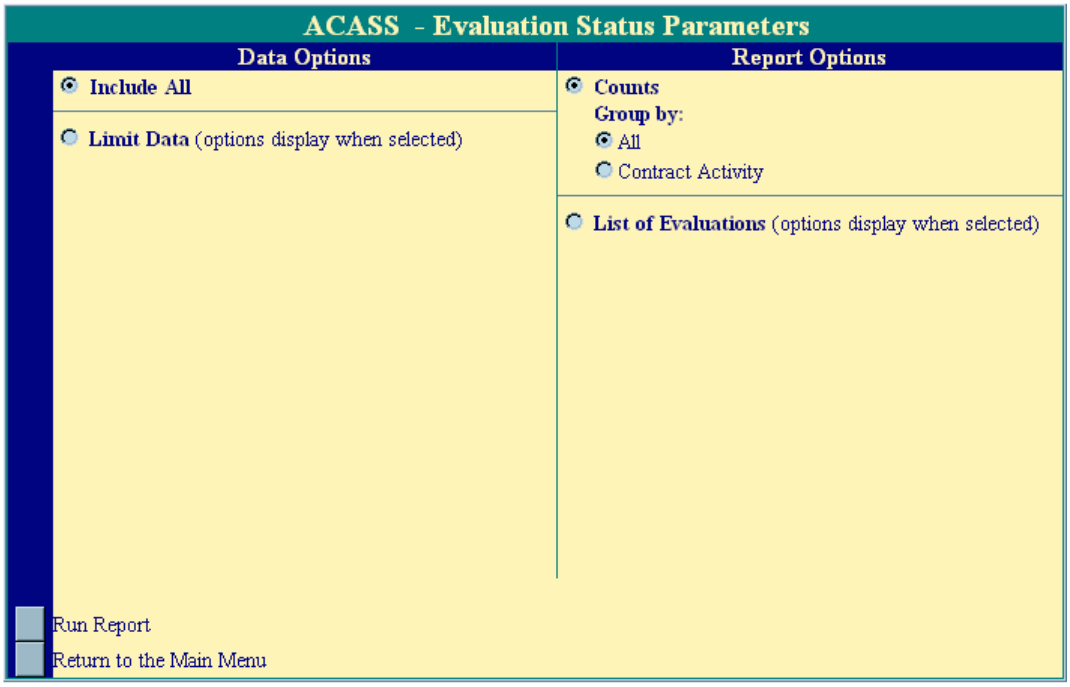
[Log] – Click on **[Log]** and a new window opens and presents the Activity Log. The Activity Log provides an audit trail of the history of actions taken on the evaluation. For example, it identifies when the applicable contract was registered, when the evaluation was initiated and who took the action(s).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

- Closed by Reviewing Official
- Contract Auto-Registered
- Contract Updated by FPDS Feed
- Contract registered
- Contract registration deleted by Focal Point
- Contract registration updated
- Contractor Rep 30 day review expired, email sent to Assessing Official
- Contractor Rep review complete, sent to the Assessing Official
- Contractor Rep review not completed, email sent to Contractor Rep/Assessing Official
- Evaluation transferred from RMS CCASS only
- Evaluation updated by Assessing Official
- Evaluation updated by Assessing Official Representative
- Evaluation updated by Contractor Rep
- Evaluation updated by Reviewing Official
- Finalized and sent to the Reviewing Official
- Finalized and sent to the Reviewing Official (Contractor Rep non-responsive)
- Initiated by Assessing Official Representative
- Initiated by Assessing Official Representative and sent to Assessing Official
- Modified by Assessing Official
- Modified by Assessing Official (Contractor Rep non-responsive)
- Rated by Assessing Official and sent to the Contractor Rep
- Returned to the Assessing Official Representative
- Returned to the Assessing Official
- Sent to Assessing Official
- Updated by Customer Support Desk
- Viewed by Contractor Rep

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

To display the Evaluation Status Report as Counts, click on the **Counts** radio button under **Report Options** on the Evaluation Status 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.



Click the **Run Report** button, the report identifies 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.

Evaluation Status Report - 01/27/2009

DATA: ALL; GROUPED BY: All

All	Registered	Initiated	Drafted	Rated	Reviewed	Finalized	Completed	Totals
Counts	0	1	1	6	2	11	3	24
	0%	4%	4%	25%	8%	46%	12%	
TOTALS:	**0**	**1**	**1**	**6**	**2**	**11**	**3**	**24**
	0%	4%	4%	25%	8%	46%	12%	

* 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; waiting for Assessing Official to finalize.
Finalized: Ratings finalized; waiting for Reviewing Official comments.
Completed: The evaluation has been completed.

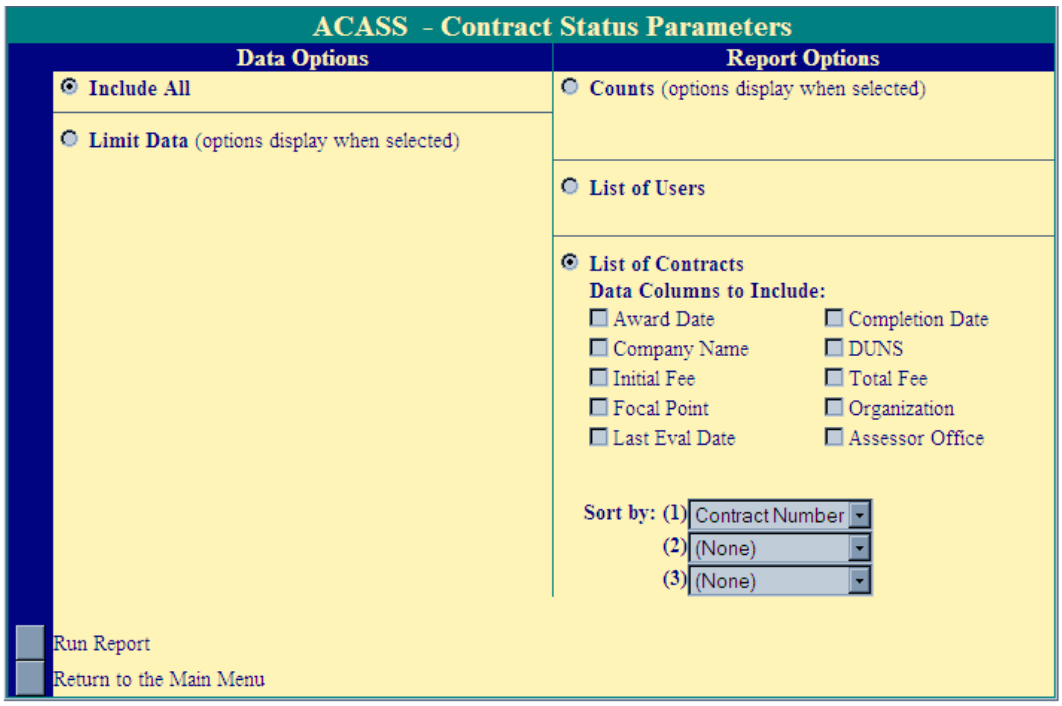
Run Another Evaluation Status Report
Return to the Main Menu

Contract Status Report

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

The Contract Status Report is designed to track the status of contracts. This report will show whether a contract is current, due or overdue for a Final evaluation for all contracts under the user's purview. The Contract Status Report will display information as counts (e.g. number of contracts due for an evaluation), as a list of users that identifies the status of each contract (e.g. current, due, overdue) and the users assigned to that contract, or as a list of contracts that identifies the status of each contract (e.g. current, due, overdue).

To run a Contract Status Report, click the **Contract Status Report** button from the Main Menu. A Contract Status Report Parameters menu will display.

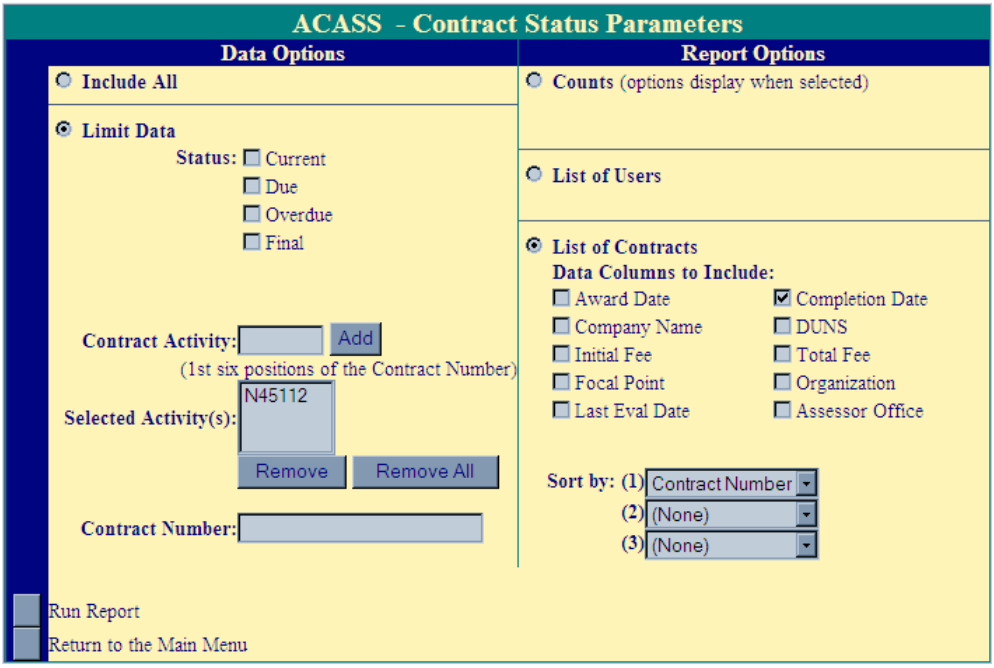


If the user leaves the default values as **Include All** (under Data Options) and **List of Contracts** (under Report Options) and then clicks on the **Run Report** button, the report results in a list of all the user's contracts, that includes the following column names; Viewed, Contract Number, Status, and Due Date.

The user can choose to include additional data columns by clicking the box(s) adjacent to the column name. A checkmark will display in the box adjacent to the column name(s) selected. The Contract Status Report may be sorted by up to three sort options. Select the desired option(s) from the **Sort By** drop-down boxes.

The Contract Status Report may be further qualified by selecting **Limit Data** under **Data Options.** Limit Data allows the user to focus in on or limit the report to desired parameters. The user limits the status report by clicking the box(s) 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

In the example below, the user is limiting the status report to display only contracts that have a Contract Number starting with N45112. The user also has chosen to include the data column of Completion Date.



Click the **Run Report** button to view a list of contracts.

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

The List of Contracts example shown below is based upon the Contract Status Parameters selected and shown above.

Contract Status Report - 01/29/2009

DATA: Contract Activity: N45112; SORTED BY: Contract Number; [Spreadsheet]

(Click on a column name to re-sort the report.)

Viewed	Contract Number	Status *	Due Date	Contract Completion Date
	N4511275C0019	Current	05/01/2010	01/01/2010
	N4511275C0067	Due	03/18/2009	11/18/2008
	N4511281C4545	Current	02/01/2013	10/04/2012
	N4511281C4546	Current	02/01/2013	10/04/2012

Count: 4

x- indicates the record has been selected for viewing

*** 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 Contract Status Report

Return to the Main Menu

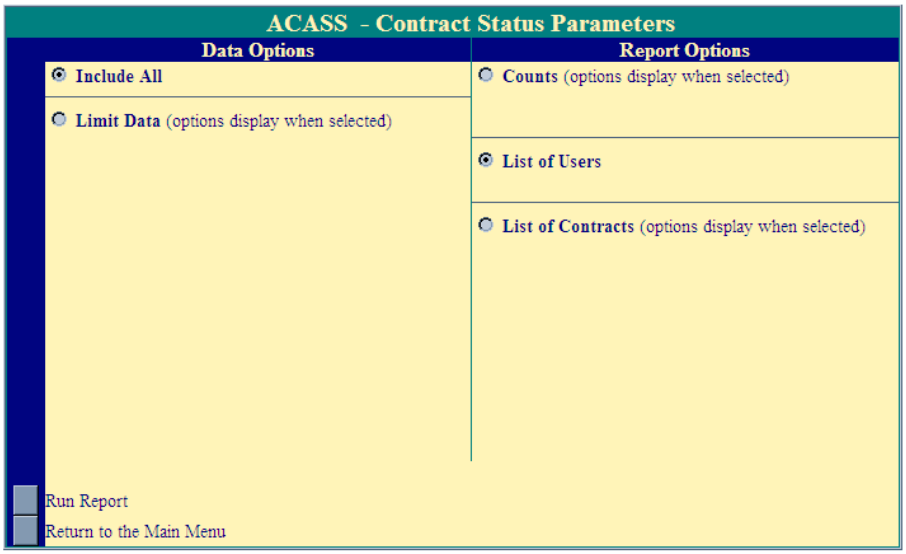
Contract Number – Click on the **Contract Number** to view all evaluations for the contract number selected. After clicking on the contract number a pop-up window will open that lists all evaluations that have been started or completed for the contract. Click on the contract number for the evaluation to be viewed and it will display in HTML format. Click the **View Evaluation as PDF** button to view the evaluation using Adobe Acrobat Reader. If the evaluation has been modified, the pop-up screen contains a **View Original Evaluation** button or a **View Modified Evaluation** button. Click the **View Original Evaluation** button to view the original evaluation, or click on the **View Modified Evaluation** 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 Contract Status Report. A **green x** will now display in the Viewed column adjacent to the contract number viewed.

Registration Status - Timeliness of contract registration may be tracked by selecting Registration Status. The Registration Status data column is available to Focal Points, Department POCs, and Agency POCs. The Contract Registration Status option will identify whether contracts have been registered within 30 days, over 30 days, and the date the contract became available in the Auto Register feature. When the registration status is over 30 days, the total number of days it took to register the contract is in parentheses. The number of days to register is calculated using the contract award date. The requirement for contract registration is 30 days from contract award date.

Focal Point – If Focal Point was selected as a data column, 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(s). Click the **Close** button to return to the list of contracts.

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

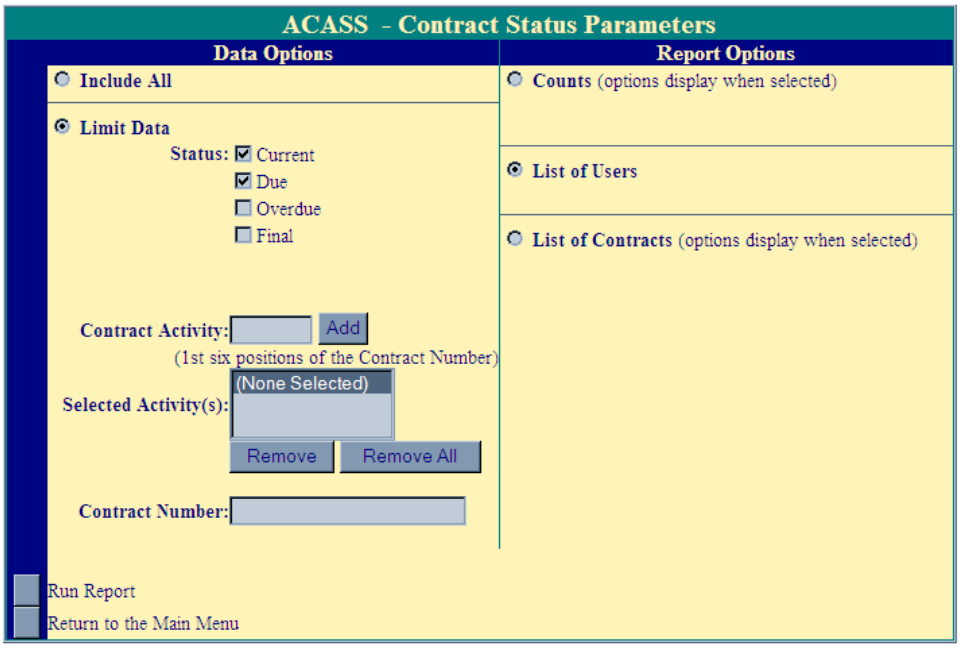
To run another Contract Status Report, click the **Run Another Contract Status Report** button. The **Return to the Main Menu** button returns to the user's Main Menu.
To display the Contract Status Report as a list of contracts with the assigned users, click on the **List of Users** radio button under **Report Options** on the Contract Status Parameters screen. This option is not available at the Contractor Representative or Senior Contractor Representative access levels.



If the user leaves the default values as **Include All** (under Data Options) and **List of Users** (under Report Options) and then clicks on the **Run Report** button, the report results in a list of all the user's contracts, that includes the following column names; Viewed, Contract Number, Status, Due Date, User Name, User Role, Phone Number, and Email Address.

The Contract Status Report may be further qualified by selecting **Limit Data** under **Data Options.** Limit Data allows the user to focus in on or limit the report to desired parameters. The user limits the status report by clicking the box(s) 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. The report can also be run for a specific contract number by entering the contract number in the **Contract Number** box.

In the example below, the user is limiting the status report to display only current or due evaluations.



Click the **Run Report** button to view a list of contracts.

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

Contract Status Report - 01/17/2011

DATA: STATUS: Current; Due; [Spreadsheet]

Viewed	Contract Number	Status *	Due Date	User Name	User Role	Phone Number	Email Address	Access Granted Date
	FB614158D0001 0001	DUE	02/17/2011	RONALD REAGAN	Focal Point	555-678-9090	Ronald.Reagan@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Alternate Focal Point	-	abraham.lincoln@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Assessing Official	-	abraham.lincoln@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Assessing Official Rep	-	abraham.lincoln@noemail.mil	01/20/2012
				GEORGE WASHINGTON	Assessing Official	444-890-7865	george.washington@noemail.mil	01/20/2012
				GEORGE WASHINGTON	Assessing Official Rep	444-890-7865	george.washington@noemail.mil	01/20/2012
				STEVE SMITH	Contractor Rep	-	steve.smith@noemail.mil	01/20/2012
				TIM TURNER	Reviewing Official	-	tim.turner@noemail.mil	01/20/2012
	FB614158D0001 0002	CURRENT	02/17/2012	RONALD REAGAN	Focal Point	555-678-9090	Ronald.Reagan@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Alternate Focal Point	-	abraham.lincoln@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Assessing Official Rep	-	abraham.lincoln@noemail.mil	01/20/2012
				ABRAHAM LINCOLN	Reviewing Official	-	abraham.lincoln@noemail.mil	01/20/2012
				GEORGE WASHINGTON	Assessing Official	444-890-7865	george.washington@noemail.mil	01/20/2012

Count: 2

x- indicates the record has been selected for viewing

*** 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.

Contract Number – Click on the Contract Number to view all evaluations for the contract number selected. After clicking on the contract number, a pop-up window will open that lists all evaluations that have been started or completed for the contract. Click on the Contract Number for the evaluation to be viewed and it will display in HTML format. Click the **View Evaluation as PDF** button to view the evaluation in Adobe Acrobat Reader. If the evaluation has been modified, the pop-up screen contains a **View Original Evaluation** button or a **View Modified Evaluation** button. Click the **View Original Evaluation** button to view the original evaluation and click on the **View Modified Evaluation** 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 Contract Status Report. A **green x** will now display in the Viewed column adjacent to the contract number viewed.

User Name – Displays all the users assigned to the contract. 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(s).

User Role – Displays the user role assigned to that contract 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.

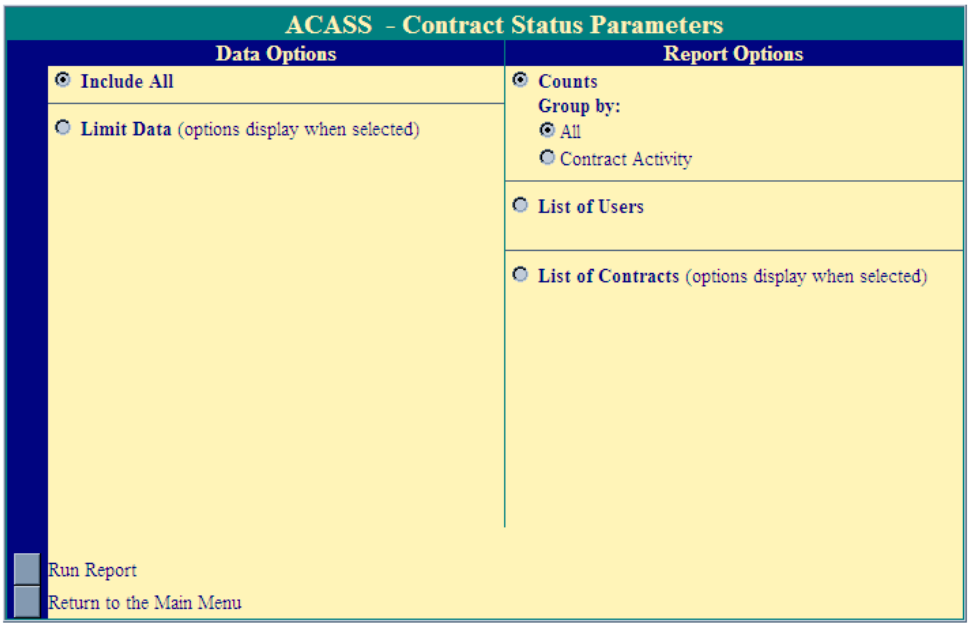
Email Address –Displays the email address for the adjacent user name. The email address is populated from the user's profile. Clicking on the user's email address will open an email to the user.

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

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

To run another Contract Status Report, click the **Run Another Contract Status Report** button. The **Return to the Main Menu** button returns to the user's Main Menu.

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



The report identifies the status of all the user's contracts by counting the number of contracts that are current, due, overdue or have a final assessment. Percentages are also provided.

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.

Contract Status Report - 01/29/2009

DATA: ALL; GROUPED BY: All

All	Current	Due	Overdue	Final	Totals
Counts	0	19	3	0	22
	0%	86%	14%	0%	
TOTALS:	**0**	**19**	**3**	**0**	**22**
	0%	**86%**	**14%**	**0%**	

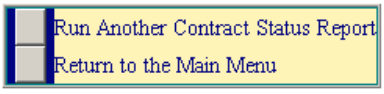
* STATUS

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.



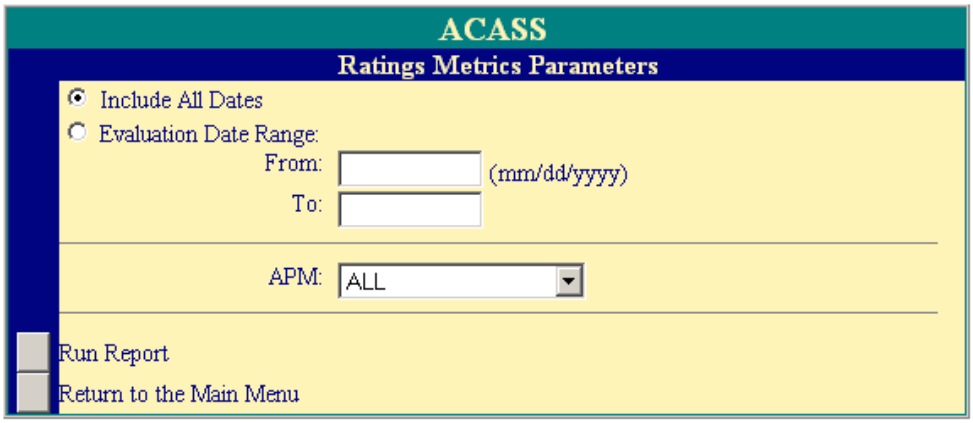
Ratings Metrics Report

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 user's 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 **Evaluation 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 POCs** 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.



NOTE: The below example does not show the entire report.

ACASS Ratings Metrics Report - 06/10/2011

DATA: Evaluation Date: ALL; Organization: ALL;

Overall Rating	**EXCEPTIONAL**	**VERY GOOD**	**SATISFACTORY**	**MARGINAL**	**UNSATISFACTORY**
Overall Rating	1	2	0	0	0
Quality of A-E Services - Design/Services	**EXCEPTIONAL**	**VERY GOOD**	**SATISFACTORY**	**MARGINAL**	**UNSATISFACTORY**
Architectural	0	0	0	0	0
Structural	1	0	0	0	0
Civil	0	0	0	0	1
Mechanical	0	0	0	0	0
Electrical	0	0	0	0	0
Fire Protection	1	0	0	0	0
Surveying, Mapping & Geospatial Information Svcs.	1	0	0	0	0
Cost Estimating	0	0	0	0	0
Value Engineering	0	0	0	0	0
Environmental Engineering	1	0	0	0	0
Geotechnical Engineering	0	0	0	0	0
Master Planning	0	0	0	0	0
Hydrology	0	0	0	0	0
Chemical Engineering	1	0	0	0	0
Geology	0	0	0	0	0

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.

ACASS - Processing Times Report - 01/29/2009

				Average Processing Times (Days)				
Month	Number of Evaluations	<= 120 Days	> 120 Days	Total	Rate	Contractor Comments	Finalize	Review
2008-JAN	0	0	0	0	0	0	0	0
2008-FEB	0	0	0	0	0	0	0	0
2008-MAR	0	0	0	0	0	0	0	0
2008-APR	0	0	0	0	0	0	0	0
2008-MAY	0	0	0	0	0	0	0	0
2008-JUN	0	0	0	0	0	0	0	0
2008-JUL	0	0	0	0	0	0	0	0
2008-AUG	0	0	0	0	0	0	0	0
2008-SEP	0	0	0	0	0	0	0	0
2008-OCT	0	0	0	0	0	0	0	0
2008-NOV	1	1	0	1	1	1	1	1
2008-DEC	2	2	0	2	1	1	1	1

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: 2008-NOV

				Average Processing Times (Days)				
Contract Activity	Number of Evaluations	<= 120 Days	> 120 Days	Total	Rate	Contractor Comments	Finalize	Review
N45112	1	1	0	1	1	1	1	1

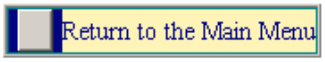
Click on a Contract Activity above to see further details below.

Return to the Main Menu

In this particular example, only one Contract Activity (N45112) applies to the user. To view the evaluation that was completed in the month, click on the **N45112** (link under Contract Activity) and the report displays processing times information at the evaluation level.

Month: 2008-NOV **Contract Activity: N45112**

				Processing Times (Days)				
Contract Number	**Evaluation Date**	**Focal Point**	**Organization**	**Total**	**Rate**	**Contractor Comments**	**Finalize**	**Review**
N4511270S0018	11/13/2008	STEVE EISE (SEISE)	USNORTHCOM	1	1	1	1	1



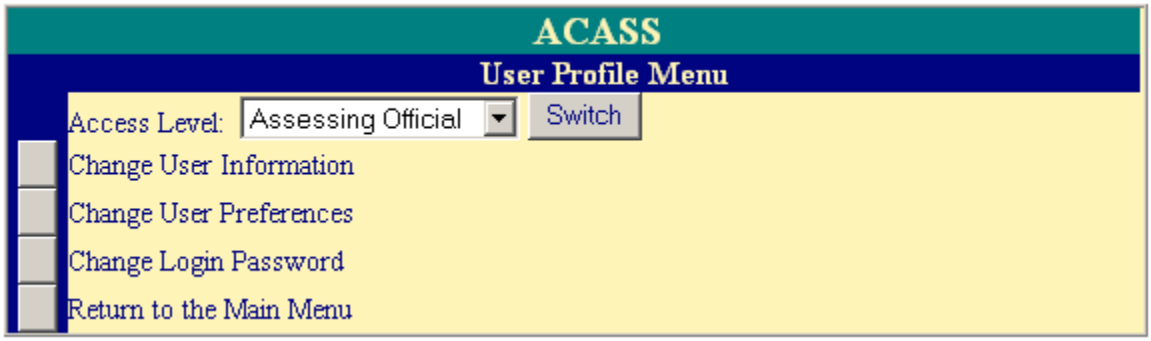
The **Return to the Main Menu** button returns the user to the Main Menu.

Change User Profile/Switch Access Level

Change User Profile/Switch Access Level: The **Change User Profile/Switch Access Level** option is very important as it is used by users at all access levels to 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 option to update the email address in ACASS and/or CCASS. 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.

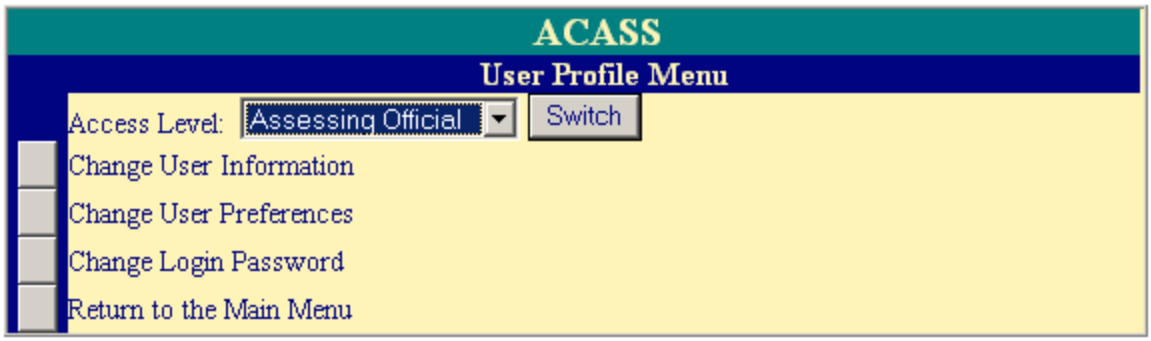
NOTE: This option is identified as **Change User Profile** at the Focal Point, Contractor Representative, Senior Contractor Representative, Department POC, Agency POC, and Business Analysis Reports access levels as they are not allowed to switch access levels.

The **Switch Access Level** option is available at the Contract Data Entry, 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 level click on the **Change User Profile/Switch Access Level** button from the Main Menu. The User Profile Menu will display.

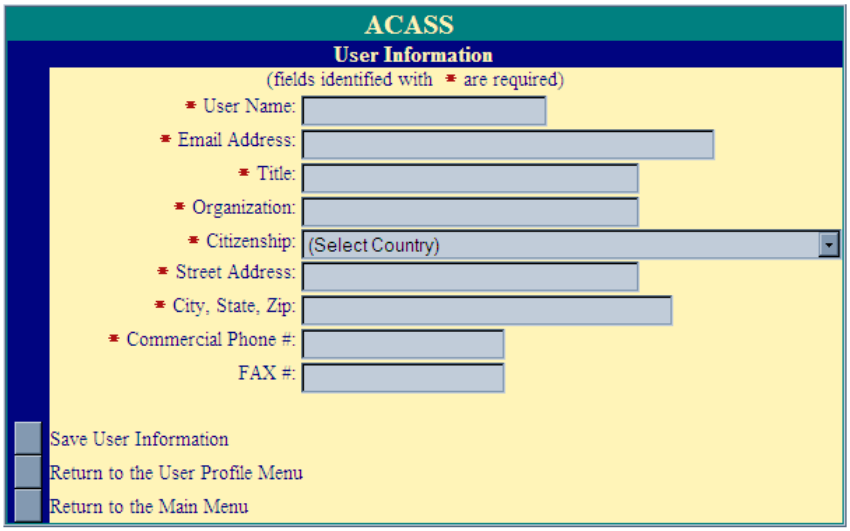


The **Access Level** drop-down box identifies each of the access levels the Focal Point has authorized. To switch levels, select the desired access level from the **Access Level** drop-down box and click on the **Switch** button. The user will be taken to the Main Menu of the switched access level. The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

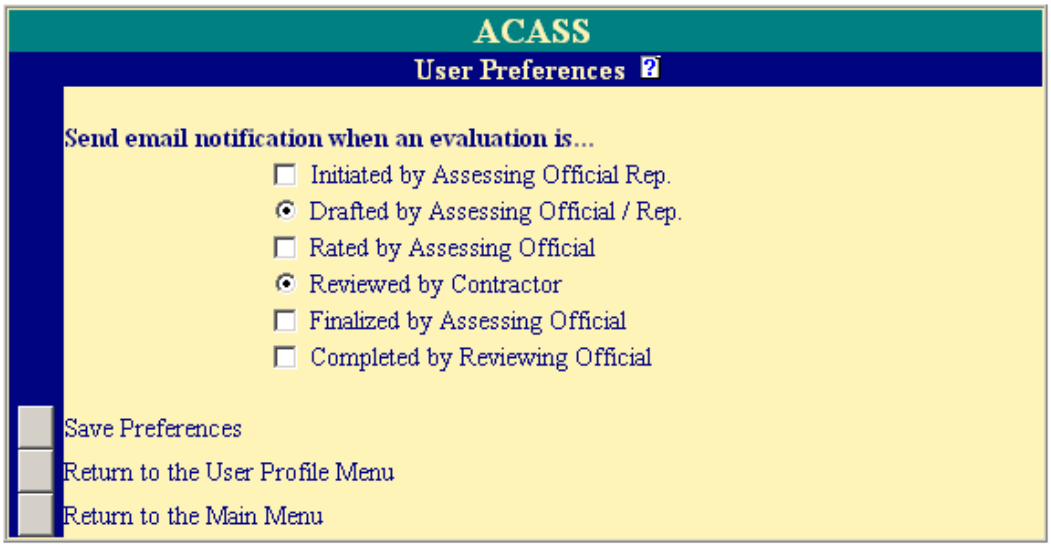


The user is able to update any of the profile information fields noted above. Fields identified with a red asterisk **(*)** are required. After all necessary changes are made, click the **Save User Information** button and a confirmation pop-up screen displays. Click the **OK** button.

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 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.



The user can select to receive optional email notifications by clicking on the box adjacent to the emails he/she 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 (**?**) adjacent to the user preferences title to obtain additional information.

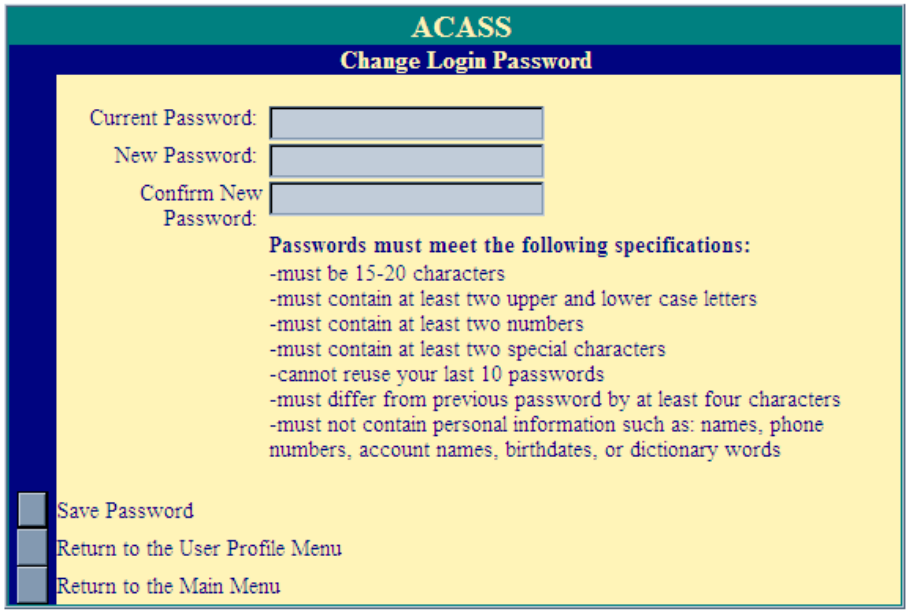
NOTE: The User Preferences menu and its optional emails are not available at the Contract Data Entry, Senior Contractor Representative or Department POC access levels. Focal Points have the ability to select send due notifications to both the Assessing Official Representatives and Assessing Officials.

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 an ACCASS/CCASS 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.



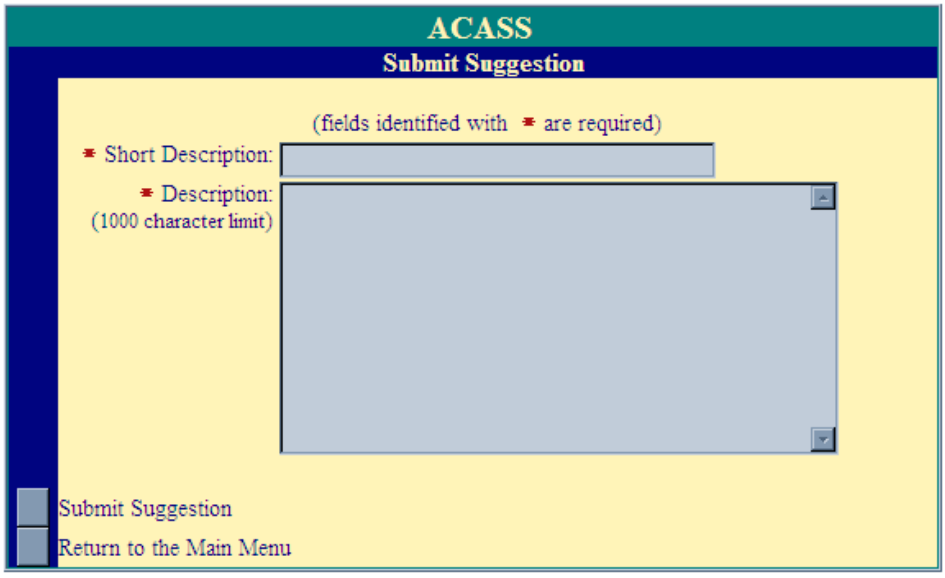
Enter the current password in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. Re-type the password in the **Confirm New Password** box.

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 ACASS/CCASS 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.

Submit Suggestion

The **Submit Suggestion** feature is available at all access levels and allows ACASS/CCASS 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.



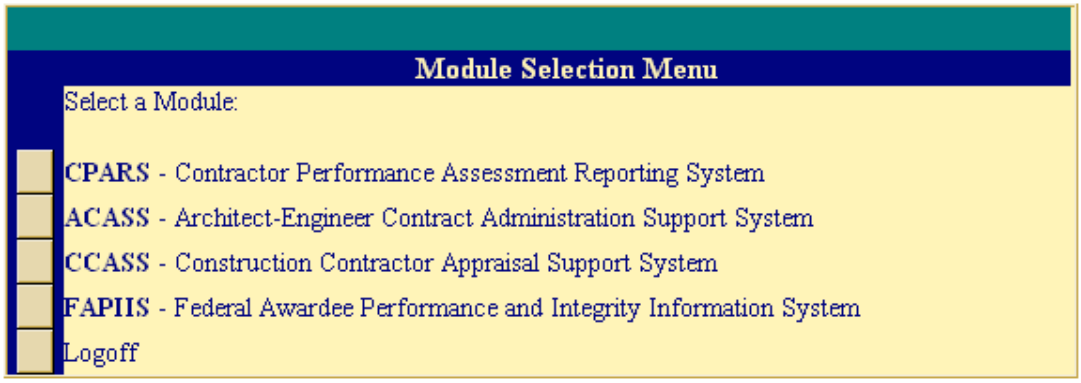
Enter a brief description in the **Short Description** box and a complete description in the **Description** box.

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

Click the **Submit Suggestion** button. Click **OK** when the confirmation message displays. The help desk monitors ACASS/CCASS for all suggestions submitted. Requests for enhancements and policy changes are routed through the Configuration Control Board (CCB) for review, discussion, and disposition. The CCB currently meets three times a year. Users submitting suggestions will receive a response and an explanation of the CCB's decision on whether or not an enhancement or change will be accepted. 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 different modules, CPARS, ACASS, CCASS, and FAPIIS 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**, **ACASS**, **CCASS**, or **FAPIIS** to access that module.

NOTE: Although all module buttons, CPARS, ACASS, CCASS, and FAPIIS are visible on the Module Selection Screen, access to those modules may be restricted based on the user's access level.

ACASS/CCASS Email Notifications

The ACASS/CCASS applications will send the following email notifications:

- An automatic notification is sent to users when they are assigned access to ACASS/CCASS.
- 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 auto-registers a contract, but no users are assigned. This email is weekly and continues until users are assigned to the contract.
- When the Focal Point or Alternate Focal Point assigns users to a contract and the contract is available in auto-register, but has not been registered. This email is weekly and continues until the contract is registered.
- When the Assessing Official drafts (creates and saves) an evaluation.
- 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 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 Assessing Official and Contractor Representative identifying evaluations that have been forwarded to the Contractor for comment, but the Contractor has not started entering comments. This email is weekly and continues until the Contractor enters comments or until the evaluation is retrieved by the Assessing Official after the 30-day comment period expires.
- An automatic notification is sent to the Assessing Official when the Contractor 30-day comment period expires. This email is weekly and continues until the evaluation is returned by the Contractor or is retrieved by the Assessing Official.
- An automatic notification is sent to the Focal Point identifying evaluations that have been archived. ACASS/CCASS evaluations are retained for a six-year period before archiving. This email is sent weekly.
- An automatic notification will be sent to the Focal Point and Department Point of Contact identifying their users who have not logged into ACASS/CCASS for over two years.
- An automatic notification will be sent to Agency Point of Contact when the Department Point of Contact provides access to a new/existing Organization.
- An automatic email is sent to Agency Point of Contact when the Department Point of Contact 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 Points and the Department Points of Contact will also be notified. This email is sent quarterly.

Using ACASS/CCASS Effectively

When Registering Contracts or Working on Evaluations:

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

- A red asterisk (*****) designates a required field. All required fields must be completed to register a contract. 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 bottom 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 much text has been entered.

- ACASS/CCASS 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 Number indicates that a note has been generated for that evaluation. Notes may be viewed or added by clicking on them.

- A red checkmark beneath a Rating Tab indicates that at least one element has been rated.

General System Information:

- At the bottom of every page in the ACASS/CCASS application there are links to the ACASS and CCASS policy guides and training opportunities.

- Use the To-Do List to open and work on the evaluation(s) 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 Help 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 Evaluation and Contract Status Reports are available to help monitor the status of contracts and evaluations.

- Run an Evaluation Status Report (List of Evaluations) to identify who has access to an evaluation (User List) 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 helpdesk with the contract 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. When browsing an evaluation or after updating a record, I am unable to view the evaluation as a PDF file. What's wrong?

A: The Adobe Acrobat Reader must be installed to view the PDF. The reader can be downloaded from http://www.adobe.com/. If you have any problems downloading or installing the plugin, please contact our Technical Support.

5. Our activity uses Macintosh computers. Can the ACASS/CCASS AIS be used on a Macintosh system?

A: Yes. The ACASS/CCASS AIS is web-based so most actions are completed directly from your browser. All data inputs may be completed on a Macintosh system. However, the Adobe Acrobat Reader for Macintosh must be installed to print/view evaluations in PDF format.

6. How do I cut and paste a MSWord document into the evaluation 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.

7. I am receiving emails stating that I have been granted access to ACASS/CCASS and more emails stating I must perform an action on an evaluation. Why?

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

8. 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" button on the Main Menu, once the evaluation opens, click on "View Original Evaluation" 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.

9. 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."

10. I am receiving an error message stating I can not 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 Evaluation Status Report, choosing the "List of Evaluations" option and clicking on the "User List" for the particular contract number.

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

A: To update a registered contract, 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 appears and any of the data elements can be updated and saved.

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

A: Contact our Help 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 helpdesk 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 that are available for Auto Register, but when I go to Auto Register those contracts are not there.

A: It’s likely the contracts 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 number to register the contract.

Assessing Official

1. 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 Evaluation Status Report to obtain the Reviewing Official's name by running a report, choose “List of Evaluations” and then click on "User List." If a Reviewing Official is not assigned to the evaluation please contact the Focal Point so that they may assign one.

2. I have entered my supporting narrative, but it is over the 16,000 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 16,000 or fewer characters.

3. How do I extend the contractor’s 30 day review period?

A: There is no specific action required to extend the 30 day review period. Once the 30 day review period expires, the evaluation will appear on your To Do List. To extend the contractor’s review period, do not retrieve the evaluation from your To Do List. Once you retrieve the evaluation and continue with the process, the contractor will no longer have access to the record for review and comment.

Contractor Rep

1. I received an email stating that I’ve been given access to a contract. When I log into the system, click View/Print I and input the contract 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 you can only view an evaluation when it is in the Rated or Completed status. You can run an Evaluation 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 assessment 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 left side of the page, click on the ACASS or CCASS link. On the left side of the page, click on ACASS or CCASS Logon. Read the Notice and Consent Banner and click Accept. If you have a Department of Defense PKI certificate, click "Contractor Logon (PKI)". If you do not have a Department of Defense PKI Certificate, click "Contractor Logon (No PKI)". 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 ACASS or CCASS 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, 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, 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 Help Desk and they can provide the name and contact information.

Policy

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

A: For Department of Defense users, Office of the Under Secretary of Defense (OUSD) Acquisition, Technology and Logistics (AT&L) Defense Procurement and Acquisition Policy (DPAP) Memo "Contractor Performance Assessment Reporting System (CPARS)" requires that evaluations that are due or overdue for contracts that began in FY08 or later or in FY07 and earlier be completed if the following conditions apply: 1) the individual assessing the contractor's performance is available, 2) has sufficient knowledge of the contractor's performance for the period in question, 3) has documentation to support narratives and ratings for the period in question, 4) has periodically communicated with the contractor regarding performance for the period in question. If your closed contract meets these conditions, you must complete an evaluation.

Other Agency users should contact their Agency point of contact for assistance.

2. Are outside CONUS offices and contractors exempt from ACASS/CCASS requirements?

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

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

A: The evaluation contains a rating element for Implementation of Subcontracting Plan. 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. Appendix 1 and Appendix 2 of the ACASS Policy Guide and the CCASS Policy Guide contain specific instructions for assessing this rating element.

4. Are there forms available for completing evaluations containing classified information? Can I enter that information into the ACASS/CCASS application?

A: Forms are available at http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd2626.pdf. **Classified information is not to be entered into the ACASS/CCASS automated application.** Use the on-line automated application for unclassified use only. Evaluations on classified programs will be processed in accordance with program security requirements. Copies of classified evaluations will be maintained and distributed in accordance with agency procedures.

5. Are evaluations 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 assessments 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 CCASS records, the unit FOIA office must refer the request to the CCASS focal point for coordination. The CCASS Program Manager at the Naval Sea Logistics Center, Portsmouth, NH, must also be notified via the Help Desk at Comm: 207-438-1690 or email to: webptsmh@navy.mil.