Contractor Performance Assessment Reporting System (CPARS)

User Manual

July 2024

Current Version 6.9.0

HTTPS://WWW.CPARS.GOV

Foreword

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

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

Please address any recommended modifications or improvements to: CPARS Project Manager
Naval Sea Logistics Center Portsmouth, Bldg. 153, 2nd Floor
Portsmouth Naval Shipyard Portsmouth, NH 03804-5000
Email: cpars-helpdesk@us.navy.mil
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Suggestions for modifying the CPARS application (problems, enhancements and/or policy) may be submitted via the **Feedback** feature of each assigned level in CPARS.

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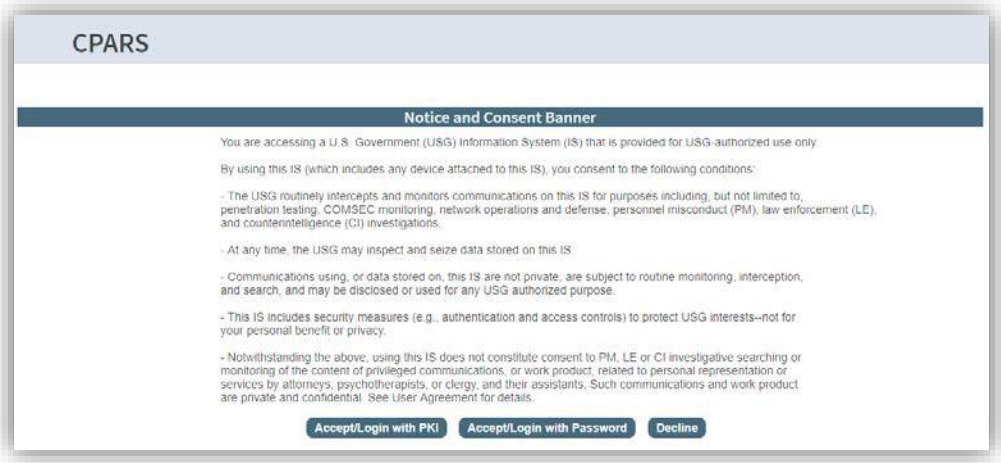
System Overview

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

Accessing the System

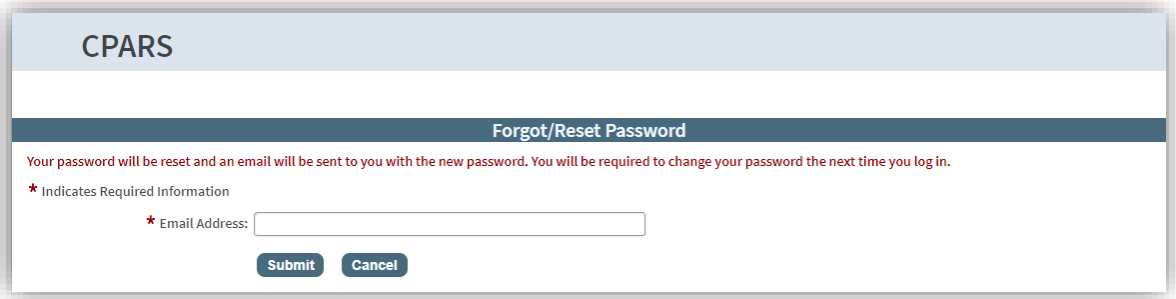
The CPARS application is accessible from **https://www.cpars.gov**. The CPARS website offers options to CPARS, the Federal Awardee Performance and Integrity Information System, View Performance Records, and also provides various items of interest including reference material, training information, as well as other information. To enter the CPARS Production System, click on the **Sign In** button located on the right hand side of the page. The Notice and Consent Banner will display.



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

NOTE: All first time users will receive a system generated email providing instructions to use the **Forgot/Reset Password** button to obtain a temporary password, once access has been granted.

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



Enter your Email Address and click **Submit**. The system will verify the information entered matches what was

entered when the account was created, and will send a temporary password to that email address. Return to the Login screen.

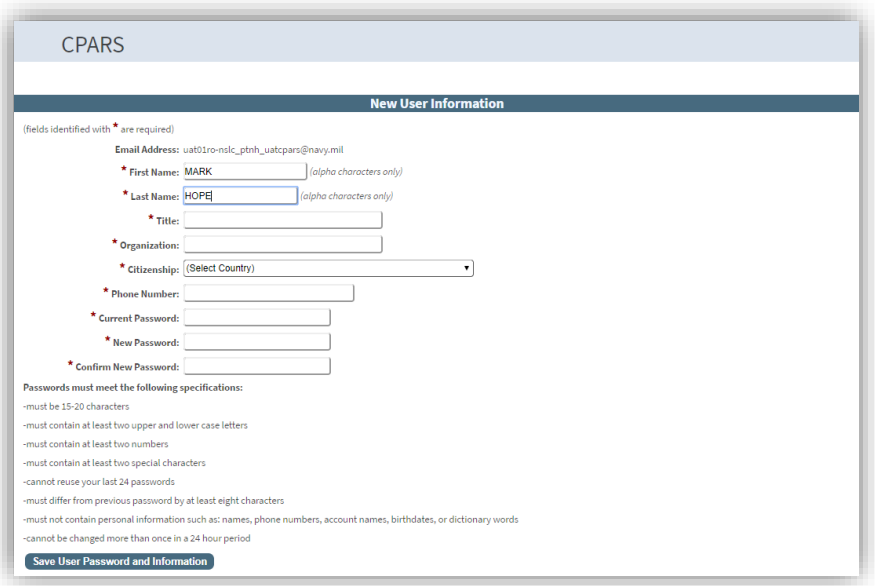
Enter your Email Address and the temporary password provided in the email, and click the applicable **Login** button.

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

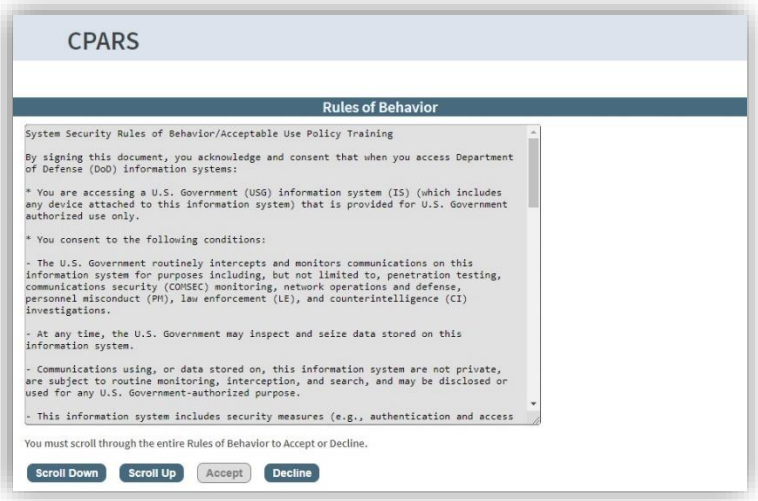
Enter the temporary password you received in the email in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. The password is case sensitive and must contain 15–20 characters, with at least two uppercase letters, two lowercase letters, two numbers, and two special characters. The last 24 passwords are kept and may not be reused. New 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 New User Information. After all the required information is entered, click the **Save User Password and Information** button and a confirmation pop-up screen displays. Click the **OK** button.

NOTE: 1. Focal Points logging in for the first time will also be required to identify all Organization(s) which they have cognizance of. 2. Corporate Senior Contractor's will be able to Add/Remove Unique Entity ID access.



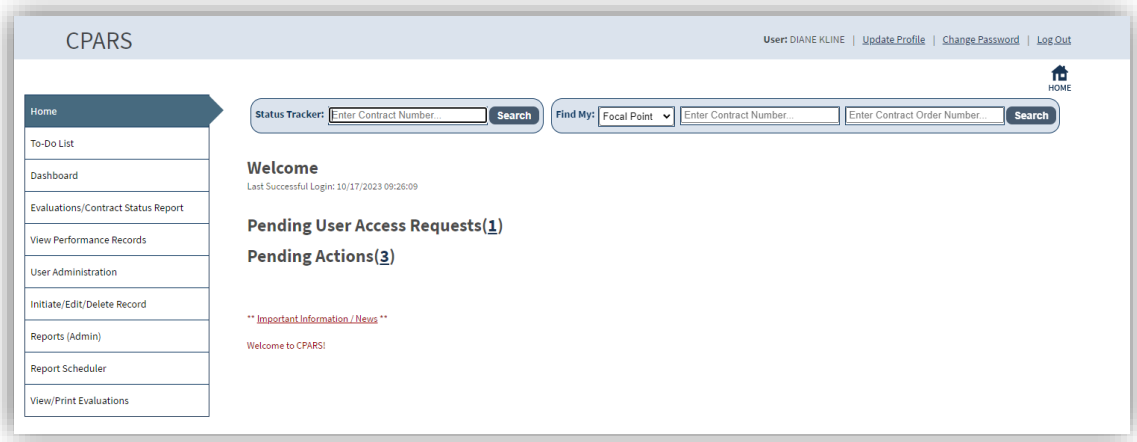
You will be brought to the Rules of Behavior screen. Read through the rules and scroll down using either the down arrow on the right, or by using the **Scroll Down** button located under the Rules of Behavior. You can also scroll up using either the up arrow on the right, or by using the **Scroll Up**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



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

Click **Accept** and the Home screen will display.

NOTE: You will only have access to items on the home menu based on the access role(s) you have been granted.



Status Tracker

This option allows users to quickly view the status of an evaluation. (**See Status Tracker Section for more specific information)**

Find My: (Focal Point/DPOC)

This option allows users to find contact information for a Focal Point or their Department Point of Contact (DPOC). **(See Find My: (Focal Point/DPOC) Section for more specific information)**

Update Profile

This option must be used whenever a user's name, title, organization, or phone number changes. (**See Update Profile Section for more specific information)**

Change Password

This option must be used whenever a user needs to update their password. (**See Change Password Section for more specific information)**

Feedback

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

Basic Workflow

CPARS

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

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

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

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

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

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

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

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

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

Integrity

To support the workflow, a user is assigned a unique level of access by the Focal Point. CPARS Focal Points define a User Access Matrix that restricts access.

The following paragraphs explain the steps in the business process:

Step 1 – **Access Granted**. A Focal Point grants access to an Integrity Data Entry user. This access allows the Data Entry user to enter Integrity Records.

Step 2 – **Enter Integrity Record**. Allows authorized individuals to enter specific integrity records. These include Termination for Default, Termination for Cause, DoD Determination of Contractor Fault, Termination for Material Failure to Comply (grants), Defective Cost or Pricing, Non-Responsibility Determination, Recipient Not Qualified Determination (grants), Subcontract Payment Issues, Material Failure to Comply with Closeout Requirements, Information on Trafficking in Persons, and Administrative Agreements.

Step 3 – **Save and Mark for Release**. When authorized individuals complete the data entry process, he/she clicks **Save and Mark for Release** and the completed Integrity record is immediately available for contractor comments and source selection retrieval (Contracts) or applicant risk review retrieval (Grants).

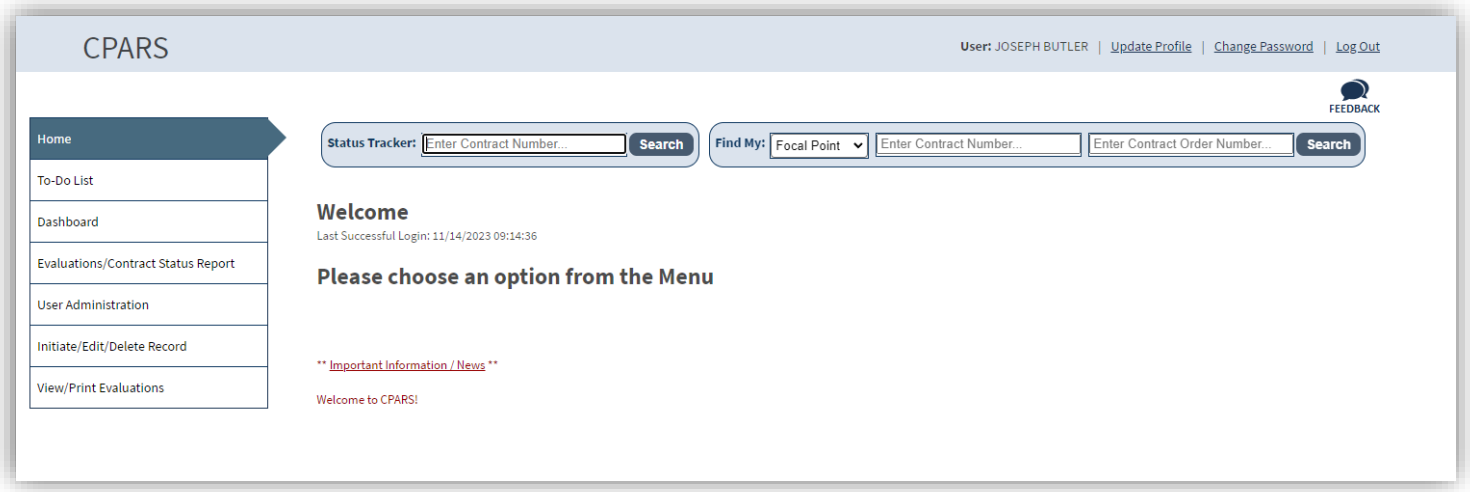
Step 4 – **Available for Comment and Retrieval**. When Save and Mark for Release is selected in Step 3, an email is sent to the contractor who is the subject of the completed Integrity Record. The email is sent to the primary past performance or the primary business point of contact that is identified at the System for Award Management (SAM) database. Note that the contractor will require access to CPARS to review and comment on any completed Integrity records. There is no contractor access available in Integrity data entry. Contractors can view and enter comments in the View Performance Records section of CPARS.

Step 5 – **Modify a Completed Record**. An Integrity Data Entry user has the ability to modify a completed record. This allows the user to change the Termination Type, Convert to Termination for Convenience, select Record Withdrawn/Rescinded, enter a Reason Withdrawn/Rescinded, or upload a new attachment, when applicable. Note that when a record is converted to Termination for Convenience, or when the record is Withdrawn/Rescinded, the record is then archived and no longer visible for contractor comments and source selection retrieval (Contracts) or applicant risk review retrieval (Grants).

Access Levels

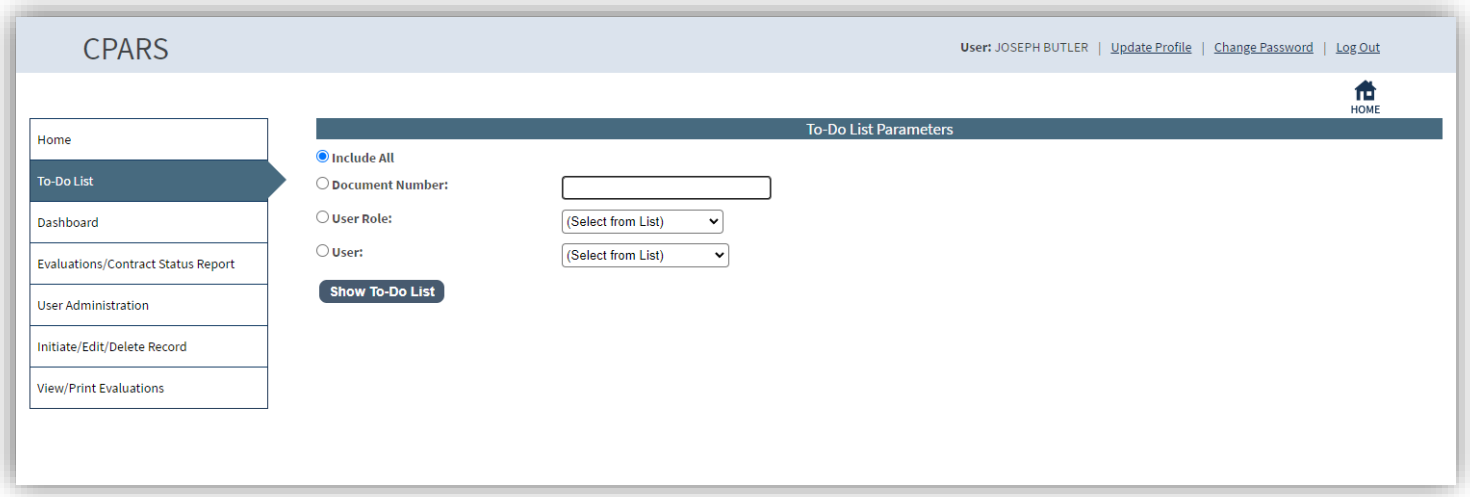
Focal Point

The Focal Point is responsible for the collection, distribution, and control of evaluations and Integrity records. Focal Points are key players in the success of the CPARS and Integrity automated workflows. Focal Point access is granted only upon the completion of the Focal Point User Access Request available at **https://www.cpars.gov/access.htm**. Focal Points coordinate CPARS and Integrity access for a specifically assigned area of responsibility. The Focal Point is also authorized to register contracts/orders that will require a contractor performance evaluation. The Focal Point assists the workflow users in implementing the automated processes by providing training and helping with administrative matters to ensure that evaluations and records are completed in a timely manner and are of high quality.



To-Do List

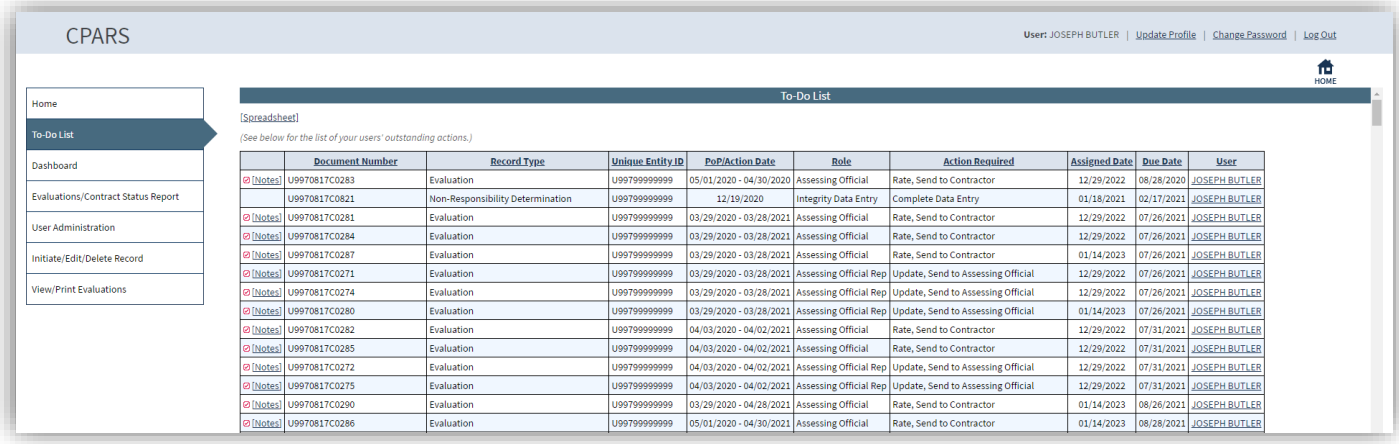
This option is a quick and efficient way for the Focal Point to monitor and check the status of pertinent evaluations and Integrity records. Click the **To-Do List** button. A To-Do List Parameters screen displays. The Focal Point can select **Include All** to produce a list of all evaluations that have been started or are due to be started and require action within his/her area of responsibility and all Integrity records that have been started and not yet completed. Select **Document Number** and enter a contract number in the adjacent field to limit the list of evaluations/records to a specific contract number. The Focal Point can also limit the To-Do List to a specific **User Role** or **User** by making the appropriate selections. Select the desired parameter and then click the **Show To-Do List** button.



A list of evaluations will display based on the parameters selected by the Focal Point. The To-Do List identifies, for each evaluation/record, the Document Number, Record Type, Unique Entity ID, Period of Performance/Action Date, Role, the Action Required, the Assigned date, the Due Date, and the name of the individual responsible for

completing the action.

To return to the To-Do List Parameters screen, click the **Return to the To-Do List Parameters** button.



	Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
[Notes]	U9970817C0283	Evaluation	U99799999999	05/01/2020 - 04/30/2020	Assessing Official	Rate, Send to Contractor	12/29/2022	08/28/2020	JOSEPH BUTLER
	U9970817C0821	Non-Responsibility Determination	U99799999999	12/19/2020	Integrity Data Entry	Complete Data Entry	01/18/2021	02/17/2021	JOSEPH BUTLER
[Notes]	U9970817C0281	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0284	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0287	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0271	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0274	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0280	Evaluation	U99799999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	01/14/2023	07/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0282	Evaluation	U99799999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	JOSEPH BUTLER
[Notes]	U9970817C0285	Evaluation	U99799999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	JOSEPH BUTLER
[Notes]	U9970817C0272	Evaluation	U99799999999	04/03/2020 - 04/02/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/31/2021	JOSEPH BUTLER
[Notes]	U9970817C0275	Evaluation	U99799999999	04/03/2020 - 04/02/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/31/2021	JOSEPH BUTLER
[Notes]	U9970817C0290	Evaluation	U99799999999	03/29/2020 - 04/28/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	08/26/2021	JOSEPH BUTLER
[Notes]	U9970817C0286	Evaluation	U99799999999	05/01/2020 - 04/30/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	08/28/2021	JOSEPH BUTLER

Dashboard

This option provides the Focal Point with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS and Integrity records.
(See Dashboard Section for more specific information)

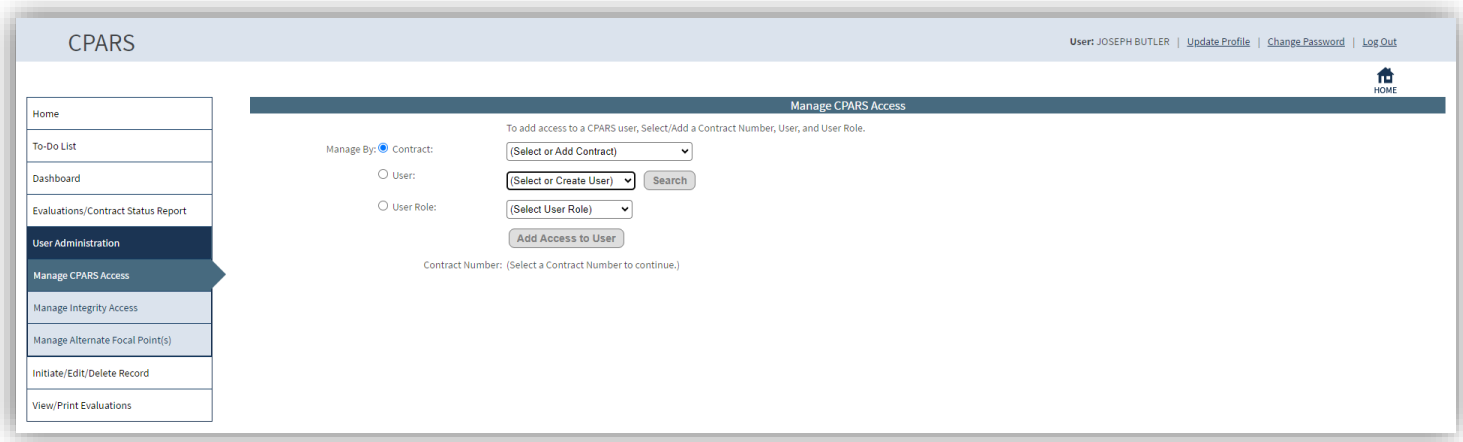
User Administration

This option allows the Focal Point to grant access to a new or existing user, change existing users' access level, remove users' access, update users' profile information, delete users, clone user accounts, transfer access from one user to another user when needed, and assign an Alternate Focal Point. Focal Points must grant access to all personnel involved in the automated workflows within the Focal Point's area of control. The "role" or level of access assigned to an individual is based on information that the Focal Point receives from project management teams (and the like) for the contracts/orders that require evaluating contractor performance. To access the User Administration options, click **User Administration**. The User Administration menu options display.

Manage CPARS Access

To grant access to contracts, the Focal Point clicks **Manage CPARS Access**. The Manage CPARS Access screen displays.

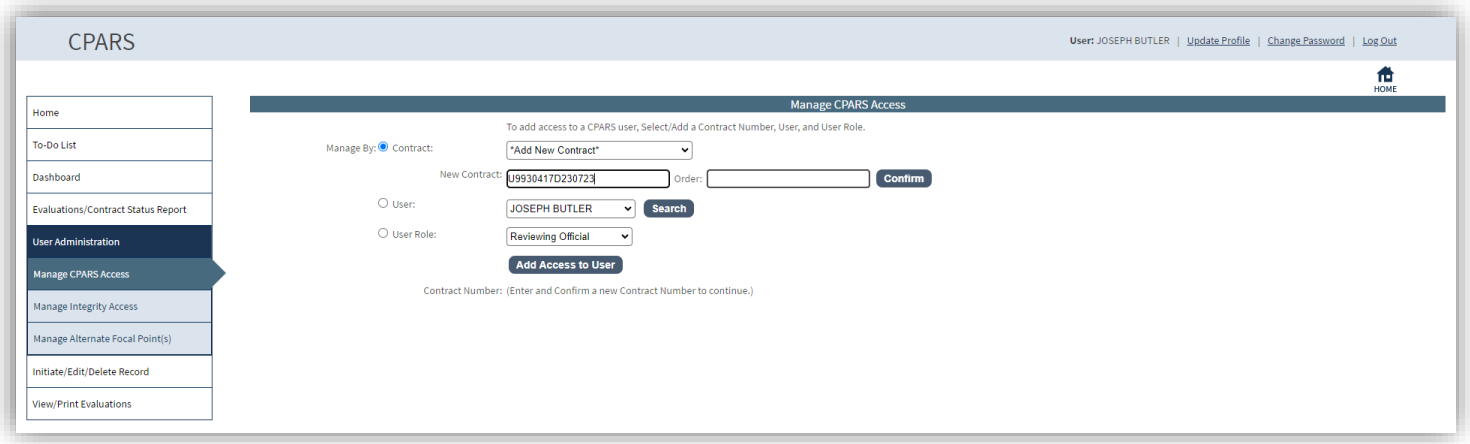
NOTE: If you have the ability to assign access on behalf of multiple Focal Points, you will need to select the Focal Point that is responsible for the contract when performing these actions. Select the Focal Point you will be representing from the drop-down. If you need to toggle to another Focal Point for more action(s), click **Manage CPARS Access** and start the process again.



To grant access to a contract, the Focal Point selects/enters a contract number from the **Contract** drop-down, selects or creates a user from the **User** drop-down, and selects a user role from the **User Role** drop-down. Once all

fields have been completed, the Add Access to User button will be available.

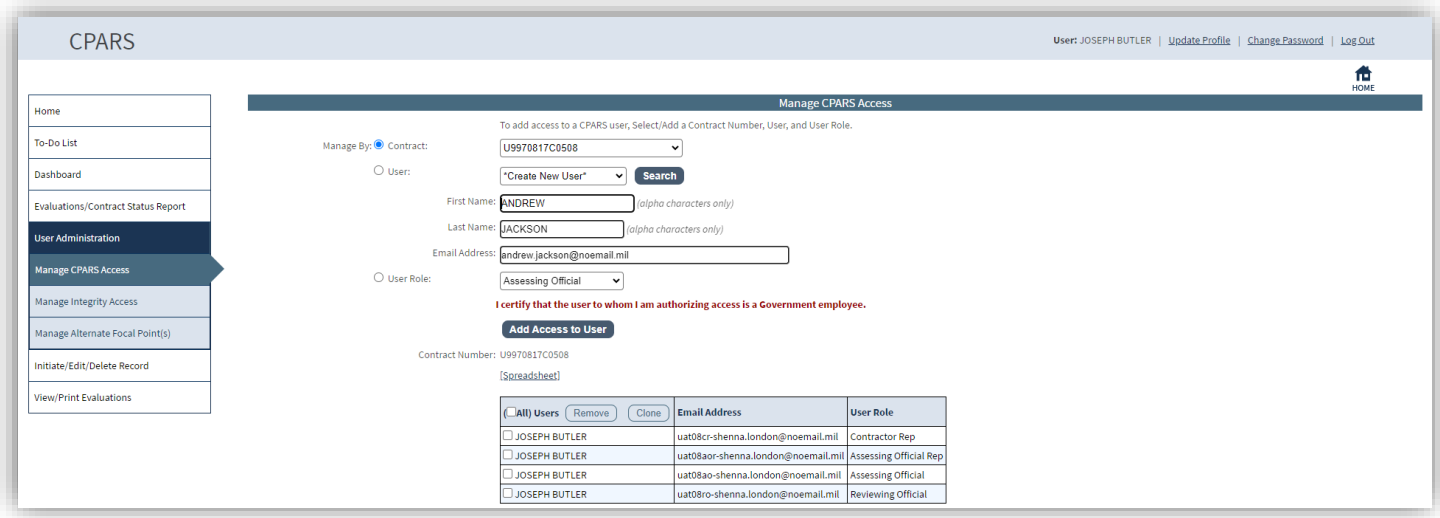
NOTE: If the Focal Point selects Add New Contract from the Contract drop-down, they must click the confirm button to ensure that no other Focal Point owns the contract/order.



The Focal Point clicks the **Add Access to User** button. The user will be added to the specified contract at the specified role. They will receive an email notification with instructions for obtaining a password.

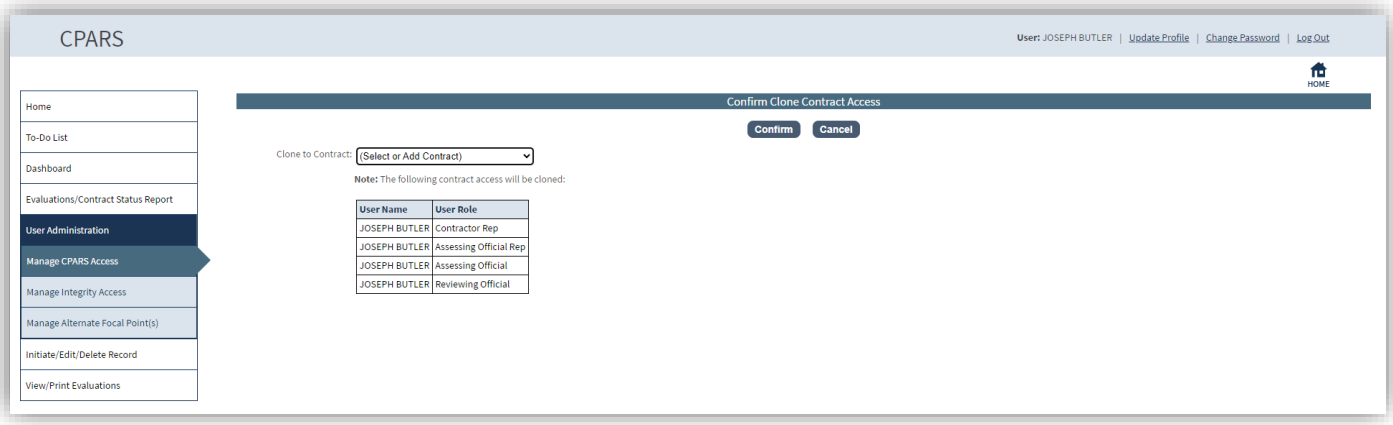
To Manage User Access by Contract: The Focal Point selects the **Contract** radio button and selects the applicable contract/order number from the drop-down. The contract/order number and users assigned will display along with options to Remove and Clone.

NOTE: If the Focal Point previously registered or granted access to a contract/order, the contract/order can be selected from the **Contract** drop-down box.



Remove – This option allows the Focal Point to remove one or more users' access to the contract/order that was selected from the drop-down. The Focal Point selects the applicable user(s) from the table or clicks **All** and then clicks **Remove**. The Confirm Remove User Access screen will display. The Focal Point clicks the **Confirm** button to remove the users' access to the displayed contract/order. The screen will refresh and a message will appear that the user(s) has been removed from the contract/order. Click **OK** to close the message. The list of users will automatically refresh to exclude the removed user(s). To cancel and return to the Manage CPARS Access screen, the Focal Point clicks **Cancel**.

Clone – This option allows the Focal Point to clone one or more users that are assigned to the contract/order that was selected from the drop-down to another contract/order. The Focal Point selects the applicable user(s) from the table or clicks **All** and then clicks **Clone**. The Confirm Clone Contract Access screen will display.



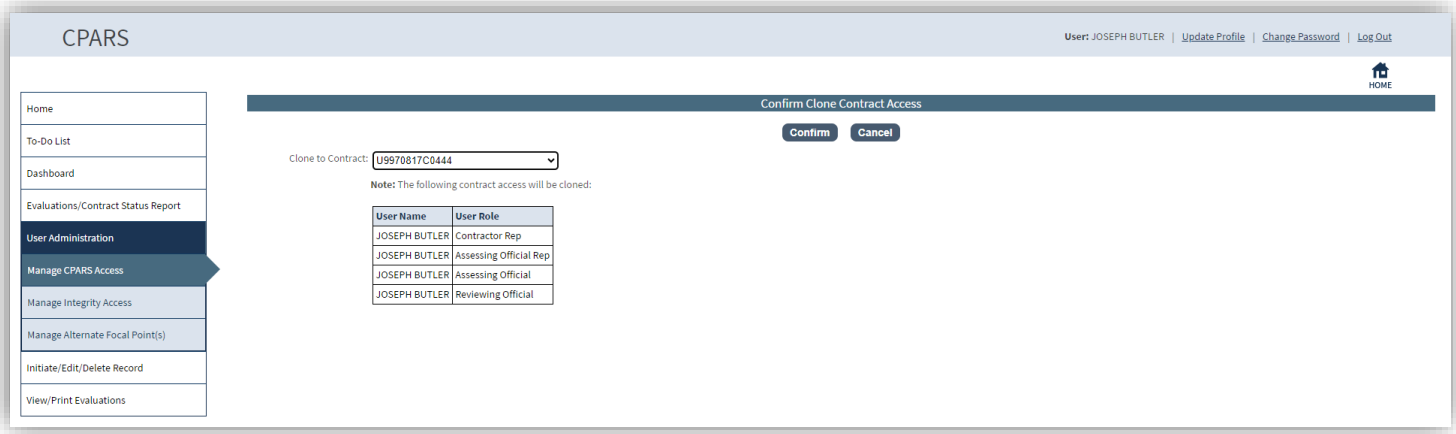
The Focal Point selects an existing contract or selects Add New Contract from the **Clone to Contract** drop-down. Once an existing contract or new contract has been entered, the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user(s) have been cloned. To clone access to another contract, click the **Clone Again** button. To return to the Manage CPARS Access screen, the Focal Point clicks **Return to Manage User Access.**

The [Spreadsheet] function will export the data columns displayed, into a Microsoft Excel Spreadsheet.
To Manage User Access by User: The Focal Point selects the **User** radio button. All users authorized by the Focal Point display in the drop-down. The Focal Point selects the desired user name from the drop-down, and a list of contracts/orders the user has access to and the role assigned will display. The available options for the Focal Point are: User Profile, Delete User, Transfer, Remove, Change Role, and Clone.

NOTE: If the Focal Point also holds a workflow role (i.e. Assessing Official Rep, Assessing Official, or Reviewing Official), they will not have the User Profile or Delete User options.

To search for a user granted access by a different Focal Point or a user who completed the **Self-Registry** in system click the **Search** button and the Search for Existing Users window will display. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select or Create User** box.

NOTE: If the Focal Point has already granted access to a user, the user can be selected from the **Select or Create User** drop-down box.

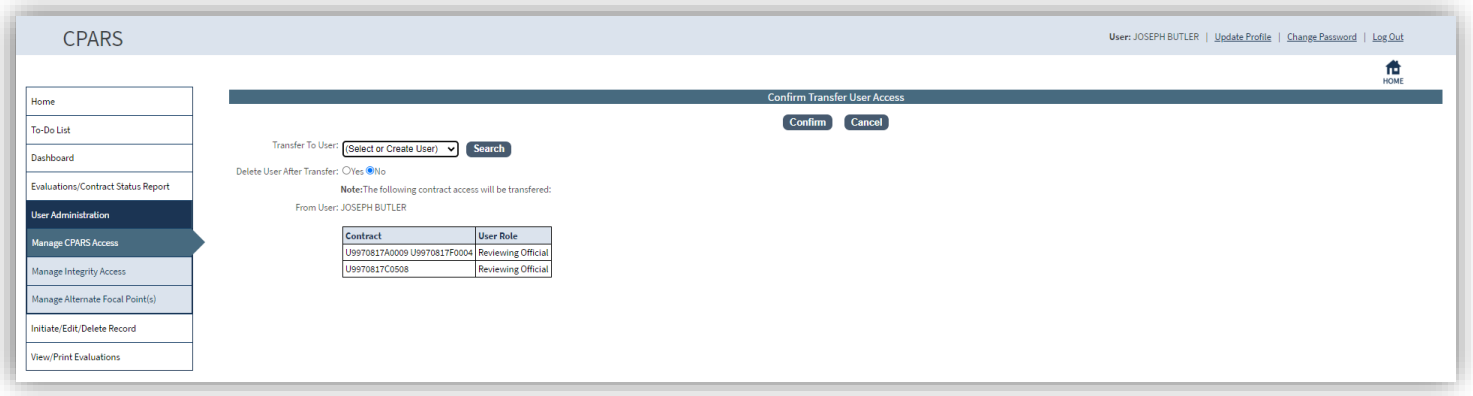


User Profile – This option allows the Focal Point to view and/or edit the user's profile information including the User's name, organization, title, email address, and phone number. Click **User Profile** and the Confirm User Profile screen will display. If the Focal Point needs to make changes to the profile, they make the necessary changes and click the **Confirm** button. The screen will refresh and a message will appear that the profile has been updated. To view or make no changes and be returned to the Manage CPARS Access screen, the Focal Point clicks **Cancel**.

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

To delete a user, click the **Delete User** button. The Confirm Delete User screen will display. If the Focal Point wants to delete the user, the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user has been deleted. To cancel the deletion and return to the Manage CPARS Access screen, the Focal Point clicks **Cancel**.

Transfer– This option allows the Focal Point to transfer CPARS access from one user to another user when needed. This function is particularly useful when individuals are reassigned and no longer involved with initiating or completing evaluations. The Focal Point selects the applicable contract(s)/orders(s) from the table or clicks **All** and then clicks **Transfer**. The Confirm Transfer User Access screen will display.

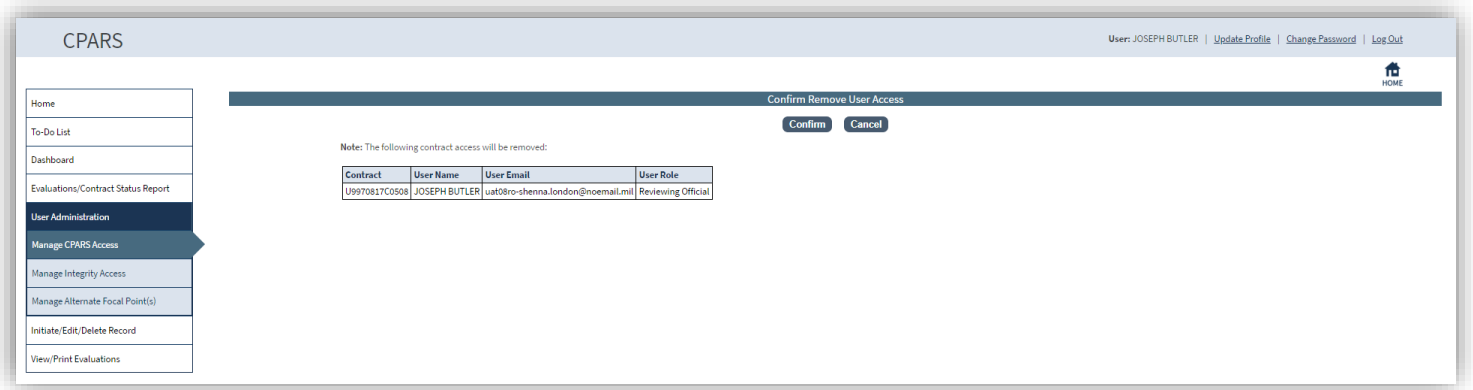


The Focal Point selects an existing user or selects Create New User from the **Transfer to User** drop-down. If the Focal Point has selected Create New User, they must enter the First Name and Last Name in the applicable **Name** boxes and an email address in the **Email Address** box. The drop-down box includes a list of existing users that have been given access to CPARS by the Focal Point. The Focal Point can choose to **Delete User After Transfer**. This action will delete the user from the CPARS database when the Focal Point clicks on the **Confirm** button, as long as no other Focal Points have assigned access to that user. Click the **Confirm** button to complete the transfer process. The screen will refresh and a message will appear that the access has been transferred. To return to the Manage CPARS Access screen, the Focal Point clicks **Return to Manage User Access.**

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

If the Focal Point also holds a workflow role (i.e. Assessing Official Rep, Assessing Official or Reviewing Official), and they have selected to transfer contracts from one of these accounts to someone else, they will not have the ability to Delete User after transfer.

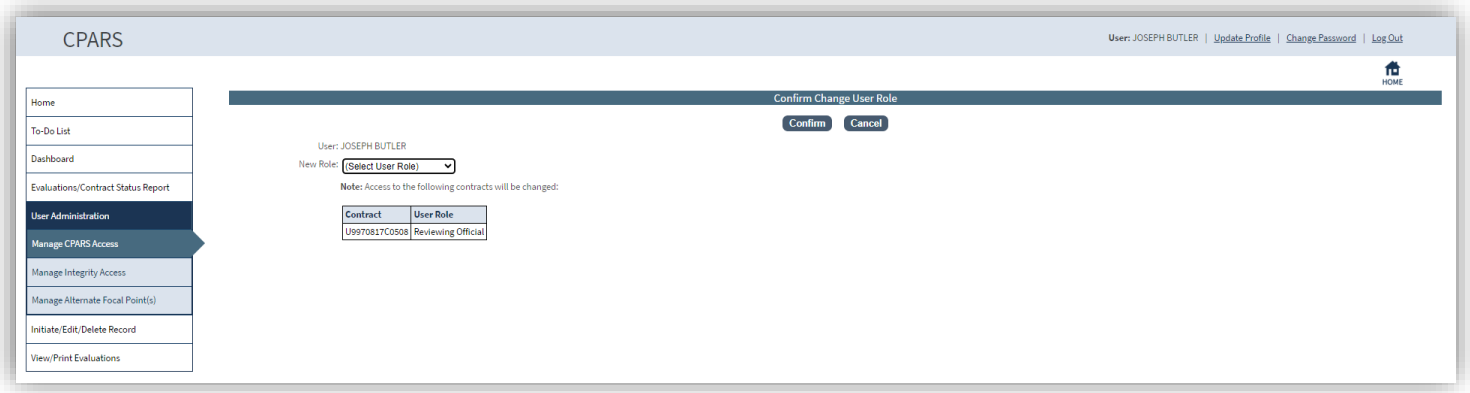
Remove Access – This option allows the Focal Point to remove access to one or more contracts/orders for the user that was selected from the drop-down. The Focal Point selects the applicable contract(s)/orders(s) from the table or clicks **All** and then clicks **Remove**. The Confirm Remove User Access screen will display.



The Focal Point clicks the **Confirm** button to remove the users' access to the displayed contracts/orders. The screen will refresh and a message will appear that the user has been removed from the contracts/orders click **OK**. The list of contracts will automatically refresh to exclude the removed contract(s). To cancel and return to the

Manage CPARS Access screen, the Focal Point clicks **Cancel**.

Change Role – This option allows the Focal Point to modify the user's role. The Focal Point selects the applicable contract(s)/orders(s) from the table or clicks **All** and then clicks **Change Role** and the Confirm Change User Role screen will display.



The Focal Point selects the new user role from the **New Role** drop-down box and clicks the **Confirm** button. The screen will refresh and a message will appear that the user role has been changed. To cancel and return to the Manage CPARS Access screen, the Focal Point clicks **Cancel**.

NOTE: The Change Role option is not available when a contractor representative is selected from the User drop-down.

Clone – This option allows the Focal Point to clone the access from one user to another user. The Focal Point selects the applicable contracts/orders from the table or clicks **All** and then clicks **Clone**. The Confirm Clone User Access screen will display.

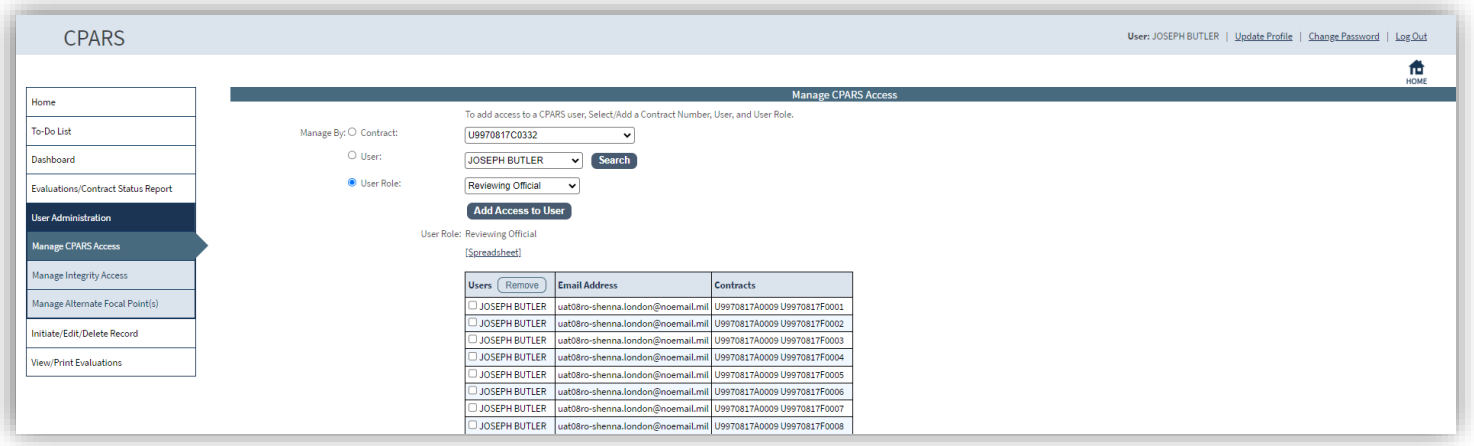
The Focal Point selects an existing contract or selects Create New User from the **Clone to User** drop-down. If the Focal Point has selected Create New User, they must enter a first name in the **First Name** box, a last name in the **Last Name** box, and an email address in the **Email Address** box. The drop-down box includes a list of existing users that have been given access to CPARS by the Focal Point. Once an existing user or new user has been entered, the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user access has been cloned. To return to the Manage CPARS Access screen, the Focal Point clicks **Return to Manage User Access.**

NOTE: When cloning to a **New User**, a system generated email will be sent to the user when he/she is assigned to a workflow role to inform the user of the temporary password procedures, responsibilities, and resources available.

The [Spreadsheet] function will export the data columns displayed, into a Microsoft Excel Spreadsheet.

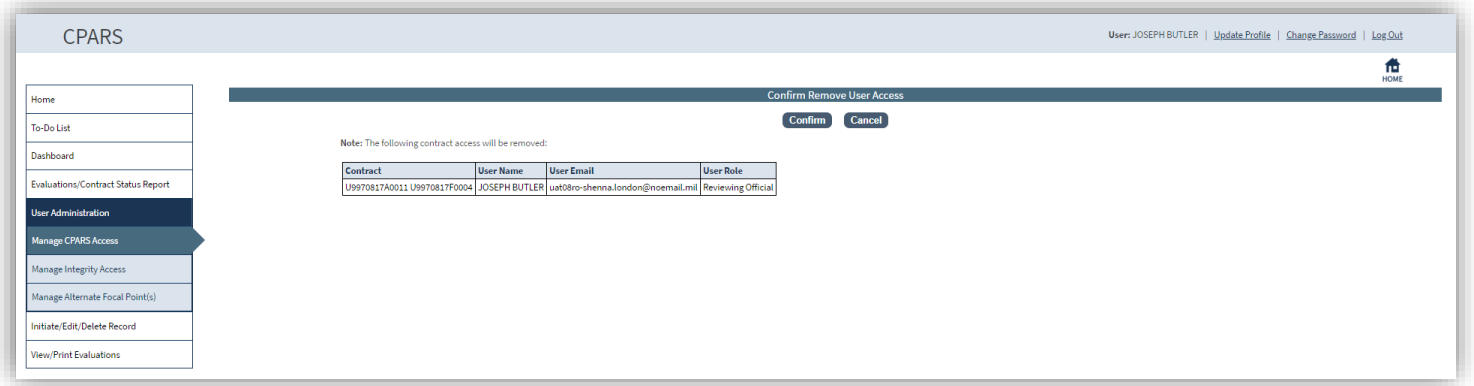
To Manage User Access by User Role: The Focal Point selects the **User Role** radio button, and the desired user role from the drop-down, a list of users and the contract/order number(s) they have access to will display. The only available option for the Focal Point is Remove.

Confirm Clone User AccessConfirm Clone User Access



The [Spreadsheet] function will export the data columns displayed, into a Microsoft Excel Spreadsheet.

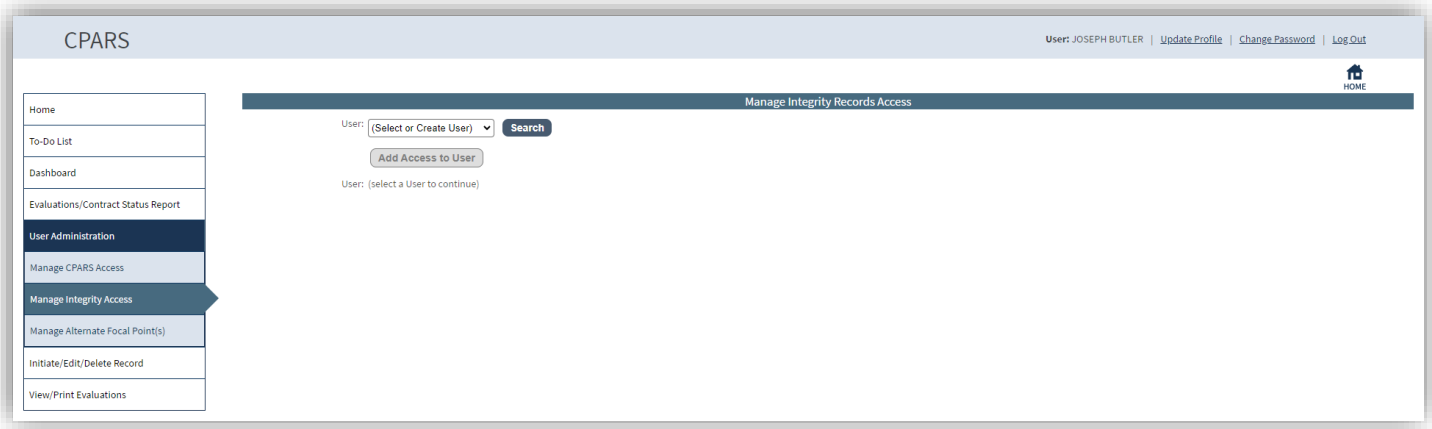
Remove Access – This option allows the Focal Point to remove access to one or more contracts/orders for the user role that was selected from the drop-down. The Focal Point selects the applicable user(s) from the table and then clicks **Remove**. The Confirm Remove User Access screen will display.



The Focal Point clicks the **Confirm** button to remove the users' access to the displayed contracts/orders. The screen will refresh and a message will appear that the user has been removed from the contracts/orders click **OK**. The list of users will automatically refresh to exclude the removed user(s). To cancel and return to the Manage CPARS Access screen, the Focal Point clicks **Cancel**.

Manage Integrity Access

To grant access to enter Integrity Records, the Focal Point clicks **Manage Integrity Access**. The Manage Integrity Access screen displays.



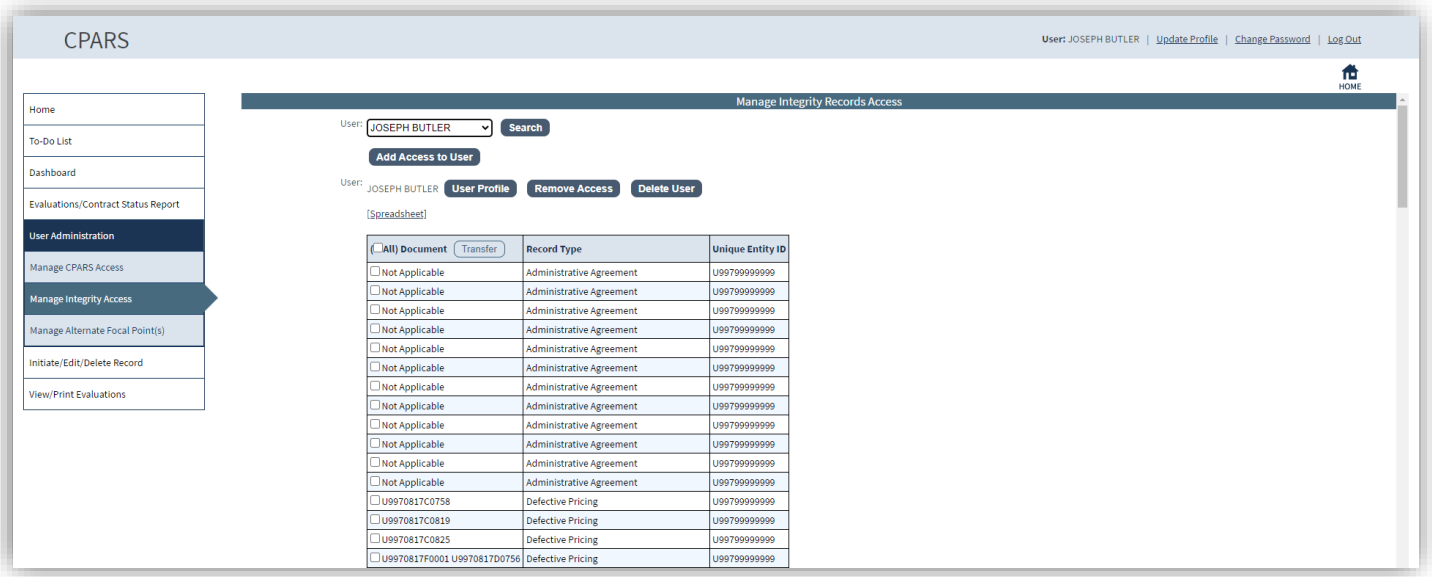
The Focal Point selects or creates a user from the **User** drop-down, and clicks the **Add Access to User** button. The user will be granted access and will receive an email notification with instructions for obtaining a password.

To search for a user granted access in CPARS or granted access by a different Focal Point in the system, click the **Search** button and the Search for Existing Users window will display. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select or Create User** box.

NOTE: When using the **Search** button to search for existing users, only existing Integrity users, or users with Alternate Focal Point, Assessing Official Representative, Assessing Official, and Reviewing Official access to CPARS will be visible. This includes users with access granted by a different Focal Point.

NOTE: If granting access to an Integrity Data Entry user and the email address entered appears to be non-government, the Focal Point will receive a warning to check the entered information.

To view or modify an existing user, the Focal Point selects the desired user name from the drop-down, a list of records the user has access to will display. The available options for the Focal Point are: User Profile, Transfer, Remove Access, and Delete User.



The [Spreadsheet] function will export the data columns displayed, into a Microsoft Excel Spreadsheet.

User Profile – This option allows the Focal Point to view and/or edit the user's profile information including the User's name, title, organization, email address, and phone number. Click **User Profile** and the Confirm User Profile screen will display. If the Focal Point needs to make changes to the profile, make the necessary changes and click the **Confirm** button. The screen will refresh and a message will appear that the profile has been updated. To view or make no changes and be returned to the Manage Integrity Access screen, the Focal Point clicks **Cancel**.

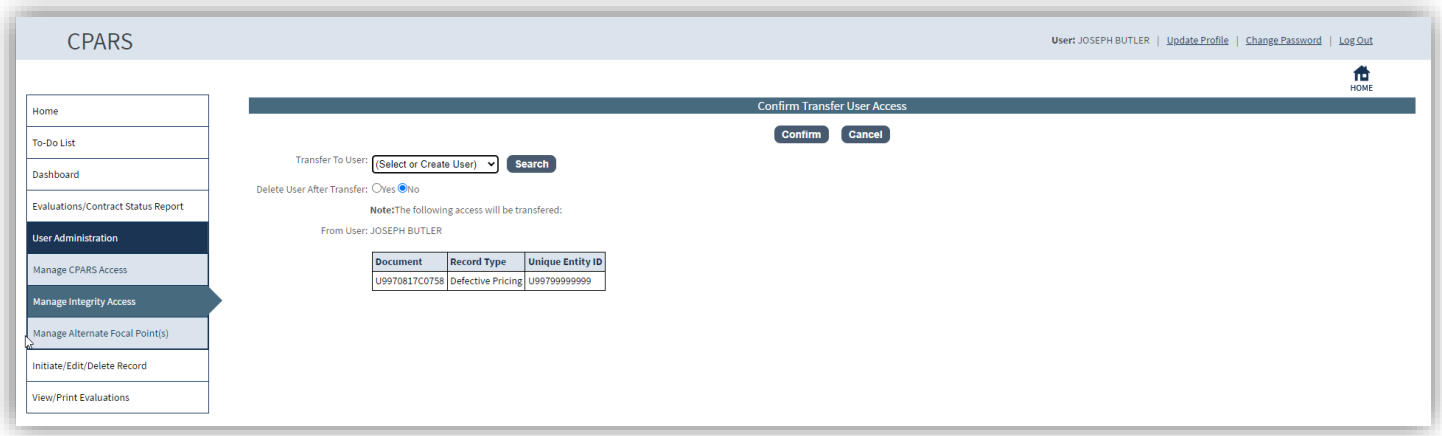
Remove Access – Clicking on this option allows the Focal Point to remove the existing user's access. To remove access, click the **Remove Access** button. The Confirm Remove User screen will display. If the Focal Point wants to Remove the user's access the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user's access has been removed. To cancel removing access and return to the Manage Integrity Access screen, the Focal Point clicks **Cancel**.

NOTE: If the user only has Integrity Data Entry access, the Remove User Access screen will display a notice that states "This User only has access to Integrity Records and will be deleted when access is removed. Note that all records created by this user will be retained and labeled "Unassigned" in reports."

Delete User – Clicking on this option allows the Focal Point to completely delete a user. To delete a user, click the **Delete User** button. The Confirm Delete User screen will display. If the Focal Point wants to delete the user, the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user has been deleted. To cancel the deletion and return to the Manage Integrity Access screen, the Focal Point clicks **Cancel**.

NOTE: If the Focal Point also has Integrity Data Entry access, and selects themselves from the drop-down, they will not have the ability to Delete User.

Transfer– This option allows the Focal Point to transfer access from one user to another. This function is particularly useful when individuals are reassigned and no longer involved with entering records. The Focal Point selects the applicable record(s) from the table or clicks **All** and then clicks **Transfer**. The Confirm Transfer User Access screen will display.



The Focal Point selects an existing user or selects Create New User from the **Transfer to User** drop-down. If the Focal Point has selected Create New User, they must enter a name (First Name and Last Name only) in the **Name** box and an email address in the **Email Address** box. The Focal Point can choose to **Delete User After Transfer**. This action will delete the user from the Integrity database when the Focal Point clicks on the **Confirm** button, as long as no other Focal Points have assigned access to that user.

To search for a user granted access in CPARS or granted access by a different Focal Point in the system, click the **Search** button and the Search for Existing Users window will display. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select or Create User** box.

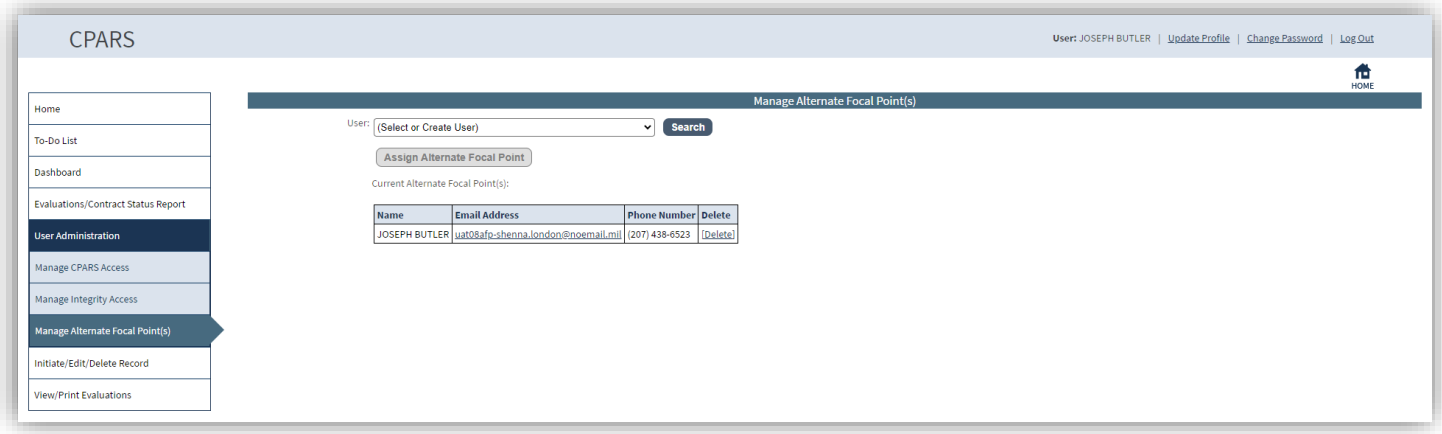
Click the **Confirm** button to complete the transfer process. The screen will refresh and a message will appear that the access has been transferred. To return to the Manage Integrity Access screen, the Focal Point clicks **Return to Manage User Access.**

NOTE: When transferring to a **New User**, a system generated email will be sent to the user to inform the user of the temporary password procedures, responsibilities, and resources available.

NOTE: If the user also has access to CPARS, the system will only provide the Focal Point with the option to remove Integrity access and the user will not be deleted.

Manage Alternate Focal Point(s)

This option allows the Focal Point to assign up to five individuals as an Alternate Focal Point. An Alternate Focal Point has the 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 the automated system at the same time to create/manage user accounts and to run reports, etc. To assign an Alternate Focal Point, click **Manage Alternate Focal Point(s).** The Manage Alternate Focal Point(s) screen displays.



To grant access, the Focal Point selects the Create New User option or by selecting an existing user from the **User** drop-down. If the Focal Point has selected Create New User, they must enter the First Name and Last Name in the applicable **Name** boxes and an email address in the **Email Address** box. The drop-down box includes a list of existing users that have been given access to CPARS by the Focal Point. Once a new name is entered or an existing user selected, click the **Assign Alternate Focal Point** button.

NOTE: The Assign Alternate Focal Point button will not be available until an existing user or Create New User has been selected.

NOTE: To search for an existing user click the **Search** button and the Search for Existing Users window will display. Enter the full or partial last name and click on the **Search** button. A list of existing user names will display. Click on the desired name and the name will appear in the **Select or Create User** box.

To delete an Alternate Focal Point, click on the **[Delete]** button. The Confirm Delete User screen will display. If the Focal Point wants to delete the user, the Focal Point clicks the **Confirm** button. The screen will refresh and a message will appear that the user has been deleted. To cancel the deletion and return to the Manage Alternate Focal Point screen, the Focal Point clicks **Cancel**.

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

Initiate/Edit/Delete Record

This option allows the Focal Point to register or update contracts, edit evaluations, delete evaluations or contracts, or update the organization on contracts. To access the Initiate/Edit/Delete Record options, click the **Initiate/Edit/Delete Record option**. The Initiate/Edit/Delete Record menu options display.

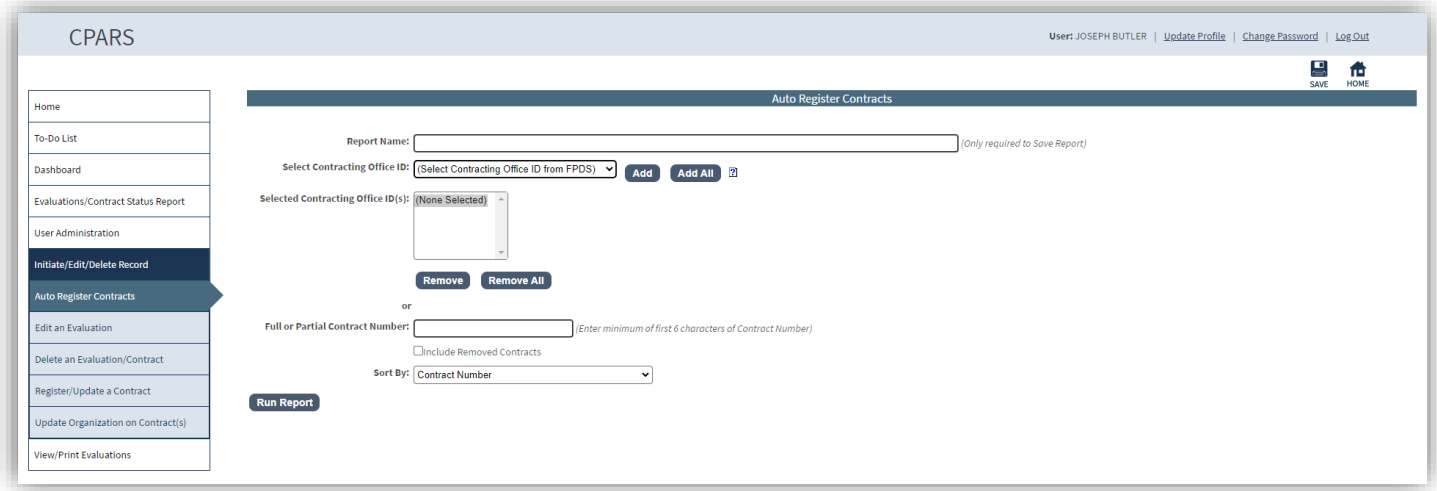
Auto Register Contracts

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

NOTE: If you have the ability to Auto Register on behalf of multiple Focal Points, you will need to select the Focal Point that is responsible for the contract when performing these actions. Select the Focal Point you will be representing from the drop-down. If you need to toggle to another Focal Point for more action(s), click **Auto Register Contracts** and start the process again.

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

NOTE: If a contract/order meets the threshold and is in FPDS, the Focal Point must use the Auto Register function to register it. All changes and updates to the contract information on these contracts/orders must be made in FPDS-NG. This includes cases where the record was manually registered and initiated prior to CPARS ever receiving the FPDS record.



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

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

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

If the user wishes to save a report to run it again in the future, the user enters a Report Name in the **Report Name** box and clicks the **Save** icon button. The Auto Register Report Parameters screen will refresh and a Select Saved Report drop-down will appear.

To run the saved report in the future, the user would select the **Report Name** from the drop-down and click **Run Report**.

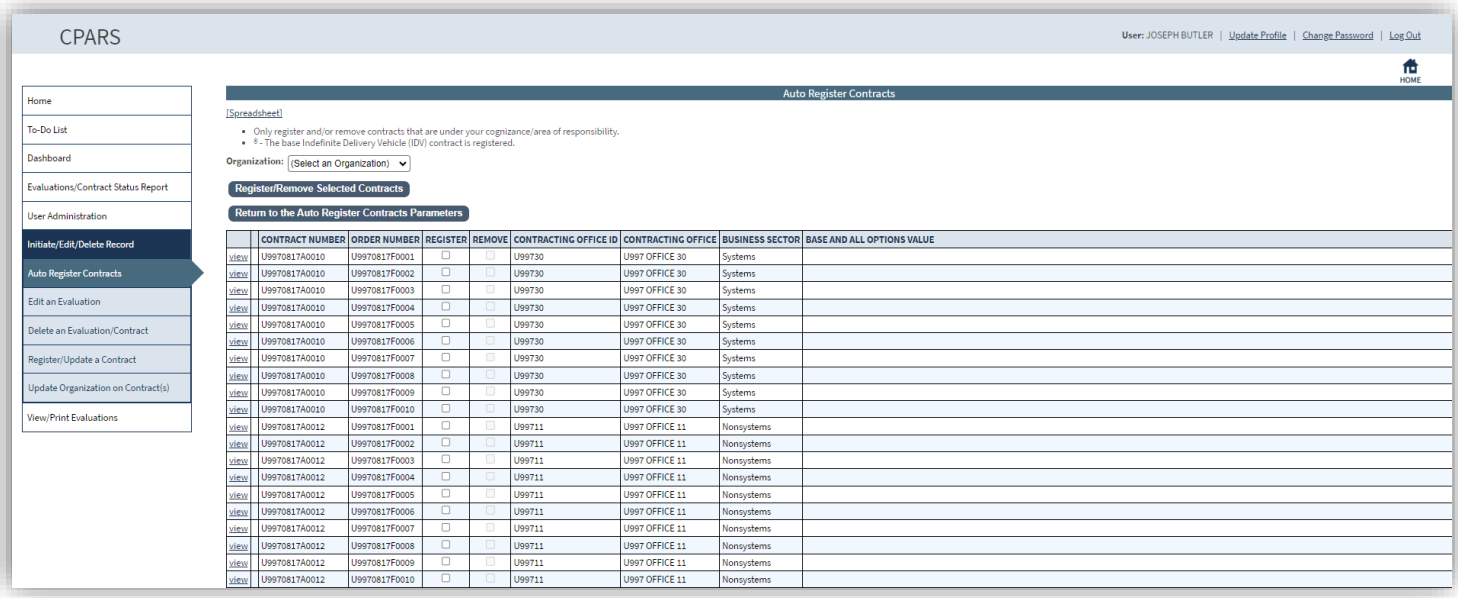
To change the parameters of a saved report, select the **Report Name** from the drop-down, select/de-select the desired parameters and click the **Save** icon.

To delete a saved report, select the **Report Name** from the drop-down and click **Delete**.

Auto Register Contracts CPARS-Eligible List Screen: Queries run in the previous parameters screen will result in a list of contracts/orders that are eligible for reporting. The CPARS-eligible list is filtered by Business Sector and applicable minimum dollar threshold. Contracts/orders not meeting the established minimum dollar threshold for CPARS reporting will not be displayed. To register contracts under the minimum dollar threshold, use the manual Register a Contract button. Also, contracts/orders that have already been registered in CPARS will not be displayed. If the base Indefinite Delivery Vehicle (IDV) has been registered in CPARS a ® symbol will be shown next to any

task orders for that contract. Contracting Office ID and Contracting Office identify the Contracting Office that placed the contract/order. Base and All Options Value is the aggregate value used to determine if the contract/order exceeds the minimum reporting dollar thresholds.

Date Signed indicates the date the contract/order was awarded. Est. Ultimate Completion Date/Last Date to Order indicates the end date of the contract/order. Available Date indicates the date that the contract/order became available in Auto Register. Prepared by indicates the email address of the person who prepared the contract action report in FPDS-NG.

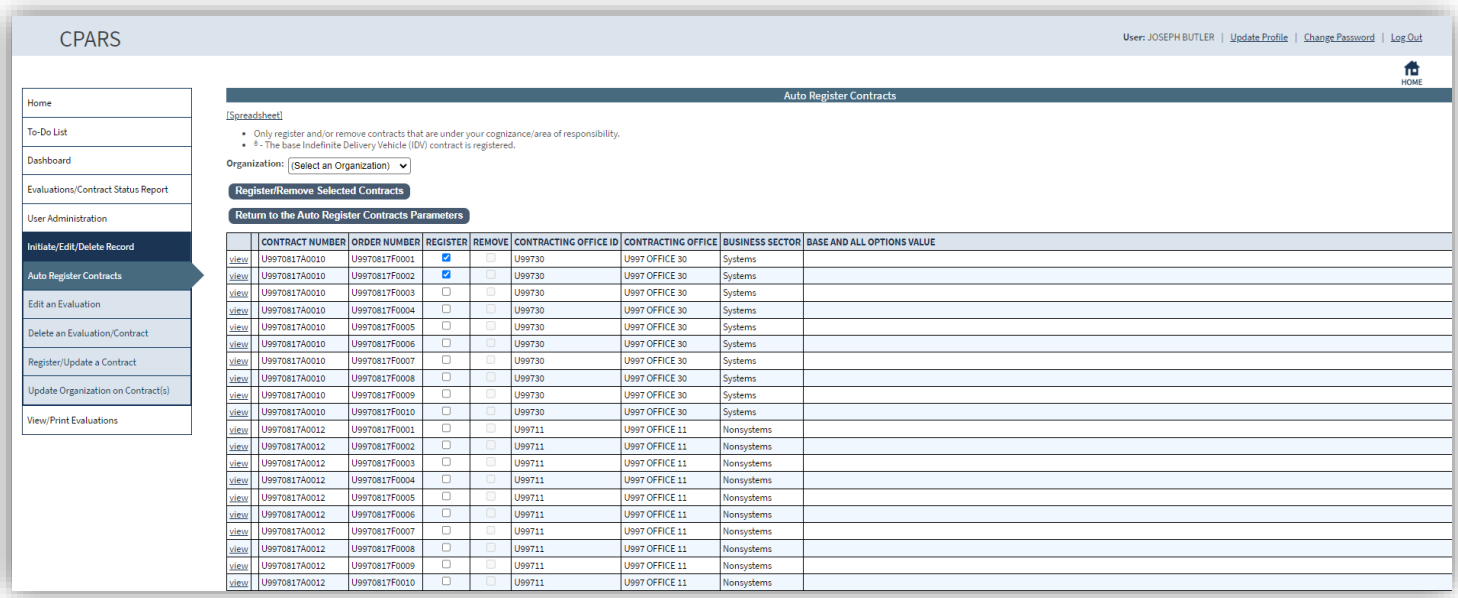


	CONTRACT NUMBER	ORDER NUMBER	REGISTER	REMOVE	CONTRACTING OFFICE ID	CONTRACTING OFFICE	BUSINESS SECTOR	BASE AND ALL OPTIONS VALUE
view	U9970817A0010	U9970817F0001	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0002	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0003	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0004	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0005	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0006	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0007	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0008	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0009	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0010	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0012	U9970817F0001	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0002	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0003	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0004	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0005	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0006	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0007	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0008	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0009	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0010	☐	☐	U99711	U997 OFFICE 11	Nonsystems	

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 CPARS reporting and is specific to the Focal Point. For example, a Navy Focal Point will see the Navy Systems Commands, while a Department of Energy Focal Point will see their organizations. Clicking **view** adjacent to a contract/order number will display the contract award data.

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



	CONTRACT NUMBER	ORDER NUMBER	REGISTER	REMOVE	CONTRACTING OFFICE ID	CONTRACTING OFFICE	BUSINESS SECTOR	BASE AND ALL OPTIONS VALUE
view	U9970817A0010	U9970817F0001	☑	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0002	☑	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0003	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0004	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0005	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0006	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0007	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0008	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0009	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0010	U9970817F0010	☐	☐	U99730	U997 OFFICE 30	Systems	
view	U9970817A0012	U9970817F0001	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0002	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0003	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0004	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0005	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0006	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0007	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0008	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0009	☐	☐	U99711	U997 OFFICE 11	Nonsystems	
view	U9970817A0012	U9970817F0010	☐	☐	U99711	U997 OFFICE 11	Nonsystems	

Once the appropriate contracts/orders have been checked for registration, the Focal Point then clicks the **Register/Remove Selected Contracts** button. A popup will appear asking you: "Are you sure you want to register/remove the selected contract(s)?" After selecting the **OK** button on the popup, the list of contracts/orders will

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

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

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

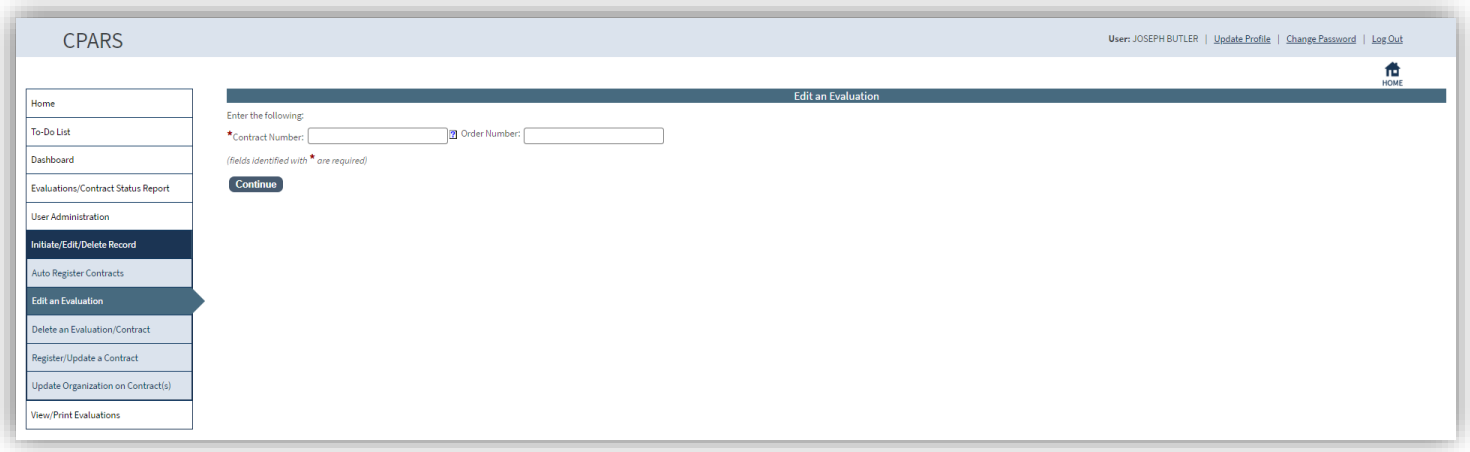
NOTE: 1. The Remove checkbox on Contracts/Orders requiring evaluations are greyed out if the Contract/Order cannot be removed. 2. This does not delete the data or absolve the Focal Point of reporting responsibility. This feature could be useful in the example of a contract with several orders. The Focal Point could choose to report on the base contract and remove the individual orders from the list. Contracts/orders that are removed from the list can be viewed and registered by checking the **Include Removed Contracts** box on the parameters screen.

Particular care should be taken when removing contracts/orders as this removes visibility on these contracts/orders for all Focal Points.

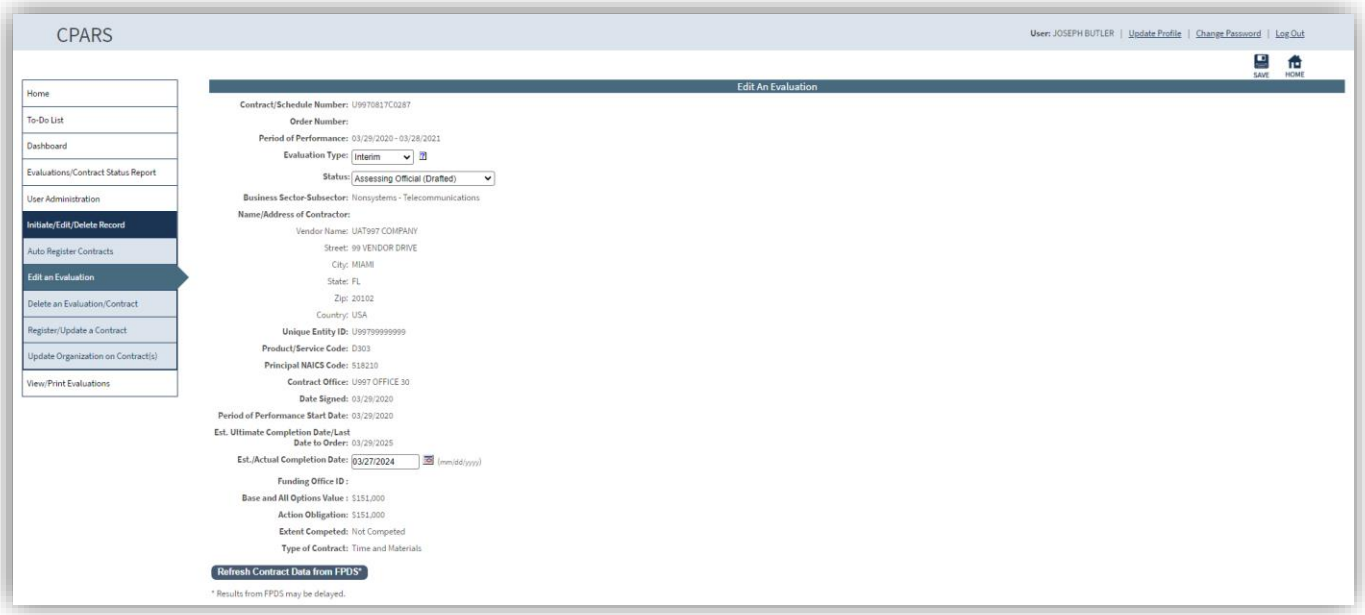
To return to the Auto Register Contracts Parameters screen, click the **Return to the Auto Register Contracts Parameters** button.

Edit an Evaluation

This option allows the Focal Point to change the Evaluation Type on an in-process or previously completed evaluation, to change the Status on an in-process evaluation, or to update an in-process evaluation at the Initiated or Drafted status with the latest information in the Contract Data Record, that CPARS has received from FPDS-NG. To edit an evaluation, click **Edit an Evaluation**. The Edit an Evaluation selection screen displays.



Enter the contract number in the **Contract Number** box **and** the order number, if applicable, in the **Order Number** box. Click the **Continue** button. The Edit an Evaluation screen will display. Clicking on the Contract Number will display the evaluation. To edit the evaluation, click **Edit** and the Edit Evaluation screen will display.



To change the Evaluation Type on an in-process or previously completed evaluation, select the correct Evaluation Type from the **Evaluation Type** drop-down. Click the **Save** icon. A pop-up will appear stating the evaluation has been saved.

NOTE: 1. Basic information is displayed to help the Focal Point choose the correct evaluation type. 2. When changing the Evaluation Type to Final or Addendum, the Focal Point will need to enter the Est. Ultimate Completion Date/Last Date to Order.

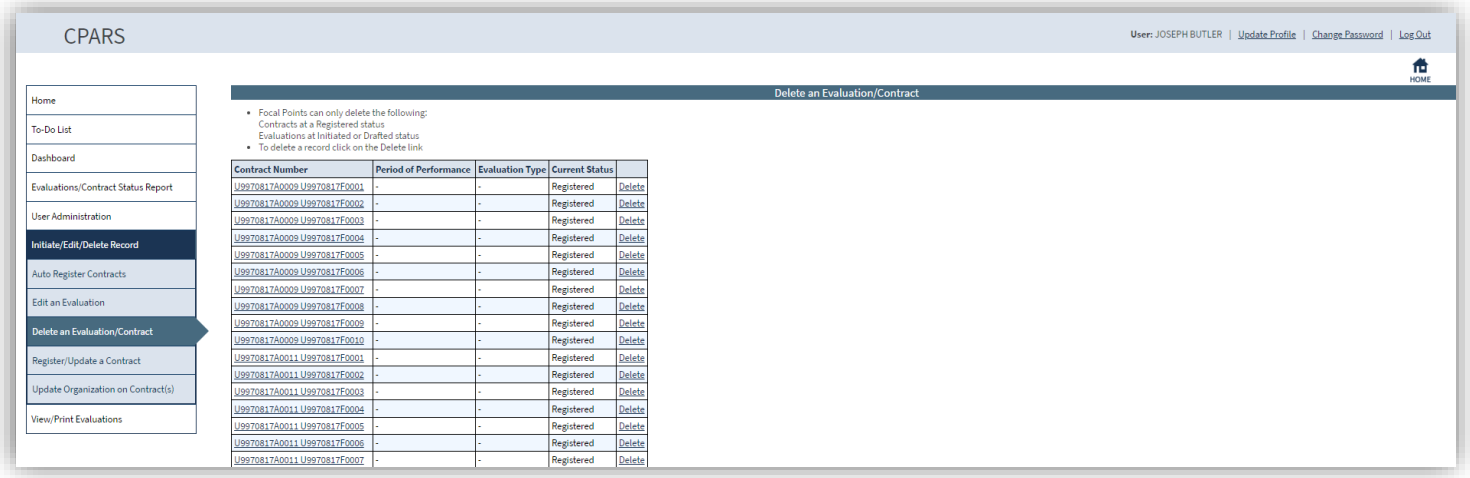
To change the Status on either an in-process or completed evaluation, select the correct Status from the Status drop-down. Click the **Save** icon. A popup will appear stating the evaluation has been saved.

To update an in-process evaluation at the Initiated or Drafted status with the latest information in the Contract Data Record received from FPDS, click on the **Refresh Contract Data from FPDS** button, click the **Save** icon. A popup will appear stating the evaluation has been saved.

NOTE: 1. Basic information is displayed to help the Focal Point identify the fields being updated. 2. There is typically a three-day delay between the time a Contract Action Report (CAR) in entered in FPDS and the time the data on that CAR is reflected in CPARS.

Delete an Evaluation/Contract

This option allows the Focal Point to delete registered contracts/orders and/or evaluations at the initiated or drafted status. To delete a registered contract/order or an in-process evaluation, click **Delete an Evaluation/Contract**. The Delete Evaluation/Contract selection screen displays. The contracts/orders and evaluations available for deletion will be displayed.



Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Contract Confirmation screen will display. Verify the correct contract/order is about to be deleted from the CPARS database. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete Record selection screen.

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

NOTE: 2. Running an **Evaluations/Contract Status Report** will list all evaluations/contracts the Focal Point is able to **Delete**. **(See Evaluations/Contract Status Report Section for more specific information)**

Register/Update a Contract

This option allows a Focal Point to manually input and update basic contract/order information into CPARS that does not exist in FPDS. This option also allows a Focal Point to register a contract that exists in FPDS but is below the minimum dollar threshold required to exist in Auto Register.

The contract/order must be registered within 30 days after contract/order award. Registering and updating a contract/order are the only functions that the Focal Point may perform in the automated workflow process. To register or update a contract/order, click on **Register/Update a Contract**. The Contract Registration data entry screen will display. If the contract/order exists in FPDS, CPARS will populate the data available from FPDS and these fields will be locked down and can't be changed. If the contract/order does not exist in FPDS the Focal Point will be required to enter the required data.

NOTE: If you have the ability to Manually Register on behalf of multiple Focal Points, you will need to select the Focal Point that is responsible for the contract when performing these actions. Select the Focal Point you will be representing from the drop-down. If you need to toggle to another Focal Point for more action(s), click the Register/Update a Contract option and start the process again.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box and the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Unique Entity ID that is applicable to the contract/order to be registered and click on the **Look Up and Populate** button and the Contract Registration data entry screen will be updated with the contractor's Unique Entity ID, name and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*****). The blue question mark (**?**) identifies that online help is available for the data entry field. The **sections** provide additional data entry boxes. Click each **section** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided, click the **Validate and Save the Contract Data** button located at the bottom of the data entry screen. Click the **OK** button.

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

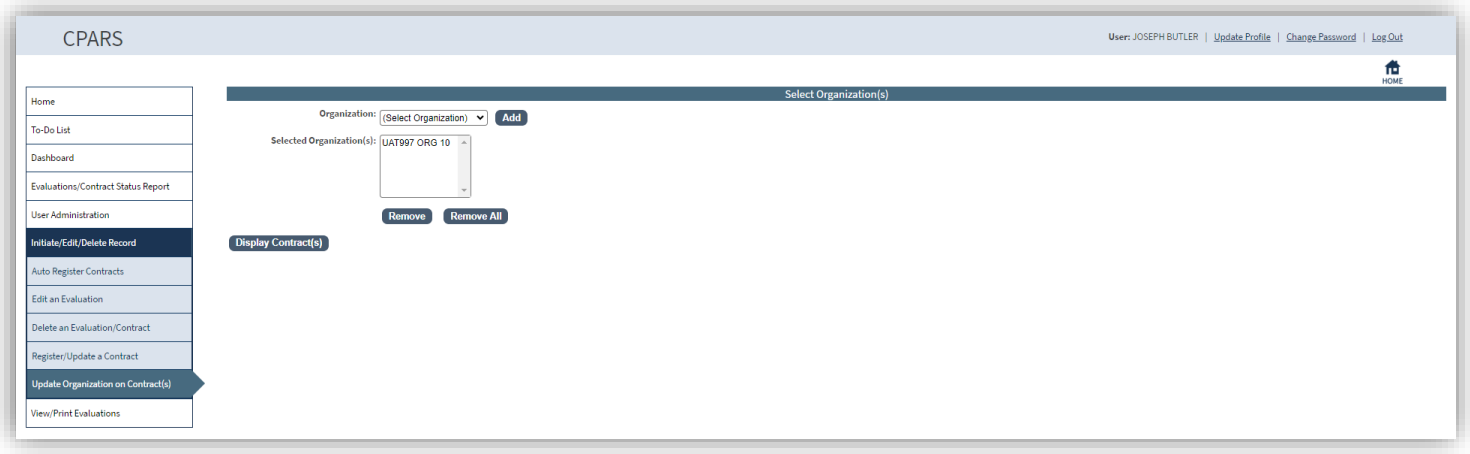
To update a contract/order that has already been registered enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box. Click the **Continue** button; the Contract Registration data entry screen displays and will display the previously registered information. Click each **section** and update the contract/order registration fields accordingly. If the contract was Auto Registered, fields originating from FPDS will be locked down and can't be changed. Once updated, click the **Save** icon. You will receive a popup indicating the record has been saved. Click the **OK** button.

If the contract was originally manually registered, but now exists in FPDS, you will also see a **Refresh Contract Data from FPDS** button. Clicking on this button will go to FPDS and get the current data to update the Contract Registration fields if applicable.

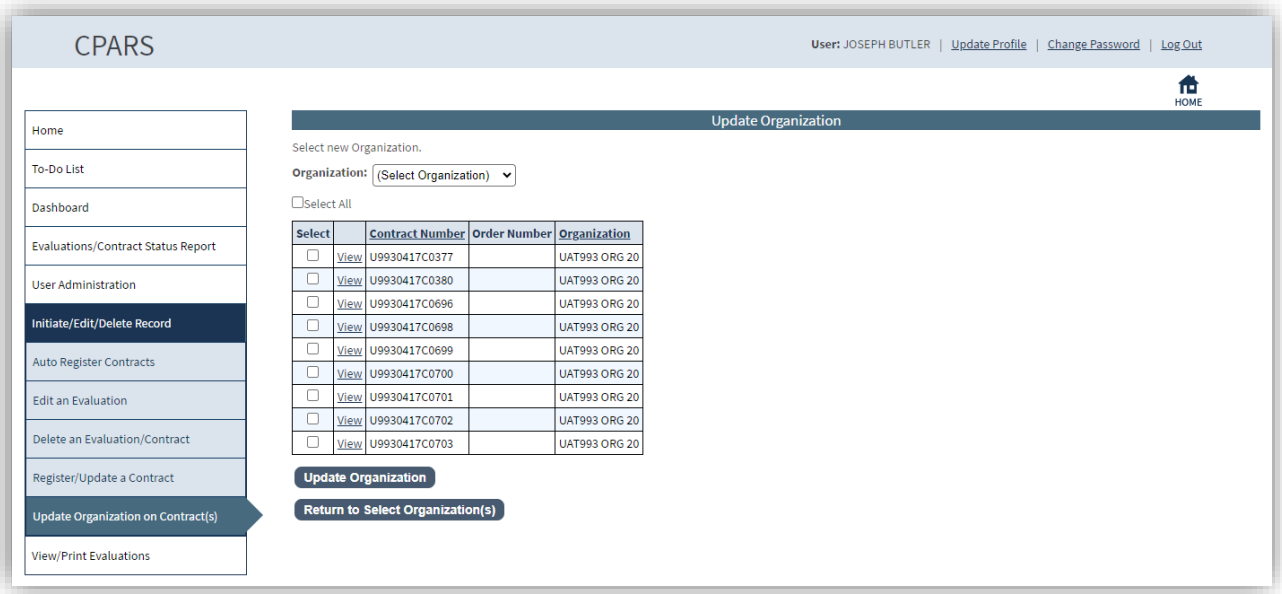
NOTE: Using the **Refresh Contract Data from FPDS** button will not update any evaluations in process.

Update Organization on Contract(s)

This option allows the Focal Point to change the organization on one or more contracts/orders within their Agency. To change the organization, click the **Update Organization on Contract(s)** button and the Select Organization(s) screen displays. Select the organization the contract/order(s) are currently mapped to and click **Add** to add the organization to the Selected Organization(s) block.



Once all applicable organizations have been added, click the **Display Contract(s)** button and the Update organization screen will display. Select the new organization from the **Organization** drop-down. Either use the Select All check box or select the individual check boxes next to the applicable contract/order number(s) needing the organization changed. Once all applicable contracts have been selected, click the **Update Organization** button.



The Return to **Select Organization(s)** button will return the Focal Point to the Select Organization(s) screen.

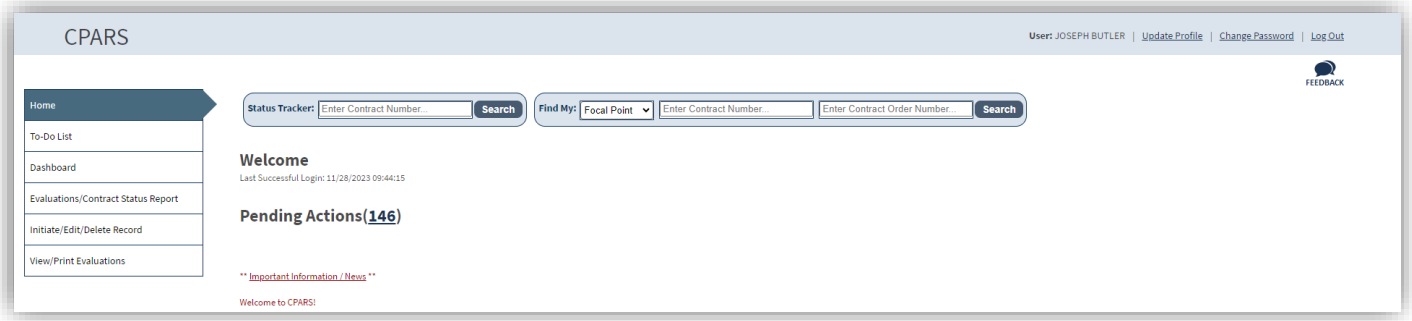
NOTE: Focal Points will only see their own Contract(s)/Order(s) under their cognizance.

View/Print Evaluations

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

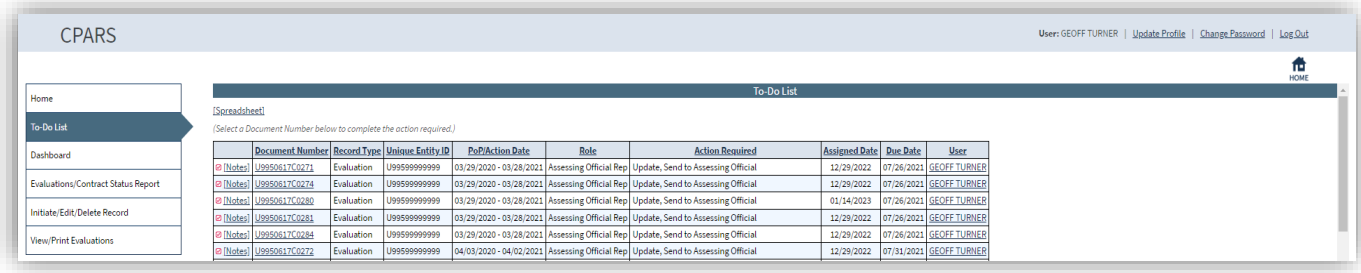
Assessing Official Representative

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.



Pending Actions/To-Do List

This option is a quick and easy method for the Assessing Official Representative to see all evaluations that are awaiting his/her action. Click the **number** next to Pending access or click **To-Do List**. The list includes evaluations that are due to be updated and sent to the Assessing Official, have been started and saved by an Assessing Official Representative, and those that have been returned by the Assessing Official. Click on the appropriate document number and the evaluation is opened in data entry format ready for the Assessing Official Representative to complete the required action. Each of the Assessing Official Representative's **Actions Required** from the To-Do List are described in further detail below.



	Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
[Notes]	U9950617C0271	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0274	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0280	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	01/14/2023	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0281	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0284	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0272	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/31/2021	GEOFF TURNER

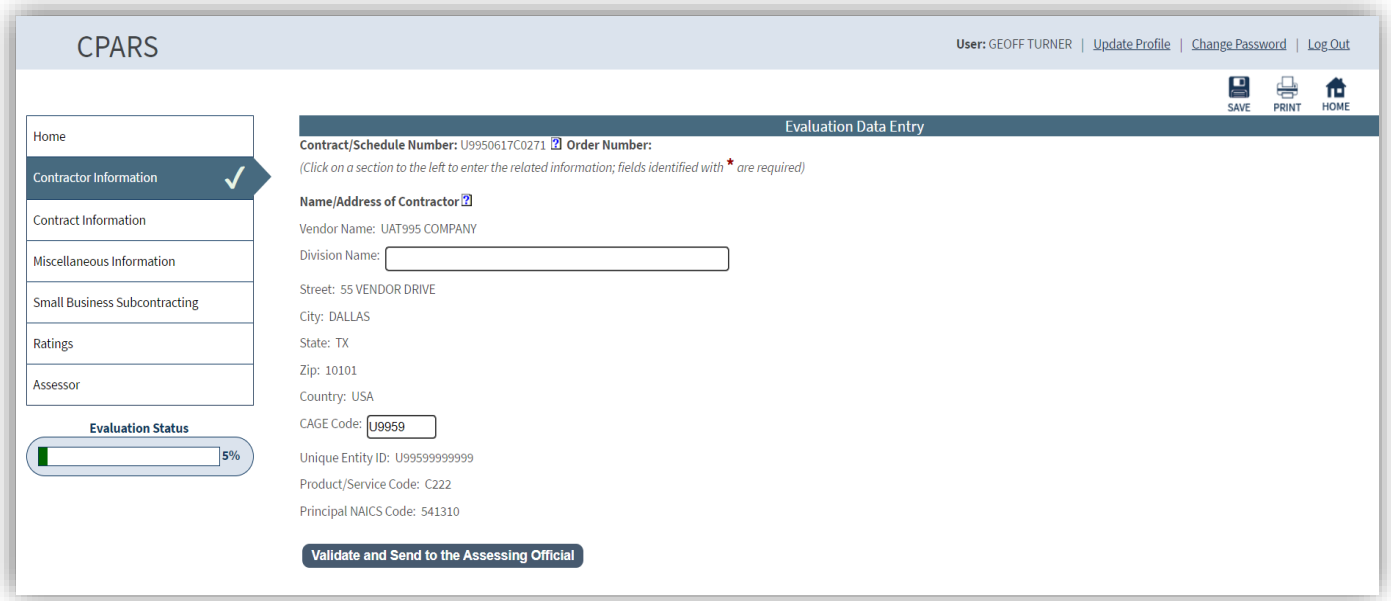
NOTE: The Due date is the date the evaluation for that Period of Performance (POP) is due. The date is the POP end date plus 120 days.

Action Required: "Update, Send to Assessing Official": Once the Focal Point has registered a contract/order and whenever an Interim evaluation for a contract/order is closed by the Assessing Official or Reviewing Official, that contract/order will automatically display on the Assessing Official Representative's To-Do List (if there is an Assessing Official Representative assigned) with an Action Required of "**Update, Send to Assessing Official**". This option allows the Assessing Official Representative to review and process evaluations that have been automatically generated when a contract/order is registered or when an Interim evaluation for the contract/order is closed, as well as those evaluations previously initiated by an Assessing Official Representative or returned by the Assessing Official.

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

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

NOTE: If the contract/order was Auto Registered by the Focal Point, the basic contract registration information cannot be manually edited. This includes cases where the record was manually registered but existed in FPDS and the Refresh from FPDS button was used. If these fields need to be updated, they will need to be updated in FPDS.



The Contractor Name/Address Section is open above. To initiate the evaluation, the Assessing Official Representative will need to fill out all the required sections and fields.

A status tracker and completion checkmarks will indicate where the user is in the process of writing the evaluation. These indicators will assist the AOR to quickly identify how far along they are in the workflow process and how much more needs to be completed before they will be able to send the evaluation to the next level in the workflow.

A green check mark will display to the right of the box at each section when the mandatory and validated information on that screen has been entered and the user moves to another section. If the mandatory fields (identified with a red asterisk *) are not completed and the user moves to another section, the green check mark will not appear. The green checkmark indicates that the mandatory and validated information on that section is complete.

The completion status bar, with a percentage of complete, will display under the list of sections in the Evaluation Data Entry Screens called “Evaluation Status”. This status bar and percentage will update as the user moves through the different sections of the evaluation data entry process. If the mandatory fields are not completed and the user moves to another section, the status bar and percentage will not change. When the user completes all required information for that section and moves to the next section, the status bar increases and displays the applicable percentage.

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 on the **OK** button to view the Evaluation in HTML or click **Cancel** to close the message from the HTML view. The Assessing Official Representative is now locked out of the evaluation and may now only view the evaluation.

Dashboard

This option provides the Assessing Official Representative with a variety of reports depending on the user’s access level. These reports are used to help users monitor the status of the CPARS process.
(See Dashboard Section for more specific information)

Initiate/Edit/Delete Record

This option allows the Assessing Official Representative to register/update contracts, and initiate or delete evaluations. To access the Initiate/Edit/Delete Record options, click the **Initiate/Edit/Delete Record option**. The Initiate/Edit/Delete Record menu options display.

Delete an Evaluation/Contract

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 **Delete an Evaluation/Contract**. The Delete an Evaluation/Contract selection screen displays. The evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Evaluation Confirmation screen will display. Verify the correct evaluation is about to be deleted from the CPARS database. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete an Incomplete Evaluation selection screen.

NOTE: Running an **Evaluations/Contract Status Report** will list all evaluations the Assessing Official Representative is able to **Delete**. **(See Evaluations/Contract Status Report Section for more specific information)**

Register/Update a Contract

This option allows an Assessing Official Representative to manually input and update basic contract/order information into CPARS that does not exist in FPDS. This option also allows an Assessing Official Representative to register a contract that exists in FPDS but is below the minimum dollar threshold required to exist in Auto Register.

The contract/order must be registered within 30 days after contract/order award. To register or update a contract/order, click on **Register/Update a Contract**. The Contract Registration data entry screen will display. If the contract/order exists in FPDS, CPARS will populate the data available from FPDS and these fields will be locked down and can't be changed. If the contract/order does not exist in FPDS the Assessing Official Representative will be required to enter the required data.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box and the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Unique Entity ID that is applicable to the contract/order to be registered and click on the **Look Up and Populate** button and the Contract Registration data entry screen will be updated with the contractor's Unique Entity ID, name, and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*****). The blue question mark (**?**) identifies that online help is available for the data entry field. The **sections** provide additional data entry boxes. Click each **section** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided, click the **Save** icon located in the top right corner of the data entry screen. Click the **OK** button.

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

To update a contract/order that has already been registered enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box. Click the **Continue** button; the Contract Registration data entry screen displays and will display the previously registered information. Click each section and update the contract/order registration fields accordingly. If the contract was Auto Registered, fields originating from FPDS will be locked down and can't be changed. Once updated, click the **Save** icon located in the top right corner of the data entry screen. Click the **OK** button.

To return to the Assessing Official Representative Home screen, click either the **Home** menu option or the **Home** icon. **Home** does not save any information that has been entered. If the contract was originally manually registered, but now exists in FPDS, you will also see a **Refresh Contract Data from FPDS** button. Clicking on this button will go to FPDS and get the current data to update the Contract Registration fields if applicable.

NOTE: Using the **Refresh Contract Data from FPDS** button will not update any evaluations in process.

Initiate an Evaluation

This option allows the Assessing Official Representative to initiate the evaluation process by entering proposed ratings and narratives. To initiate an evaluation, click on **Initiate an Evaluation**. The Initiate an Evaluation data entry screen will display. When the evaluation is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. If the evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **and** the order number in the **Order Number** box and

click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract/order information and any miscellaneous information entered during contract/order registration.
NOTE: The contract/order must be registered before an evaluation can be initiated. The **sections** provide additional data entry fields. Click each section to complete the Initiate an Evaluation process.

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

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

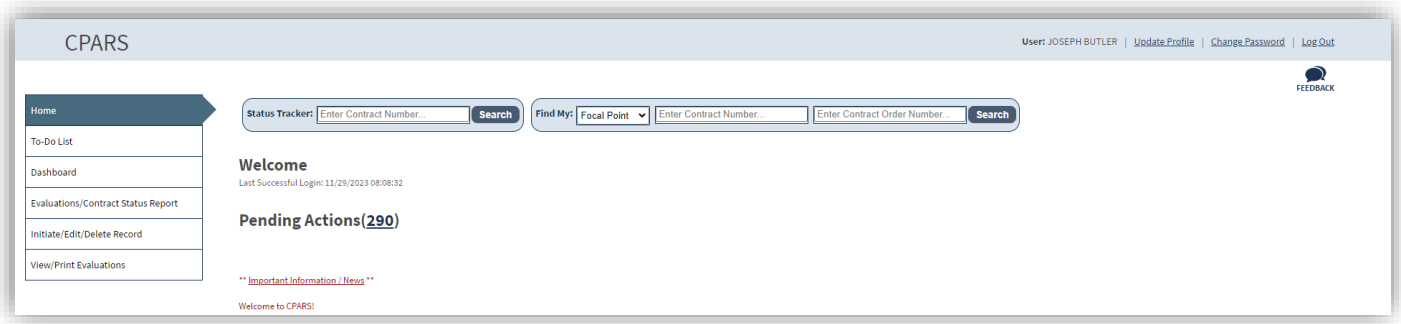
Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field. A red checkmark located within any of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

View/Print Evaluations

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

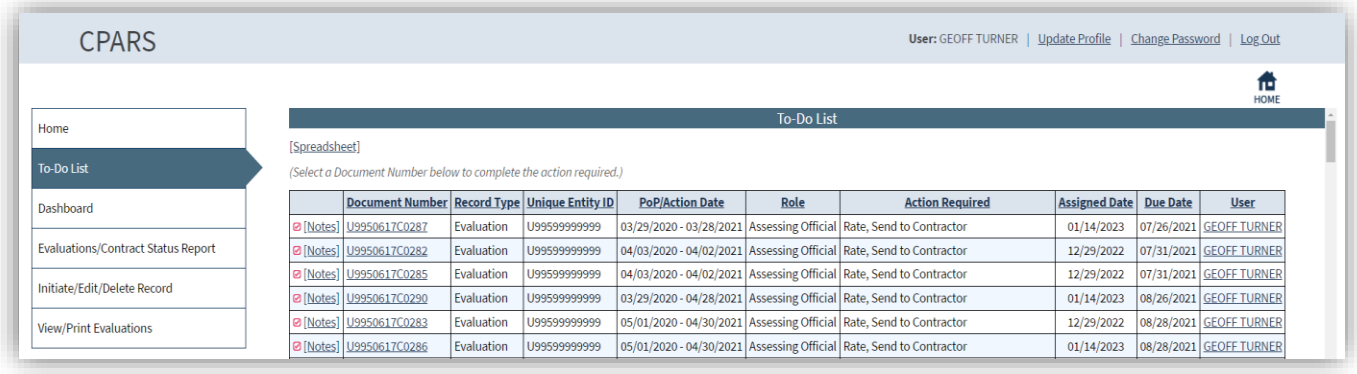
Assessing Official

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



Pending Actions/To-Do List

This option is a quick and easy method for the Assessing Official to see all evaluations that are awaiting his/her action. Click the **Number** next to pending Actions or click **To-Do List**. The list includes evaluations that are due to be Rated and sent to the Contractor, have been previously saved by an Assessing Official, evaluations that have been forwarded by the Assessing Official Representative, evaluations returned by the Contractor Representative, evaluations that have not been returned by the Contractor Representative within the 60-day comment period, and evaluations that have been returned by the Review Official. Click on the appropriate contract/order number and the evaluation is opened in data entry format ready for the Assessing Official to complete the required action. The evaluation status will determine the **To-Do Lists Action Required.** Each of the Assessing Official’s **Actions Required** are described in further detail below.



	Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
[Notes]	U9950617C0287	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	07/26/2021	GEOFF TURNER
[Notes]	U9950617C0282	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	GEOFF TURNER
[Notes]	U9950617C0285	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	GEOFF TURNER
[Notes]	U9950617C0290	Evaluation	U99599999999	03/29/2020 - 04/28/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	08/26/2021	GEOFF TURNER
[Notes]	U9950617C0283	Evaluation	U99599999999	05/01/2020 - 04/30/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	08/28/2021	GEOFF TURNER
[Notes]	U9950617C0286	Evaluation	U99599999999	05/01/2020 - 04/30/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	08/28/2021	GEOFF TURNER

NOTE: The Due date is the date the evaluation for that Period of Performance (POP) is due. The date is the POP end date plus 120 days.

Action Required: “Rate, Send to Contractor”: Once the Focal Point has registered a contract/order and whenever an Interim evaluation for a contract/order is closed by the Assessing Official or Reviewing Official, that contract/order will automatically display on the Assessing Official’s To-Do List (if there is No Assessing Official Representative assigned) with an Action Required of **“Update, Send to Contractor”**. This option allows the Assessing Official to review and process evaluations that have been automatically generated when a contract/order is registered, when an Interim evaluation for the contract/order is closed, as well as those evaluations previously saved by an Assessing Official. To save a partially complete evaluation, the Report Type and Period of Performance must have been filled in.

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

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

The evaluation screen shot below has the **Assessor Section** selected. The Assessing Official could return it to the Assessing Official Representative for further input by selecting the **Return to the Assessing Official Representative** button.

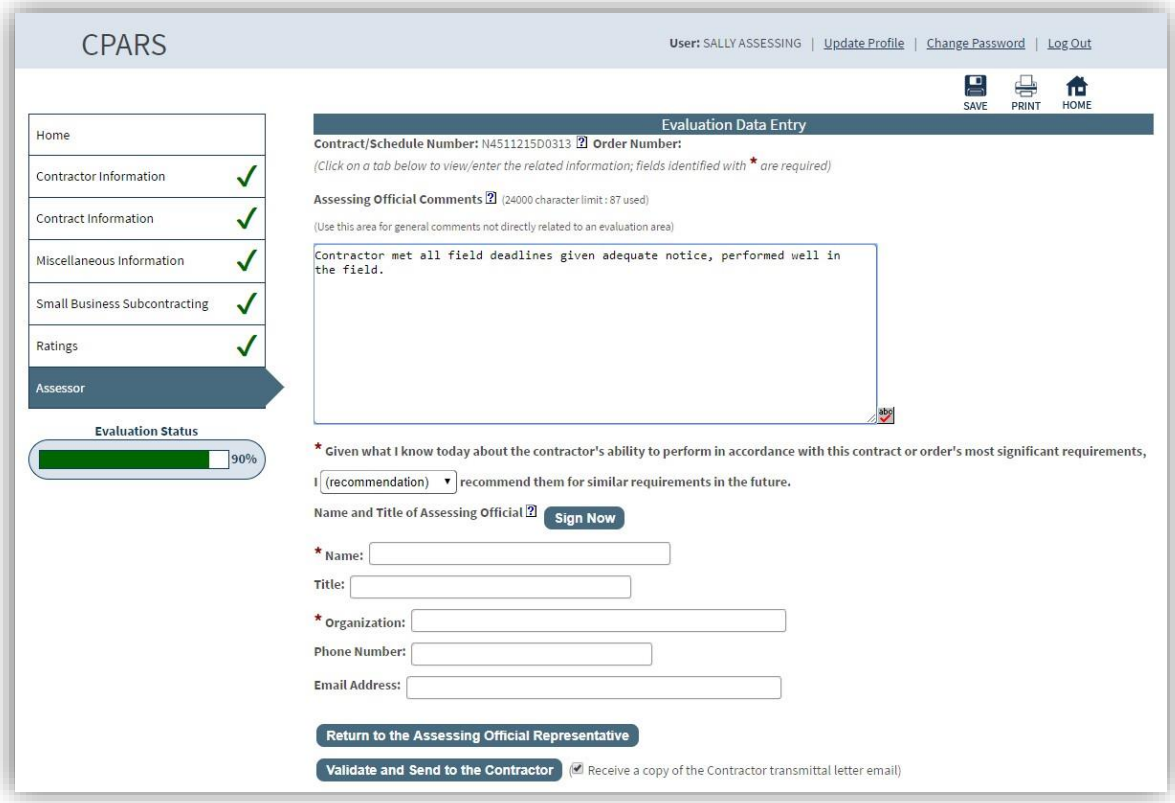
A status tracker and completion checkmarks will indicate where the user is in the process of writing the evaluation. These indicators will assist the AO to quickly identify how far along they are in the workflow process and how much more needs to be completed before they will be able to send the evaluation to the next level in the workflow.

A green check mark will display to the right of the box at each section when the mandatory and validated information on that screen has been entered and the user moves to another section. If the mandatory fields (identified with a red asterisk *) are not completed and the user moves to another section, the green check mark will not appear. The green checkmark indicates that the mandatory and validated information on that section is complete.

The completion status bar, with a percentage of complete, will display under the list of sections in the Evaluation Data Entry Screens called “Evaluation Status”. This status bar and percentage will update as the user moves through the different sections of the evaluation data entry process. If the mandatory fields are not completed and the user moves to another section, the status bar and percentage will not change. When the user completes all required information for that section and moves to the next section, the status bar increases and displays the applicable percentage.

If the Assessing Official is satisfied with the Assessing Official Representative’s ratings and remarks or has made his/her final edits and validations to the evaluation, then he/she will fill out all the required sections and fields below and select the **Validate and Send to the Contractor** button.

NOTE: If the contract/order was Auto Registered by the Focal Point, the basic contract registration information cannot be manually edited. This includes cases where the record was manually registered but existed in FPDS and the Refresh from FPDS button was used. If these fields need to be updated, they will need to be updated in FPDS.

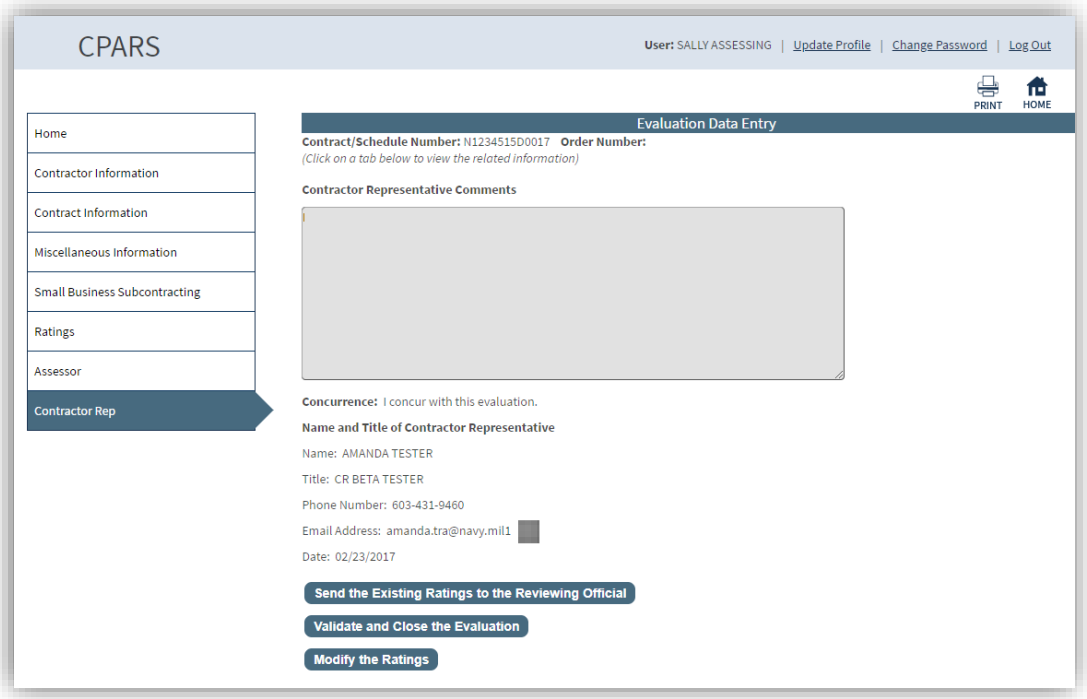


Action Required: "Finalize Ratings": This option allows the Assessing Official to review evaluations that have been returned by the Contractor Representative, are overdue from the Contractor Representative (60-day comment period expired), or have been returned by the Reviewing Official. The Assessing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

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

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

The evaluation screen shot below has the **Contractor Rep Section** selected. The Assessing Official reviews the entire evaluation by clicking on each **section**. Review contractor comments by clicking on the ratings sections and Contractor Rep section.



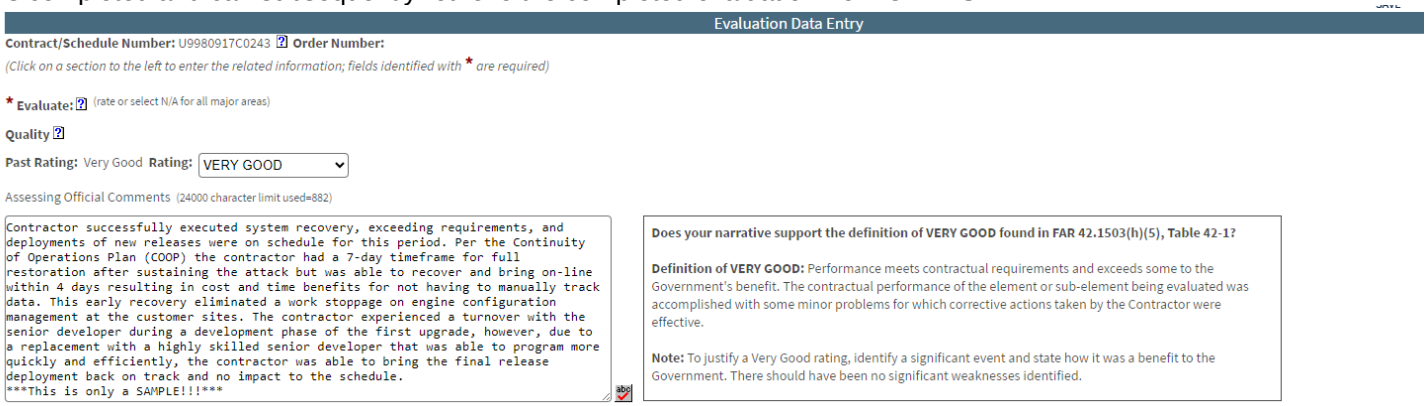
Evaluations completed without contractor comment will be automatically annotated in the Contractor Comments section of the HTML view, with the following system-generated statement: "The report was delivered/received by the contractor on MM/DD/YYYY. The contractor neither signed nor offered comment in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

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

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

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

If the **Modify the Ratings** button is selected, both the original evaluation (including contractor comments) and the modified evaluation are stored in CPARS (notice sections in example below). Whenever a modified evaluation is viewed, users have the option to view/print the original evaluation (Original Ratings). If Modify the Ratings is selected, the Assessing Official will make the desired changes on the Modified Ratings section and provide supporting narratives in the white spaces provided. Once completed with the Modified Ratings, the Assessing Official has the option to **Validate and Send to the Reviewing Official** or **Validate and Close the Evaluation** (if not contentious). The Contractor Representative will receive an automated email notification whenever an evaluation is completed and can subsequently retrieve the completed evaluation from CPARS.



Dashboard

This option provides the Assessing Official with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS process. (See Dashboard Section for more specific information)

Initiate/Edit/Delete Record

This option allows the Assessing Official to register/update contracts, initiate or delete evaluations, and take over an evaluation. To access the Initiate/Edit/Delete Record options, click the **Initiate/Edit/Delete Record option**. The Initiate/Edit/Delete Record menu options display.

Delete an Evaluation/Contract

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 **Delete an Evaluation/Contract**. The Delete an Evaluation/Contract selection screen displays. The evaluations available for deletion will be displayed. Click on the **Delete** link adjacent to the applicable contract/order number to be deleted. The Delete Evaluation Confirmation screen will display. Verify the correct evaluation is about to be deleted from the CPARS database. Select the **Confirm Delete** button. Select the **Cancel** button to return to the Delete an Incomplete Evaluation selection screen.

NOTE: Running an **Evaluations/Contract Status Report** will list all evaluations the Assessing Official is able to **Delete. (See Evaluations/Contract Status Report Section for more specific information)**

Register/Update a Contract

This option allows an Assessing Official to manually input basic contract/order information into CPARS that does not exist in FPDS or is below the minimum dollar threshold requiring an evaluation. The contract/order must be registered within 30 days after contract/order award. To register or update a contract/order, click on **Register/Update a Contract**. The Register/Update a Contract data entry screen will display.

To register an evaluation that is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. When an evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box and the order number in the **Order Number** box and click the **Continue** button. In either case, the Contract Registration data entry screen will display. Enter the Unique Entity ID that is applicable to the contract/order to be registered and click on the **Look Up and Populate** button and the Contract Registration data entry screen will be updated with the contractor's Unique Entity ID, name, and address. Continue with the contract/order registration process by entering basic contract/order information in the spaces provided. Required fields are identified with a red asterisk (*****). The blue question mark (**?**) identifies that online help is available for the data entry field. The **sections** provide additional data entry boxes. Click each **section** and enter data in of the required fields (*****) to register and save the contract/order. Once all required information is provided,

click the **Save** icon located in the top right corner of the data entry screen. Click the **OK** button.

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

To update a contract/order that has already been registered enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box and click the **Continue** button. The Contract Registration data entry screen displays and will display the previously registered information. Click each **section** and update the contract/order registration fields accordingly. Once updated, click the **Save** icon button located in the top right corner. Click the **OK** button. To return to the Assessing Official Home screen, click either the **Home** menu option or the **Home** icon. **Home** 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 **Initiate an Evaluation**. The Initiate an Evaluation data entry screen will display. When the evaluation is to be completed at the contract level, enter the contract number in the **Contract Number** box and click the **Continue** button. If the evaluation is to be completed at the Task/Delivery Order level, enter the contract number in the **Contract Number** box **and** the order number in the **Order Number** box and click the **Continue** button. In either case, the data entry screens display and are pre-filled with the basic contract/order information and any miscellaneous information entered during contract registration.

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

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

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

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

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

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

Prior to forwarding the evaluation to the Contractor Representative, the Assessing Official must enter their identifying information. Click the **Sign Now** button on the Assessor Section to populate the data from the User Profile. When the proposed ratings and remarks are ready for the Contractor Representative's review and comment, click the **Validate and Send to the Contractor** button. All required fields must be completed at this time.
If the Assessing Official would like to receive a copy of the Contractor Transmittal Letter, the adjacent check box should be checked. The Contractor Representative will be notified via email that an evaluation is ready for review and comment. A message will appear stating that the Evaluation has been saved and a notice has been sent to the Contractor Representative. Click on the **OK** button to view the Evaluation in HTML or click **Cancel** to close the message from the HTML view. The Assessing Official is now locked out of the evaluation and may only view the evaluation.

NOTE: The evaluation will not be forwarded if a Contractor Representative 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.

Take Over an Evaluation

This option allows the Assessing Official to take over an evaluation that is at the Initiated status waiting for the Assessing Official Rep to process to the Drafted status. Taking over the evaluation will move the evaluation to the Drafted status allowing the Assessing Official to work on the evaluation and move forward in the workflow process.

To take over an evaluation, click **Take Over an Evaluation**. The Take Over an Evaluation screen displays. The evaluations available to take over will be displayed. Click on the Contract Number of the evaluation you wish to take over. When the evaluation opens, it will be in edit mode and will now appear on the To-do List for all Assessing Officials that have access to that contract number. If no evaluations display, there are none at the Initiated status that the Assessing Official has access to.

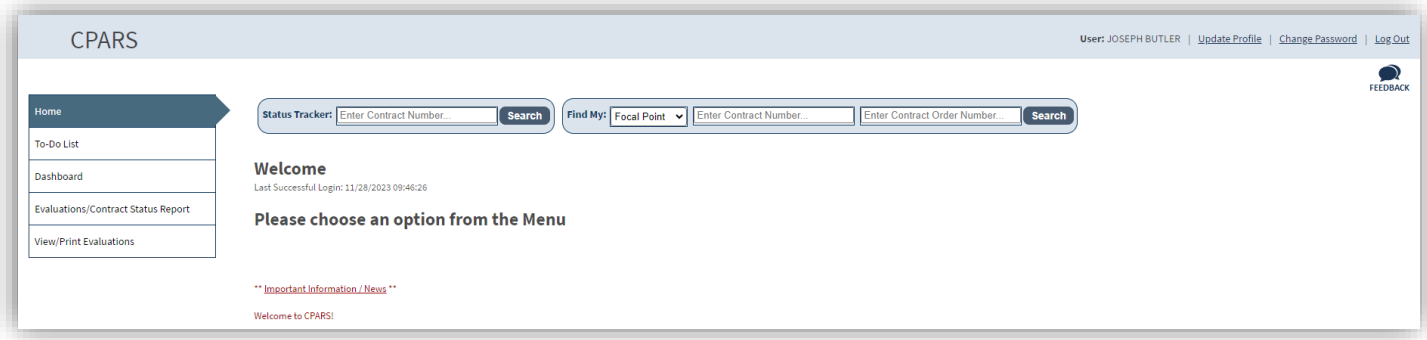
NOTE: Taking over the evaluation by the Assessing Official will lock out all Assessing Official Reps from editing the evaluation.

View/Print Evaluations

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

Contractor Representative

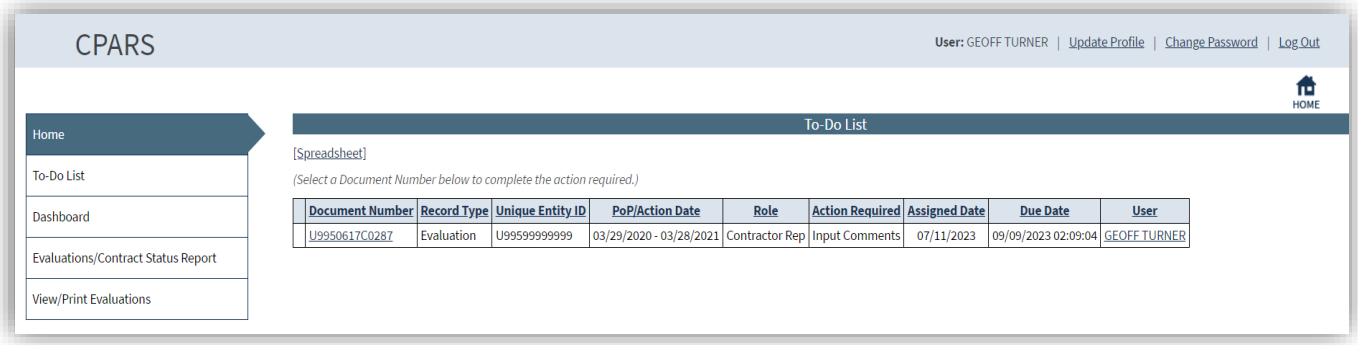
The Contractor Representative is responsible for reviewing and commenting on proposed ratings and remarks for all evaluations forwarded by the Assessing Official. An evaluation is required to be prepared by the Government to document contractor performance for each contract/order that exceeds specified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



Pending Actions/To-Do List

This option is used by the Contractor Representative to review and input comments on evaluations that have been forwarded by the Assessing Official. Click on the **Number** next to Pending Actions or click **To-Do List**. Then locate and click on the contract/order number of the evaluation that has been forwarded for review and comment. Each of the Contractor Representative's **Actions Required** are described in further detail below.

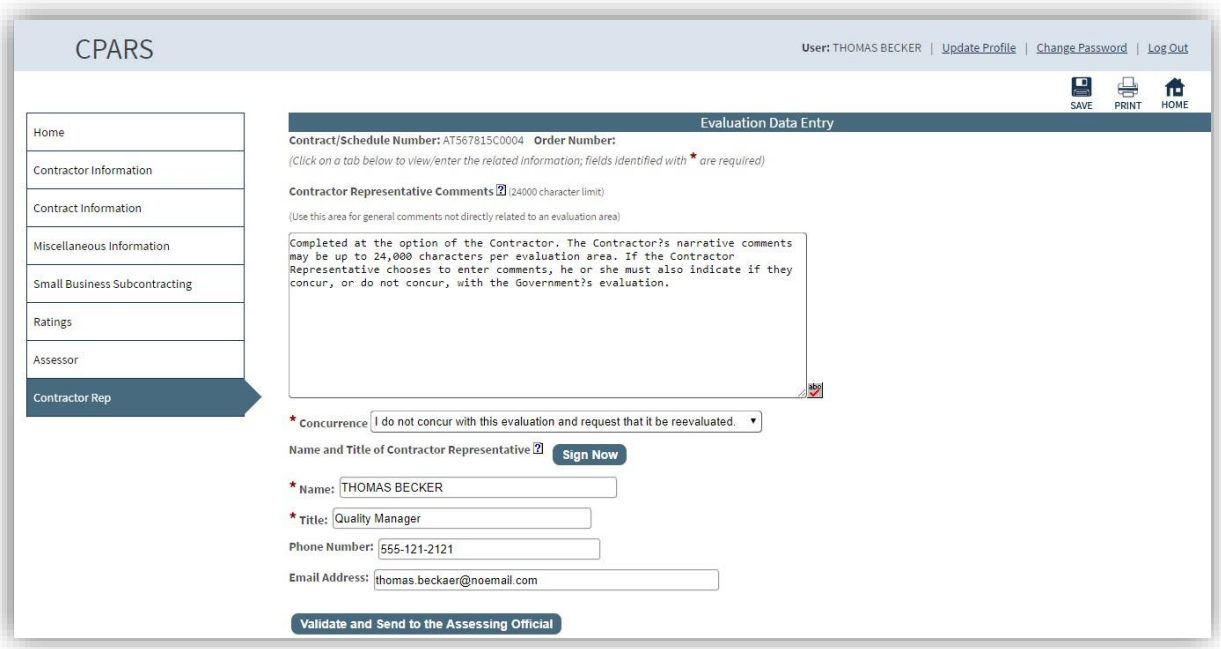
Action Required: "Input Comments", the Contractor Representative is allotted a 60-day review/comment period starting from the date **and** time the Assessing Official forwarded the evaluation. If the Contractor Representative does not provide comments within the 60-day period, the evaluation is then returned to the Assessing Official and the Contractor Representative no longer has access to enter comments. The Government will have to complete the evaluation without the Contractor Representative comments.



NOTE: The Due date is the date that contractor comments are due. The date is the Assessing Official signature date **and** time plus 60 days.

The evaluation will open in read-only format except for specific fields located on the Ratings and Contractor Rep sections. A red checkmark ☑ located within any of the Rating Sections indicates the element has been rated for the specific performance area. Click on each of the Sections to review the proposed ratings and remarks. After the evaluation has been reviewed, the Contractor Representative clicks the Contractor Rep Section 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 section 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** icon button in the top right corner. To return to the Contractor Representative Home screen, click either the **Home** menu option or the **Home** icon. **Home** does not save any 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 Section has been completed, click the **Validate and Send to the Assessing Official** button to save the information and to return the evaluation to the Assessing Official. A notice will be sent to the Assessing Official. Click the **OK** button. A notice that the evaluation has been sent to the Assessing Official will appear with an option to **View the Evaluation**. Click **OK** to view the evaluation in HTML or **Cancel** to return Home.



Dashboard

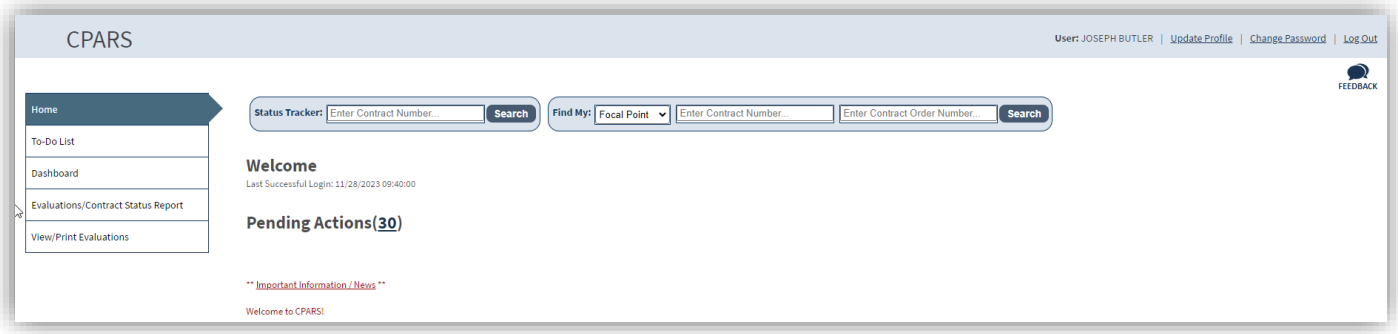
This option provides the Contractor Rep with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS process.
(See Dashboard Section for more specific information)

View/Print Evaluations

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

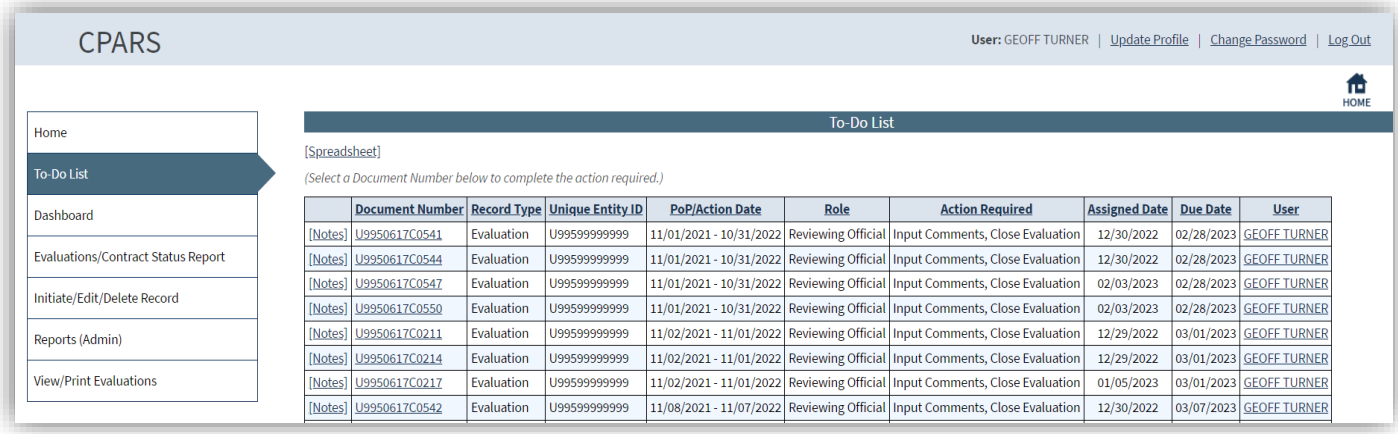
Reviewing Official

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



Pending Actions/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 Number next to Pending Actions or click **To-Do List.** Then locate and click on the contract/order number of the evaluation that has been forwarded for review and closure. Each of the reviewing Official's **Actions Required** are described in further detail below.



	Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
[Notes]	U9950617C0541	Evaluation	U99599999999	11/01/2021 - 10/31/2022	Reviewing Official	Input Comments, Close Evaluation	12/30/2022	02/28/2023	GEOFF TURNER
[Notes]	U9950617C0544	Evaluation	U99599999999	11/01/2021 - 10/31/2022	Reviewing Official	Input Comments, Close Evaluation	12/30/2022	02/28/2023	GEOFF TURNER
[Notes]	U9950617C0547	Evaluation	U99599999999	11/01/2021 - 10/31/2022	Reviewing Official	Input Comments, Close Evaluation	02/03/2023	02/28/2023	GEOFF TURNER
[Notes]	U9950617C0550	Evaluation	U99599999999	11/01/2021 - 10/31/2022	Reviewing Official	Input Comments, Close Evaluation	02/03/2023	02/28/2023	GEOFF TURNER
[Notes]	U9950617C0211	Evaluation	U99599999999	11/02/2021 - 11/01/2022	Reviewing Official	Input Comments, Close Evaluation	12/29/2022	03/01/2023	GEOFF TURNER
[Notes]	U9950617C0214	Evaluation	U99599999999	11/02/2021 - 11/01/2022	Reviewing Official	Input Comments, Close Evaluation	12/29/2022	03/01/2023	GEOFF TURNER
[Notes]	U9950617C0217	Evaluation	U99599999999	11/02/2021 - 11/01/2022	Reviewing Official	Input Comments, Close Evaluation	01/05/2023	03/01/2023	GEOFF TURNER
[Notes]	U9950617C0542	Evaluation	U99599999999	11/08/2021 - 11/07/2022	Reviewing Official	Input Comments, Close Evaluation	12/30/2022	03/07/2023	GEOFF TURNER

NOTE: The Due date is the date the evaluation for that Period of Performance (POP) is due. The date is the POP end date plus 120 days.

Action Required: "Input Comments, Close Evaluation". This option allows the Reviewing Official to review evaluations that have been forwarded for review and closure by the Assessing Official. The Reviewing Official has the option to **Return to the Assessing Official** or **Validate and Close the Evaluation.**

Locate and click on the contract/order number of the evaluation that has been forwarded for review, comment, and completion. The evaluation will open in read-only format except for the fields located on the Reviewer Section. Fields on the Reviewer Section 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 **Rating Sections** indicates that element has been rated for the specific performance area.

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

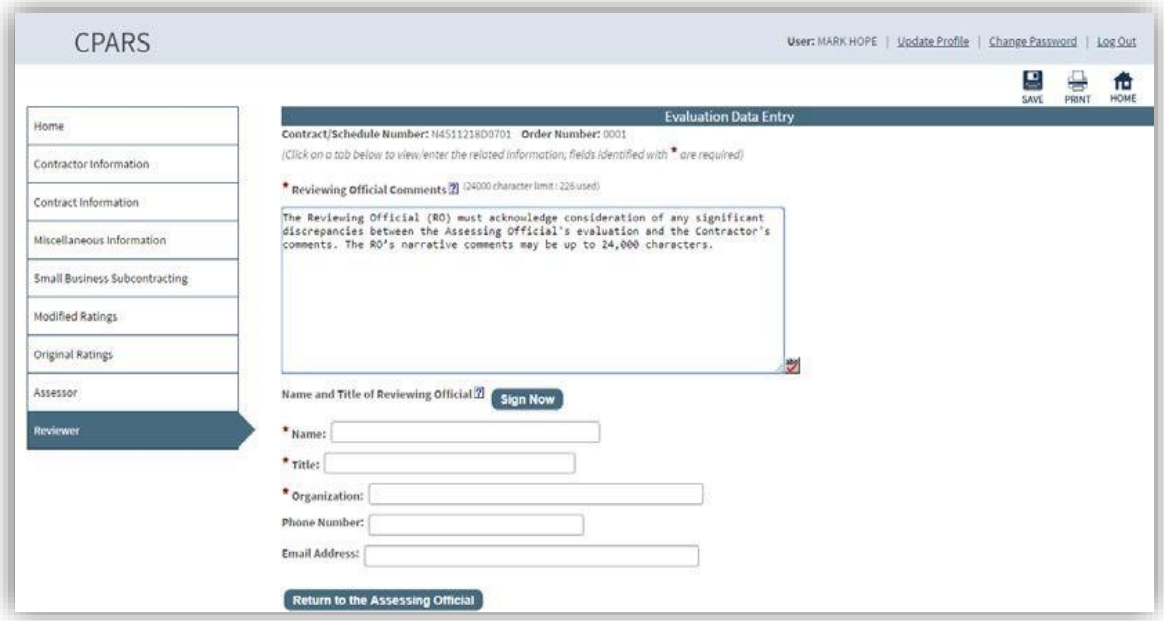
Click on each of the **Sections** to review the entire evaluation. The Reviewing Official has the option to click on the

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 Section and enters their comments in the **Reviewing Official Comments** field. The Reviewing Official must acknowledge consideration of any significant discrepancies between the Assessing Official's evaluation and the Contractor's remarks. To save partially completed remarks and information, click the **Save** icon in the top right corner.

To return to the Reviewing Official Home screen, click either the **Home** menu option or the **Home** icon. **Home** does not save any 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 Section 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 Home Screen. Click the **OK** button to confirm that the evaluation was closed. An automatic email notice is sent to the Contractor Representative. Click **Home** to return to the Reviewing Official Home Screen.

NOTE: If the Assessing Official modified the evaluation, the Contractor section is moved to the Original Ratings section.



Dashboard

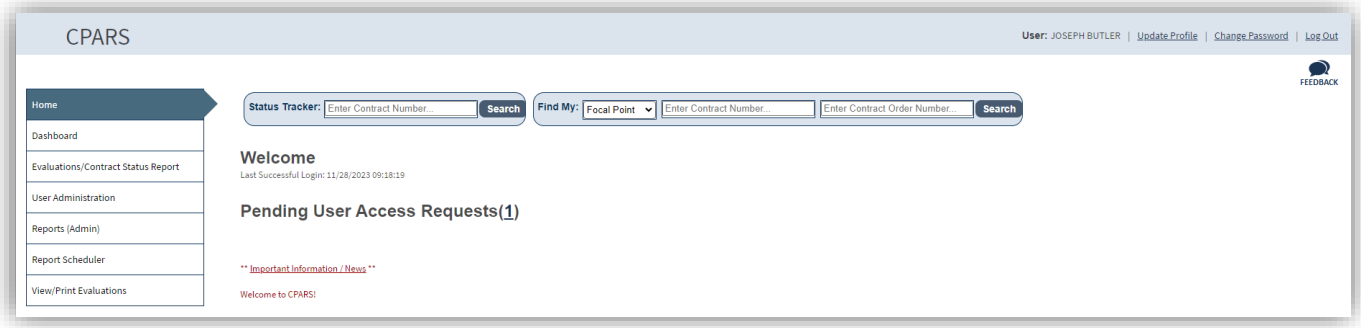
This option provides the Reviewing Official with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS process.
(See Dashboard Section for more specific information)

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 **View/Print Evaluations** and the View/Print Evaluations data entry screen displays. Enter the contract number in the **Contract Number** box and the order number, if applicable, in the **Order Number** box, and click the **Continue** button, a list of evaluations will display. Click on the contract number of the evaluation to be viewed, it will open in HTML format. Once the evaluation is displayed, the user is able to view and/or print the evaluation on a local printer.

Department Point of Contact

This access level offers a manager complete visibility of the CPARS and Integrity processes across an entire department. In addition, this level is used to give access to Agency Points of Contact (Agency POC) who require oversight of the CPARS process for specific organizations within the department. The Department Point of Contact (Department POC) is also able to view Status Reports, Evaluation Metrics Reports, Ratings Metrics Reports, Ad Hoc Reports, and Processing Times Reports. Department POC access is granted only upon completion of a CPARS Department POC Access Request located on the Access Info section on the CPARS website.



Dashboard

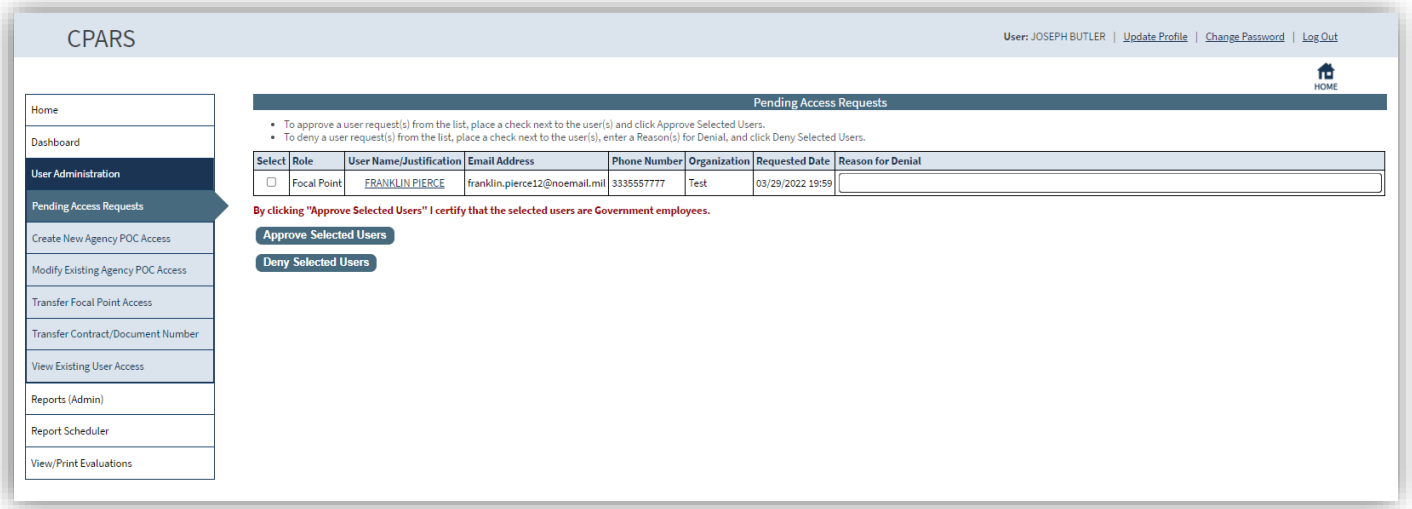
This option provides the Department POC with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS and Integrity processes.
(See Dashboard Section for more specific information)

User Administration

This option allows the Department POC to Approve/Deny Focal Point Access, transfer Focal Point Access, create and manage all Agency POC user accounts within the applicable department, and view existing Agency POCs and Focal Points. Each Agency POC will be given access to an Organization(s) within the department. To access the User Administration options, click the **User Administration option**. The User Administration menu options display.

Pending Access Requests

This option allows the Department POC to view a list of people requesting Focal Point access. The list will display: Role, User Name/Justification, Email Address, Phone Number, Organization, and Requested Date. Clicking on the User's Name allows the Department POC to view the user's profile information, including role, name, email address, title, organization, phone number, requested date, and justification.

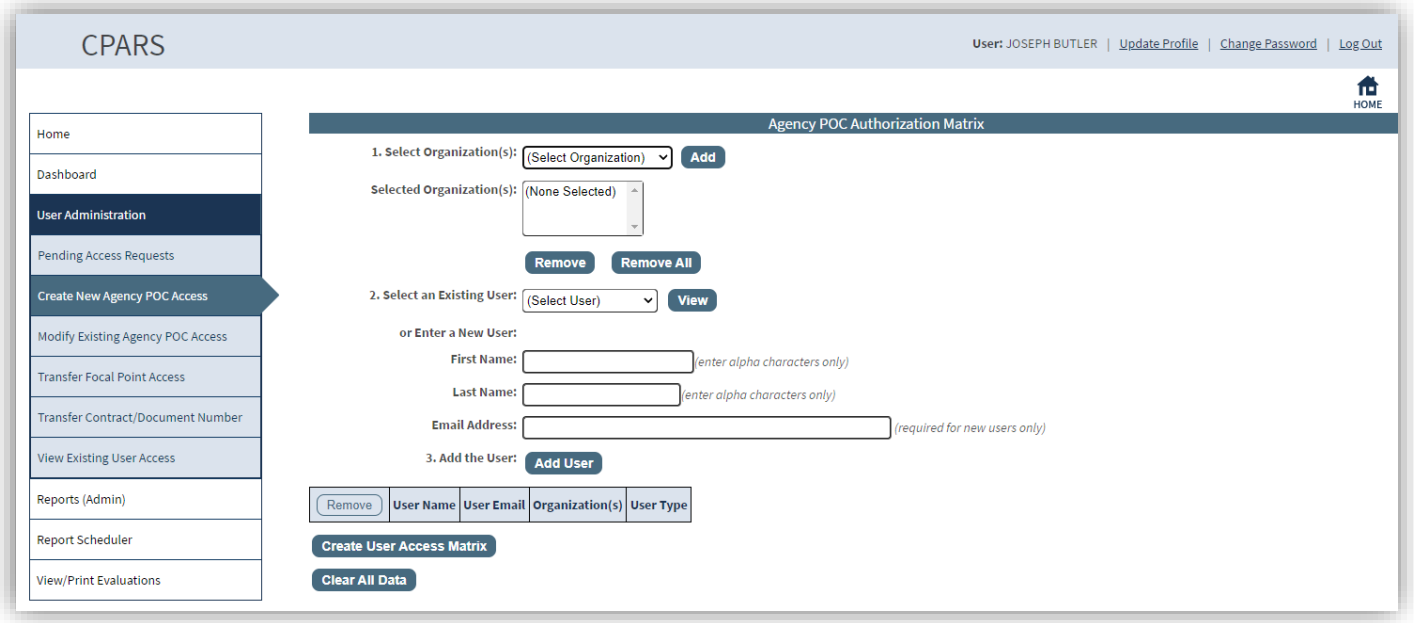


To grant the Requestor Focal Point Access, the Department POC checks the select box next to the Requestor's name and clicks the **Approve Selected Users** button.

To deny the Requestor Focal Point Access, the Department POC checks the select box next to the Requestor's name, enters a Reason for Denial, and clicks the **Deny Selected Users** button.

Create New Agency POC Access

To provide access to a new Agency POC, the Department POC clicks **Create New Agency POC Access**. The CPARS Agency POC Authorization Matrix displays.



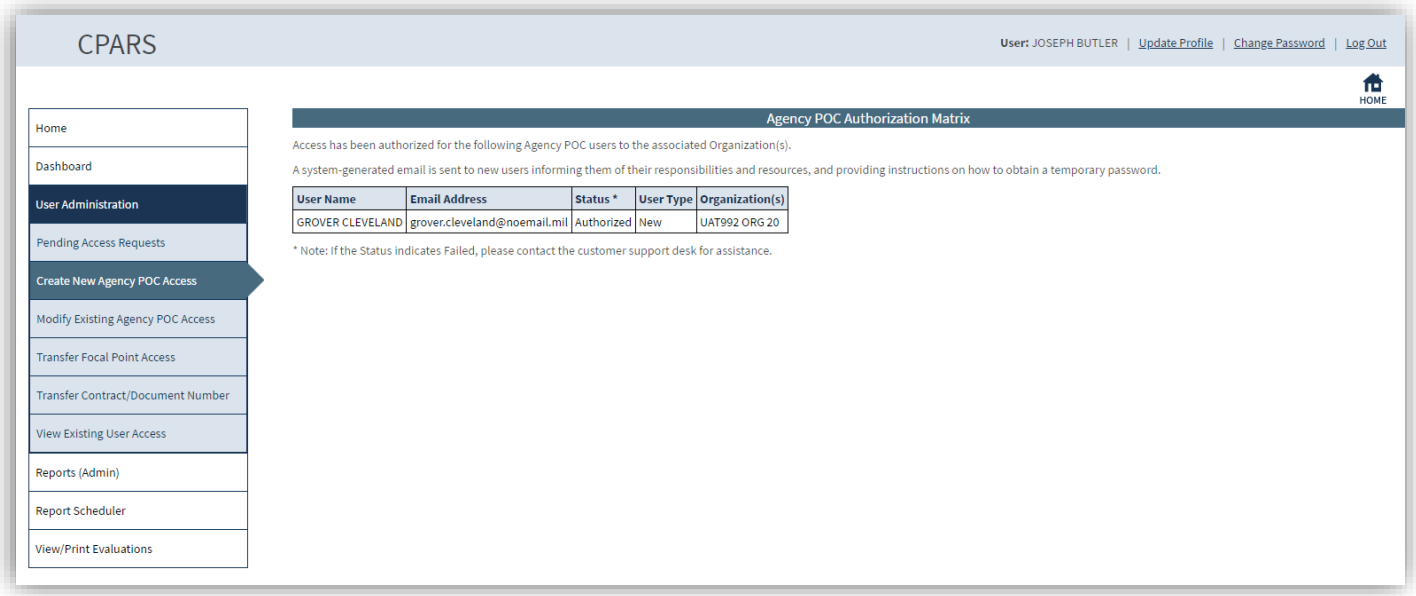
Assign Organization Access To An Existing User: In step 1, select an Organization from the **Select Organization(s)** drop-down box and then click the **Add** button. To delete an Organization from the **Selected Organization(s)** box, highlight the Organization and then click the **Remove** button. To delete all Organizations in the 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 the 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.

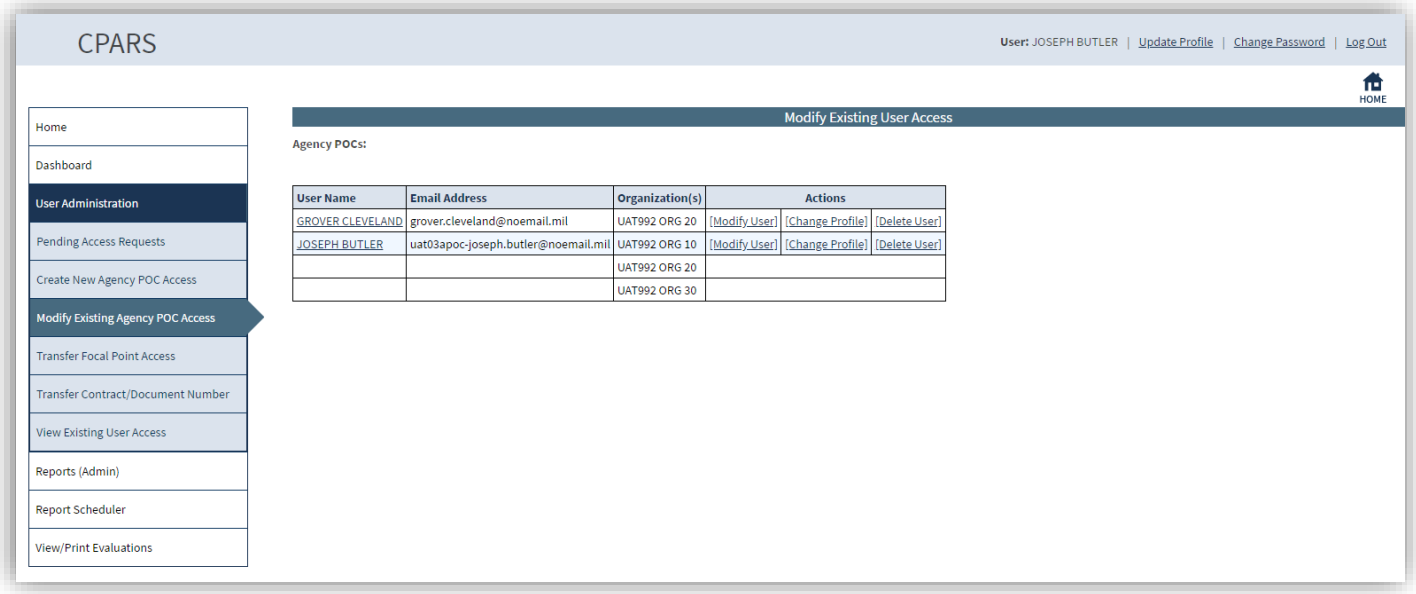
The **View** button allows the Department POC to view the existing user's name, organization, email address, and phone number. The Department POC can remove a user from Step 3 by clicking in the box adjacent to the name to be removed and then click **Remove**. The **Clear All Data** button clears ALL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

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



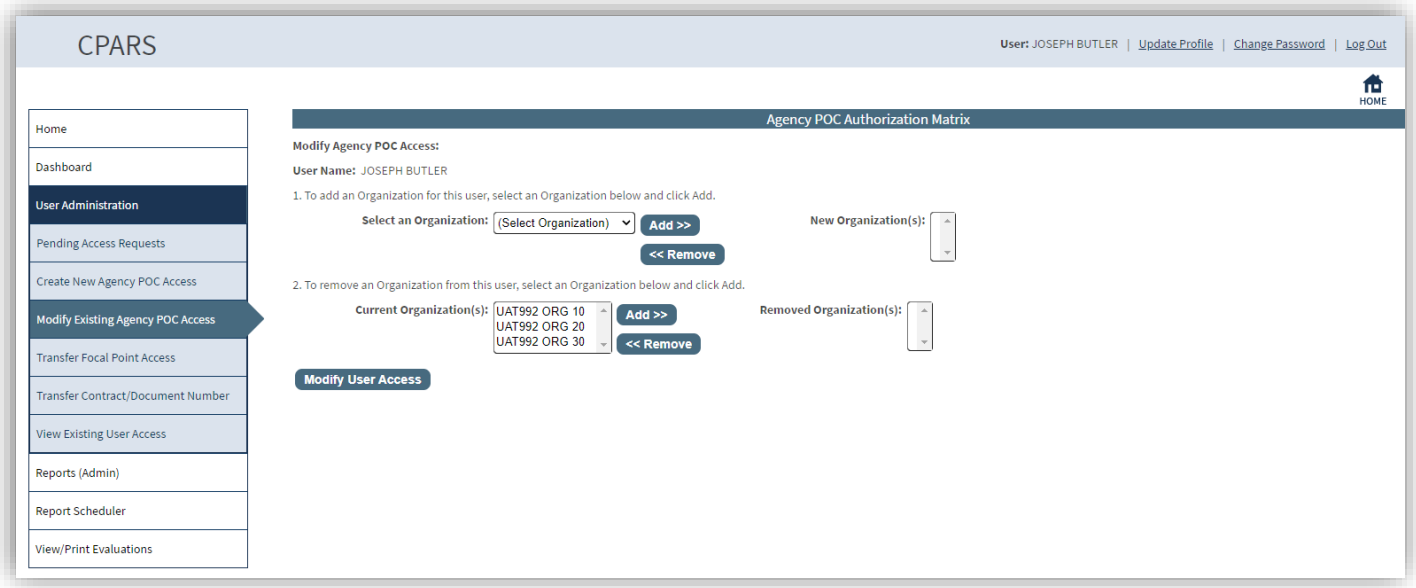
Modify Existing Agency POC Access

This option allows the Department POC to modify the access of his/her designated Agency POC(s), add or delete Organization(s) for an Agency POC or delete an Agency POC's user account when access is no longer required. Click **Modify Existing Agency POC Access** and the Modify Existing User Access screen displays.

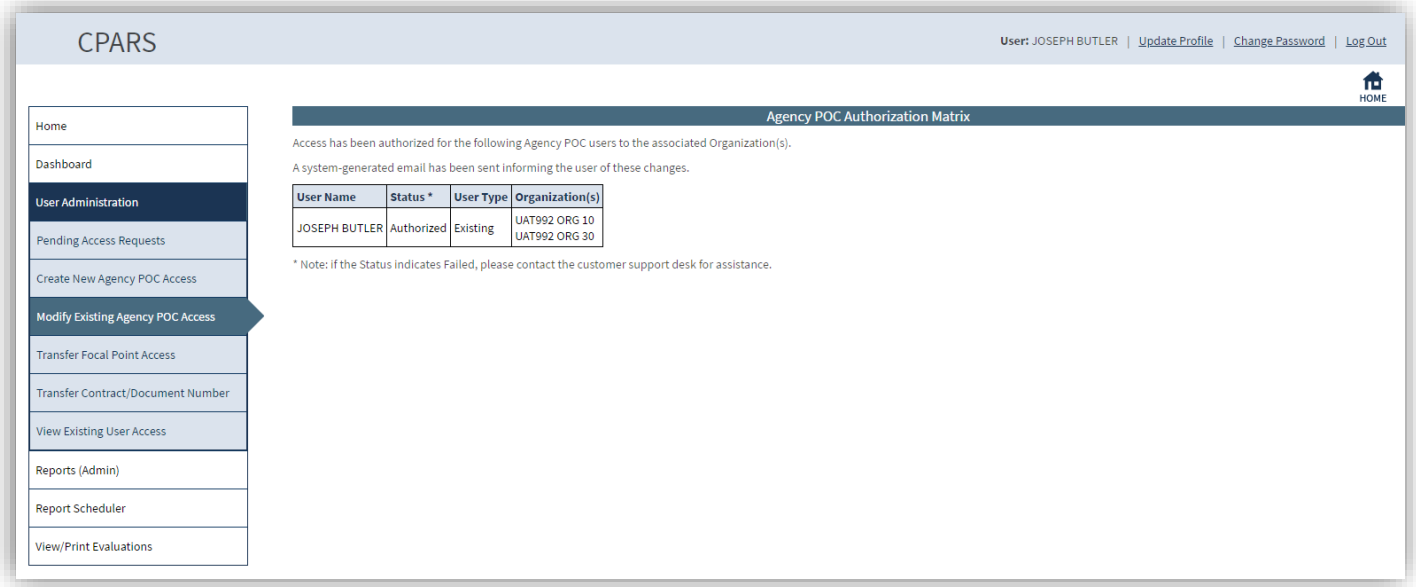


User Name – Click on the user's name to view the user's profile information, including name, title, organization, email address, and phone number. Click the **Close** button to return to previous screen.

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



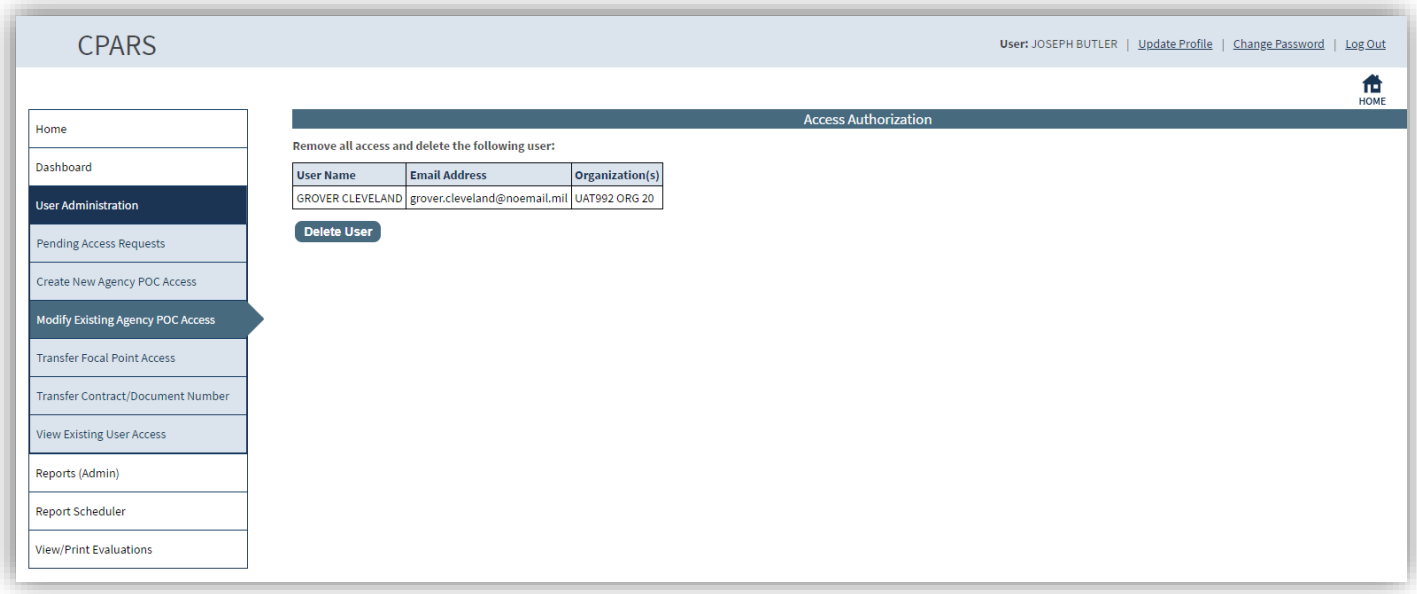
Review the authorization matrix to verify the information is correct. If the information is correct click the **Modify User Access** button. A confirmation screen will display identifying the Organization(s) the Agency POC has been authorized access to, and an email notification will be sent to the user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



NOTE: If the Department POC also holds Agency POC access, the Department POC will not have the options of View Profile and Delete User next to their Agency POC account.

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

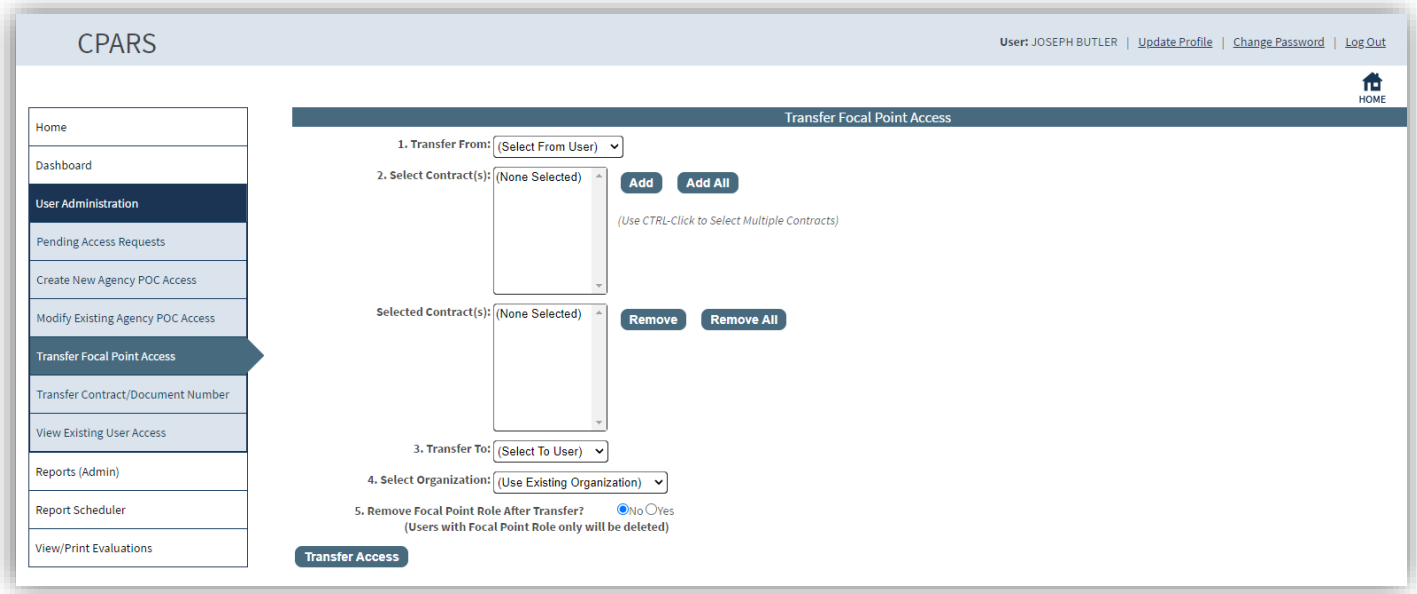
[Delete User] – This option is used to delete an Agency POC from CPARS. Click the **[Delete User]** link and the following screen displays:



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

Transfer Focal Point Access

This option allows the Department POC to transfer contracts/orders and users from one Focal Point to another and also gives the Department POC the ability to delete a Focal Point. To transfer a Focal Point, click **Transfer Focal Point Access**. The Transfer Focal Point Access screen will display.



In Step 1, select a Focal Point name from the **Transfer From** drop-down box.

In Step 2, select the specific contract(s)/order(s) to be transferred from the **Select Contract(s)** box. Multiple contracts/orders can be selected by holding the CTRL key and clicking each contract to be transferred. To select multiple contracts that are adjacent, click on the first contract, hold the SHIFT key, and then click on the last contract to be transferred. Once contracts/orders are selected click **Add** or select **Add All** to transfer all contracts/orders. If an incorrect contract/order is selected after clicking **Add**, highlight the incorrect contract/order in the **Selected Contract(s)** box and click on the **Remove** button. The **Remove All** button will remove all contracts/orders from the **Selected Contract(s)** box.

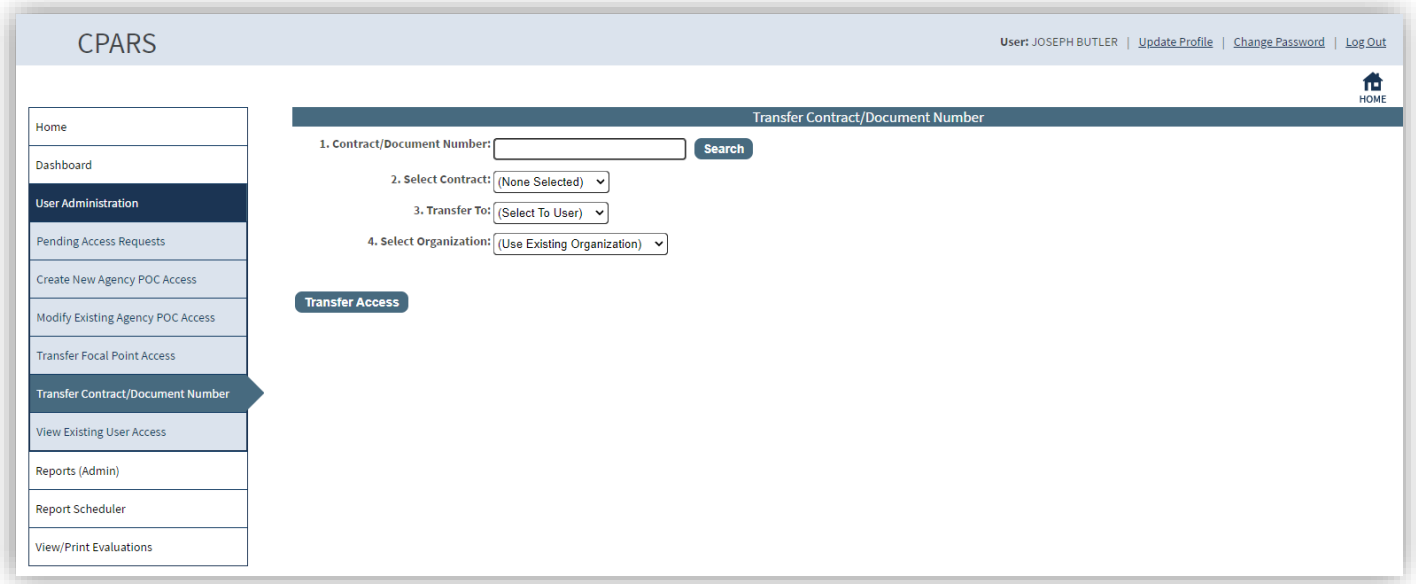
In Step 3, select a Focal Point name from the **Transfer To** drop-down.

In Step 4, if the organization on the contracts selected is changing, select the new organization from the **Select Organization** drop-down. Otherwise leave the default of Use Existing Organization selected.

In Step 5, the Department POC must choose Yes or No to delete the **Focal Point After Transfer**. This action will delete the user from the CPARS database, as long as the Focal Point has no other contracts or access assigned. Click the Transfer Access button to complete the transfer process.

Transfer Contract/Document Number

This option allows the Department POC the ability to transfer one Contract/Document Number at a time without having to scroll through contracts in the Transfer Focal Point option. This option allows to transfer a contract or Integrity record from one Focal Point to another Focal point.



In Step 1, enter the Contract/Document Number you wish to transfer from an existing Focal Point to another in the **Contract/Document Number** field and click on the **Search** button. If there is a contract/document that matches that number, it will appear in the drop-down in Step 2. If there is no Contract/Document Number that matches the data you entered, you will receive a message indicating this.

In Step 2, select the Contract/Document Number in the **Select Contract** drop-down. Depending on the Document/Contract Number entered, there may be multiple options available in Step 2.

In Step 3, select the Focal Point to transfer the Contract/Document Number to in the **Transfer To** drop-down.

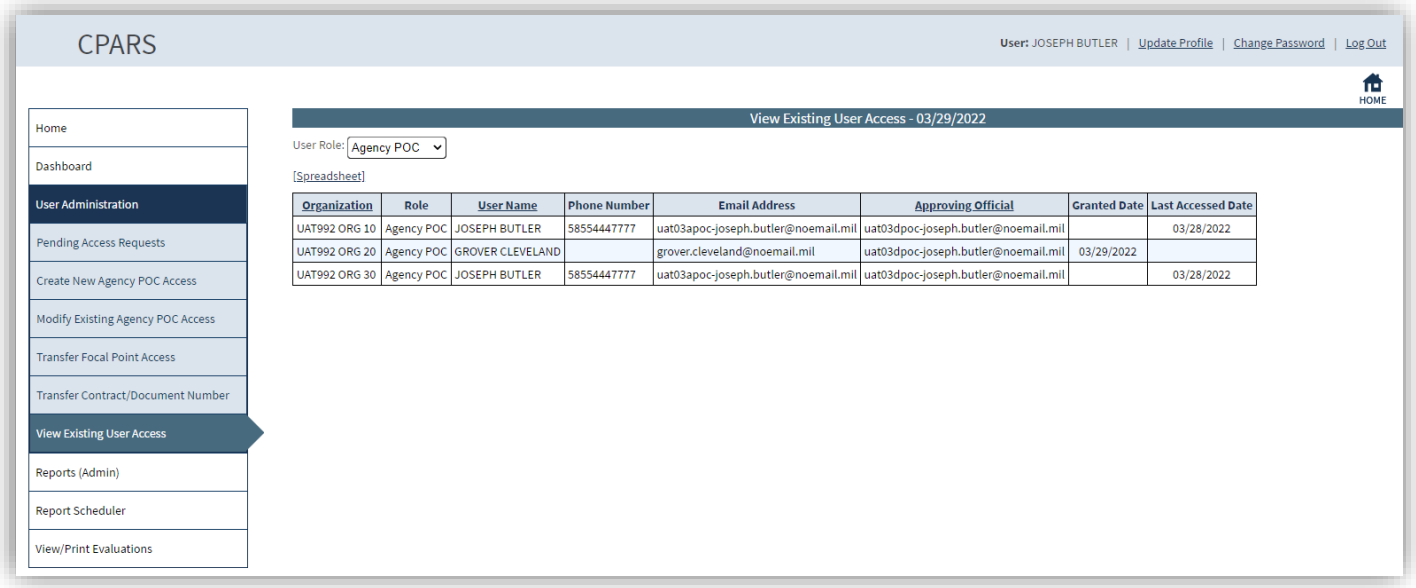
In Step 4, if the Organization associated with that Contract Number will not change, keep the default of Use Existing Organization. If the Organization needs to change with the Focal Point, select the Organization from the **Select Organization** drop-down.

Click on the Transfer Access button and the Contract/Document Number will transfer to the newly assigned Focal Point as well as all users associated with the Contract/Document Number.

View Existing User Access

This option allows the Department POC to view a list of Agency POCs or Focal Points. To view existing user access, click the **View Existing User Access** section. The list will default to show the Agency POCs. To see the Focal Points, select the Focal Point option from the **User Role** drop-down. When viewing Agency POCs, the list will display the Organization(s) the Agency POC has cognizance of, Role, User Name, Phone Number, Email Address, Approving Official, Granted Date, and Last Accessed Date. If viewing the Focal Points, the list will display: the Organization(s) the Focal Point has cognizance of, Role, User Role (Focal Point and their Alternates), User Name, Phone Number, Email Address, Approving Official, Granted Date, Last Accessed Date, and the system(s) they are Active In.

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



Organization	Role	User Name	Phone Number	Email Address	Approving Official	Granted Date	Last Accessed Date
UAT992 ORG 10	Agency POC	JOSEPH BUTLER	58554447777	uat03apoc-joseph.butler@noemail.mil	uat03dpoc-joseph.butler@noemail.mil		03/28/2022
UAT992 ORG 20	Agency POC	GROVER CLEVELAND		grover.cleveland@noemail.mil	uat03dpoc-joseph.butler@noemail.mil	03/29/2022	
UAT992 ORG 30	Agency POC	JOSEPH BUTLER	58554447777	uat03apoc-joseph.butler@noemail.mil	uat03dpoc-joseph.butler@noemail.mil		03/28/2022

Reports (Admin)

Provides the Department POC with an Ad Hoc Report. This report is used to help monitor the status of the CPARS process. To access the Reports (Admin) options, click the **Reports (Admin) option**. The Report (Admin) menu options display.

Ad Hoc Report

This option allows the Department POC to perform Ad Hoc queries of their agency data with the following report options: Contracts Requiring Evaluation, Evaluation Activity Log, Evaluation Workflow Users, and Performance Evaluations-Agency Only. **(See Ad Hoc Section for more specific information)**

Report Scheduler

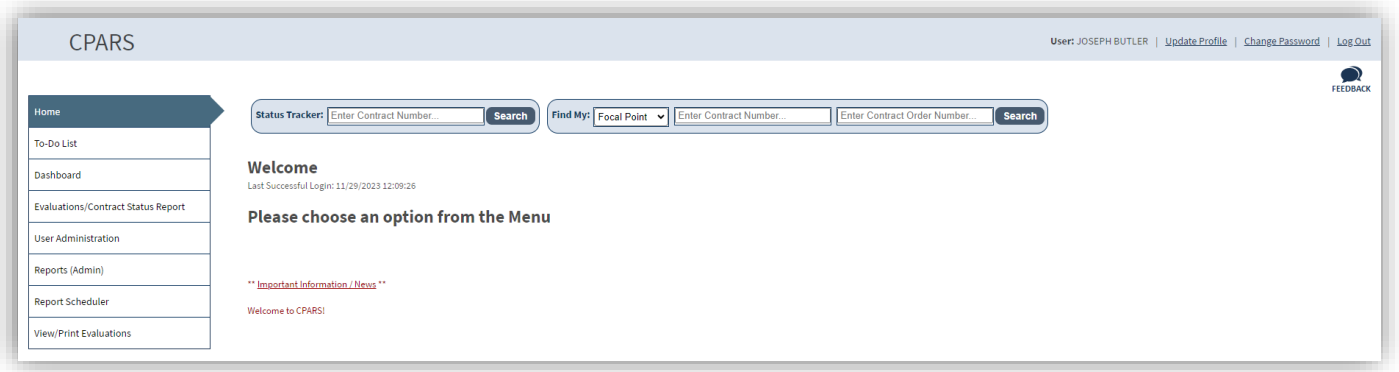
This tool allows Department POC users to request that certain reports be automatically run and sent to their email inbox as file attachments. Current available reports are the Evaluations/Contract Status Reports, Evaluation Metrics Reports, and Processing Times Reports. **(See Report Scheduler Section for more specific information)**

View/Print Evaluations

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

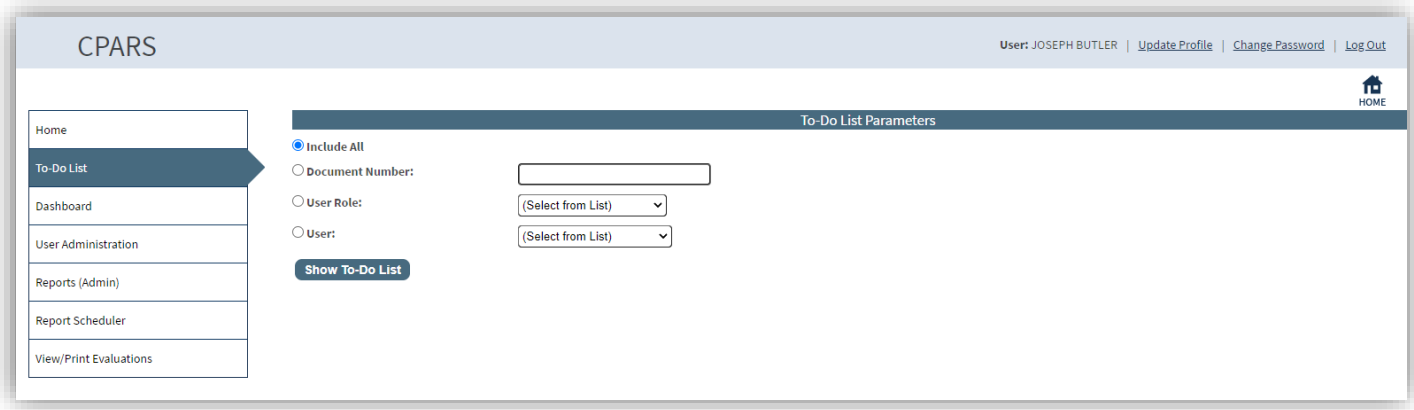
Agency Point of Contact

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

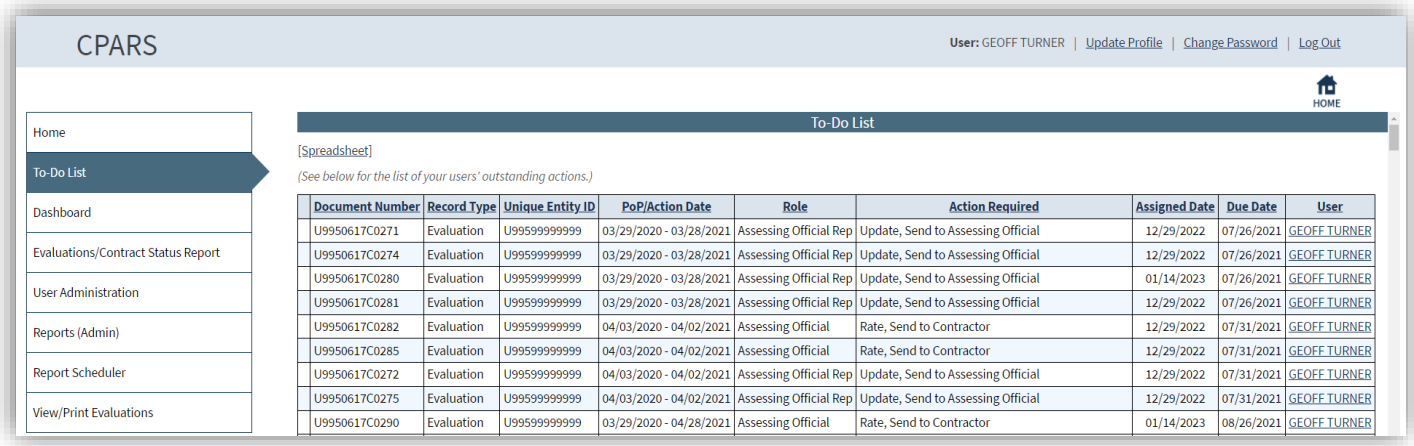


To-Do List

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 **To-Do List** and a To-Do List Parameters screen displays. Select the desired parameters and click the **Show To-Do List** button.



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



Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
U9950617C0271	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
U9950617C0274	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
U9950617C0280	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	01/14/2023	07/26/2021	GEOFF TURNER
U9950617C0281	Evaluation	U99599999999	03/29/2020 - 03/28/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/26/2021	GEOFF TURNER
U9950617C0282	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	GEOFF TURNER
U9950617C0285	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official	Rate, Send to Contractor	12/29/2022	07/31/2021	GEOFF TURNER
U9950617C0272	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/31/2021	GEOFF TURNER
U9950617C0275	Evaluation	U99599999999	04/03/2020 - 04/02/2021	Assessing Official Rep	Update, Send to Assessing Official	12/29/2022	07/31/2021	GEOFF TURNER
U9950617C0290	Evaluation	U99599999999	03/29/2020 - 04/28/2021	Assessing Official	Rate, Send to Contractor	01/14/2023	08/26/2021	GEOFF TURNER

This report displays the Document Number, Record Type, Unique Entity ID, Period of Performance/Action Date, Role, Action Required, Assigned Date, Due Date, and the name of the user responsible for the action.

NOTE: The Due date is the date the evaluation for that Period of Performance (POP) is due. The date is the POP end date plus 120 days.

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

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

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

Dashboard

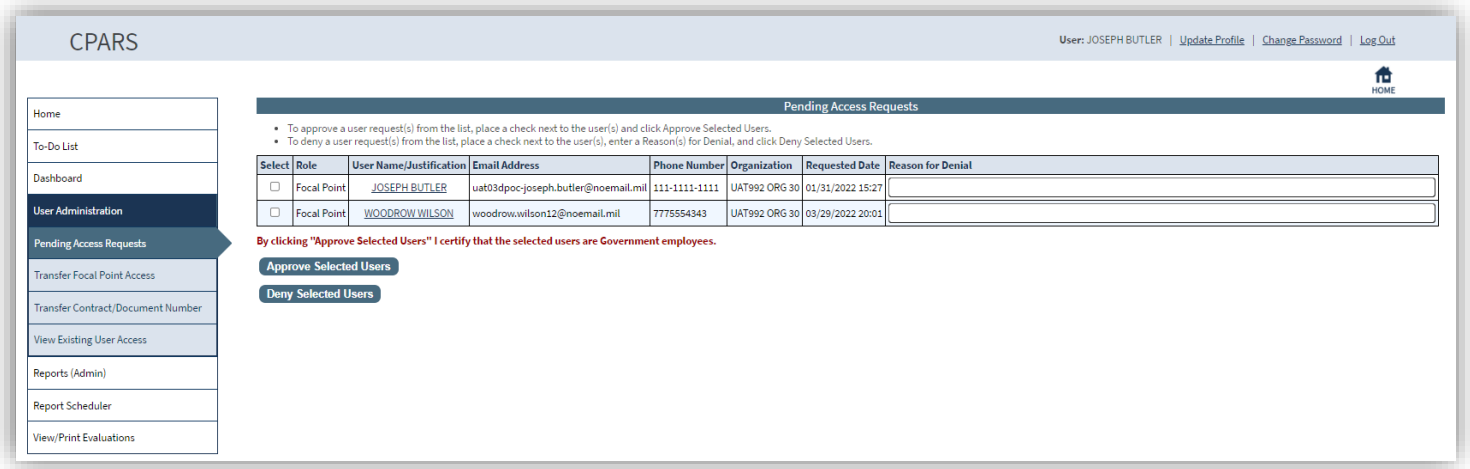
This option provides the Agency POC with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS process.
(See Dashboard Section for more specific information)

User Administration

This option allows the Agency POC to Approve/Deny Focal Point Access, transfer Focal Point Access, and view existing Focal Points for the organization(s) that the Agency POC has cognizance of. To access the User Administration options, click the **User Administration option**. The User Administration menu options display.

Pending Access Requests

This option allows the Agency POC to view a list of people requesting Focal Point access. The list will display: Role, User Name/Justification, Email Address, Phone Number, Organization, and Requested Date. Clicking on the User's Name allows the Agency POC to view the user's profile information, including role, name, email address, title, organization, phone number, requested date, and justification.

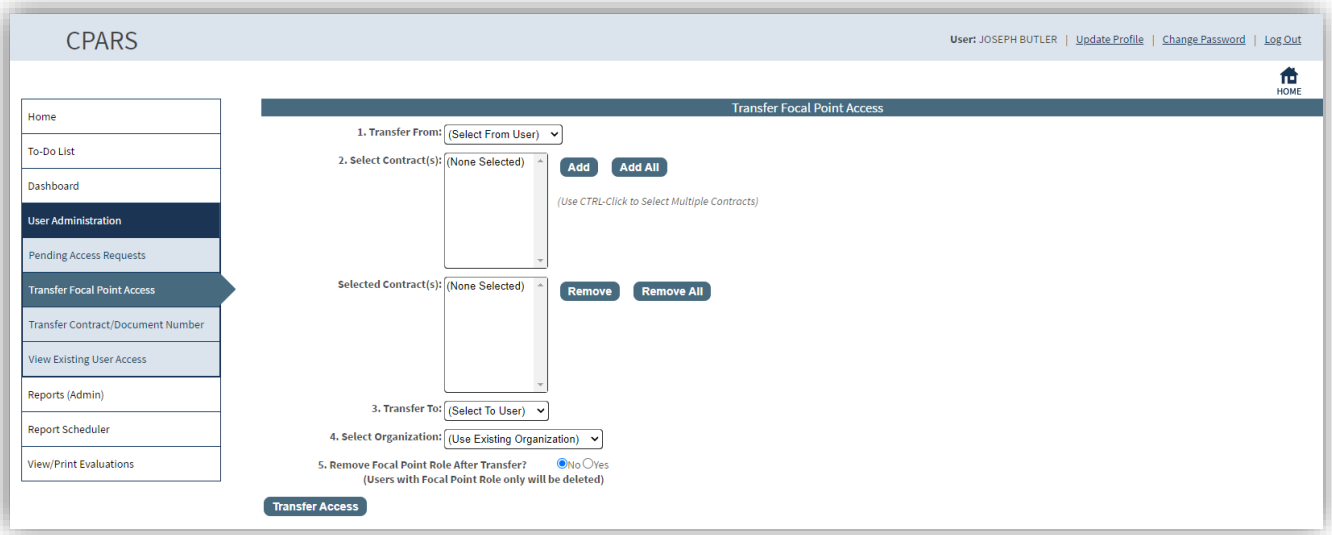


To grant the Requestor CPARS Focal Point Access the Agency POC checks the select box next to the Requestor's name and clicks the **Approve Selected Users** button.

To deny the Requestor CPARS Focal Point Access the Agency POC checks the select box next to the Requestor's name, enters a Reason for Denial, and clicks the **Deny Selected Users** button.

Transfer Focal Point Access

This option allows the Agency POC to transfer contracts/orders and users from one Focal Point to another and also gives the Agency POC the ability to delete a Focal Point for the organization(s) that the Agency POC has cognizance of. To transfer Focal Point access, click **Transfer Focal Point Access**. The CPARS Transfer Focal Point Access screen will display.



In Step 1, select a Focal Point name from the **Transfer From** drop-down box.

In Step 2, select the specific contract(s)/order(s) to be transferred from the **Select Contract(s)** box. Multiple contracts/orders can be selected by holding the CTRL key and clicking each contract to be transferred. To select multiple contracts that are adjacent, click on the first contract, hold the SHIFT key, and then click on the last contract to be transferred. Once contracts/orders are selected click **Add** or select **Add All** to transfer all contracts/orders. If an incorrect contract/order is selected after clicking **Add**, highlight the incorrect contract/order in the **Selected Contract(s)** box and click on the **Remove** button. The **Remove All** button will remove all contracts/orders from the **Selected Contract(s)** box.

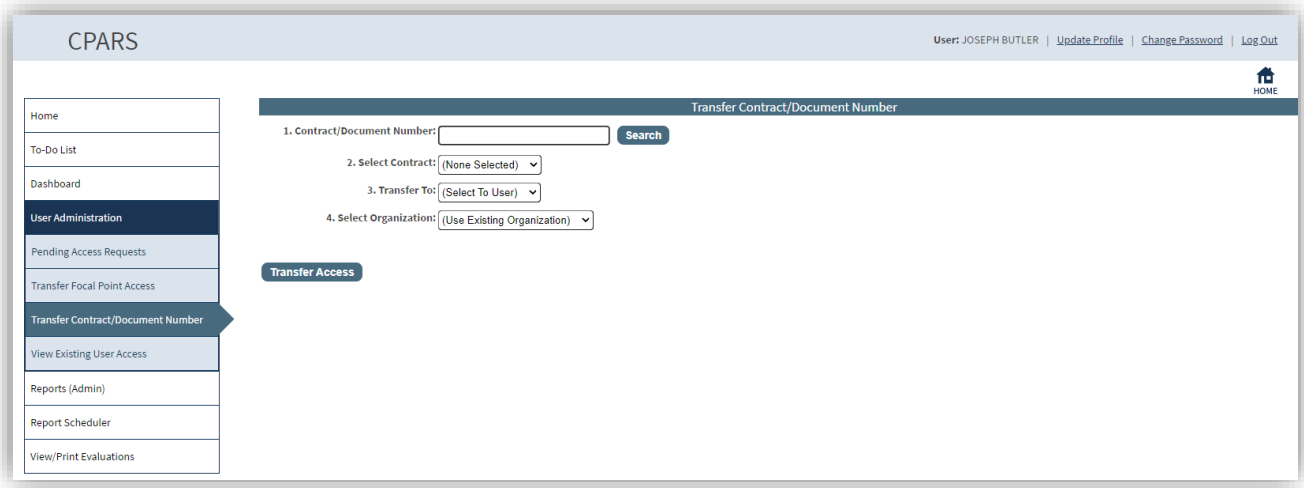
In Step 3, select a Focal Point name from the **Transfer To** drop-down.

In Step 4, if the organization on the contracts selected is changing, select the new organization from the **Select Organization** drop-down. Otherwise leave the default of Use Existing Organization selected.

In Step 5, the Agency POC must choose Yes or No to delete the **Focal Point After Transfer**. This action will delete the user from the CPARS database, as long as the Focal Point has no other contracts or access assigned. Click the Transfer Access button to complete the transfer process.

Transfer Contract/Document Number

This option allows the Agency POC the ability to transfer one Contract/Document Number at a time without having to scroll through contracts in the Transfer Focal Point option. This option allows to transfer a contract or Integrity record from one Focal Point to another Focal Point.



In Step 1, enter the Contract/Document Number you wish to transfer from an existing Focal Point to another in the **Contract/Document Number** field and click on the **Search** button. If there is a contract/document that matches that number, it will appear in the drop-down in Step 2. If there is no Contract/Document Number that matches the data you entered, you will receive a message indicating this.

In Step 2, select the Contract/Document Number in the **Select Contract** drop-down. Depending on the Document/Contract Number entered, there may be multiple options available in Step 2.

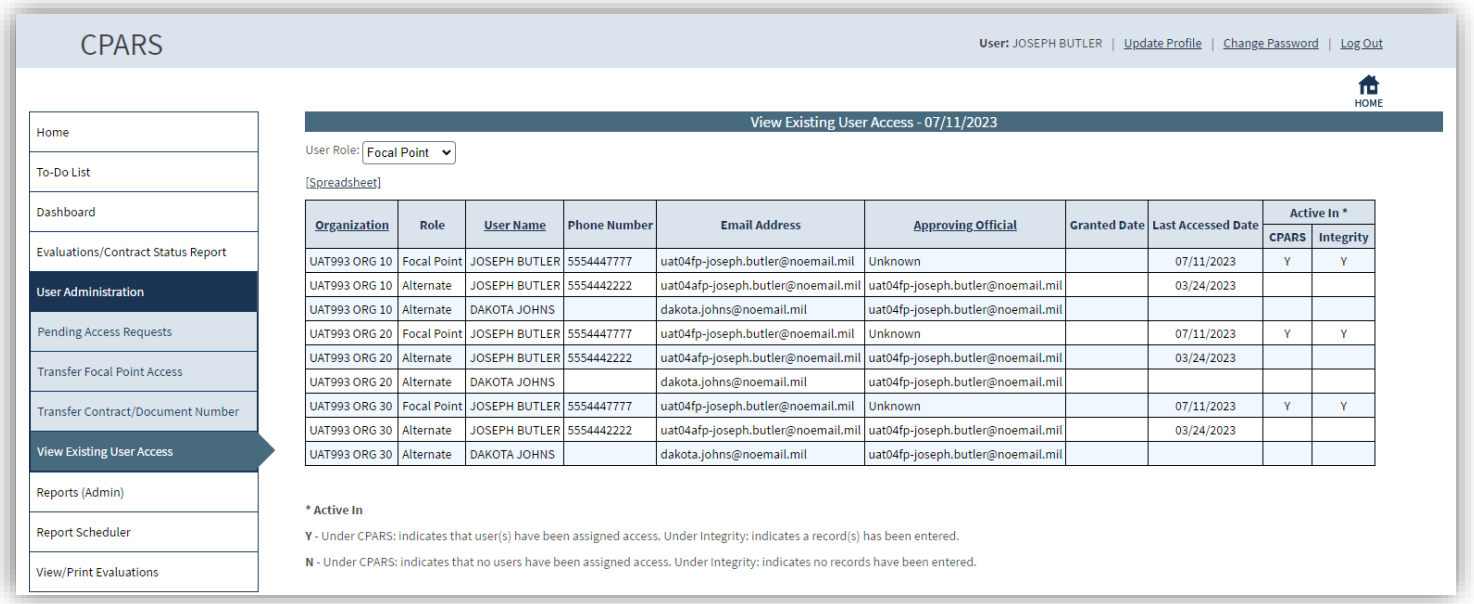
In Step 3, select the Focal Point to transfer the Contract/Document Number to in the **Transfer To** drop-down.

In Step 4, if the Organization associated with that Contract Number will not change, keep the default of Use Existing Organization. If the Organization needs to change with the Focal Point, select the Organization from the **Select Organization** drop-down.

Click on the Transfer Access button and the Contract/Document Number will transfer to the newly assigned Focal Point as well as all users associated with the Contract/Document Number.

View Existing Focal Points

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 of. The list will display the Organization(s) the Focal Point has cognizance of, Role (Focal Point or Alternate Focal Point), User Name, Phone Number, Email Address, Approving Official, Granted Date, Last Accessed Date, and the system(s) they are Active In.



Organization	Role	User Name	Phone Number	Email Address	Approving Official	Granted Date	Last Accessed Date	Active In *	
								CPARS	Integrity
UAT993 ORG 10	Focal Point	JOSEPH BUTLER	5554447777	uat04fp-joseph.butler@noemail.mil	Unknown		07/11/2023	Y	Y
UAT993 ORG 10	Alternate	JOSEPH BUTLER	5554442222	uat04afp-joseph.butler@noemail.mil	uat04fp-joseph.butler@noemail.mil		03/24/2023		
UAT993 ORG 10	Alternate	DAKOTA JOHNS		dakota.johns@noemail.mil	uat04fp-joseph.butler@noemail.mil				
UAT993 ORG 20	Focal Point	JOSEPH BUTLER	5554447777	uat04fp-joseph.butler@noemail.mil	Unknown		07/11/2023	Y	Y
UAT993 ORG 20	Alternate	JOSEPH BUTLER	5554442222	uat04afp-joseph.butler@noemail.mil	uat04fp-joseph.butler@noemail.mil		03/24/2023		
UAT993 ORG 20	Alternate	DAKOTA JOHNS		dakota.johns@noemail.mil	uat04fp-joseph.butler@noemail.mil				
UAT993 ORG 30	Focal Point	JOSEPH BUTLER	5554447777	uat04fp-joseph.butler@noemail.mil	Unknown		07/11/2023	Y	Y
UAT993 ORG 30	Alternate	JOSEPH BUTLER	5554442222	uat04afp-joseph.butler@noemail.mil	uat04fp-joseph.butler@noemail.mil		03/24/2023		
UAT993 ORG 30	Alternate	DAKOTA JOHNS		dakota.johns@noemail.mil	uat04fp-joseph.butler@noemail.mil				

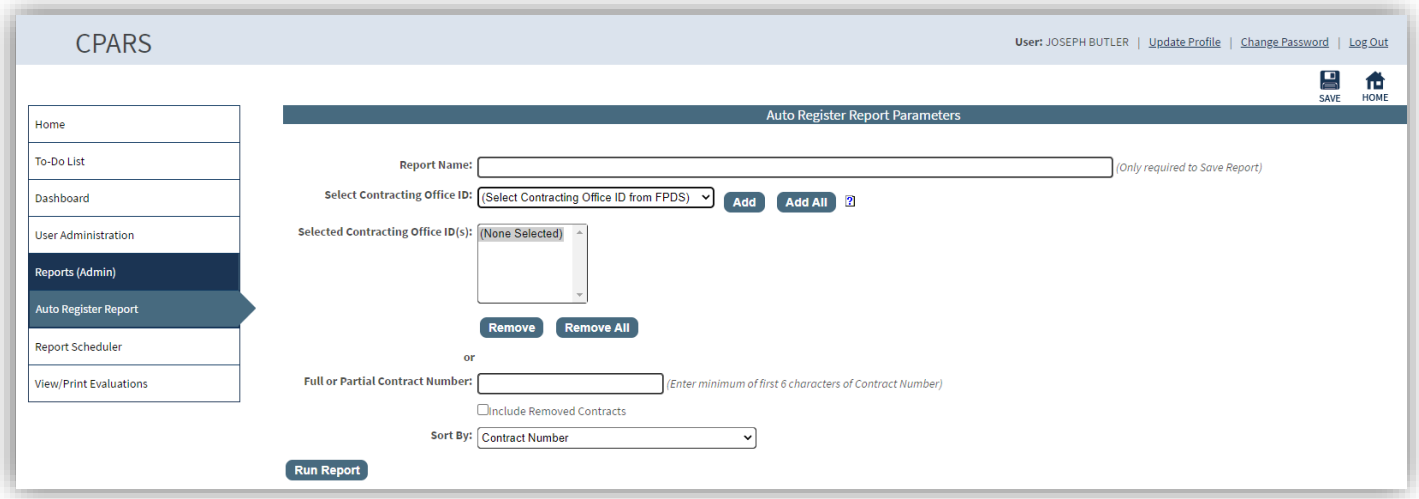
[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Focal Point List.

Reports (Admin)

Provides the Agency POC with an Auto Register Report. This report is used to help monitor the status of the CPARS process. To access the Reports (Admin) options, click the **Reports (Admin) option**. The Report (Admin) menu options display.

Auto Register Report

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



After selecting the **Auto Register Report**, select a **Contracting Office ID** from the drop-down or enter a full or partial contract number in the space provided. If you wish to see the removed contracts you must select/check the **Include Removed Contracts** check box. The Auto Register Report may be sorted by up to seven sort options.

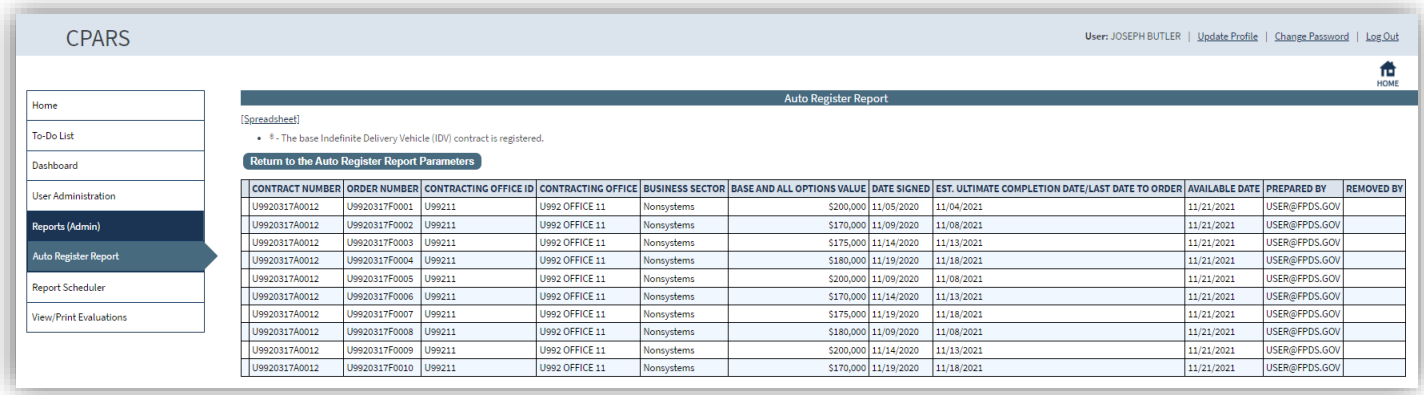
Select the desired option from the **Sort By** drop-down box.
If the user wishes to save this report to run it again in the future, the user enters a Report Name in the **Report Name** box and clicks the **Save** icon. The Auto Register Report Parameters screen will refresh and a Select Saved Report drop-down will appear.

To run the saved report in the future, the user would select the **Report Name** from the drop-down and click **Run Report**.

To change the parameters of a saved report, select the **Report Name** from the drop-down, select/de-select the desired parameters and click the **Save** icon.

To delete a saved report, select the **Report Name** from the drop-down and click **Delete**.

Click the **Run Report** button at the bottom of this screen and the list will run as shown below.



CONTRACT NUMBER	ORDER NUMBER	CONTRACTING OFFICE ID	CONTRACTING OFFICE	BUSINESS SECTOR	BASE AND ALL OPTIONS VALUE	DATE SIGNED	EST. ULTIMATE COMPLETION DATE/LAST DATE TO ORDER	AVAILABLE DATE	PREPARED BY	REMOVED BY
U9920317A0012	U9920317F0001	U99211	U992 OFFICE 11	Nonsystems	$200,000	11/05/2020	11/04/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0002	U99211	U992 OFFICE 11	Nonsystems	$170,000	11/09/2020	11/08/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0003	U99211	U992 OFFICE 11	Nonsystems	$175,000	11/14/2020	11/13/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0004	U99211	U992 OFFICE 11	Nonsystems	$180,000	11/19/2020	11/18/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0005	U99211	U992 OFFICE 11	Nonsystems	$200,000	11/09/2020	11/08/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0006	U99211	U992 OFFICE 11	Nonsystems	$170,000	11/14/2020	11/13/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0007	U99211	U992 OFFICE 11	Nonsystems	$175,000	11/19/2020	11/18/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0008	U99211	U992 OFFICE 11	Nonsystems	$180,000	11/09/2020	11/08/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0009	U99211	U992 OFFICE 11	Nonsystems	$200,000	11/14/2020	11/13/2021	11/21/2021	USER@FPDS.GOV	
U9920317A0012	U9920317F0010	U99211	U992 OFFICE 11	Nonsystems	$170,000	11/19/2020	11/18/2021	11/21/2021	USER@FPDS.GOV	

The example above includes removed contracts. The **Removed By** column identifies the Focal Point who removed each contract/order, click on the Focal Point's name to view the Focal Point's profile information, including name, title, organization, email address, and phone number. Click the **Close button to return to the list of contracts.**
[Spreadsheet] – Click on the **[Spreadsheet]** in the upper left hand corner to create a Microsoft Excel version of the Auto Register Report list.

Report Scheduler

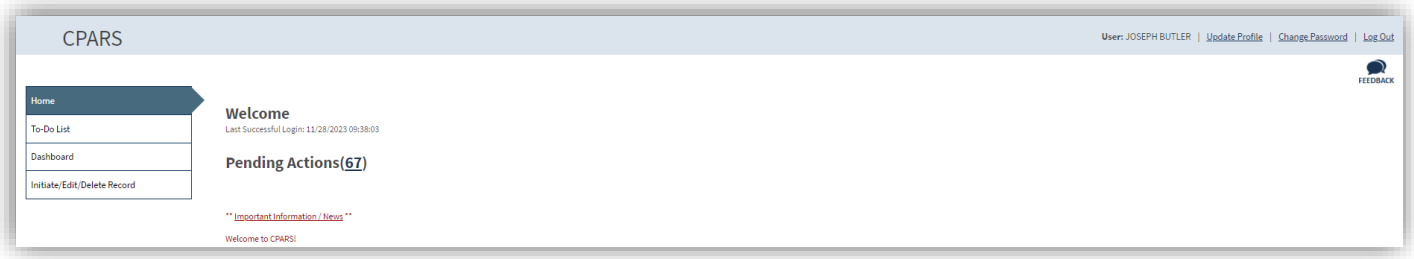
This tool allows Agency POC users to request that certain reports be automatically run and sent to their email inbox as file attachments. Current available reports are the Evaluations/Contract Status Reports, Evaluation Metrics Reports, and Processing Times Reports. **(See Report Scheduler Section for more specific information)**

View/Print Evaluations

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

Integrity Data Entry

The Data Entry user is responsible for creating, updating, and completing Integrity Records. The following record types are available for processing: Termination for Default, Termination for Cause, DoD Determination of Contractor Fault, Termination for Material Failure to Comply (grants), Defective Pricing, Non-Responsibility Determination, Recipient Not-Qualified Determination (grants), Subcontract Payment Issues, Information on Trafficking in Persons, Material Failure to Comply with Closeout Requirements, and Administrative Agreement.



Welcome

Last Successful Login: 11/28/2023 09:38:03

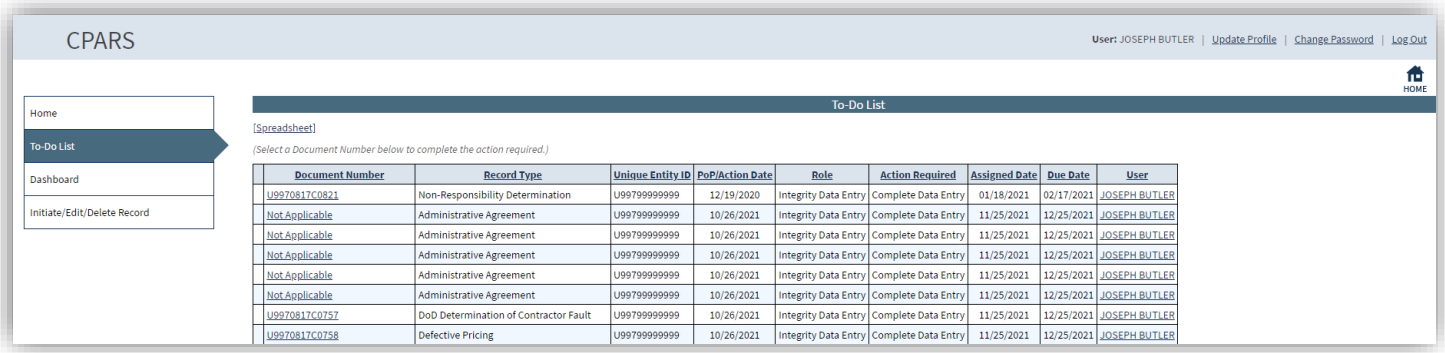
Pending Actions(67)

** Important Information / News **

Welcome to CPARS!

Pending Actions/To-Do List

This option is a quick and easy method for the Data Entry user to see all the records that he/she has started, but not completed. Click the number next to Pending Actions or click the **To-Do List** and a list of records that have been started and saved by the Data Entry user will display. Click on the appropriate document number and the record is opened in data entry format ready for the Data Entry user to complete.



To-Do List

[Spreadsheet]

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

	Document Number	Record Type	Unique Entity ID	PoP/Action Date	Role	Action Required	Assigned Date	Due Date	User
	U9970817C0821	Non-Responsibility Determination	U99799999999	12/19/2020	Integrity Data Entry	Complete Data Entry	01/18/2021	02/17/2021	JOSEPH BUTLER
	Not Applicable	Administrative Agreement	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	Not Applicable	Administrative Agreement	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	Not Applicable	Administrative Agreement	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	Not Applicable	Administrative Agreement	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	Not Applicable	Administrative Agreement	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	U9970817C0757	DoD Determination of Contractor Fault	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER
	U9970817C0758	Defective Pricing	U99799999999	10/26/2021	Integrity Data Entry	Complete Data Entry	11/25/2021	12/25/2021	JOSEPH BUTLER

Dashboard

This option provides the Integrity Data Entry user with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the Integrity process.

(See Dashboard Section for more specific information)

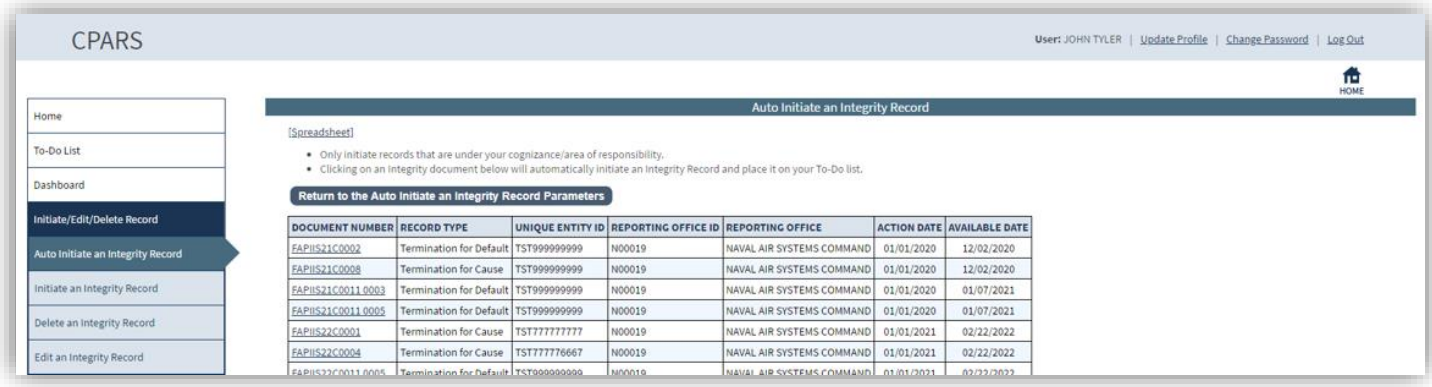
Initiate/Edit/Delete Record

This option allows the Integrity Data Entry user to initiate Integrity records, delete Integrity records, and edit completed Integrity records. To access the Initiate/Edit/Delete Record options, click the **Initiate/Edit/Delete Record option**. The Initiate/Edit/Delete Record menu options display.

Auto Initiate an Integrity Record

The Auto Initiate an Integrity Record function provides Integrity Data Entry (IDE) users the ability to produce and review a list of required Termination for Default and Termination for Cause Records. From the list of eligible Terminations, the FDE user is able to quickly initiate individual termination records in Integrity. The ability to auto initiate terminations is only available to FDE users. The termination must be coded as such in the Federal Procurement Data System, or FPDS in order to display on the list.

By using the "Select Contracting Office ID" you can either add (1), multiple or ALL of the Contracting Office IDs that are under their purview. After selecting the Contracting Office ID/s that you wish to search select "Run Report". If there is an Integrity Record that needs action the below will be displayed. If there is nothing "No Records Found" will be returned as a message.



DOCUMENT NUMBER	RECORD TYPE	UNIQUE ENTITY ID	REPORTING OFFICE ID	REPORTING OFFICE	ACTION DATE	AVAILABLE DATE
FAPIIS21C0002	Termination for Default	TST999999999	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2020	12/02/2020
FAPIIS21C0008	Termination for Cause	TST999999999	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2020	12/02/2020
FAPIIS21C0011 0003	Termination for Default	TST999999999	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2020	01/07/2021
FAPIIS21C0011 0005	Termination for Default	TST999999999	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2020	01/07/2021
FAPIIS22C0001	Termination for Cause	TST777777777	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2021	02/22/2022
FAPIIS22C0004	Termination for Cause	TST777776667	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2021	02/22/2022
FAPIIS22C0011 0005	Termination for Default	TST999999999	N00019	NAVAL AIR SYSTEMS COMMAND	01/01/2021	02/22/2022

By selecting the "Document Number" which is the only field that is hyperlinked on the report the user will be brought to the Integrity Data Entry page. The remaining mandatory fields to be filled out are only: Termination Type (Full or Partial) and attaching supporting documentation. Not completing the record during this process will move this to your To-Do list. Once it is saved and marked for release it will fall off.

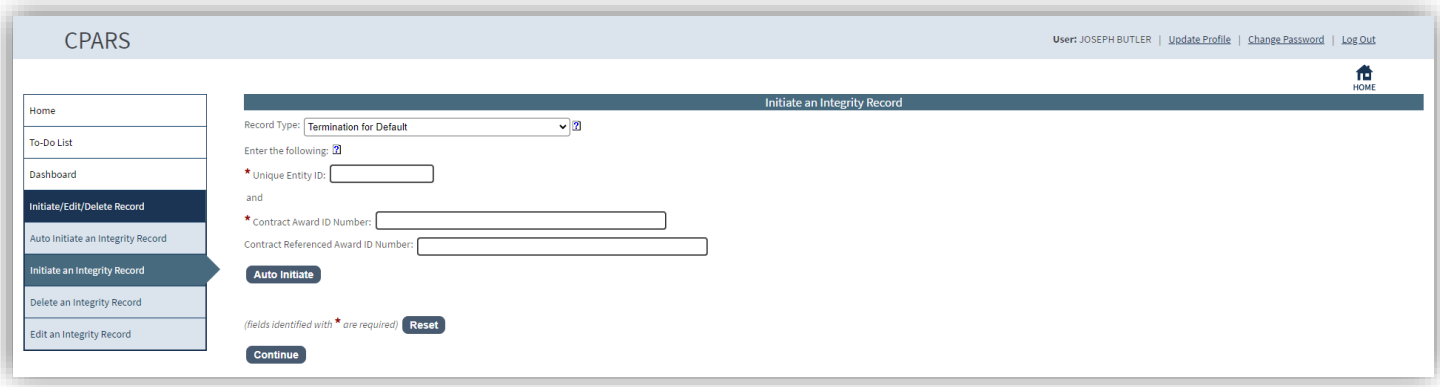
Initiate an Integrity Record

This option allows a user to enter the record information. To enter a record, click on **Initiate an Integrity Record**. The record type selection drop-down will display. Select the applicable record type from the **Record Type** drop-down box. The "Auto Initiate" option can be used when a Unique Entity ID is entered to see if there are any available records that can be initiated. This **ONLY** applies to Terminations for Default and Terminations for Cause. If there are none to be completed. The User will have to continue to fill out the fields manually. If there is a record to be completed, you will be brought to the Integrity Data Entry page and follow the steps as usual with most of the fields already being entered minus the Termination Type field and the attachment being included.

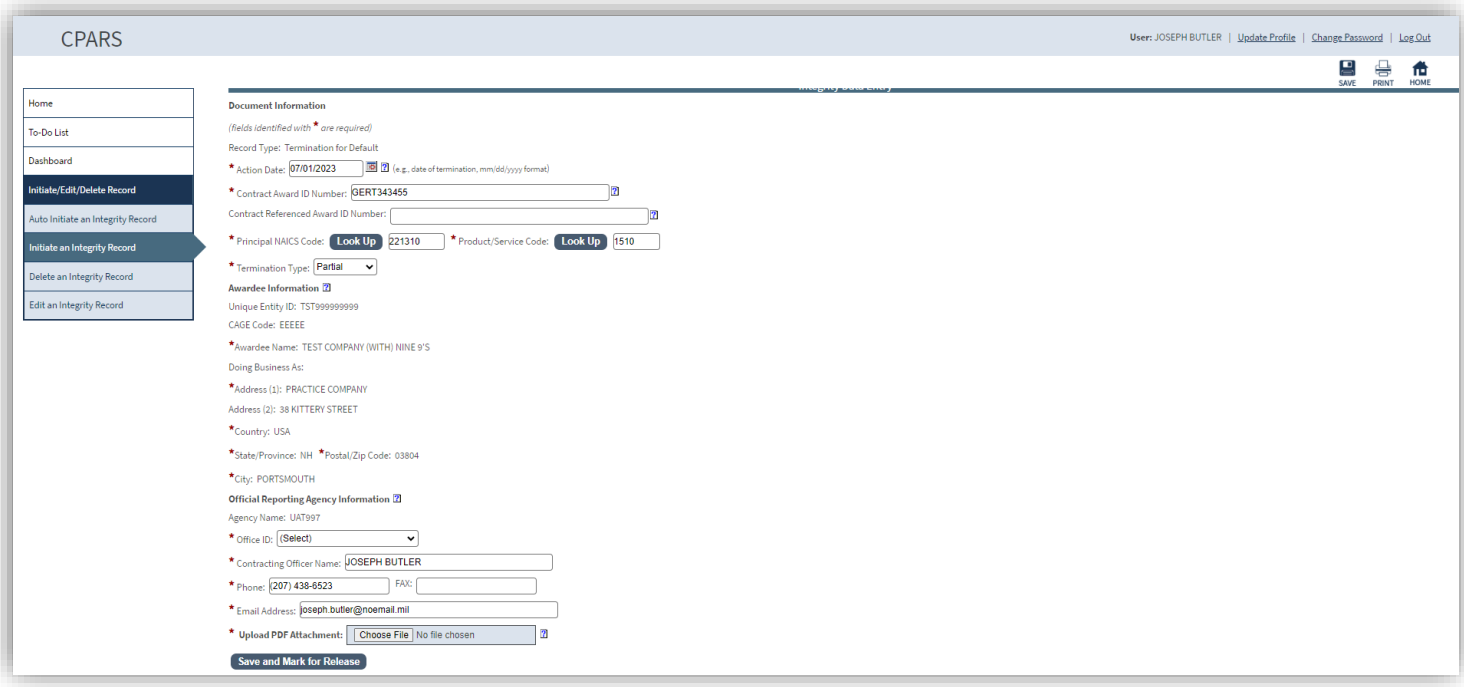
The below screenshot is applicable when entering a Termination for Default, but note that the "Auto Initiate" button ONLY applies to Terminations for Default and Terminations for Cause. Enter the Unique Entity ID in the block and click Auto Initiate. Any terminations that need to be entered for the Unique Entity ID entered will be displayed. This

list functions the same as the “Auto Initiate an Integrity Record” section.

NOTE: For the Administrative Agreement record type, when an entity does not have a Unique Entity ID, click the Continue button to initiate the Administrative Agreement without a UEI.



For a Termination for Default, enter the Unique Entity ID number, Contract Award ID Number, and Contract Referenced Award ID Number, if applicable, and click the **Continue** button. This will then search the Federal Procurement Data System (FPDS) for the specific Contract Award ID Number and Contract Referenced Award ID Number. If a match is found, the Principal NAICS Code, Product/Service Code and Awardee Information on the Data Entry screen will be prepopulated. If no match is found with FPDS, it will then search the System for Award Management (SAM) database for the specific Unique Entity ID and will prepopulate the Awardee Information if the Unique Entity ID is registered at SAM.



<u>Document Information</u>: Enter the Document Information in the spaces provided, if not prepopulated. The data entry screen identifies required fields with a red asterisk (*****). However, the Data Entry user is allowed to save a partially entered record without addressing all the required fields. In order to save a partially entered Termination for Default, enter the **Action Date**, **Contract Award ID Number**, **Unique Entity ID,** and then click the **Save** icon. Note that when the Data Entry user is ready to continue working on the record, simply log back in, click on the **To-Do List** or the **Pending Actions** option, and click on the document number for the record. To upload a PDF Attachment, click the **Browse** button. Locate and select the applicable PDF file and click **Open**. The file path will appear in the Upload PDF Attachment box, click the **Save** icon. To view the attached PDF, click the **View** button.

NOTE: PDF files may be uploaded/replaced after a record has been Saved and Marked for Release by using the Edit an Integrity Record option. When a record is marked for release the record is completed and available in the

View Performance Records section of CPARS for source selection purposes. Edit an Integrity Record is explained in more detail below.

- There is no contractor access available in Integrity data entry. Contractors can view and enter comments in the View Performance Records section of CPARS.

Awardee Information: Enter the Awardee Information manually if it was not available from FPDS or SAM. Note that State/Province and Postal/Zip Code become required fields when United States or Canada is selected in the **Country** drop-down arrow box.

Reporting Agency Information: Select the applicable Office ID from the **Office ID** drop-down box. The remaining data elements are prepopulated with information saved in the user's profile.
Online help is available during the data entry process. Fields identified with a blue question mark (**?**) indicates online help availability. Simply click on the blue question mark to obtain an explanation of the information to be entered in the adjacent field.

To save a record without marking for release click the **Save** icon. Click on the **Print** icon to view or print a record. When the record is ready to be completed and made available for source selection purposes and public access, click the **Save and Mark for Release** button. All required fields must be completed at this time. A message will display stating that "The Integrity record has been saved and marked for release." Click the **OK** button.

Delete an Integrity Record

This option allows the Data Entry user to delete a record that has been started, but not completed and marked for release, or available for source selection and public access. To delete a record, click **Delete an Integrity Record**. A list of records that have been started and are available for deletion will display. Click the document number of the record to be deleted. The Delete Record Confirmation screen will display. Select the **Confirm Delete** button to delete the record from the database.

Edit an Integrity Record

This option allows the Data Entry user to modify a record that has been completed and marked for release, and is available for source selection and public access. To edit a completed record, click **Edit an Integrity Record**. A list of completed records available for editing will display. Click the document number of the record to be edited. The **Edit a Completed Record** screen will display. The available fields that can be edited will depend upon the record type being edited. To save the edits to the record click the **Save** icon.

Types of edits that can be completed:

- PDF attachments can be uploaded/replaced in the record after it has been completed and marked for release.

- Add a Unique Entity ID to a completed Administrative Agreement where a Unique Entity ID was not provided.

- Terminations for Default and Terminations for Cause can be changed to a Termination for Convenience or Termination Type changed to Complete or Partial.

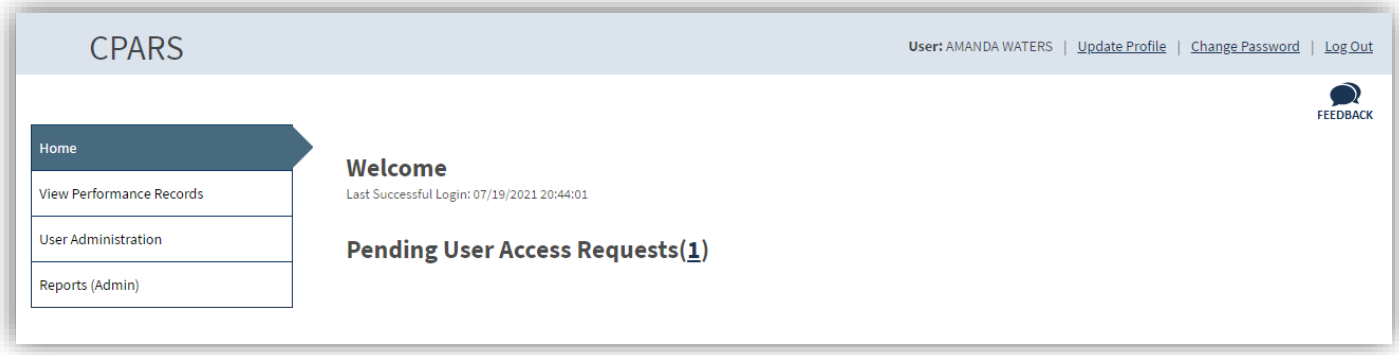
- Records may be Withdrawn/Rescinded by selecting Yes for Record Withdrawn/Rescinded and entering a Reason Withdrawn/Rescinded. This can be used in the event of a FAR 9.105-2(b)(2)(iv) request by contractor to remove information protected by the Freedom of Information Act.

All changes made using the **Edit an Integrity Record** option are reflected immediately upon clicking the **Save** icon. When a record is changed to a Termination for Convenience or is Withdrawn/Rescinded, it is immediately archived and no longer visible for source selection.

Click on **Print** icon to view or print the record displayed on the screen.

Owner (View Performance)

The Owner (View Performance) is responsible for administering access to view performance records. The Owner (View Performance), level is used to authorize/remove access to the following roles; Manager (View Performance) and Access (View Performance) users. The Owner (View Performance) is also able to view Assessment Reports, Integrity Reports, Integrity Records, Ad Hoc Reports, and Compliance Reports. Owner (View Performance) access is granted only upon the completion of an Owner (View Performance) User Access Request Form available at https://cpars.gov/access.htm.



View Performance Records

This option allows the Owner (View Performance) user to view past performance evaluations for source selection purposes, Integrity Reports, compliance reports, all government entered Integrity Records, and all Awardee entered proceedings. To access the View Performance Records options, click the **View Performance Records** option. The View Performance Records menu options display.

NOTE: The View Performance Records Menu options are also applicable at the Access (View Performance) level. As such, each option is described in more detail in the Access (View Performance) section.

User Administration

This option allows the Owner (View Performance) to Approve/Deny Manager (View Performance) and Access (View Performance) requests, view existing users, and remove existing user access. To access the User Administration options, click **User Administration**. The User Administration menu options display.

Pending Access Requests

This option allows the Owner (View Performance) to view a list of people requesting Manager (View Performance) and Access (View Performance) access. The list will display The Role, Requestor's name, Email Address, Phone Number, Organization, and Requested Date. Clicking on the User's Name allows the Owner (View Performance) to view the user's profile information, including role, name, email address, title, organization, phone number, requested date, and justification.

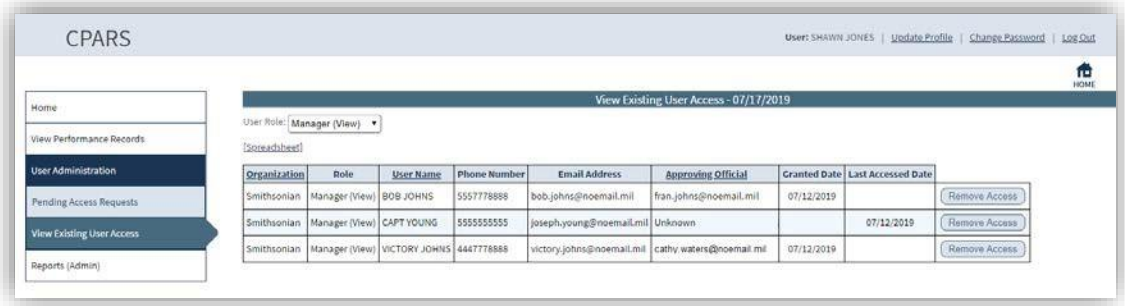
To grant the Requestor access as a Manager (View Performance) or Access (View Performance), the Owner (View Performance) checks the select box next to the Requestor's name and clicks the **Approve Selected Users** button. To deny the Requestor access as a Manager (View Performance) or Access (View Performance), the Owner (View Performance) checks the select box next to the Requestor's name, enters the Reason for Denial and clicks the **Deny Selected Users** button.

View Existing User Access

This option allows the Owner (View Performance) to view a list of the Managers (View Performance), and Access (View Performance) users. This option also allows the Owner (View Performance) to Remove a Manager (View Performance) or Access (View Performance) user's access. The list will display the Organization, Role, User Name, Phone Number, Email Address, Approving Official, Granted Date, and Last Accessed Date.

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

The list will automatically default to the user role of Manager (View). The Owner (View Performance) can choose to view it as an Access (View Performance) user by selecting the Access (View) role from the **User Role** drop-down.

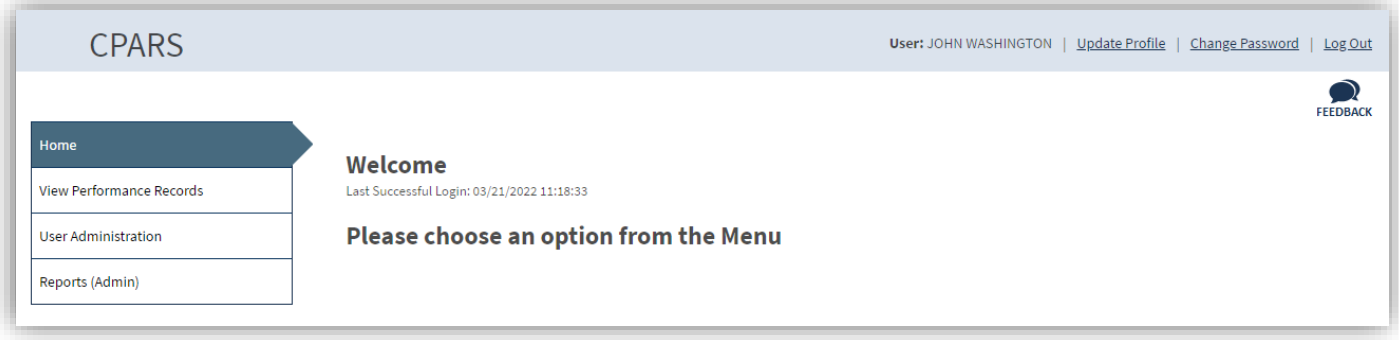


Remove Access – This option allows the Owner (View Performance) to remove a user's access. To remove a user's access, the Owner (View Performance) clicks the **Remove Access** button**.**

NOTE: The remaining Owner (View Performance) Menu options are also applicable at the other access levels. As such, the Reports (Admin) option is described in more detail in the Ad Hoc section.

Manager (View Performance)

The Manager (View Performance) is responsible for administering access to past performance information. The Manager (View Performance) approves/removes Access (View Performance) users. The Manager (View Performance) is also able to view Assessment Reports, Integrity Reports, Compliance Metrics Reports, Integrity Compliance Reports, Ad Hoc Reports, Government Integrity Records, and All Awardee Proceedings. Manager (View Performance) access is granted only upon the completion of a Manager (View Performance) User Access Request Form available at https://cpars.gov/access.htm.



View Performance Records

This option allows the Manager (View Performance) user to view past performance evaluations for source selection purposes, Integrity Reports, compliance reports, all government entered Integrity Records, and all Awardee entered proceedings. To access the View Performance Records options, click the **View Performance Records** option. The View Performance Records menu options display.

NOTE: The View Performance Records Menu options are also applicable at the Access (View Performance) level. As such, each option is described in more detail in the Access (View Performance) section.

User Administration

This option allows the Manager (View Performance) to Approve/Deny access to an Access (View Performance) users, view existing user access, or remove existing user access. To access the User Administration options, click **User Administration**. The User Administration menu options display.

Pending Access Requests

This option allows the Manager (View Performance) to view a list of people requesting the role of Access (View Performance). The list will display the Role, Requestor's name, Email Address, Phone Number, Organization, and Requested Date. Clicking on the User's Name allows the Manager (View Performance) to view the user's profile information, including role, name, email address, title, organization, phone number, requested date, and justification.

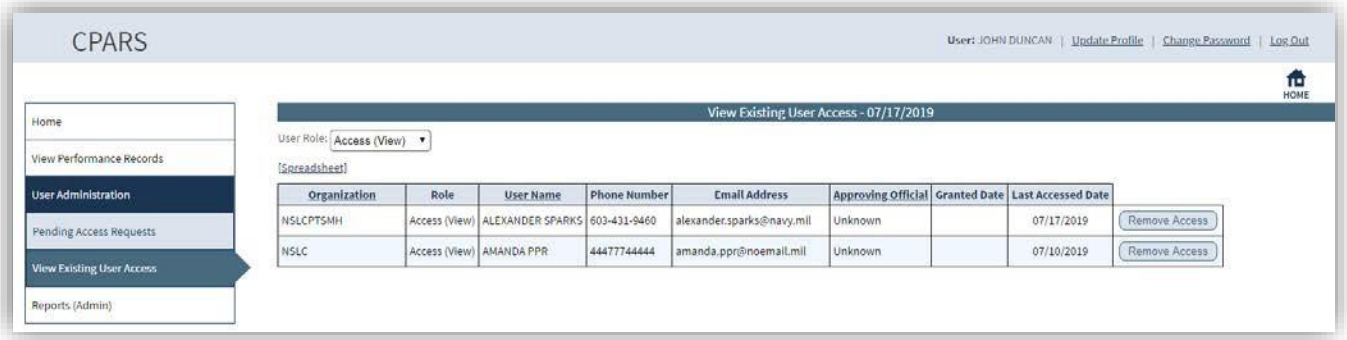
To grant the Requestor the Access (View Performance) role, the Manager (View Performance) checks the select box next to the Requestor's name and clicks the **Approve Selected Users** button.

To deny the Requestor the Access (View Performance) role, the Manager (View Performance) checks the select box next to the Requestor's name, enters the Reason for Denial, and clicks the **Deny Selected Users** button.

View Existing User Access

This option allows the Manager role to view a list of the Access (View Performance) users. This option also allows the Manager (View Performance) to Remove an Access (View Performance) user's access. The list will display the Organization, Role, User Name, Phone Number, Email Address, Approving Official, Granted Date, and Last Accessed Date.

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

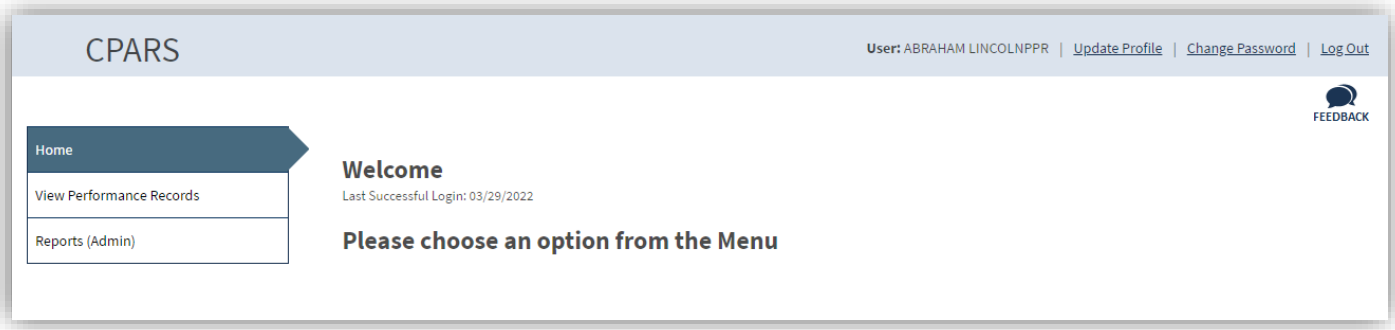


Remove Access – This option allows the Manager (View Performance) to remove a user's access. To remove a user's access, the Manager (View Performance) clicks the **Remove Access** button**.**

NOTE: The remaining Manager (View Performance) Menu options are also applicable at the other access levels. As such, the Reports (Admin) option is described in more detail in the Ad Hoc section.

Access (View Performance)

The Access (View Performance) user is able to view Assessment Reports, Integrity Reports, Compliance Metrics Reports, Integrity Compliance Reports, Ad Hoc Reports, Government Integrity Records, and All Awardee Proceedings. Access (View Performance) access is granted only upon the completion of an Access (View Performance) User Access Request Form available at https://cpars.gov/access.htm.

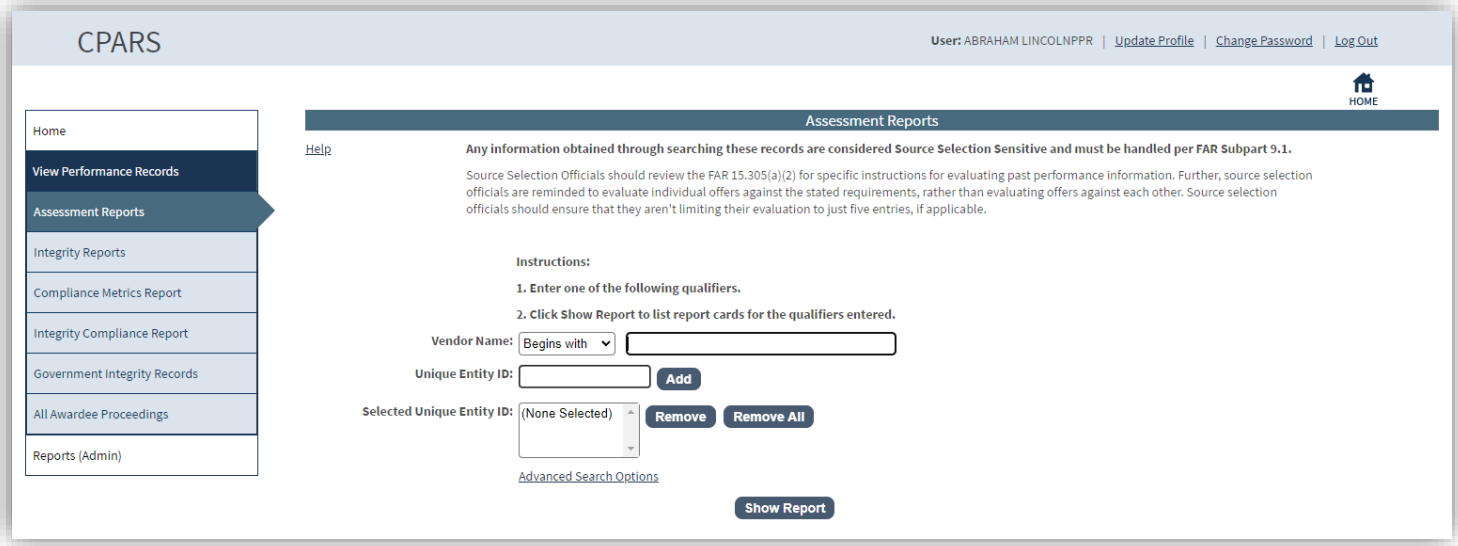


View Performance Records

This option allows the Access (View Performance) user to view past performance evaluations for source selection purposes, Integrity Reports, compliance reports, all government entered Integrity Records, and all Awardee entered proceedings. To access the Manage User Access options, click the **View Performance Records** option. The View Performance Records menu options display.

Assessment Reports

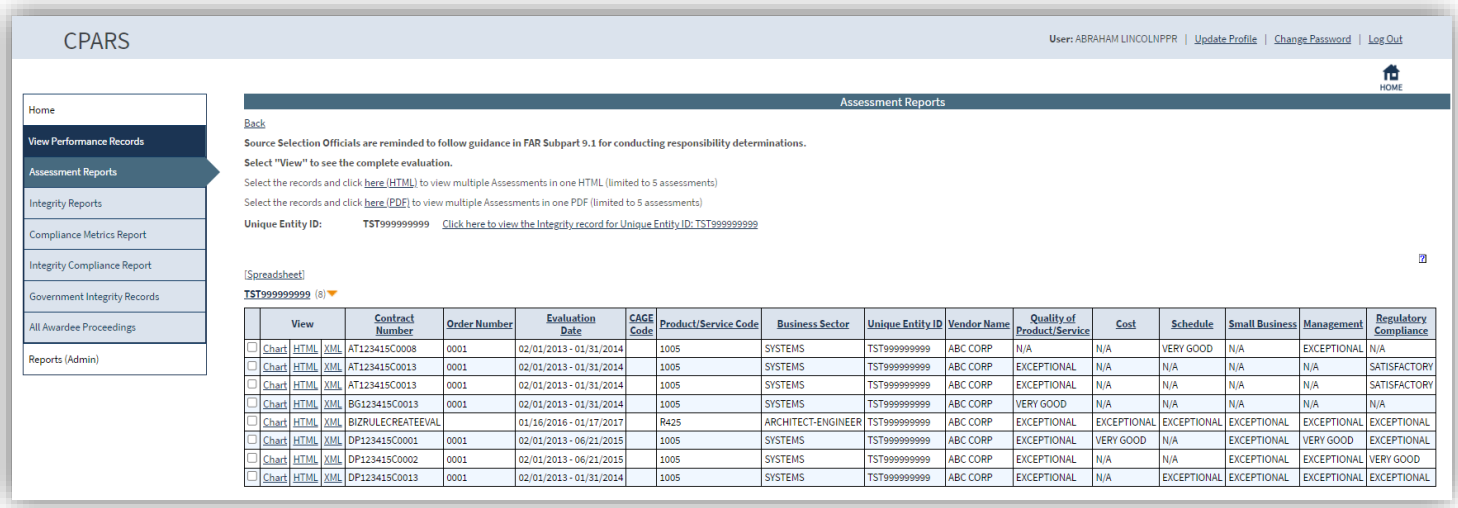
Assessment Reports allows users to view past performance evaluations for source selection purposes. To run an Assessment Report, click the **View Performance Records** option. The View Performance Records menu options display click **Assessment Reports.** The Assessment Reports Parameters menu will display.



Assessment Reports selection allows users to enter specific qualifiers to view the evaluations for the qualifiers entered. You may enter Vendor Name, up to a combination of 5 Unique Entity ID SAM qualifiers, or use the Advanced Search Option. Enter the desired qualifiers and click the **Show Report** button.

NOTE: If a filter that allows for more than one company to be selected is used, a list of companies matching the description will be displayed, along with the number of their associated assessment reports.

Click **List** to display the list of Assessment Reports for each Vendor Name.



View	Contract Number	Order Number	Evaluation Date	CAGE Code	Product/Service Code	Business Sector	Unique Entity ID	Vendor Name	Quality of Product/Service	Cost	Schedule	Small Business	Management	Regulatory Compliance
Chart HTML XML	AT123415C0008	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP	N/A	N/A	VERY GOOD	N/A	EXCEPTIONAL	N/A
Chart HTML XML	AT123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP	EXCEPTIONAL	N/A	N/A	N/A	N/A	SATISFACTORY
Chart HTML XML	AT123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP	EXCEPTIONAL	N/A	N/A	N/A	N/A	SATISFACTORY
Chart HTML XML	BG123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP	VERY GOOD	N/A	N/A	N/A	N/A	N/A
Chart HTML XML	BIZRULECREATEEVAL		01/16/2016 - 01/17/2017		R425	ARCHITECT-ENGINEER	TST999999999	ABC CORP	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL
Chart HTML XML	DP123415C0001	0001	02/01/2013 - 06/21/2015		1005	SYSTEMS	TST999999999	ABC CORP	EXCEPTIONAL	VERY GOOD	N/A	EXCEPTIONAL	VERY GOOD	EXCEPTIONAL
Chart HTML XML	DP123415C0002	0001	02/01/2013 - 06/21/2015		1005	SYSTEMS	TST999999999	ABC CORP	EXCEPTIONAL	N/A	N/A	EXCEPTIONAL	EXCEPTIONAL	VERY GOOD
Chart HTML XML	DP123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP	EXCEPTIONAL	N/A	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL	EXCEPTIONAL

Click **[Spreadsheet]** to create a Microsoft Excel version of the Assessment Reports (does not include the narratives).

To view the Integrity Report for the searched on UEI click the Unique Entity ID: XXXXXXXXX Click here to view the Integrity records(s) for Unique Entity ID: XXXXXXXXX link.

To view and save multiple Assessment Report files as HTML or PDF (limited to 5 assessments), you can select individual records with a check mark in the box next to the word Chart and either click **View (HTML, XML)** or use the Click **Here (HTML, PDF)** button above the table.

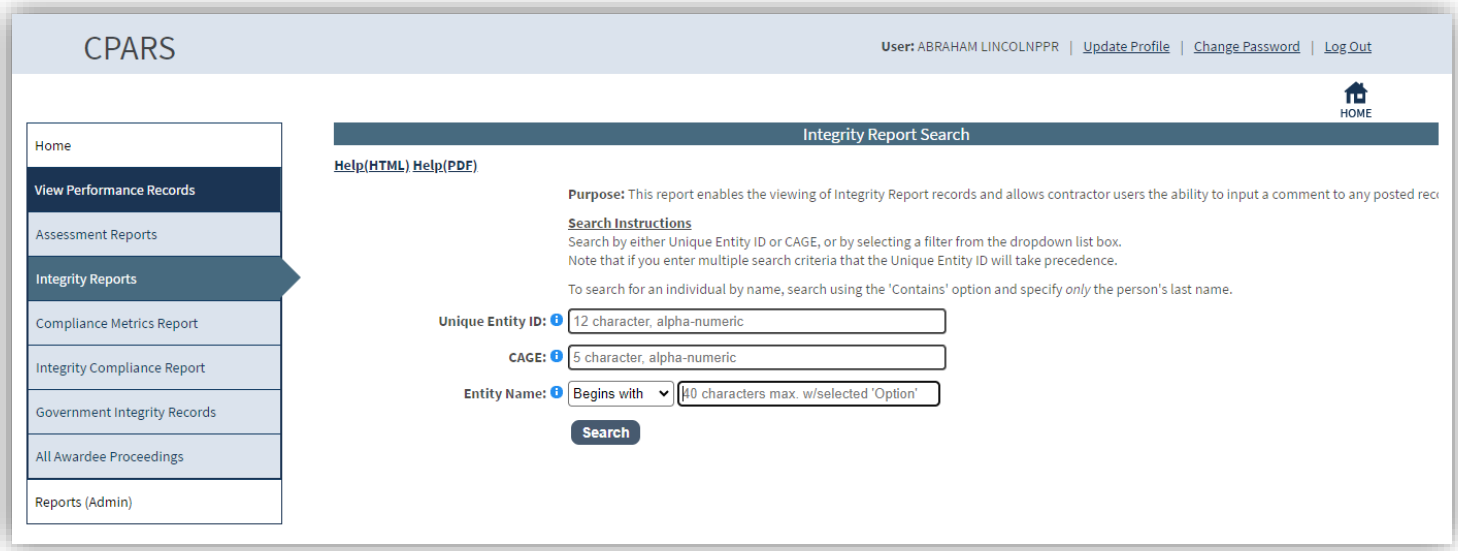
Chart- Click on **Chart** to view a compilation of data as a Pie Chart and bar graph depicting business ratings over a three or six-year period depending on the business sector.

View (HTML) – Click on **View (HTML)** to view the evaluation as an HTML document**. View (XML) –** Click on **View (XML)** to view the evaluation as an XML document**.**

NOTE: XML is a general-purpose markup language. It allows users to define their own tags. Its primary purpose is to facilitate the sharing of data across different information systems, particularly via the Internet.

Integrity Reports

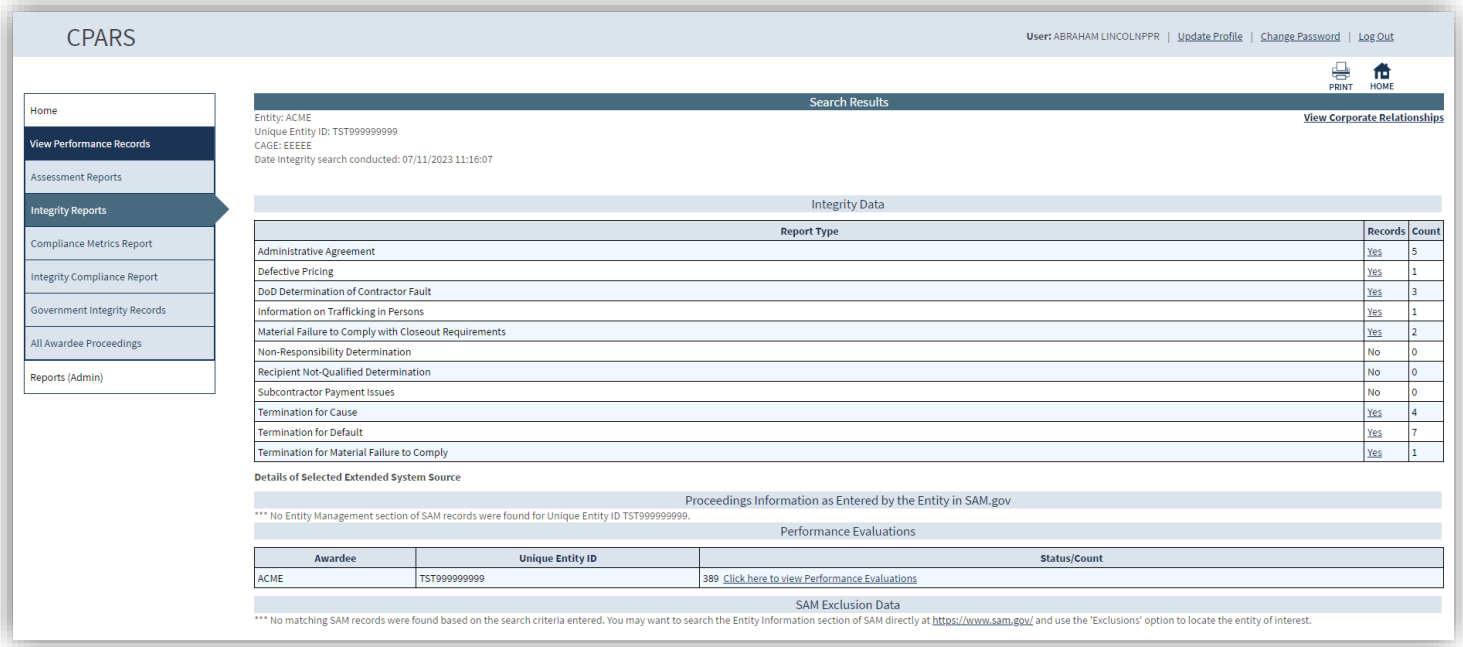
Integrity Reports allows users to view Integrity data, proceedings information, System for Award Management (SAM) exclusion data, and corporate relationships. To run an Integrity Report, click the **View Performance Records** option. Click **Integrity Report**. The Integrity Report Parameters menu will display.



NOTE: It is possible in the Integrity application that an entity may not have a CAGE Code. If you search by CAGE and do not get the entity you are looking for, try using the 'Name' search option. Note that some of the extended systems, such as the Performance Information section of SAM, do not require Unique Entity ID. If your search of the system does not produce a Performance Information section of SAM record, you can go directly to **https://www.sam.gov/** and use the 'Advanced Search' option to locate the entity of interest.

To search for an individual by name, search using the 'Contains' option and specify only the person's last name. Enter the desired qualifiers and click the Search button. The Integrity Search Results page will display.

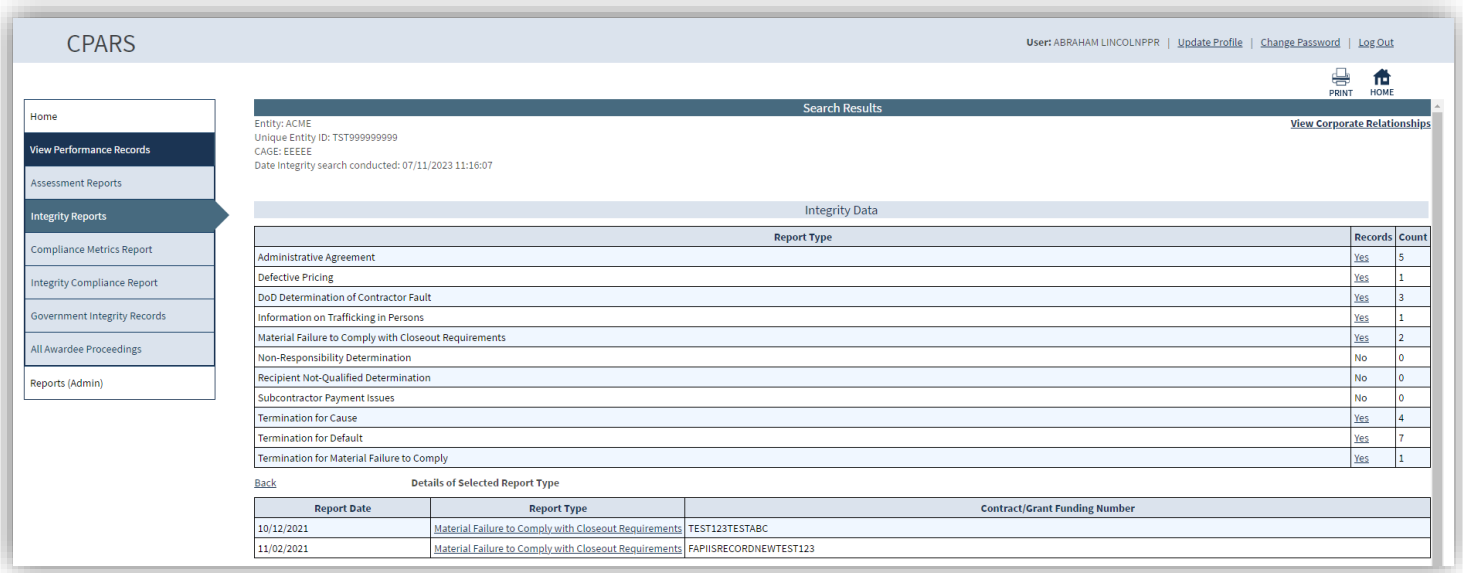
NOTE: If a filter that allows for more than one company to be selected is used, a list of companies matching the description will be displayed.



Integrity Data

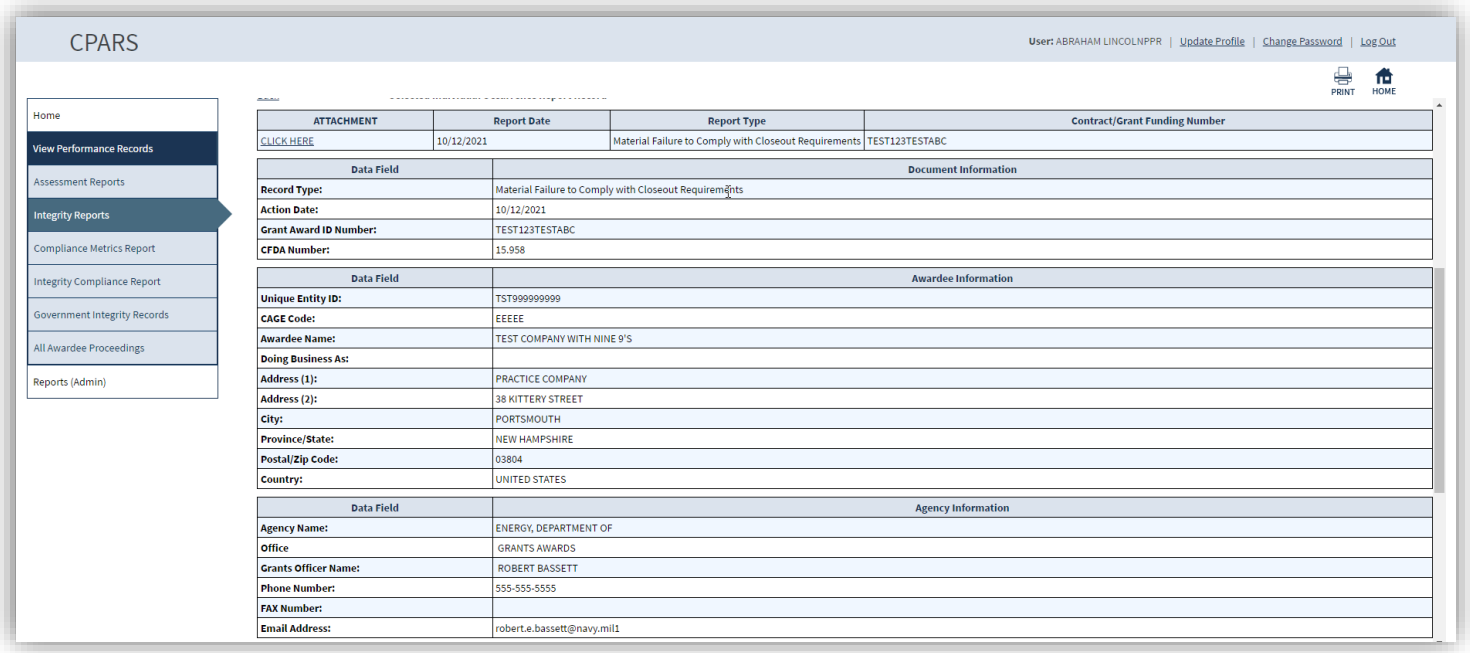
The Integrity Data table at the top of the screen displays the different types of Integrity records. If an awardee/contractor has an Integrity record of a particular type, the Records column in the table will display Yes and the Count column will display the number of records of that type.

To view a record of a particular type, click the Yes link in the table.



If there are multiple records of that type, a Details of Selected Report Type table will display at the bottom of the screen. The table will indicate the Report Date and document number for each record.

To view an individual record, click on the Report Type link in the row for that record. The record will display at the bottom of the screen.



CLICK HERE- Click the **CLICK HERE** link to view the attachment that was upload to the Integrity Record.

Proceedings Information as Entered by the Entity in SAM.gov

This section will display whether the Entity has entered any Proceedings Information into SAM. If information has been entered, the information will display.

Performance Evaluations

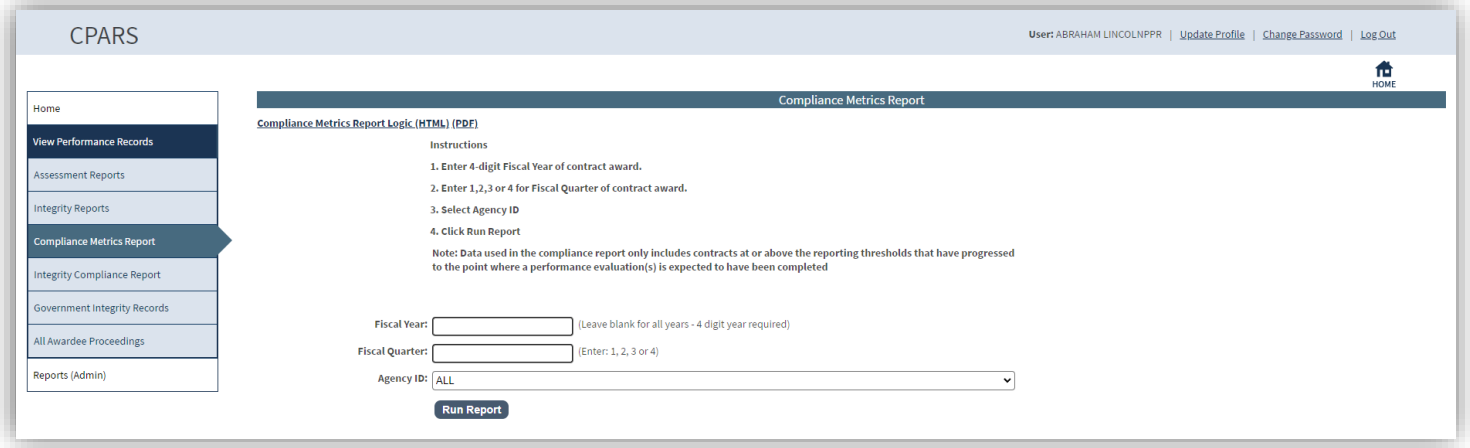
This section will display whether the Entity has any performance evaluations entered in the system. To view the Performance Evaluations for the Entity, click the Click here to view Performance Evaluations link or use the Assessment Reports option. **(See Assessment Reports Section for more specific information)**

SAM Exclusion Data

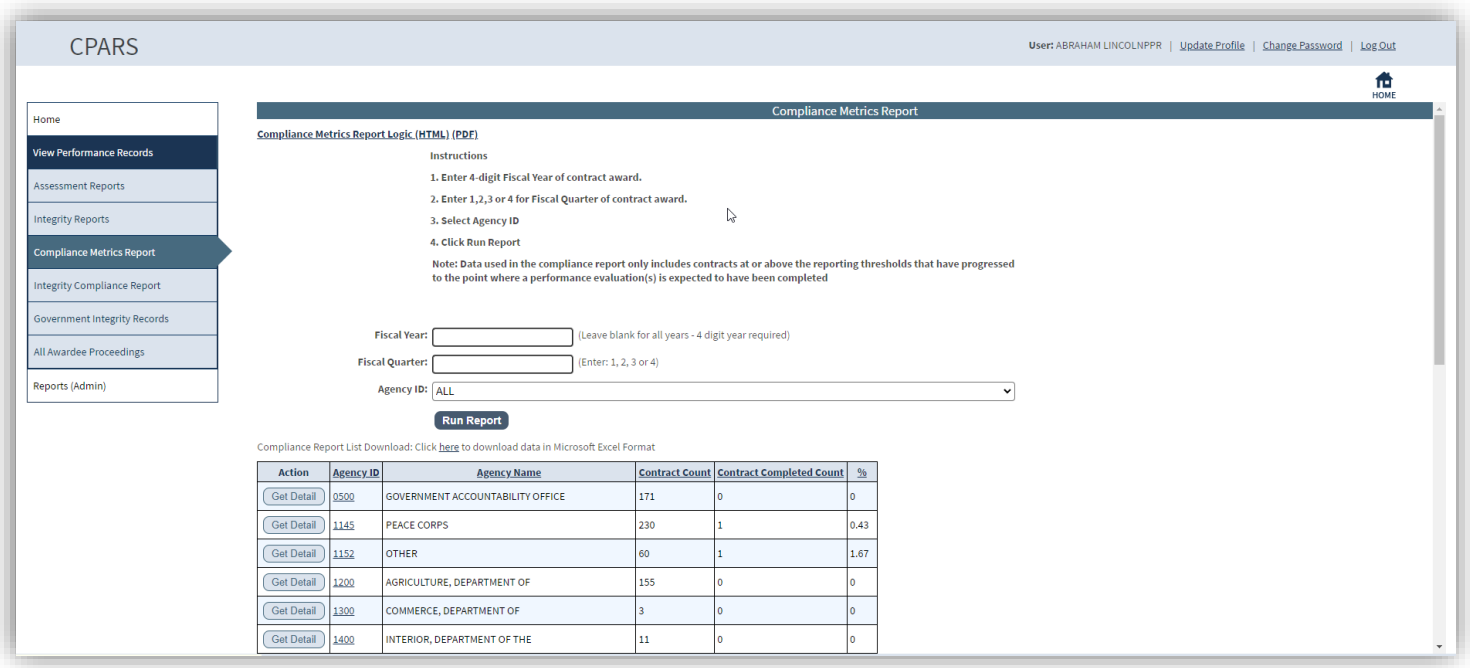
This section will display any exclusion record from SAM.gov. Indicating that the individual or Entity listed is disqualified from receiving any federal government contracts.

Compliance Metrics Reports

The Compliance Metrics Report is used to review compliance with past performance reporting requirements by comparing contracts entered into the Federal Procurement Data System (FPDS) and completed evaluations. To run a Compliance Metrics Report, click the **View Performance Records** option. Click **Compliance Metrics Report**. The Compliance Metrics Report Parameters menu will display.



Enter the desired qualifiers and click the **Run Report** button or to list all Agencies click the **Run Report** button. The Compliance Report will display.

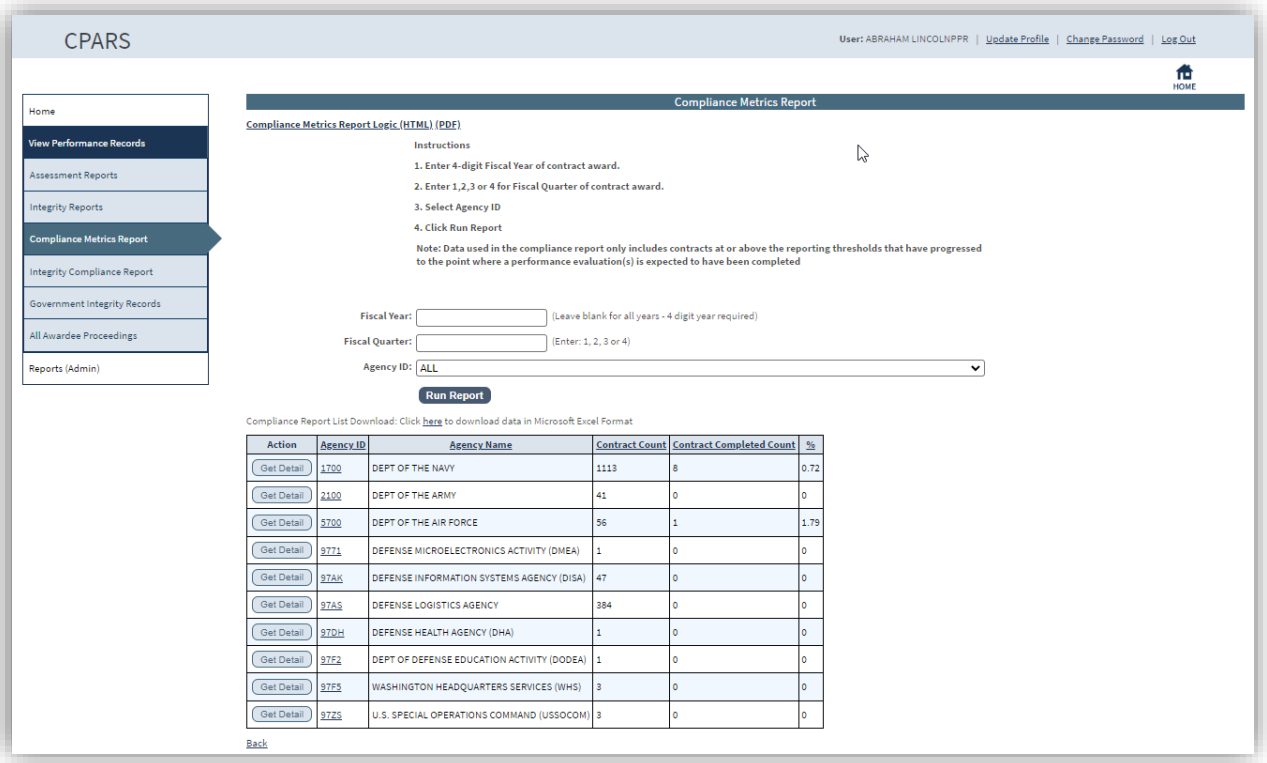


Action	Agency ID	Agency Name	Contract Count	Contract Completed Count	%
Get Detail	0500	GOVERNMENT ACCOUNTABILITY OFFICE	171	0	0
Get Detail	1145	PEACE CORPS	230	1	0.43
Get Detail	1152	OTHER	60	1	1.67
Get Detail	1200	AGRICULTURE, DEPARTMENT OF	155	0	0
Get Detail	1300	COMMERCE, DEPARTMENT OF	3	0	0
Get Detail	1400	INTERIOR, DEPARTMENT OF THE	11	0	0

Click the **Here** button above the table to export the data columns displayed into a Microsoft Excel Spreadsheet.

Click the **Get Detail** button to receive a Microsoft Excel Spreadsheet of all the Agency's contract numbers and their individual compliance.

Click the applicable Agency ID to display the Compliance Metrics at the Contracting Office ID Level.

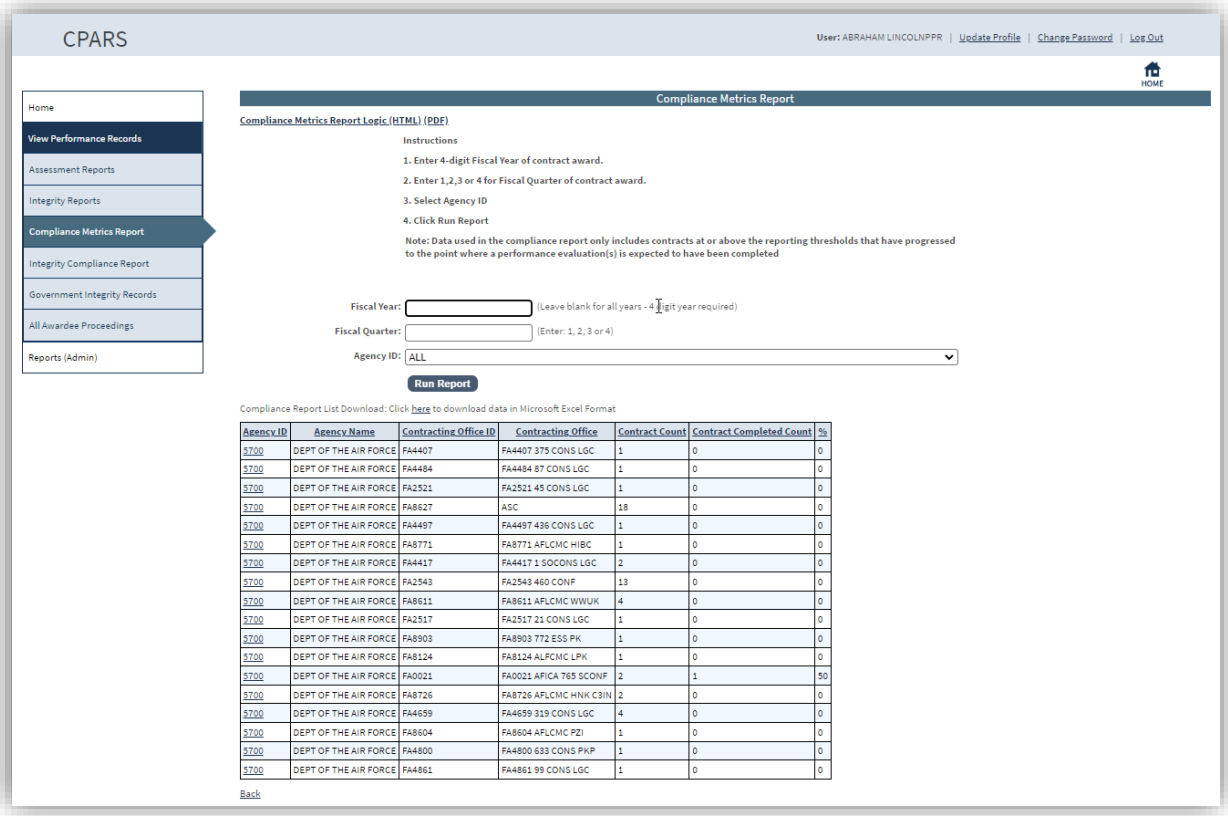


Action	Agency ID	Agency Name	Contract Count	Contract Completed Count	%
Get Detail	1700	DEPT OF THE NAVY	1113	8	0.72
Get Detail	2100	DEPT OF THE ARMY	41	0	0
Get Detail	5700	DEPT OF THE AIR FORCE	56	1	1.79
Get Detail	9771	DEFENSE MICROELECTRONICS ACTIVITY (DMEA)	1	0	0
Get Detail	97AK	DEFENSE INFORMATION SYSTEMS AGENCY (DISA)	47	0	0
Get Detail	97AS	DEFENSE LOGISTICS AGENCY	384	0	0
Get Detail	97DH	DEFENSE HEALTH AGENCY (DHA)	1	0	0
Get Detail	97F2	DEPT OF DEFENSE EDUCATION ACTIVITY (DODEA)	1	0	0
Get Detail	97F5	WASHINGTON HEADQUARTERS SERVICES (WHS)	3	0	0
Get Detail	97ZS	U.S. SPECIAL OPERATIONS COMMAND (USSOCOM)	3	0	0

Click the **Here** button above the table to export the data columns displayed into a Microsoft Excel Spreadsheet.

Click the **Get Detail** button to receive a Microsoft Excel Spreadsheet of all the Agency's contract numbers and their individual compliance.

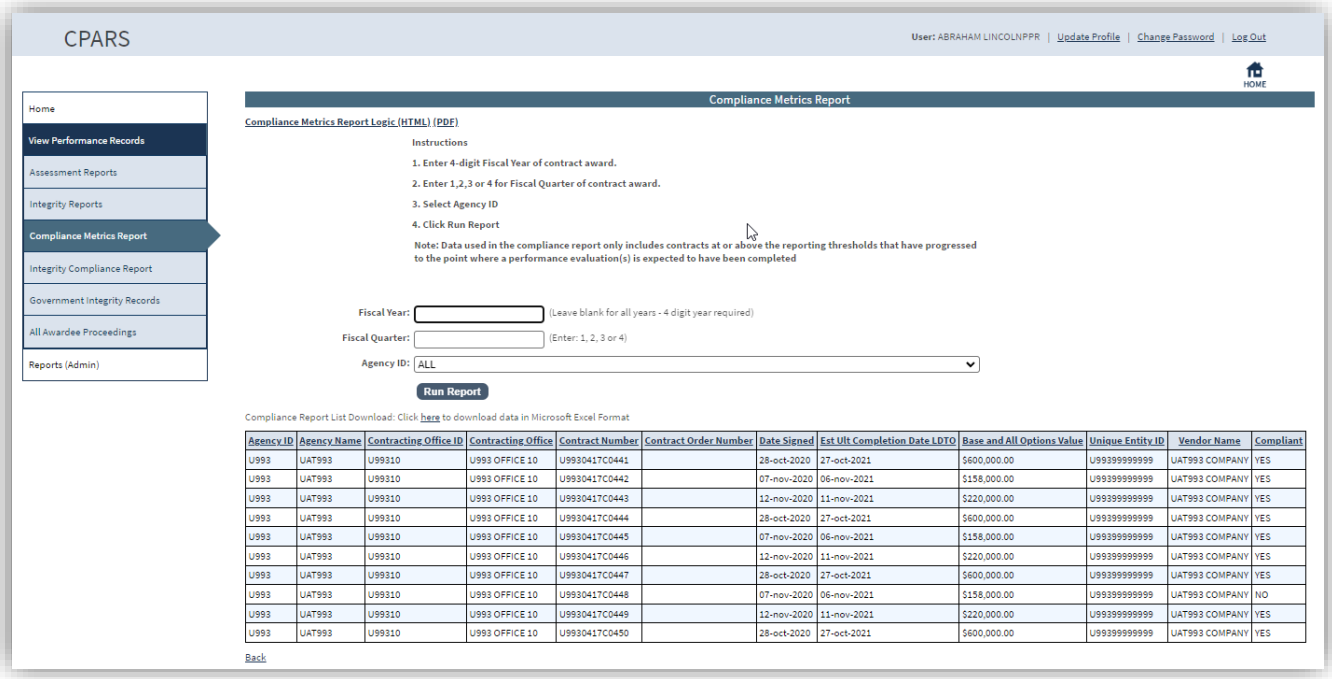
Click the applicable Agency ID to display the Compliance Metrics at the Contracting Office ID Level.



Agency ID	Agency Name	Contracting Office ID	Contracting Office	Contract Count	Contract Completed Count	%
5700	DEPT OF THE AIR FORCE	FA4407	FA4407 375 CONS LGC	1	0	0
5700	DEPT OF THE AIR FORCE	FA4484	FA4484 87 CONS LGC	1	0	0
5700	DEPT OF THE AIR FORCE	FA2521	FA2521 45 CONS LGC	1	0	0
5700	DEPT OF THE AIR FORCE	FA8627	ASC	18	0	0
5700	DEPT OF THE AIR FORCE	FA4497	FA4497 436 CONS LGC	1	0	0
5700	DEPT OF THE AIR FORCE	FA8771	FA8771 AFLCMC HIBC	1	0	0
5700	DEPT OF THE AIR FORCE	FA4417	FA4417 1 SOCONS LGC	2	0	0
5700	DEPT OF THE AIR FORCE	FA2543	FA2543 460 CONF	13	0	0
5700	DEPT OF THE AIR FORCE	FA8611	FA8611 AFLCMC WWUK	4	0	0
5700	DEPT OF THE AIR FORCE	FA2517	FA2517 21 CONS LGC	1	0	0
5700	DEPT OF THE AIR FORCE	FA8903	FA8903 772 ESS PK	1	0	0
5700	DEPT OF THE AIR FORCE	FA8124	FA8124 ALFCMC LPK	1	0	0
5700	DEPT OF THE AIR FORCE	FA0021	FA0021 AFICA 765 SCONF	2	1	50
5700	DEPT OF THE AIR FORCE	FA8726	FA8726 AFLCMC HNK C3IN	2	0	0
5700	DEPT OF THE AIR FORCE	FA4659	FA4659 319 CONS LGC	4	0	0
5700	DEPT OF THE AIR FORCE	FA8604	FA8604 AFLCMC PZI	1	0	0
5700	DEPT OF THE AIR FORCE	FA4800	FA4800 633 CONS PKP	1	0	0
5700	DEPT OF THE AIR FORCE	FA4861	FA4861 99 CONS LGC	1	0	0

Click the **Here** button above the table to export the data columns displayed, into a Microsoft Excel Spreadsheet.

Click the applicable Agency ID to display the Compliance Metrics at the Detailed Office ID Level.

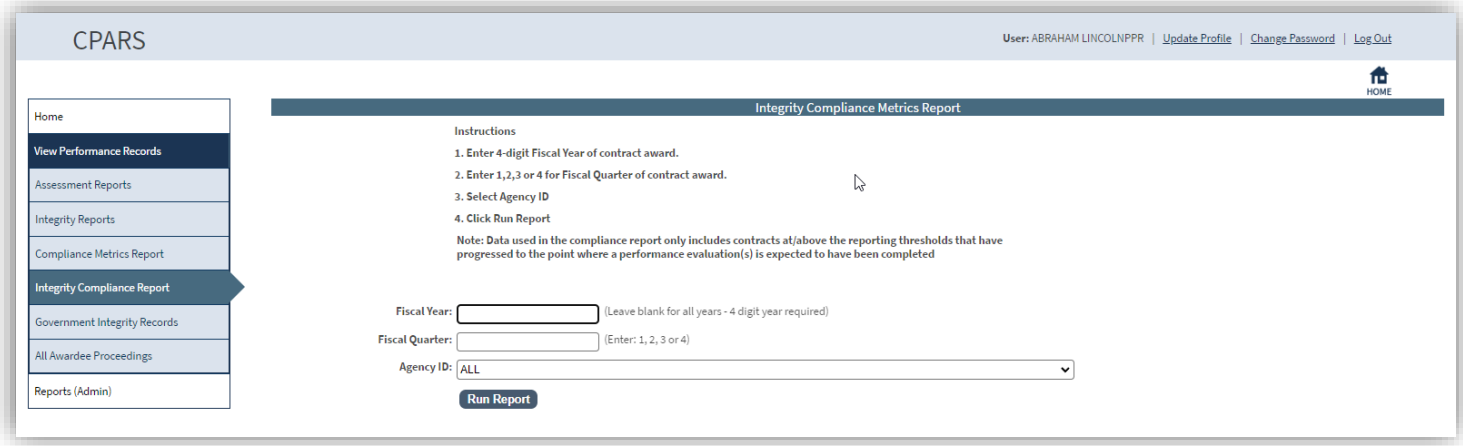


Agency ID	Agency Name	Contracting Office ID	Contracting Office	Contract Number	Contract Order Number	Date Signed	Est Ult Completion Date LDTO	Base and All Options Value	Unique Entity ID	Vendor Name	Compliant
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0441		28-oct-2020	27-oct-2021	$600,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0442		07-nov-2020	06-nov-2021	$158,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0443		12-nov-2020	11-nov-2021	$220,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0444		28-oct-2020	27-oct-2021	$600,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0445		07-nov-2020	06-nov-2021	$158,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0446		12-nov-2020	11-nov-2021	$220,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0447		28-oct-2020	27-oct-2021	$600,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0448		07-nov-2020	06-nov-2021	$158,000.00	U99399999999	UAT993 COMPANY	NO
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0449		12-nov-2020	11-nov-2021	$220,000.00	U99399999999	UAT993 COMPANY	YES
U993	UAT993	U99310	U993 OFFICE 10	U9930417C0450		28-oct-2020	27-oct-2021	$600,000.00	U99399999999	UAT993 COMPANY	YES

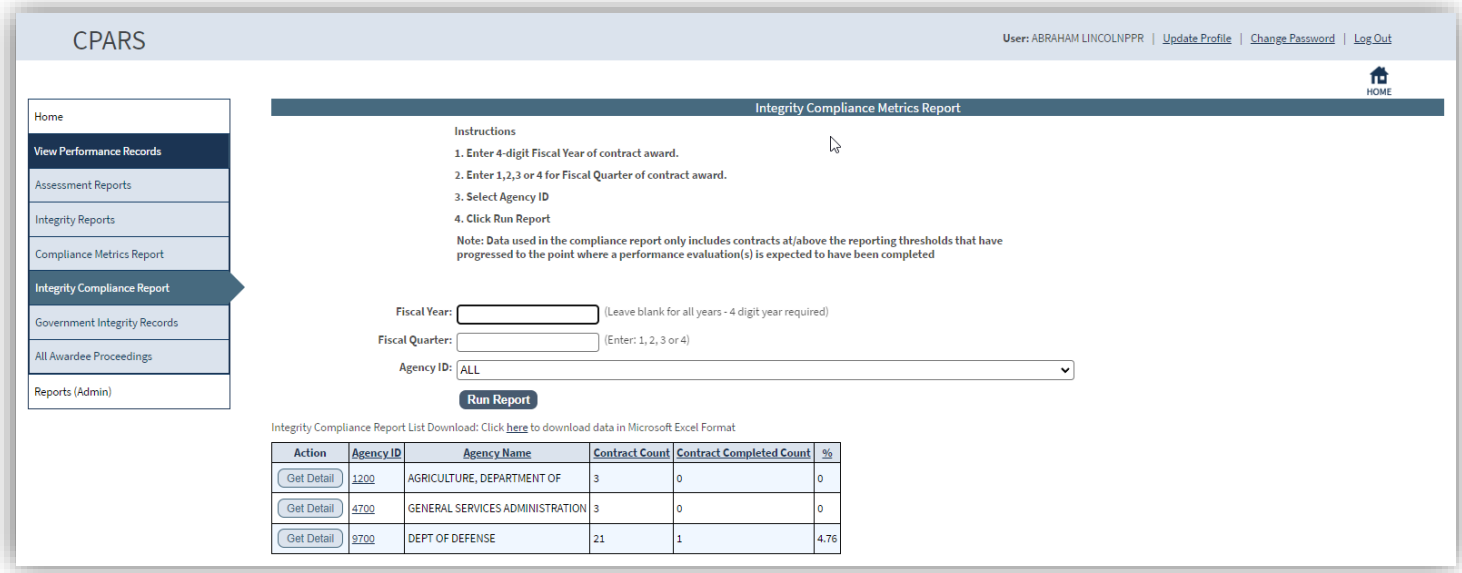
Click the **Here** button above the table to export the data columns displayed into a Microsoft Excel Spreadsheet.

Integrity Compliance Report

The Integrity Compliance Metrics is used to review compliance with Integrity reporting requirements for Terminations for Default and Cause. The Integrity Compliance Metrics compare contracts/orders entered into the Federal Procurement Data System (FPDS) with those contracts/orders reported in Integrity. To run an Integrity Compliance Report, click the **View Performance Records** option. Click **Integrity Compliance Report**. The Compliance Metrics Report Parameters menu will display.



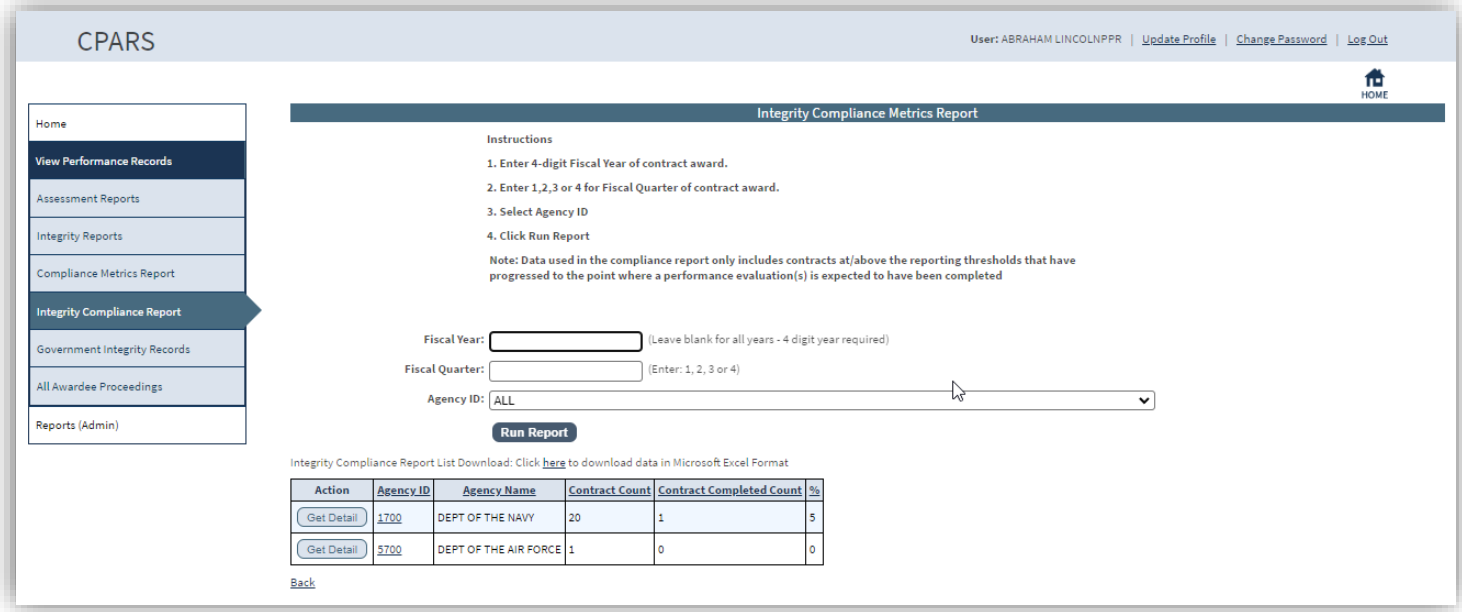
Enter the desired qualifiers and click the **Run Report** button or to list all Agencies click the **Run Report** button. The Compliance Report will display.



Click the **Here** button above the table to export the data columns displayed, into a Microsoft Excel Spreadsheet

Click the **Get Detail** button to receive a Microsoft Excel Spreadsheet of all the Agency's contract numbers and their individual compliance.

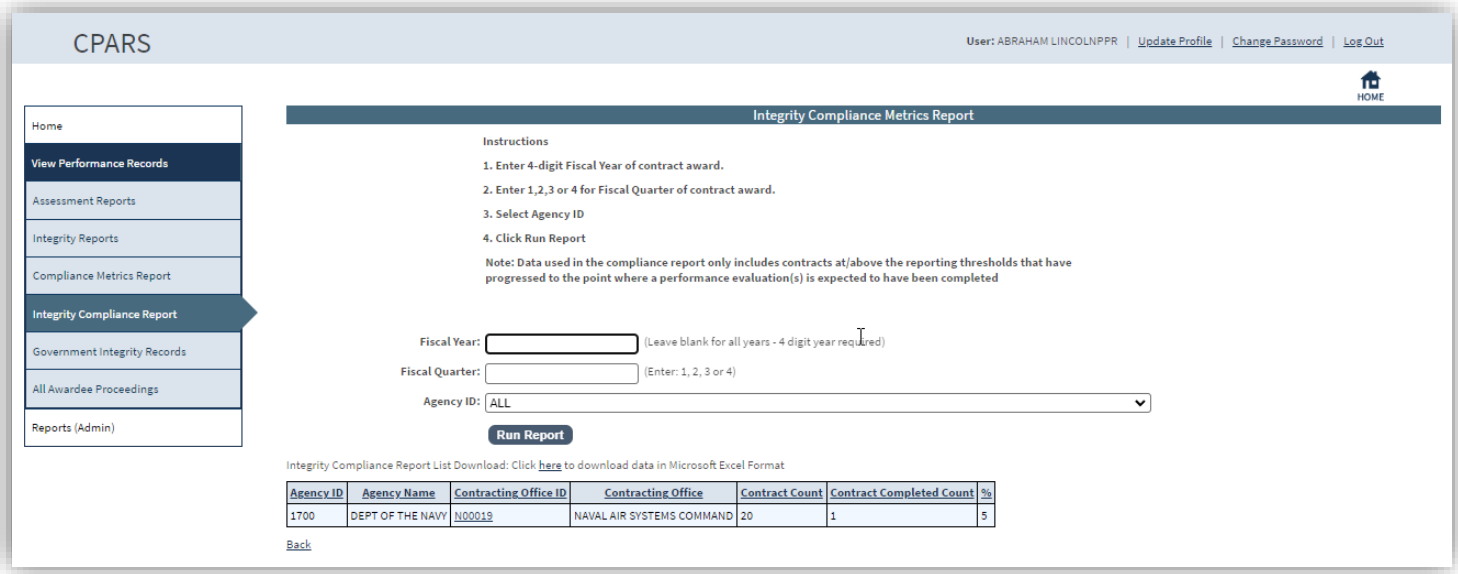
Click the applicable Agency ID to display the Compliance Metrics at the Office ID Level.



Click the **Here** button above the table to export the data columns displayed into a Microsoft Excel Spreadsheet.

Click the **Get Detail** button to receive a Microsoft Excel Spreadsheet of all the Agency's contract numbers and their individual compliance.

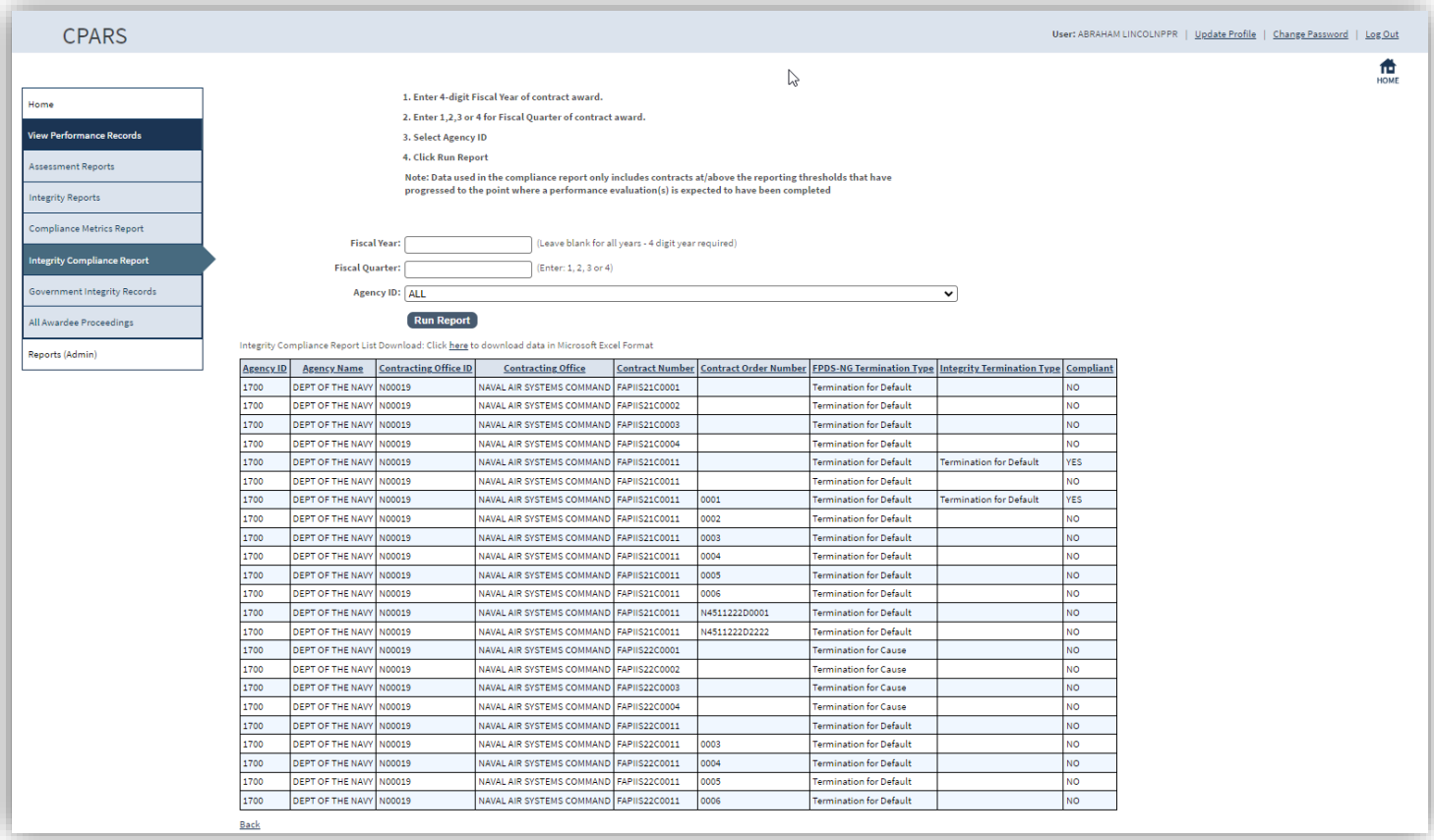
Click the applicable Agency ID to display the Compliance Metrics at the Agency Level.



Agency ID	Agency Name	Contracting Office ID	Contracting Office	Contract Count	Contract Completed Count	%
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	20	1	5

Click the **Here** button above the table to export the data columns displayed, into a Microsoft Excel Spreadsheet.

Click the applicable Agency ID to display the Compliance Metrics at the Detailed Office ID Level.



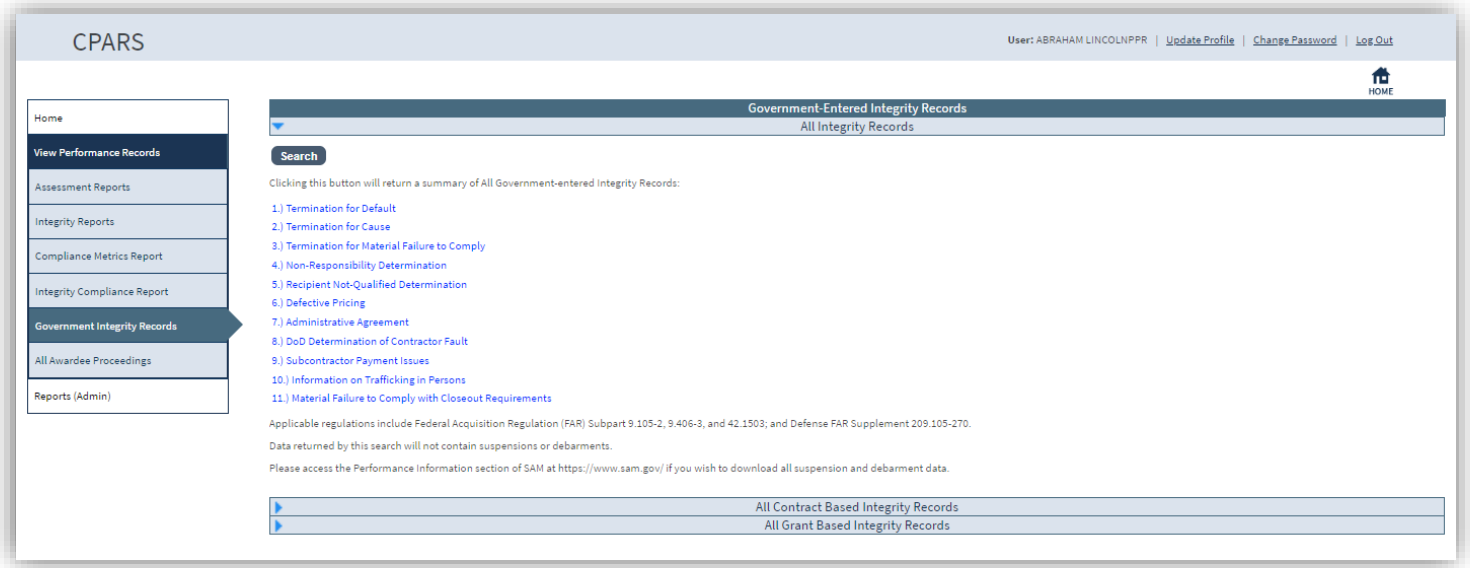
Agency ID	Agency Name	Contracting Office ID	Contracting Office	Contract Number	Contract Order Number	FPDS-NG Termination Type	Integrity Termination Type	Compliant
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0001		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0002		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0003		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0004		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011		Termination for Default	Termination for Default	YES
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0001	Termination for Default	Termination for Default	YES
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0002	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0003	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0004	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0005	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	0006	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	N4511222D0001	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS21C0011	N4511222D2222	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0001		Termination for Cause		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0002		Termination for Cause		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0003		Termination for Cause		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0004		Termination for Cause		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0011		Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0011	0003	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0011	0004	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0011	0005	Termination for Default		NO
1700	DEPT OF THE NAVY	N00019	NAVAL AIR SYSTEMS COMMAND	FAPIIS22C0011	0006	Termination for Default		NO

Click the **Here** button above the table to export the data columns displayed into a Microsoft Excel Spreadsheet.

Government Integrity Records

This option allows users to view a list of all government entered Integrity records. Users can choose to obtain a list of all Government entered Integrity Records, All Government entered Contract Based Integrity Records, or All Government entered Grant Based Integrity Records. To run a Government-Entered Integrity Record listing, click the **View Performance Records** option. Click **Government Integrity Records.** The Government-Entered Integrity

Records screen will display.



Clicking this button will return a summary of All Government-entered Integrity Records:

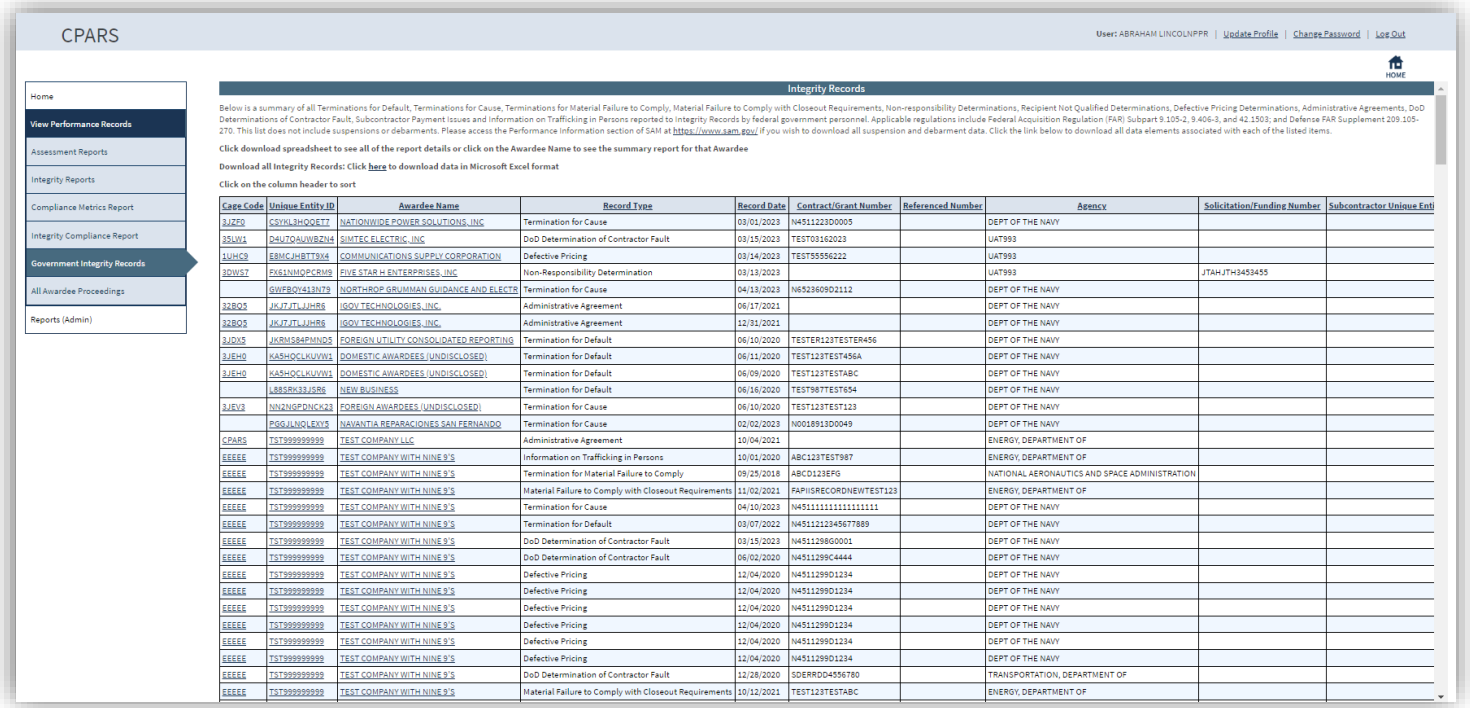
1.) Termination for Default
2.) Termination for Cause
3.) Termination for Material Failure to Comply
4.) Non-Responsibility Determination
5.) Recipient Not-Qualified Determination
6.) Defective Pricing
7.) Administrative Agreement
8.) DoD Determination of Contractor Fault
9.) Subcontractor Payment Issues
10.) Information on Trafficking in Persons
11.) Material Failure to Comply with Closeout Requirements

Applicable regulations include Federal Acquisition Regulation (FAR) Subpart 9.105-2, 9.406-3, and 42.1503; and Defense FAR Supplement 209.105-270.

Data returned by this search will not contain suspensions or debarments.

Please access the Performance Information section of SAM at https://www.sam.gov/ if you wish to download all suspension and debarment data.

Click on **Search** for the applicable list. The list of All Government-entered records for the selected list will display.



Below is a summary of all Terminations for Default, Terminations for Cause, Terminations for Material Failure to Comply, Material Failure to Comply with Closeout Requirements, Non-responsibility Determinations, Recipient Not Qualified Determinations, Defective Pricing Determinations, Administrative Agreements, DoD Determinations of Contractor Fault, Subcontractor Payment Issues and Information on Trafficking in Persons reported to Integrity Records by federal government personnel. Applicable regulations include Federal Acquisition Regulation (FAR) Subpart 9.105-2, 9.406-3, and 42.1503; and Defense FAR Supplement 209.105-270. This list does not include suspensions or debarments. Please access the Performance Information section of SAM at https://www.sam.gov/ if you wish to download all suspension and debarment data. Click the link below to download all data elements associated with each of the listed items.

Click download spreadsheet to see all of the report details or click on the Awardee Name to see the summary report for that Awardee

Download all Integrity Records: Click here to download data in Microsoft Excel format

Click on the column header to sort

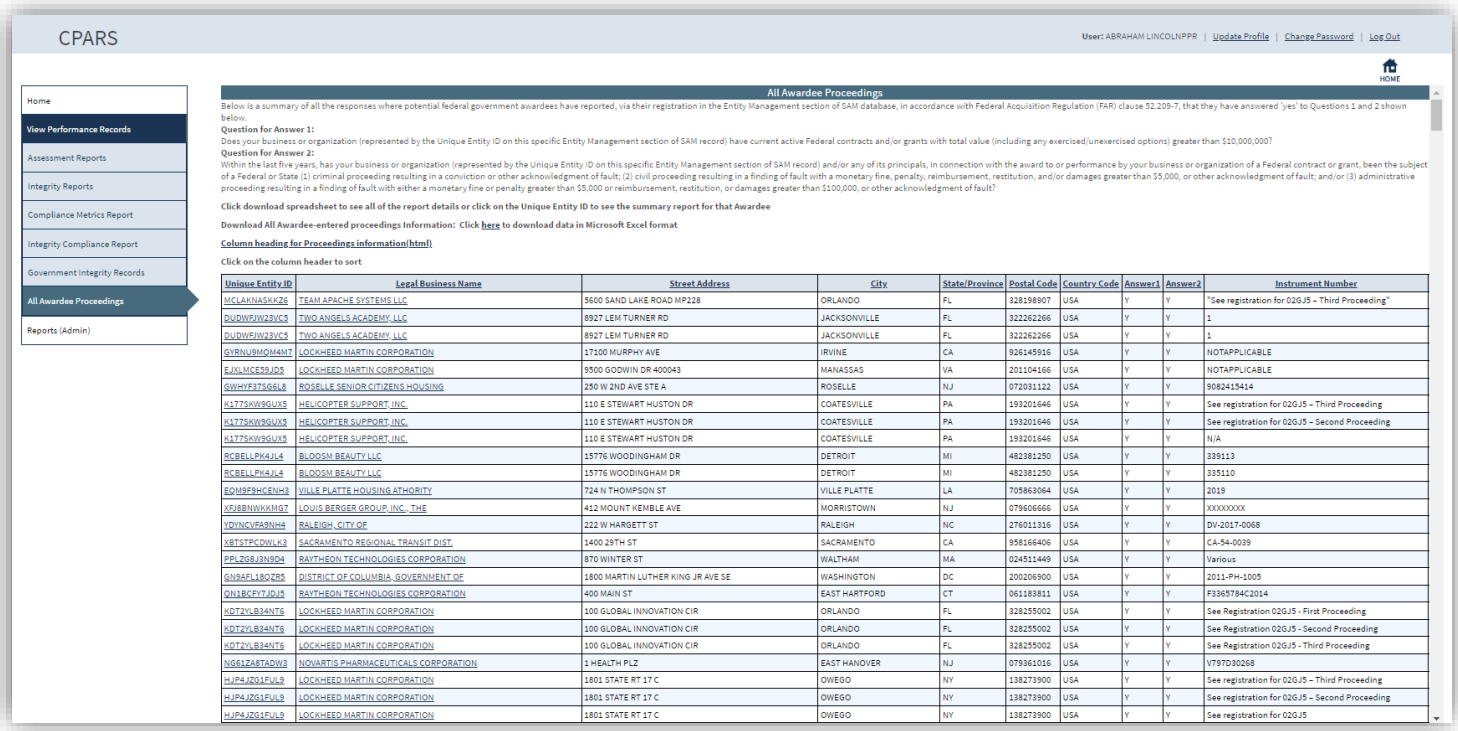
Cage Code	Unique Entity ID	Awardee Name	Record Type	Record Date	Contract/Grant Number	Referenced Number	Agency	Solicitation/Funding Number	Subcontractor Unique Enti
3JZF0	CSYKL3HQQET7	NATIONWIDE POWER SOLUTIONS, INC	Termination for Cause	03/01/2023	N4511223D0005		DEPT OF THE NAVY		
35LW1	D4U7QAUWBZN4	SIMTEC ELECTRIC, INC	DoD Determination of Contractor Fault	03/15/2023	TEST03162023		UAT993		
1UHC9	E8MCJHBTT9X4	COMMUNICATIONS SUPPLY CORPORATION	Defective Pricing	03/14/2023	TEST55556222		UAT993		
3DWS7	FX61NMQPCRM9	FIVE STAR H ENTERPRISES, INC	Non-Responsibility Determination	03/13/2023			UAT993	JTAHJTH3453455	
	GWFBQY413N79	NORTHROP GRUMMAN GUIDANCE AND ELECTR	Termination for Cause	04/13/2023	N6523609D2112		DEPT OF THE NAVY		
32BQ5	JKJ7JTLJJHR6	IGOV TECHNOLOGIES, INC.	Administrative Agreement	06/17/2021			DEPT OF THE NAVY		
32BQ5	JKJ7JTLJJHR6	IGOV TECHNOLOGIES, INC.	Administrative Agreement	12/31/2021			DEPT OF THE NAVY		
3JDX5	JKRMS84PMND5	FOREIGN UTILITY CONSOLIDATED REPORTING	Termination for Default	06/10/2020	TESTER123TESTER456		DEPT OF THE NAVY		
3JEH0	KA5HQCLKUVW1	DOMESTIC AWARDEES (UNDISCLOSED)	Termination for Default	06/11/2020	TEST123TEST456A		DEPT OF THE NAVY		
3JEH0	KA5HQCLKUVW1	DOMESTIC AWARDEES (UNDISCLOSED)	Termination for Default	06/09/2020	TEST123TESTABC		DEPT OF THE NAVY		
	L88SRK33JSR6	NEW BUSINESS	Termination for Default	06/16/2020	TEST987TEST654		DEPT OF THE NAVY		
3JEV3	NN2NGPDNCK23	FOREIGN AWARDEES (UNDISCLOSED)	Termination for Cause	06/10/2020	TEST123TEST123		DEPT OF THE NAVY		
	PGGJLNQLEXY5	NAVANTIA REPARACIONES SAN FERNANDO	Termination for Cause	02/02/2023	N0018913D0049		DEPT OF THE NAVY		
CPARS	TST999999999	TEST COMPANY LLC	Administrative Agreement	10/04/2021			ENERGY, DEPARTMENT OF		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Information on Trafficking in Persons	10/01/2020	ABC123TEST987		ENERGY, DEPARTMENT OF		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Termination for Material Failure to Comply	09/25/2018	ABCD123EFG		NATIONAL AERONAUTICS AND SPACE ADMINISTRATION		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Material Failure to Comply with Closeout Requirements	11/02/2021	FAPIISRECORDNEWTEST123		ENERGY, DEPARTMENT OF		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Termination for Cause	04/10/2023	N45111111111111111		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Termination for Default	03/07/2022	N4511212345677889		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	DoD Determination of Contractor Fault	03/15/2023	N4511298G0001		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	DoD Determination of Contractor Fault	06/02/2020	N4511299C4444		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Defective Pricing	12/04/2020	N4511299D1234		DEPT OF THE NAVY		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	DoD Determination of Contractor Fault	12/28/2020	SDERRDD4556780		TRANSPORTATION, DEPARTMENT OF		
EEEEE	TST999999999	TEST COMPANY WITH NINE 9'S	Material Failure to Comply with Closeout Requirements	10/12/2021	TEST123TESTABC		ENERGY, DEPARTMENT OF		

Click the **here** link at the top of the report to download data in Microsoft Excel format.

Click on the applicable CAGE Code, Unique Entity ID, or Awardee Name to view the Entity's Integrity Record. **(See Integrity Reports Section for more specific information)**

All Awardee Proceedings Report

This option allows users to view a list of all Awardee entered Proceedings. To run a list of All Awardee Proceedings, click the **View Performance Records** option. Click **All Awardee Proceedings**. The All Awardee Proceedings Records list will display.



CPARS

User: ABRAHAM LINCOLNPPR | Update Profile | Change Password | Log Out

HOME

- Home
- View Performance Records
- Assessment Reports
- Integrity Reports
- Compliance Metrics Report
- Integrity Compliance Report
- Government Integrity Records
- All Awardee Proceedings
- Reports (Admin)

All Awardee Proceedings

Below is a summary of all the responses where potential federal government awardees have reported, via their registration in the Entity Management section of SAM database, in accordance with Federal Acquisition Regulation (FAR) clause 52.209-7, that they have answered 'yes' to Questions 1 and 2 shown below.

Question for Answer 1:
Does your business or organization (represented by the Unique Entity ID on this specific Entity Management section of SAM record) have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than $10,000,000?

Question for Answer 2:
Within the last five years, has your business or organization (represented by the Unique Entity ID on this specific Entity Management section of SAM record) and/or any of its principals, in connection with the award to or performance by your business or organization of a Federal contract or grant, been the subject of a Federal or State (1) criminal proceeding resulting in a conviction or other acknowledgment of fault; (2) civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than $5,000, or other acknowledgment of fault; and/or (3) administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than $5,000 or reimbursement, restitution, or damages greater than $100,000, or other acknowledgment of fault?

Click download spreadsheet to see all of the report details or click on the Unique Entity ID to see the summary report for that Awardee

Download All Awardee-entered proceedings Information: Click here to download data in Microsoft Excel format

Column heading for Proceedings information(html)

Click on the column header to sort

Unique Entity ID	Legal Business Name	Street Address	City	State/Province	Postal Code	Country Code	Answer1	Answer2	Instrument Number
MCLAKNASKKZ6	TEAM APACHE SYSTEMS LLC	5600 SAND LAKE ROAD MP228	ORLANDO	FL	328198907	USA	Y	Y	"See registration for 02GJ5 – Third Proceeding"
DUDWFJW23VC5	TWO ANGELS ACADEMY, LLC	8927 LEM TURNER RD	JACKSONVILLE	FL	322262266	USA	Y	Y	1
DUDWFJW23VC5	TWO ANGELS ACADEMY, LLC	8927 LEM TURNER RD	JACKSONVILLE	FL	322262266	USA	Y	Y	1
GYRNU9MQM4M7	LOCKHEED MARTIN CORPORATION	17100 MURPHY AVE	IRVINE	CA	926145916	USA	Y	Y	NOTAPPLICABLE
EJXLMCE59JD3	LOCKHEED MARTIN CORPORATION	9500 GODWIN DR 400043	MANASSAS	VA	201104166	USA	Y	Y	NOTAPPLICABLE
GWHYF3TSG6L8	ROSELLE SENIOR CITIZENS HOUSING	250 W 2ND AVE STE A	ROSELLE	NJ	072031122	USA	Y	Y	9082415414
K177SKW9GUX5	HELICOPTER SUPPORT, INC.	110 E STEWART HUSTON DR	COATESVILLE	PA	193201646	USA	Y	Y	See registration for 02GJ5 – Third Proceeding
K177SKW9GUX5	HELICOPTER SUPPORT, INC.	110 E STEWART HUSTON DR	COATESVILLE	PA	193201646	USA	Y	Y	See registration for 02GJ5 – Second Proceeding
K177SKW9GUX5	HELICOPTER SUPPORT, INC.	110 E STEWART HUSTON DR	COATESVILLE	PA	193201646	USA	Y	Y	N/A
RCBELLPK4JL4	BLOOSM BEAUTY LLC	15776 WOODINGHAM DR	DETROIT	MI	482381250	USA	Y	Y	339113
RCBELLPK4JL4	BLOOSM BEAUTY LLC	15776 WOODINGHAM DR	DETROIT	MI	482381250	USA	Y	Y	335110
EQM9F9HCENH3	VILLE PLATTE HOUSING ATHORITY	724 N THOMPSON ST	VILLE PLATTE	LA	705863064	USA	Y	Y	2019
XFJ8BNWKKMG7	LOUIS BERGER GROUP,INC., THE	412 MOUNT KEMBLE AVE	MORRISTOWN	NJ	079606666	USA	Y	Y	XXXXXXXX
YDYNCVFA9NH4	RALEIGH, CITY OF	222 W HARGETT ST	RALEIGH	NC	276011316	USA	Y	Y	DV-2017-0068
XBTSTPCDWLK3	SACRAMENTO REGIONAL TRANSIT DIST.	1400 29TH ST	SACRAMENTO	CA	958166406	USA	Y	Y	CA-54-0039
PPLZG8J3N9D4	RAYTHEON TECHNOLOGIES CORPORATION	870 WINTER ST	WALTHAM	MA	024511449	USA	Y	Y	Various
GN9AFL18QZB5	DISTRICT OF COLUMBIA, GOVERNMENT OF	1800 MARTIN LUTHER KING JR AVE SE	WASHINGTON	DC	200206900	USA	Y	Y	2011-PH-1005
QN1BCFY7JDJ5	RAYTHEON TECHNOLOGIES CORPORATION	400 MAIN ST	EAST HARTFORD	CT	061183811	USA	Y	Y	F3365784C2014
KDT2YLB34NT6	LOCKHEED MARTIN CORPORATION	100 GLOBAL INNOVATION CIR	ORLANDO	FL	328255002	USA	Y	Y	See Registration 02GJ5 - First Proceeding
KDT2YLB34NT6	LOCKHEED MARTIN CORPORATION	100 GLOBAL INNOVATION CIR	ORLANDO	FL	328255002	USA	Y	Y	See Registration 02GJ5 - Second Proceeding
KDT2YLB34NT6	LOCKHEED MARTIN CORPORATION	100 GLOBAL INNOVATION CIR	ORLANDO	FL	328255002	USA	Y	Y	See Registration 02GJ5 - Third Proceeding
NG61ZA8TADW3	NOVARTIS PHARMACEUTICALS CORPORATION	1 HEALTH PLZ	EAST HANOVER	NJ	079361016	USA	Y	Y	V797D30268
HJP4JZG1FUL9	LOCKHEED MARTIN CORPORATION	1801 STATE RT 17 C	OWEGO	NY	138273900	USA	Y	Y	See registration for 02GJ5 – Third Proceeding
HJP4JZG1FUL9	LOCKHEED MARTIN CORPORATION	1801 STATE RT 17 C	OWEGO	NY	138273900	USA	Y	Y	See registration for 02GJ5 – Second Proceeding
HJP4JZG1FUL9	LOCKHEED MARTIN CORPORATION	1801 STATE RT 17 C	OWEGO	NY	138273900	USA	Y	Y	See registration for 02GJ5

Click the **here** link at the top of the report to download data in Microsoft Excel format.

Click on the applicable Unique Entity ID or Legal Business to view the Entity's Integrity Record. **(See Integrity Reports Section for more specific information)**

NOTE: The remaining Access (View Performance) Menu options are also applicable at the other access levels. As such, the Reports (Admin) option is described in more detail in the Ad Hoc section.

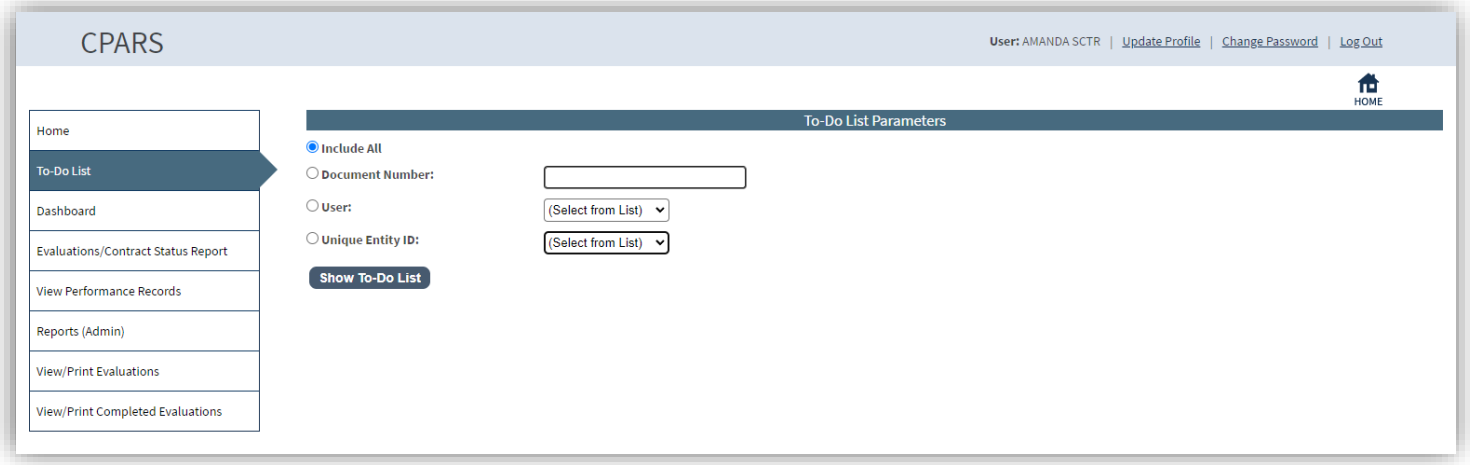
Senior Contractor Representative

The Senior Contractor Representative access level allows a designated corporate official to view in-process evaluations when statused at the Contractor Representative level, and all completed evaluations. Additional features at this level allow the Senior Contractor Representative to quickly identify evaluations that have been sent to the company for comment and respond to Integrity Records. Senior Contractor Representative access is provided by submitting a request from the Access Info section at https://cpars.gov/access.htm.

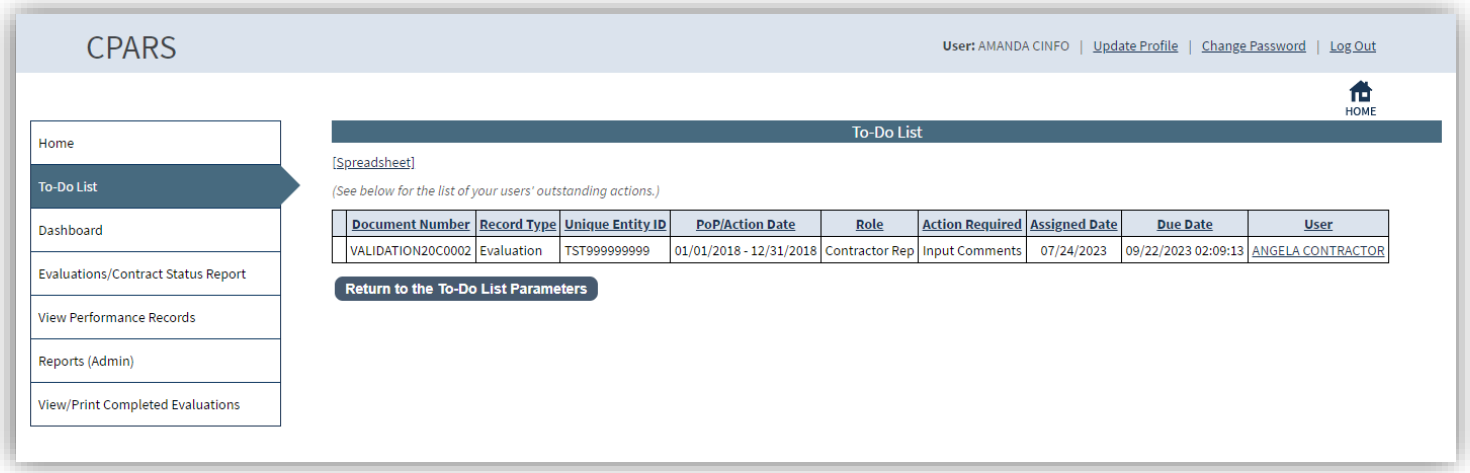
NOTE: This access level will **not** allow you to comment on a performance assessment or evaluation.

To-Do List

This option allows the Senior Contractor Representative to identify all evaluations that have been forwarded to the corporation, its divisions or subsidiaries, for contractor review and comment. The evaluations identified on this list require contractor review and comment and should be returned to the Government by the required due date or they will be closed by the Government without contractor review and comment. Click **To-Do List** and the 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 **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 **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 Unique Entity ID numbers by selecting **Unique Entity ID** and selecting the Unique Entity ID from the drop-down box. Select the desired parameter and then click the **Show To-Do List** button. A list of evaluations will display.



This report displays Document Number, Record Type, Unique Entity ID, Period of Performance/Action Date, Role, Action Required, Assigned Date, Due Date, and User.

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

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

Return to the To-Do List Parameters button allows the Senior Contractor Representative to select new qualifiers and run another report.

Dashboard

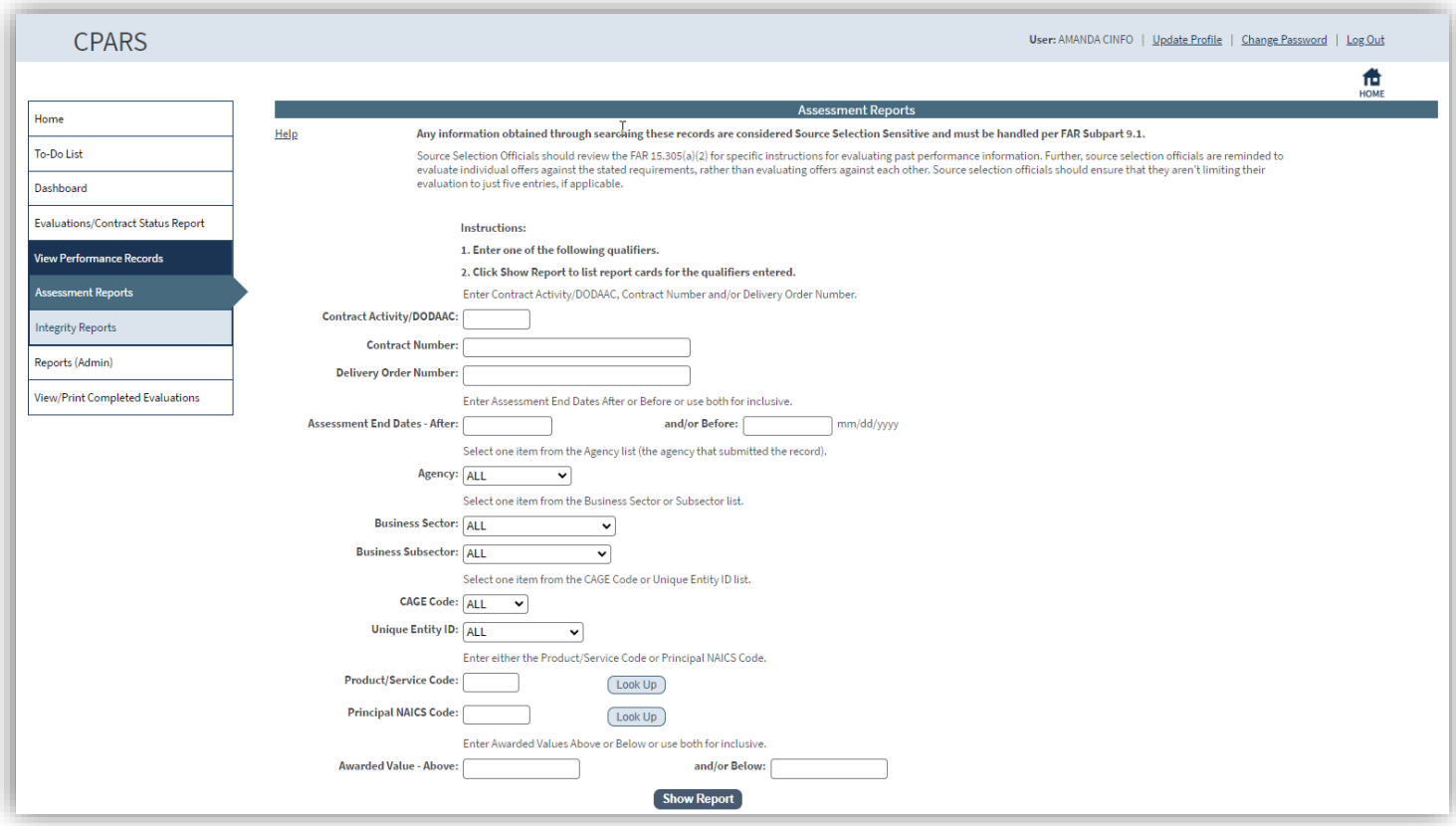
This option provides the Senior Contractor Representative with a variety of reports depending on the user's access level. These reports are used to help users monitor the status of the CPARS process. **(See Dashboard Section for more specific information)**

View Performance Records

This option allows the Senior Contractor Representative to view their organization's past performance evaluations and Integrity Reports available for source selection purposes. To access the View Performance Records options, click the **View Performance Records** option. The View Performance Records menu options display.

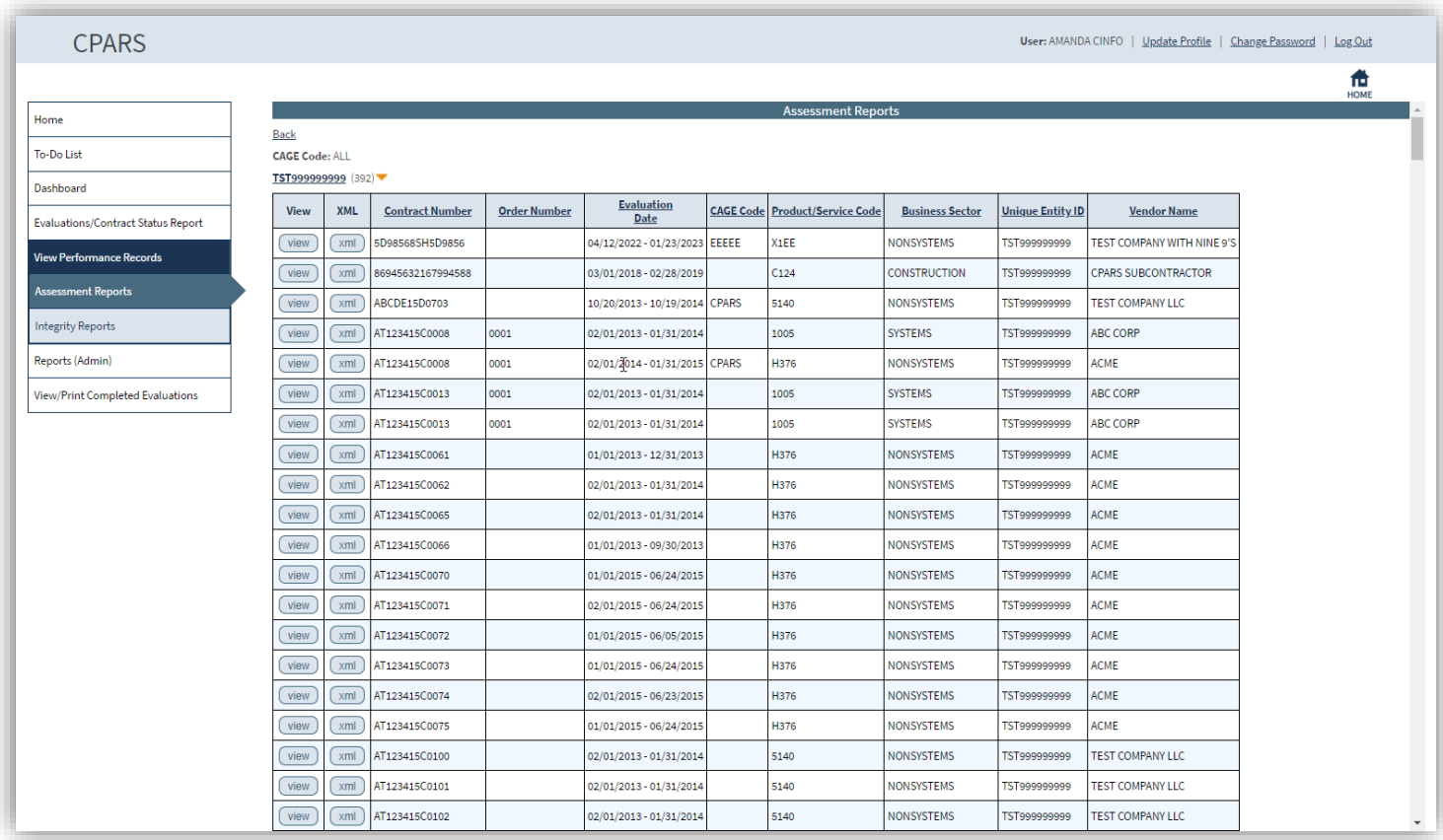
Assessment Reports

This option allows Senior Contractor Representative users to view past performance evaluations available for source selection purposes for their organization. To run an Assessment Report, click the **View Performance Records** option. Click **Assessment Reports**. The Assessment Report Parameters menu will display.



Assessment Reports selection allows users to enter specific qualifiers to view the evaluations for the qualifiers entered. Enter the desired qualifiers and click the **Show Report** button.

NOTE: The user can retrieve all reports by just clicking the Show Report button.



View	XML	Contract Number	Order Number	Evaluation Date	CAGE Code	Product/Service Code	Business Sector	Unique Entity ID	Vendor Name
view	xml	5D98568SH5D9856		04/12/2022 - 01/23/2023	EEEEE	X1EE	NONSYSTEMS	TST999999999	TEST COMPANY WITH NINE 9'S
view	xml	86945632167994588		03/01/2018 - 02/28/2019		C124	CONSTRUCTION	TST999999999	CPARS SUBCONTRACTOR
view	xml	ABCDE15D0703		10/20/2013 - 10/19/2014	CPARS	5140	NONSYSTEMS	TST999999999	TEST COMPANY LLC
view	xml	AT123415C0008	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP
view	xml	AT123415C0008	0001	02/01/2014 - 01/31/2015	CPARS	H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP
view	xml	AT123415C0013	0001	02/01/2013 - 01/31/2014		1005	SYSTEMS	TST999999999	ABC CORP
view	xml	AT123415C0061		01/01/2013 - 12/31/2013		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0062		02/01/2013 - 01/31/2014		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0065		02/01/2013 - 01/31/2014		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0066		01/01/2013 - 09/30/2013		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0070		01/01/2015 - 06/24/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0071		02/01/2015 - 06/24/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0072		01/01/2015 - 06/05/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0073		01/01/2015 - 06/24/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0074		02/01/2015 - 06/23/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0075		01/01/2015 - 06/24/2015		H376	NONSYSTEMS	TST999999999	ACME
view	xml	AT123415C0100		02/01/2013 - 01/31/2014		5140	NONSYSTEMS	TST999999999	TEST COMPANY LLC
view	xml	AT123415C0101		02/01/2013 - 01/31/2014		5140	NONSYSTEMS	TST999999999	TEST COMPANY LLC
view	xml	AT123415C0102		02/01/2013 - 01/31/2014		5140	NONSYSTEMS	TST999999999	TEST COMPANY LLC

View – Click on **View** to view the evaluation as an HTML document.

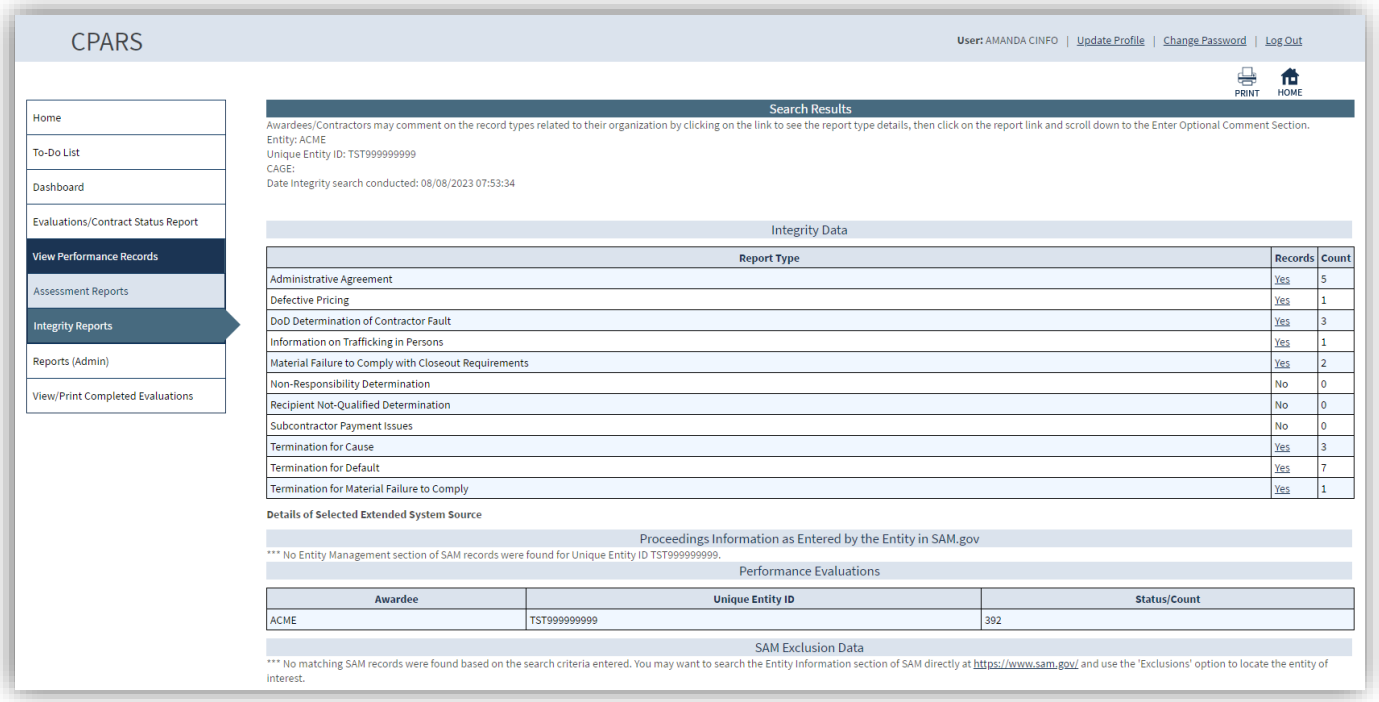
XML – Click on **XML** to view the evaluation as an XML document.

NOTE: XML is a general-purpose markup language. It allows users to define their own tags. Its primary purpose is to facilitate the sharing of data across different information systems, particularly via the Internet.

Integrity Reports

Integrity Reports allows Corporate Senior Contractor users to view Integrity data, provide comments on Integrity records, view proceedings information, System for Award Management (SAM) exclusion data, and Corporate Relationships for the Unique Entity ID under their cognizance. To run an Integrity Report, click the **Integrity Report** button from the View Performance Records Menu options. The Integrity Report Parameters menu will display.

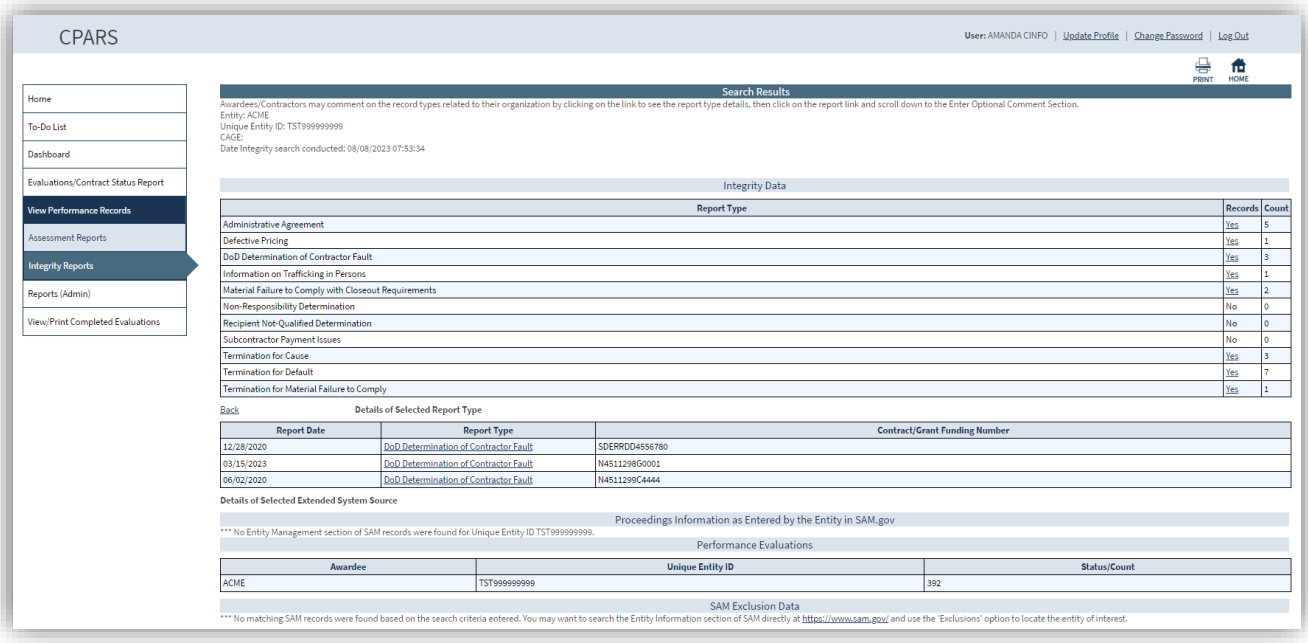
NOTE: If the user has access to more than one Unique Entity ID, the user will need to select the Unique Entity ID they want to run the report for.



Integrity Data

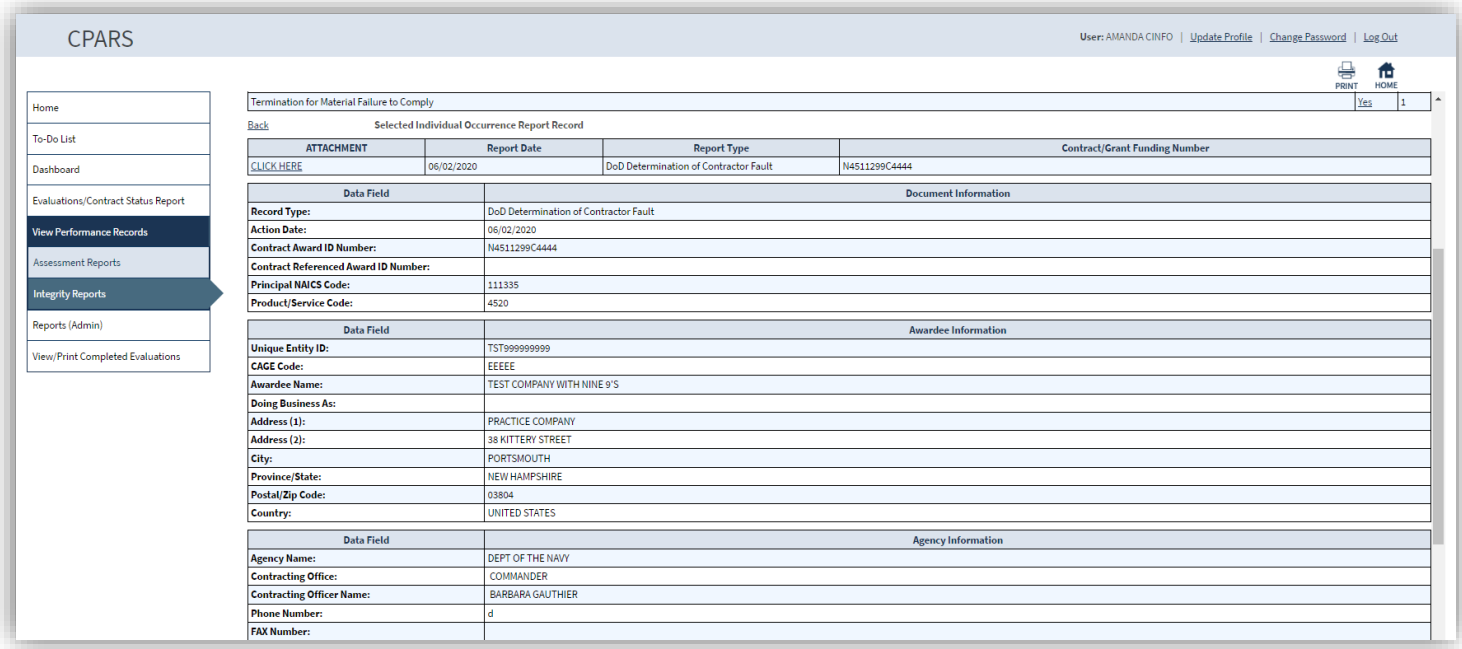
The Integrity Data table at the top of the screen displays the different types of Integrity records. If an awardee/contractor has an Integrity record of a particular type, the Records column in the table will display Yes and the Count column will display the number of records of that type.

To view a record of a particular type, click the Yes link in the table.



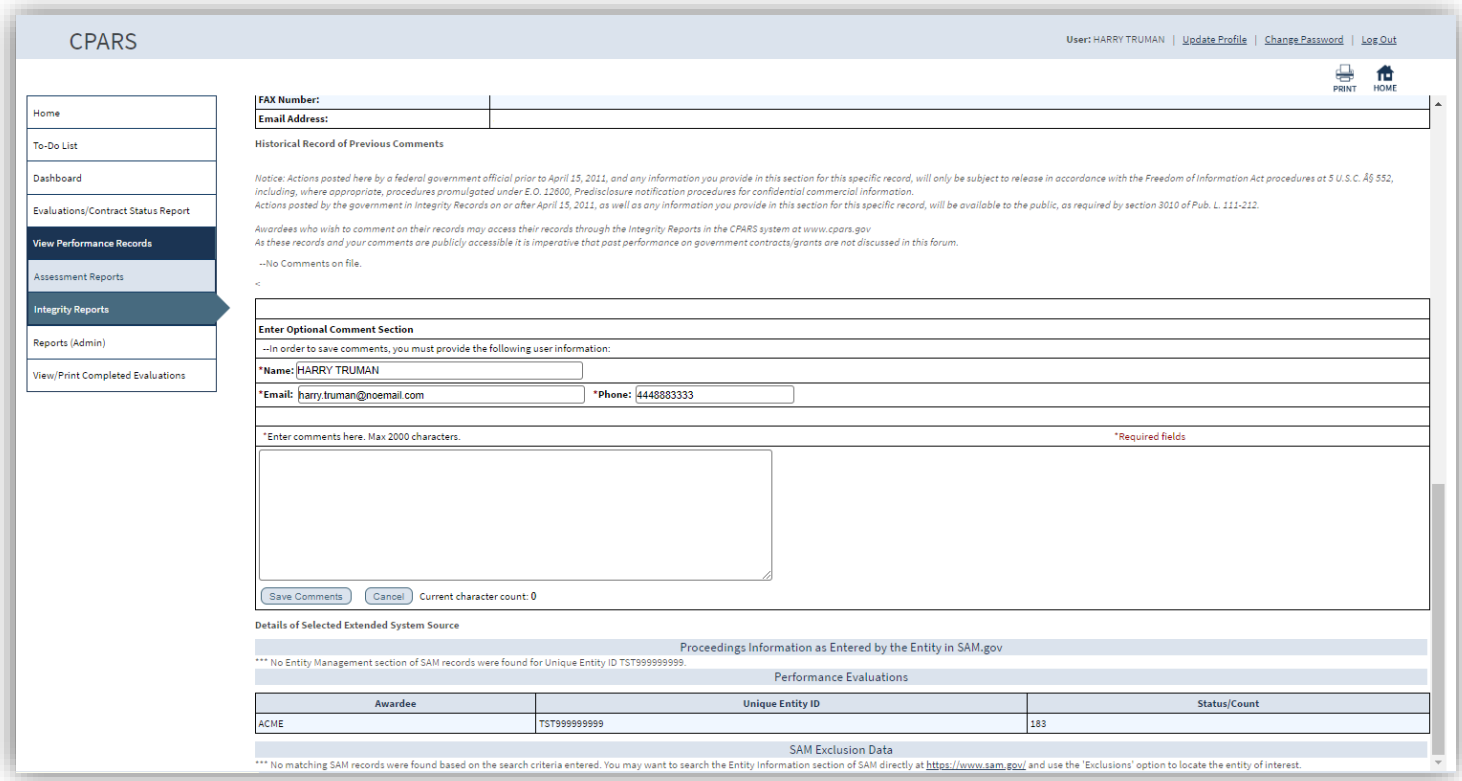
If there are multiple records of that type, a Details of Selected Report Type table will display at the bottom of the screen. The table will indicate the Report Date and document number for each record.

To view an individual record, click on the Report Type link in the row for that record. The record will display at the bottom of the screen.



CLICK HERE- Click the **CLICK HERE** link to view the attachment that was upload to the Integrity Record.

After the Integrity record has been reviewed, the Corporate Senior Representative scrolls down and enters their comments in the **Enter Optional Comment Section.** Fields that are identified with a red asterisk (*) are mandatory and must be completed by the Corporate Senior Representative. To save comments, click the **Save Comments** button. Contractors may provide an unlimited number of comments



Proceedings Information as Entered by the Entity in SAM.gov

This section will display whether the Entity has entered any Proceedings Information into SAM. If information has been entered, the information will display.

Performance Evaluations

This section will display whether the Entity has any performance evaluations entered in the system. To view the Performance Evaluations for the Entity, use the Assessment Reports option. **(See Assessment Reports Section for more specific information)**

SAM Exclusion Data

This section will display any exclusion record from SAM.gov. Indicating that the individual or Entity listed is disqualified from receiving any federal government contracts.

Reports (Admin)

This option allows the Senior Contractor Representative to run various reports such as Ad Hoc and contractor reps. To access the Reports (Admin) options, click the **Reports (Admin)** option.

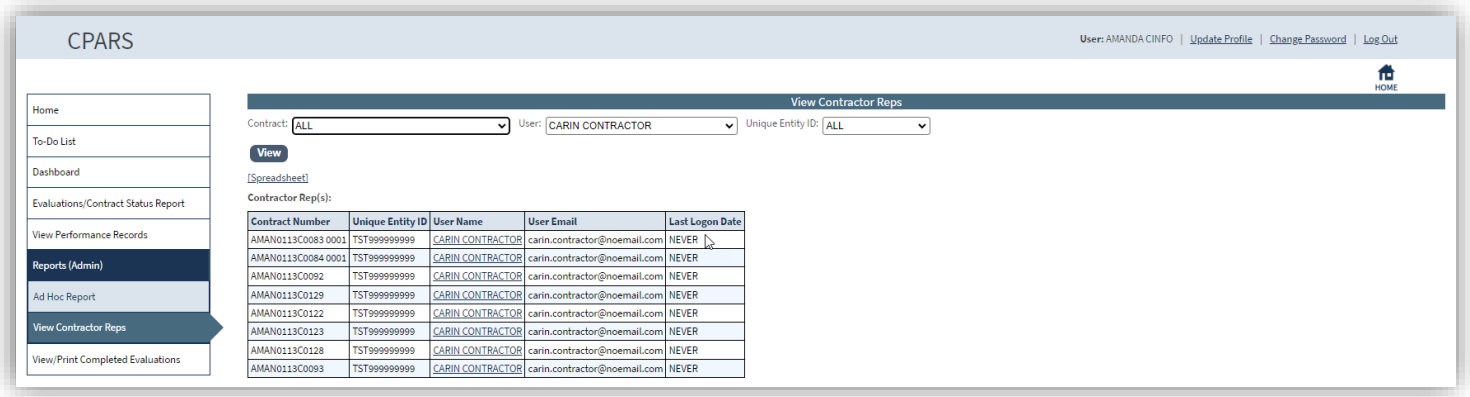
Ad Hoc Report

This option allows the Senior Contractor Representative to perform Ad Hoc queries of their organization's data with the following report options: Integrity Records and Performance Evaluations-Source Selection. **(See Ad Hoc Section for more specific information)**

View Contractor Reps

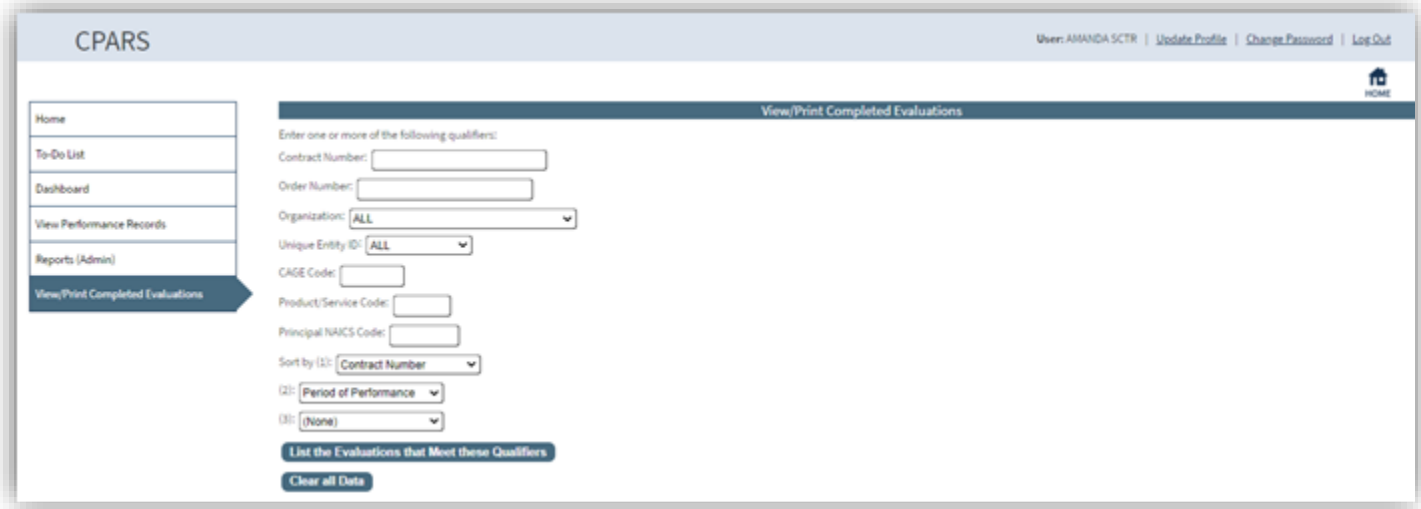
This option allows the Senior Contractor Representative to quickly identify all Contractor Representatives (and view their contact information) within the corporation who have been authorized to enter comments in CPARS evaluations. Click **View Contractor Reps**. The View Contractor Reps screen displays.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

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

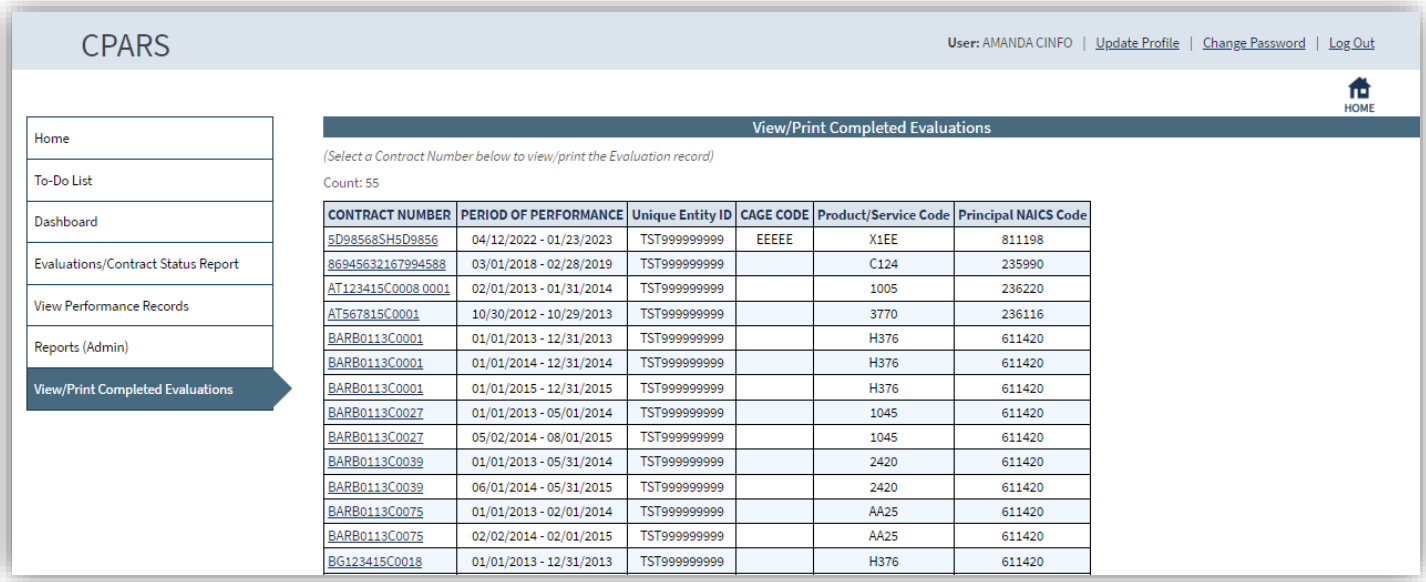


View/Print Completed Evaluations

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



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



CONTRACT NUMBER	PERIOD OF PERFORMANCE	Unique Entity ID	CAGE CODE	Product/Service Code	Principal NAICS Code
5D98568SH5D9856	04/12/2022 - 01/23/2023	TST999999999	EEEEE	X1EE	811198
86945632167994588	03/01/2018 - 02/28/2019	TST999999999		C124	235990
AT123415C0008 0001	02/01/2013 - 01/31/2014	TST999999999		1005	236220
AT567815C0001	10/30/2012 - 10/29/2013	TST999999999		3770	236116
BARB0113C0001	01/01/2013 - 12/31/2013	TST999999999		H376	611420
BARB0113C0001	01/01/2014 - 12/31/2014	TST999999999		H376	611420
BARB0113C0001	01/01/2015 - 12/31/2015	TST999999999		H376	611420
BARB0113C0027	01/01/2013 - 05/01/2014	TST999999999		1045	611420
BARB0113C0027	05/02/2014 - 08/01/2015	TST999999999		1045	611420
BARB0113C0039	01/01/2013 - 05/31/2014	TST999999999		2420	611420
BARB0113C0039	06/01/2014 - 05/31/2015	TST999999999		2420	611420
BARB0113C0075	01/01/2013 - 02/01/2014	TST999999999		AA25	611420
BARB0113C0075	02/02/2014 - 02/01/2015	TST999999999		AA25	611420
BG123415C0018	01/01/2013 - 12/31/2013	TST999999999		H376	611420

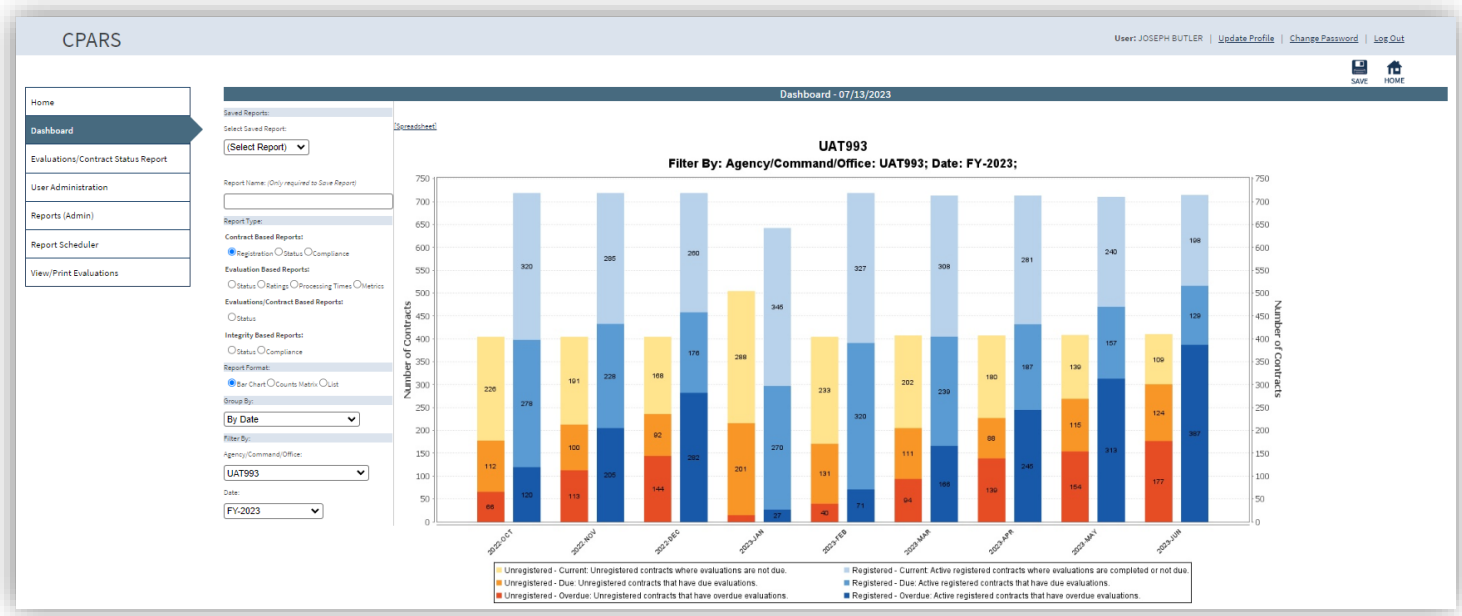
Reports

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

Dashboard

The Dashboard allows users to monitor the status of contracts and evaluations within their purview. The report will display results in the form of counts, a bar chart, or list if available. The Dashboard is broken down into three categories: Contract Based Reports, Evaluation Based Reports, and Integrity Reports. The Contract Based Report category contains the Registration Report, Status Report, Compliance Report and Auto-Register Report. The Evaluation Based Report category contains the Status Report, Ratings Metrics Report, Processing Times Report, and Evaluation Metrics Report. The Integrity Report category contains the Status Report, and Compliance Report. Slight variations of this report occur at different access levels and are described as applicable.

To run the Dashboard, click **Dashboard**. The Dashboard will display.



The DPOC's screens are displayed in the following examples. Slight variations of this report occur at different access levels and are described as applicable.

If the user wishes to save any Dashboard reports to run again in the future, the user selects the desired Report and parameters, enters a Report Name in the **Report Name** box and clicks the **Save** icon. The Dashboard screen will refresh and a Select Saved Report drop-down will appear. To Run the saved report in the future, the user would select the Report Name from the drop-down.

To change the parameters of a saved report, select the **Report Name** from the drop-down, select/de-select the desired parameters and click the **Save** icon.

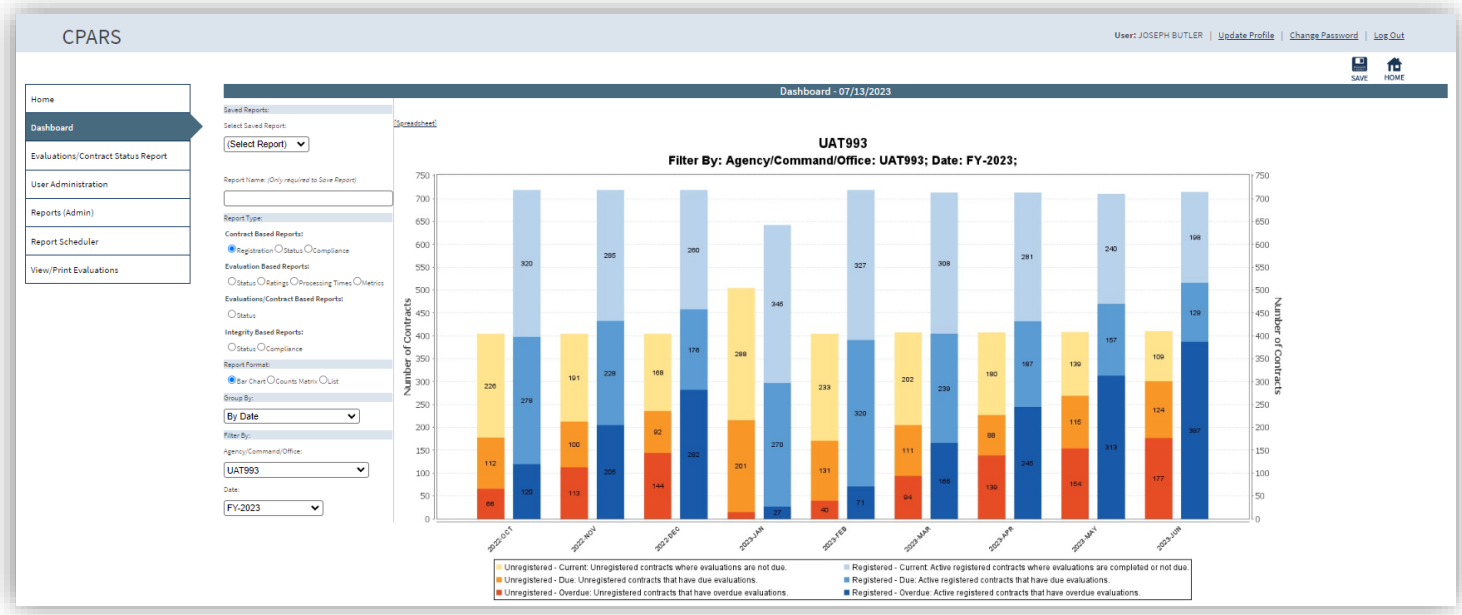
To delete a saved report, select the **Report Name** from the drop-down and click **Delete**.

Contract Based Reports

Registration

The Registration option allows users to track the number of unregistered and registered contracts that are in current, due, and overdue status. Contract counts are provided in graphical format. Contract counts as well as a listing of contracts are available in spreadsheet format. The report is available at the Agency, Major Command, Sub-Command, and Contract Office levels and may be displayed by Date or Agency/Command/Office. Users will only see data for the Agency to which they are assigned. Users may view data for any of their Agency's Major Commands, Sub-Commands, or Contract Offices. The Registration report option is available to **Focal Points**,

Department POCs, and **Agency POCs**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data either By Date for an Agency/Command/Office or By Agency/Command/Office for a Date.

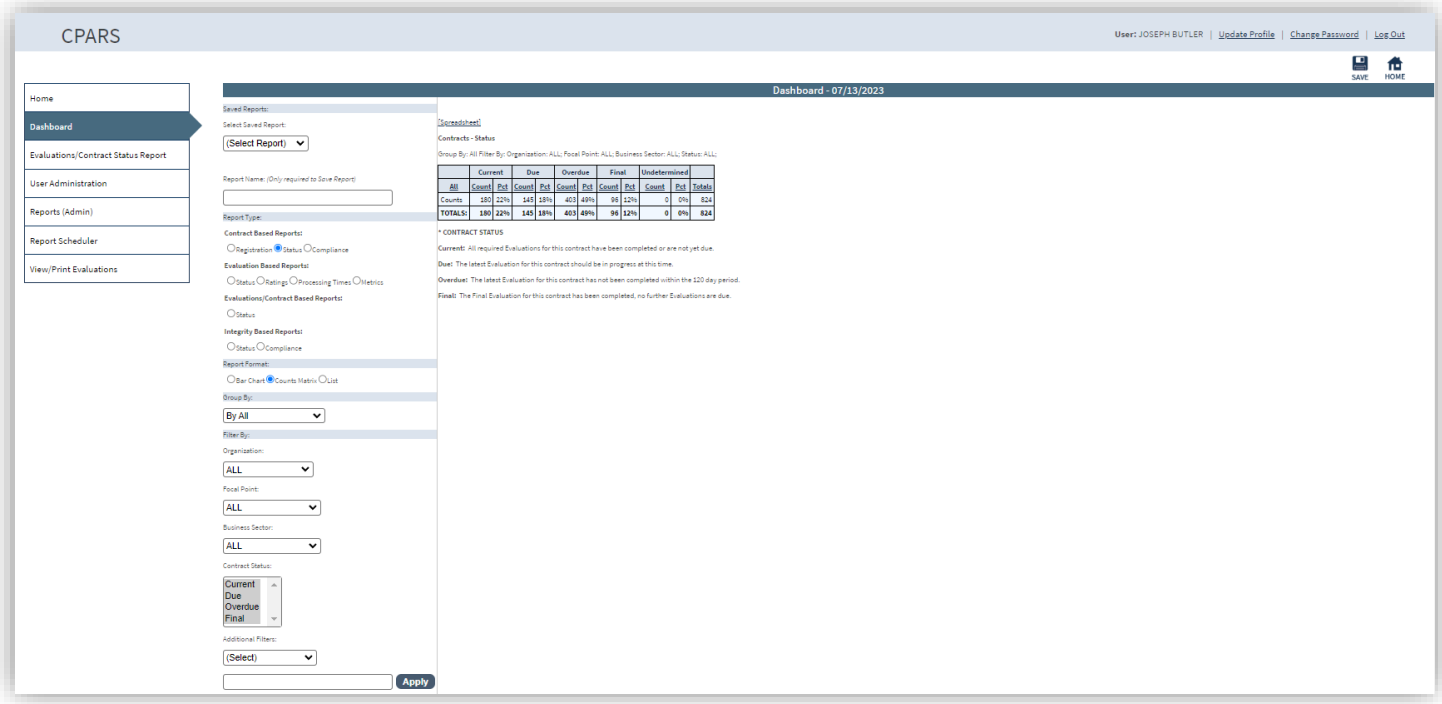
Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data by Agency/Command/Office, or Date.

NOTE: The Agency/Command/ Office allows the user to view data at the Agency, Major Command, Sub-Command, or Contract Office level. Not all agencies will have Major Commands or Sub-Commands. The structure for the drop-down is determined by the agency's structure in the Federal Procurement Data System (FPDS). Major Commands, Sub-Commands, and Contract Offices with no contract counts to display are not listed.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Status

The Status option allows users to monitor the status of contracts within their purview. The report results in the status of all the user's contracts/orders by counting the number of contracts/orders that are current, due, overdue, or have a final evaluation. Users may view user assigned. The Status option is available to **Focal Points**, **Department POCs**, **Agency POCs, Assessing Official Representatives, Assessing Officials, Contractor Representatives, Reviewing Officials, and Senior Contractor Representatives**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data grouped by the selected option.

NOTE: Focal Point Group By options include All, Organization; Contract Activity, and Assessing Official; **Department POC** Group By options include All, Organization, and Contract Activity; **Agency POC** Group By options include All, Focal Point, and Contract Activity; **Assessing Official Representative, Assessing Official**, **Reviewing Official,** and **Contractor Representative** Group By options include All and Contract Activity; **Senior Contractor Representative** Group By options include All, Contract Activity, Organization, and Unique Entity ID. All is the default value.

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: Focal Point Filter By options include Organization, Business Sector, and Contract Status; **Department POC and Agency POC** Filter By options include Organization, Focal Point, Business Sector, and Contract Status; **Assessing Official Representative, Assessing Official, Reviewing Official, and Contractor Representative** Filter By options include Business Sector and Contract Status; **Senior Contractor Representative** Filter By options include Business Sector, Unique Entity ID, and Contract Status. All is the default value.

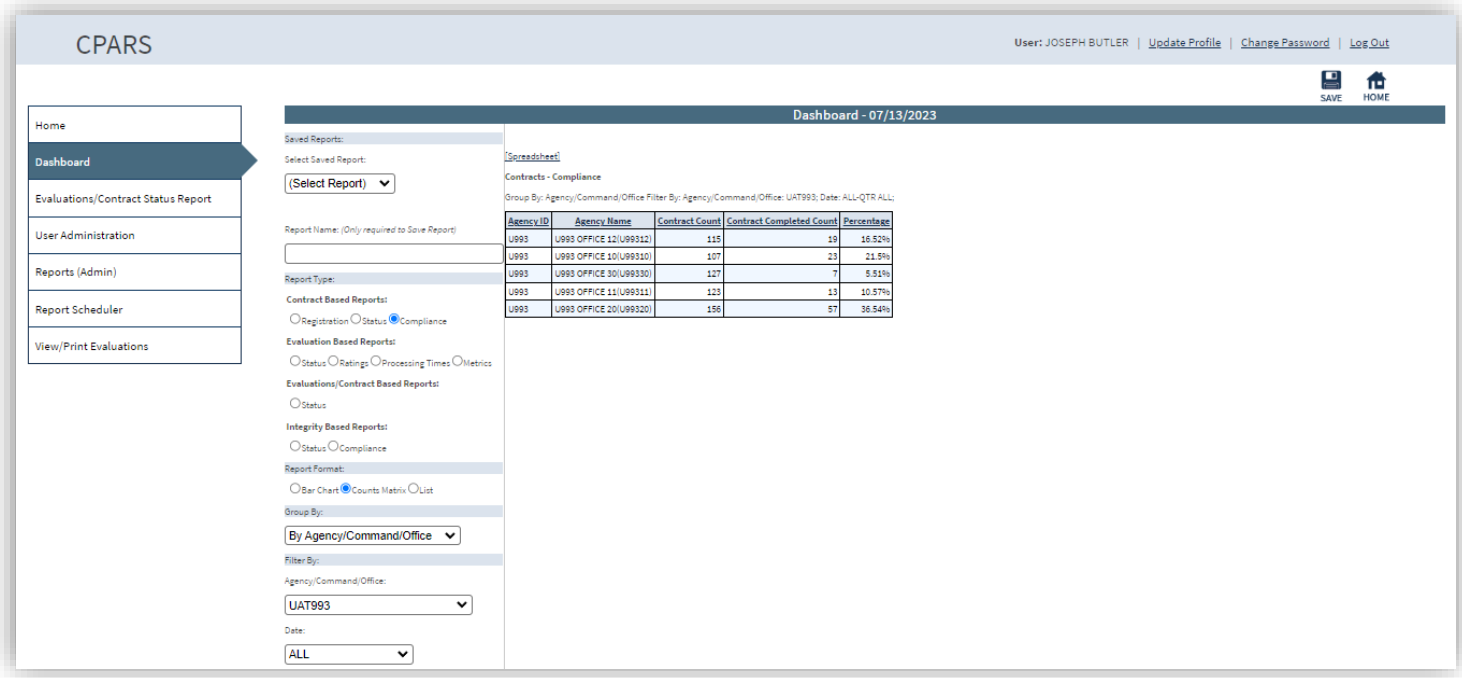
[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

If the List, Report Format option is selected. Users are able to view users assigned to the contract. To view users, select the required levels from the Include Assigned Users drop-down under Report Options,

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

Compliance

The Compliance option is used to review compliance with reporting requirements by comparing contracts entered into the Federal Procurement Data System (FPDS) and completed evaluations. The Compliance report option is available to **Focal Points**, **Department POCs**, and **Agency POCs**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

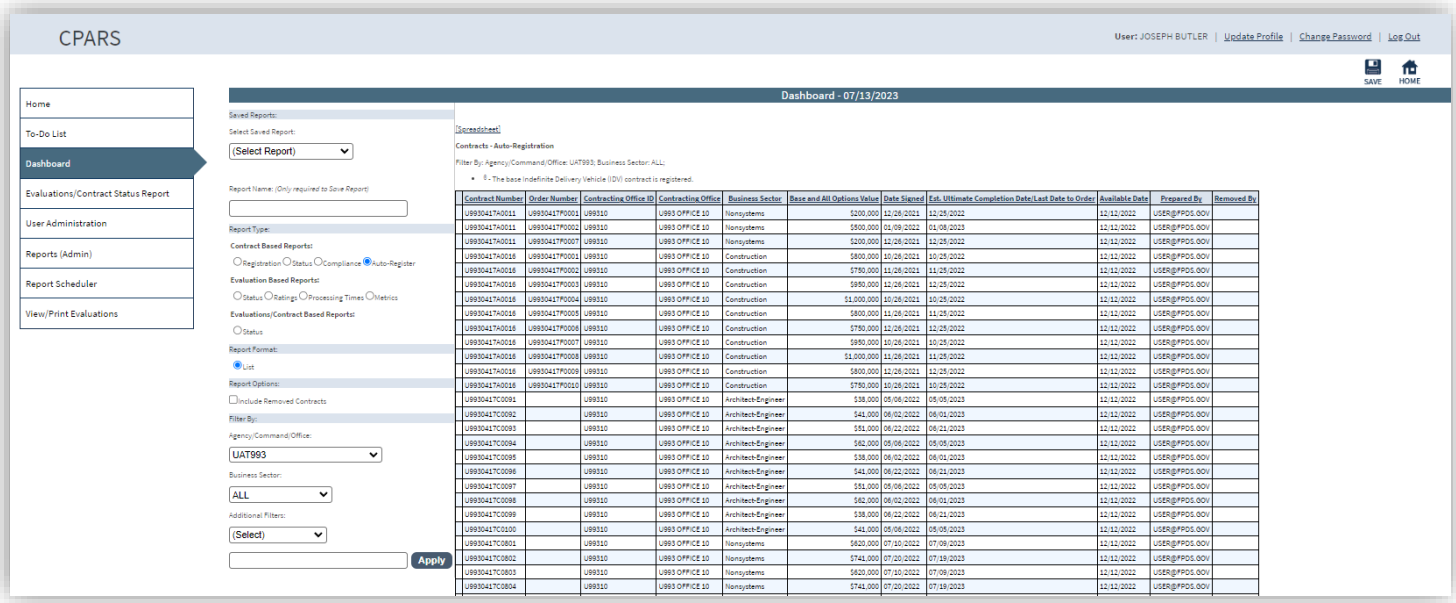
Group By – Clicking on an option in the drop-down allows the user to display the data by Agency/Command/Office.

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data by Agency/Command/Office, or Date.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Auto- Register

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



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Report Options – Check this option to include removed contracts.

Group By – Clicking on an option in the drop-down allows the user to display the data by Agency/Command/Office.

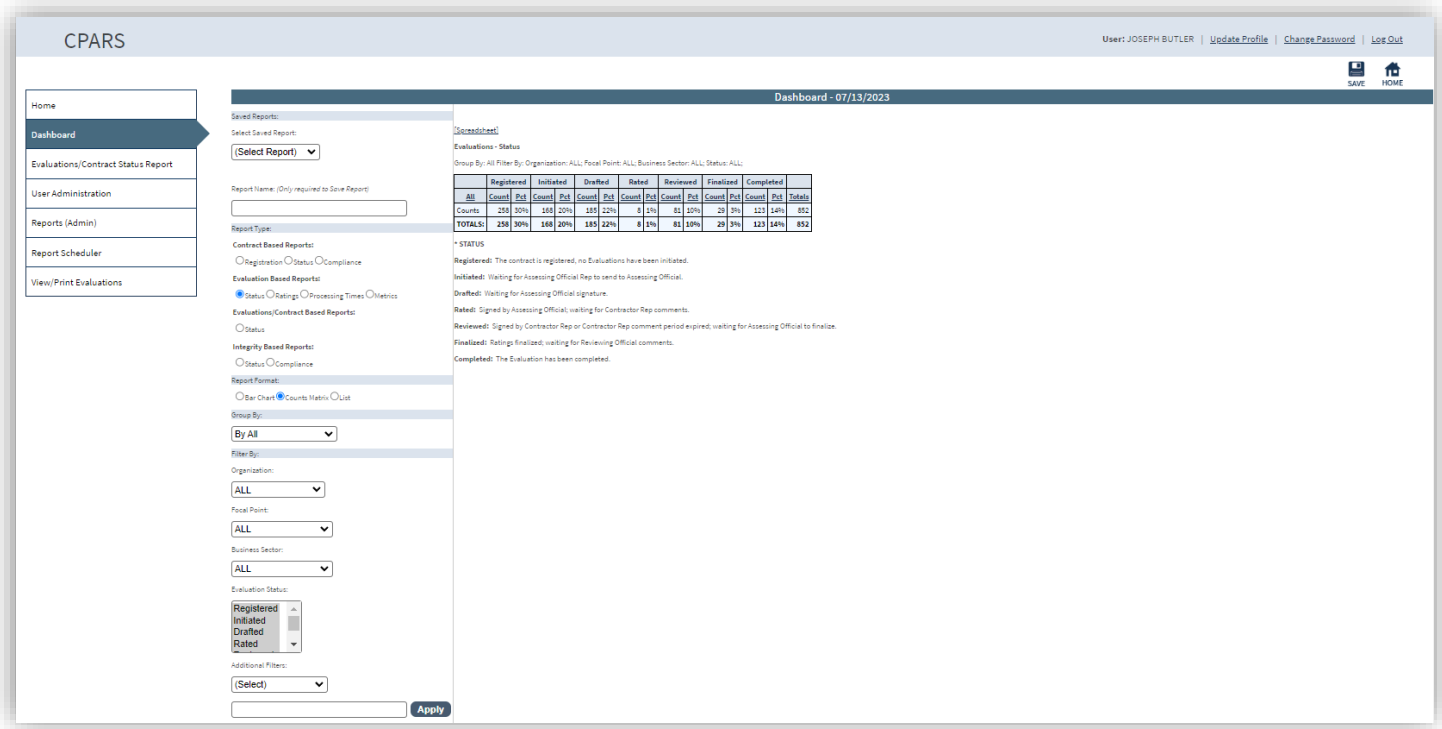
Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data by Agency/Command/Office, or Date.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Evaluation Based Reports

Status

The Status option allows users to monitor the status of evaluations within their purview. The report results in the status of the user's evaluations by displaying the number of evaluations statused at each step of the automated workflow process. Users have the ability to view the evaluation, view/add Notes, Delete Registered, Initiated, and Drafted evaluations, and view the Activity Log. The Status option is available to **Focal Points**, **Department POCs**, **Agency POCs, Assessing Official Representatives, Assessing Officials, Contractor Representatives, Reviewing Officials, and Senior Contractor Representatives**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data grouped by the selected option.

NOTE: Focal Point Group By options include All, Organization; Contract Activity, and Assessing Official; **Department POC** Group By options include All, Organization, and Contract Activity; **Agency POC** Group By options include All, Focal Point, and Contract Activity; **Assessing Official Representative, Assessing Official**, **Reviewing Official,** and **Contractor Representative** Group By options include All and Contract Activity; **Senior Contractor Representative** Group By options include All, Contract Activity, Organization, and Unique Entity ID. All is the default value.

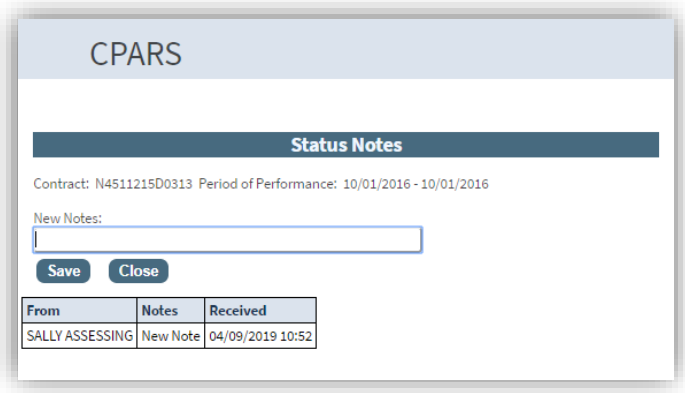
Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: Focal Point Filter By options include Organization, Business Sector, and Evaluation Status; **Department POC and Agency POC** Filter By options include Organization, Focal Point, Business Sector, and Evaluation Status; **Assessing Official Representative, Assessing Official, Reviewing Official, and Contractor Representative** Filter By options include Business Sector and Evaluation Status; **Senior Contractor Representative** Filter By options include Business Sector, Unique Entity ID, and Evaluation Status. All is the default value.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

If the List, Report Format option is selected. The following additional options are available.

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



Contract Number - Click on the specific Contract/Order Number and the evaluation will display in HTML format. If the Assessing Official modified the evaluation after it was returned from the Contractor Rep, the window contains a **View Original 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.

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

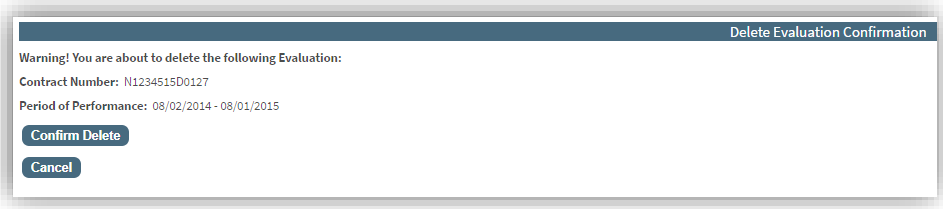
Delete – Column to the right of the **Activity Log** displays a **Delete** link if the evaluation/contract meets the requirement to be deleted. This option is available to Focal Points, Assessing Official Representatives, and Assessing Officials.

NOTE: To **Delete**, The Focal Point must have access to the contract number as a Focal Point and the record must be in the **Initiated**, **Drafted, or Registered** Status. The Assessing Official Representative must have access to the contract number and it must be in the **Initiated** status. The Assessing Official must have access to the contract number and it must be in the **Drafted** status.

When the Focal Point clicks the **Delete** link for a registered contract, the Focal Point will receive the following warning:

Clicking on **Confirm Delete** will return the Focal Point to the previous **Dashboard** page.

When the user clicks the **Delete** link for an in-process evaluation, the user will get the following warning:

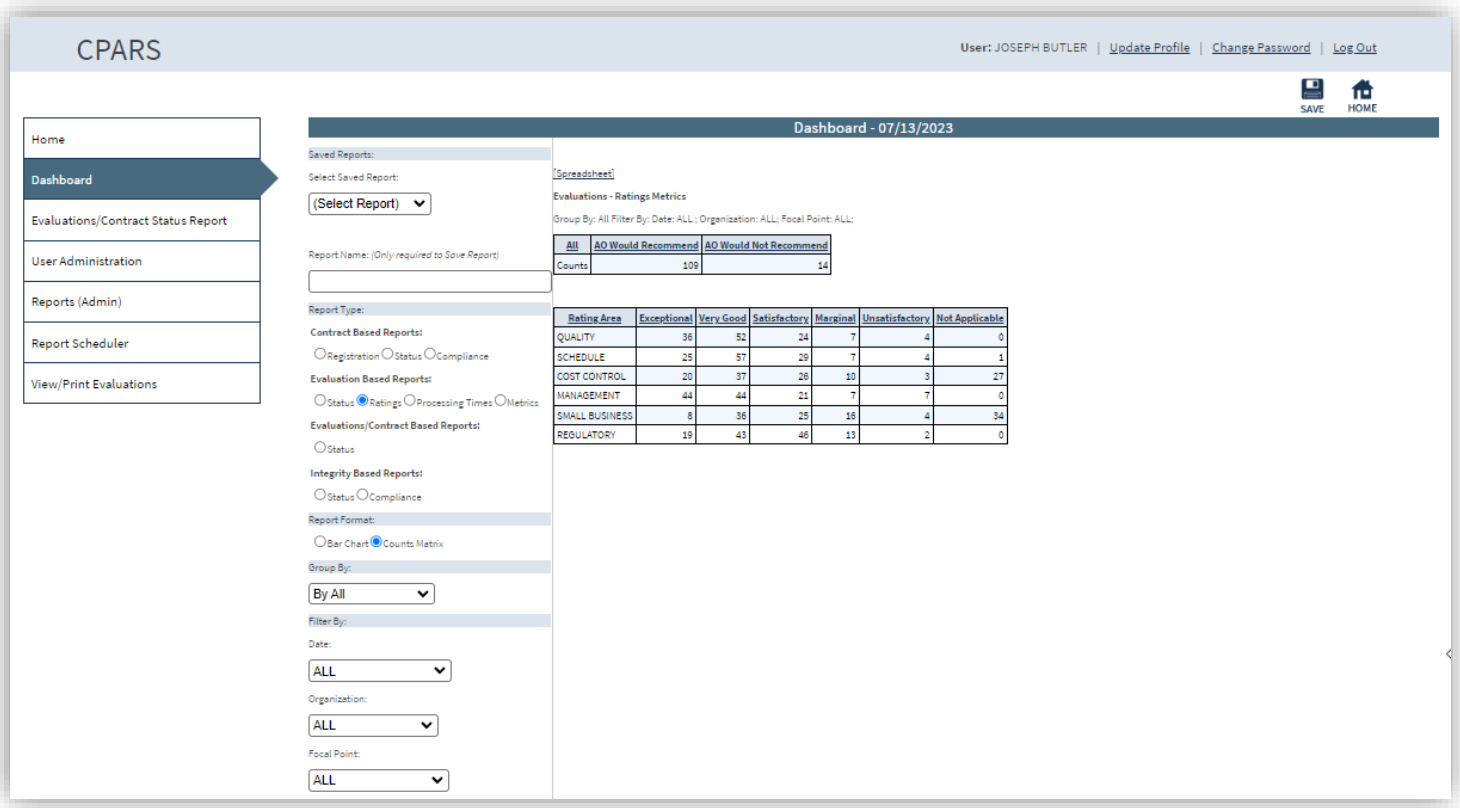


Clicking on **Confirm Delete** will return the user to the previous **Dashboard** page.

NOTE: Clicking on **Confirm Delete** is irreversible and the deleted evaluation will add an entry to the **Activity Log**.

Ratings

The Ratings option helps users monitor the distribution of ratings for completed evaluations. The Ratings option is available to **Focal Points**, **Department POCs**, **Agency POCs,** and **Senior Contractor Representatives**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart or Counts.

Group By – Clicking on an option in the drop-down allows the user to display the data grouped by the selected option.

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

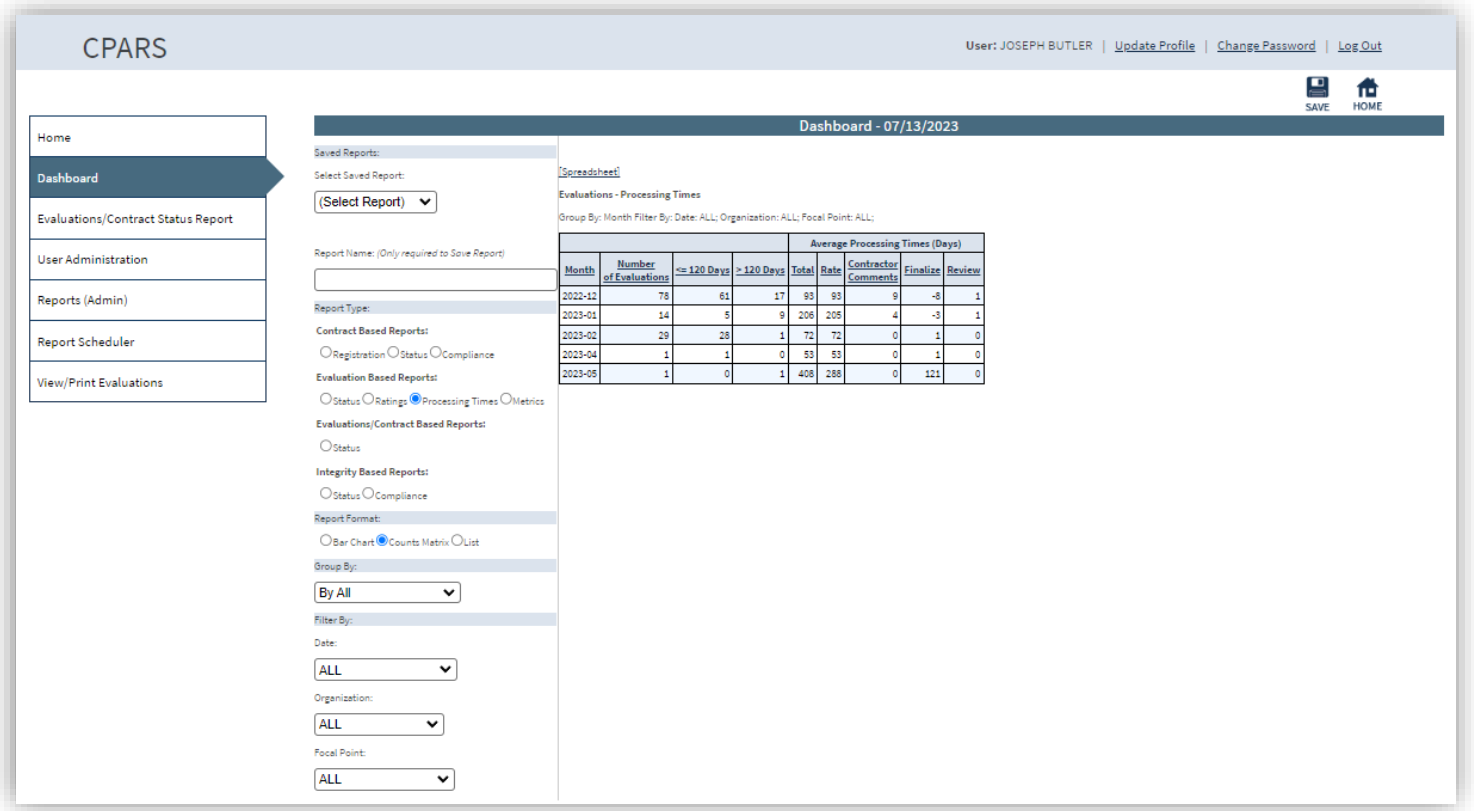
Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: Focal Point Filter By options include Date and Organization; **Department POC and Agency POC** Filter By options include Date, Organization, and Focal Point; **Senior Contractor Representative** Filter By options include All, Contract Activity, Organization, and Unique Entity ID. All is the default value.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Processing Times

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



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data grouped by the selected option.

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

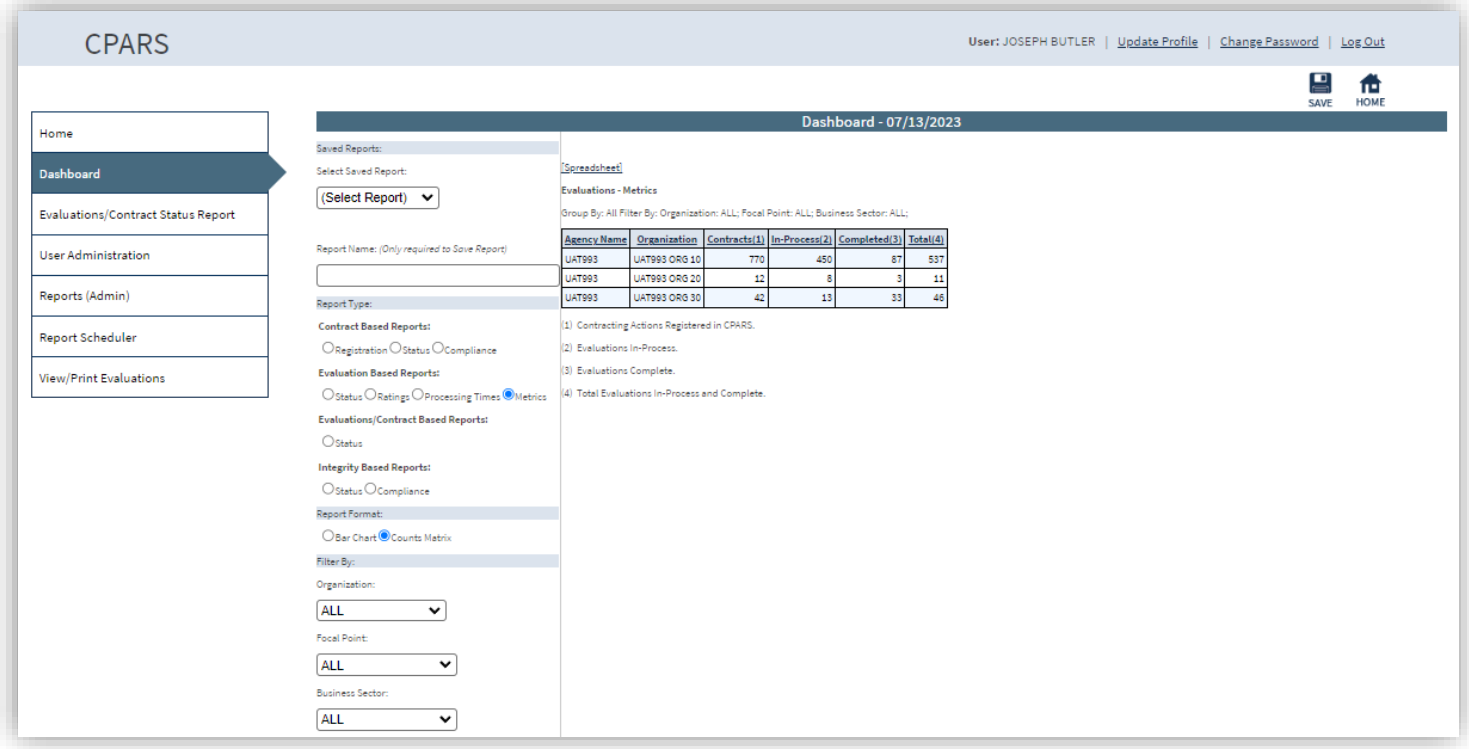
Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: Focal Point Filter By options include Date and Organization; **Department POC and Agency POC** Filter By options include Date, Organization, and Focal Point. All is the default value.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Metrics

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



Report Format – Clicking on an option allows the user to display the data as a Bar Chart or Counts.

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

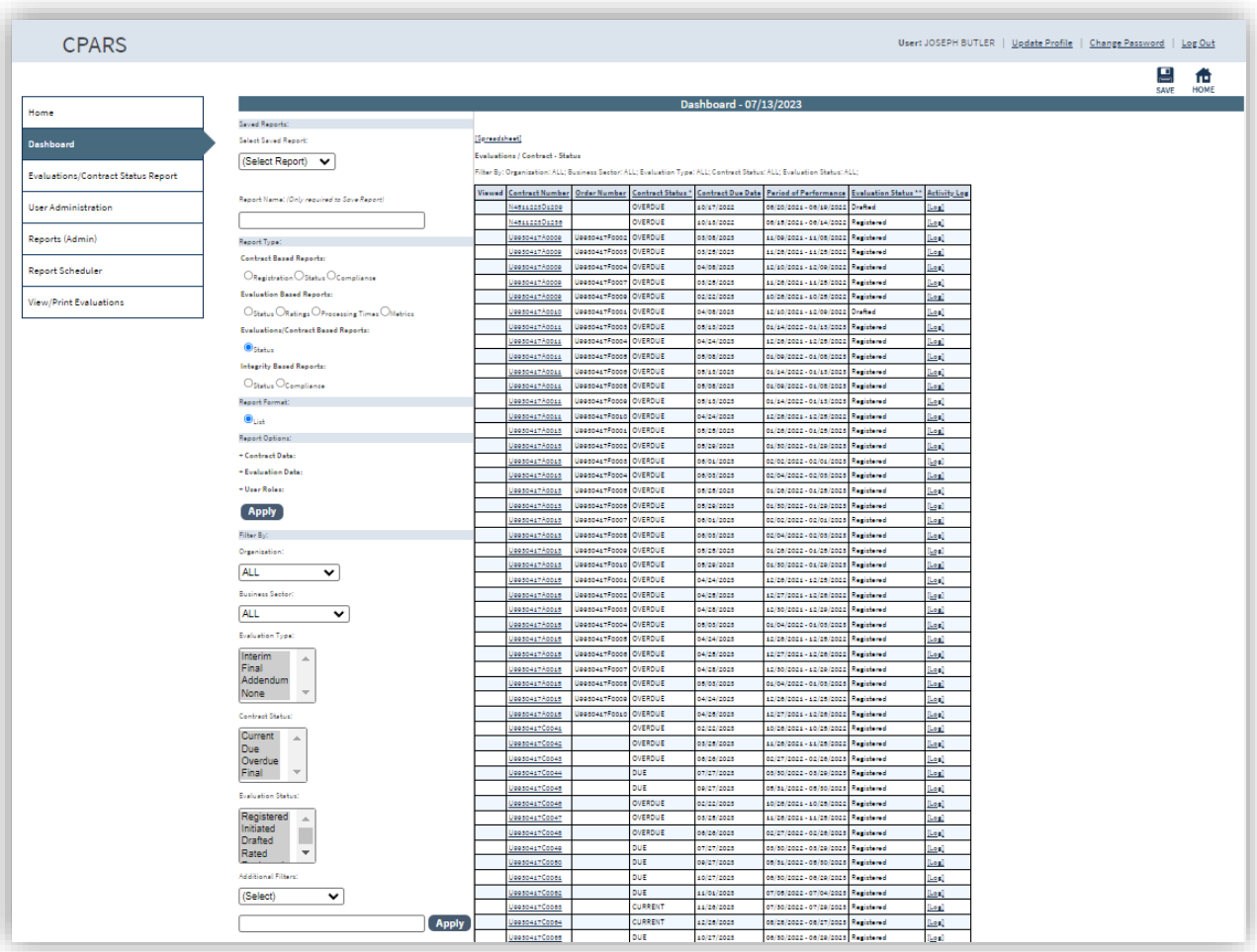
NOTE: Focal Point Filter By options include Organization and Business Sector; **Department POC and Agency POC** Filter By options include Organization, Focal Point, and Business Sector. All is the default value.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Evaluations/Contract Based Reports

Status

The Status option allows users to monitor the status of contracts and evaluations within their purview. The report will display information as a list of contracts/evaluations that identifies the status of each contract/order available that provides the user read-only access to each evaluation. Users have the ability to view the evaluation, view/add Notes, Delete Registered, Initiated, and Drafted evaluations, and view the Activity Log. The Status option is available to **Focal Points**, **Department POCs**, **Agency POCs, Assessing Official Representatives, Assessing Officials, Contractor Representatives, Reviewing Officials, and Senior Contractor Representatives**.



The default columns include Notes, Viewed, Contract Number, Order Number, Period of Performance, Contract Status, Contract Due Date, Evaluation Status, and Activity Log.

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

Report Format – Display the data as a List.

Report Options – The report may be further qualified by selecting desired parameters from the Contract Data, Evaluation Data, and User Role options. The user limits the report by clicking the box(es) under the desired parameter. A checkmark will display in the box. Click Apply

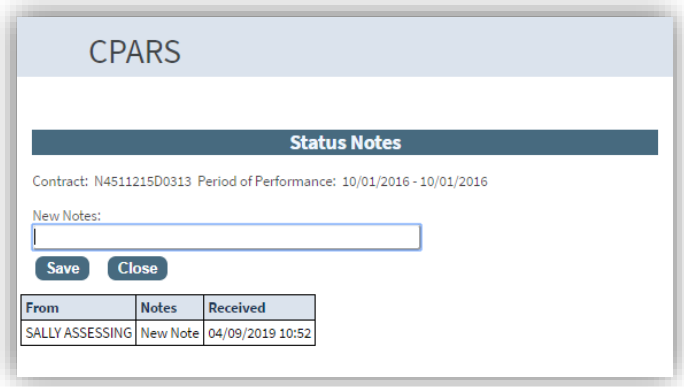
NOTE: Contractor Representative access level **does not** include the User Roles of Assessing Official Rep, Assessing Official, Contractor Rep, or Reviewing Official. **Senior Contractor Representative** access level **does not** include the User Roles of Assessing Official Rep, Assessing Official, or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

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: **Focal Point** Filter By options include Organization, Business Sector, Contract Status and Evaluation Status; **Department POC and Agency POC** Filter By options include Organization, Focal Point, Business Sector, Contract Status and Evaluation Status; **Assessing Official Representative, Assessing Official, Reviewing Official, and Contractor Representative** Filter By options include Business Sector, Contract Status and Evaluation Status; **Senior Contractor Representative** Filter By options include Business Sector, Unique Entity ID, Contract Status and Evaluation Status.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

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



Contract Number - Click on the specific Contract/Order Number and the evaluation will display in HTML format. If the Assessing Official modified the evaluation after it was returned from the Contractor Rep, the window contains a **View Original 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.

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

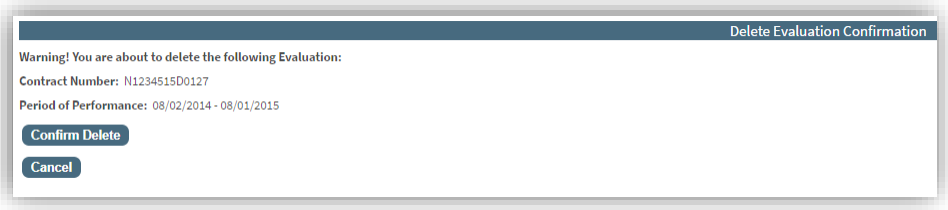
Delete – Column to the right of the **Activity Log** displays a **Delete** link if the evaluation/contract meets the requirement to be deleted. This option is available to Focal Points, Assessing Official Representatives, and Assessing Officials.

NOTE: To **Delete**, The Focal Point must have access to the contract number as a Focal Point and the record must be in the **Initiated**, **Drafted, or Registered** Status. The Assessing Official Representative must have access to the contract number and it must be in the **Initiated** status. The Assessing Official must have access to the contract number and it must be in the **Drafted** status.

When the Focal Point clicks the **Delete** link for a registered contract, the Focal Point will receive the following warning:

Clicking on **Confirm Delete** will return the Focal Point to the previous **Dashboard** page.

When the user clicks the **Delete** link for an in-process evaluation, the user will get the following warning:



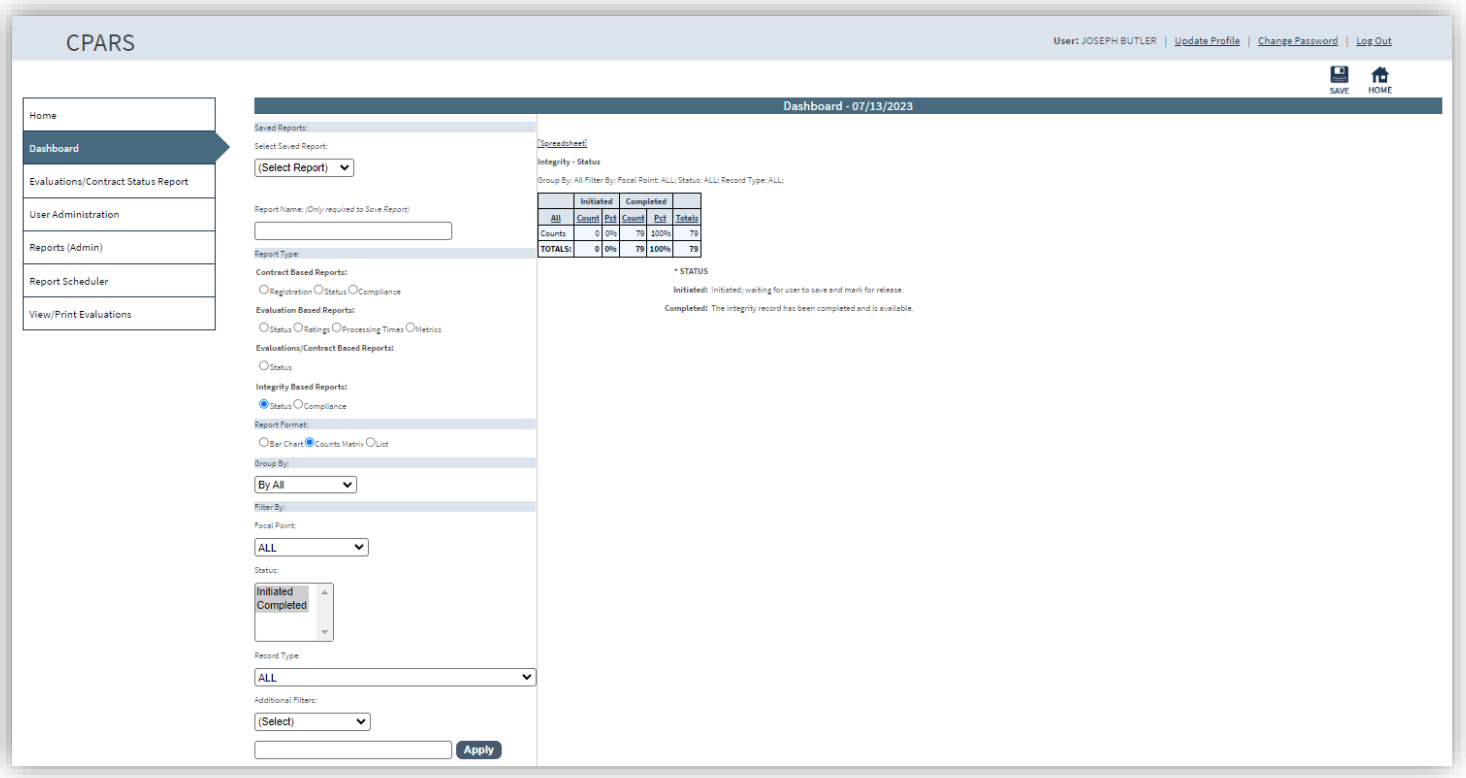
Clicking on **Confirm Delete** will return the user to the previous **Dashboard** page.

NOTE: Clicking on **Confirm Delete** is irreversible and the deleted evaluation will add an entry to the **Activity Log**.

Integrity Based Reports

Status

The Status option allows users to monitor the status of Integrity records within their purview. The report results in the status of the user's Integrity Record by displaying the number of records statused at each step of the automated workflow process. Users can view the record and activity log. The Status option is available to **Focal Points**, **Department POCs**, **and Integrity Data Entry users.**



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data grouped by the selected option.

NOTE: Focal Point and **Integrity Data Entry** Group By options include All and Record Type; **Department POC** Group By options include All, Record Type, and Focal Point. All is the default value.

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data.

NOTE: Focal Point and **Integrity Data Entry** Filter By options include Status and Record Type; **Department POC** Filter By options include Focal Point, Status, and Record Type. All is the default value.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

If the List, Report Format option is selected. The following additional options are available.

Document Number - Click on the specific Document Number and the record will display in HTML format. Click the **Print** button to print the record. Click the **Close** button to return to the list of records. A **green (x)** appears in the Viewed column adjacent to the document number for the record(s) that were viewed.

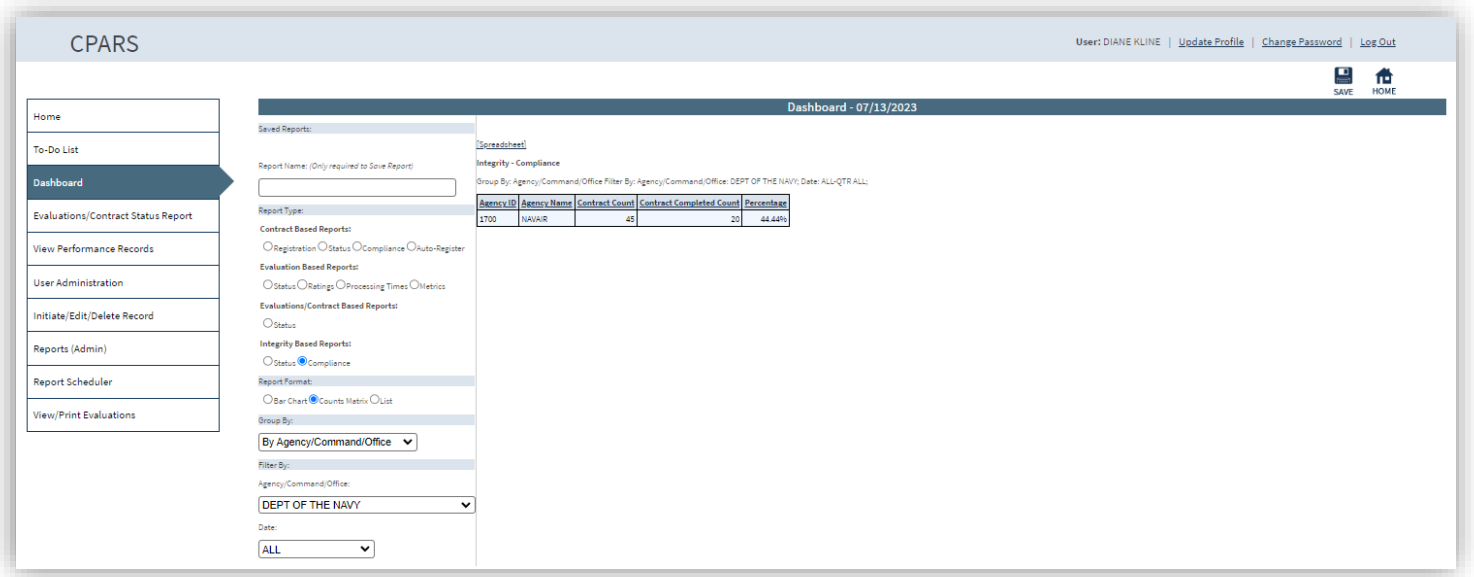
Updated By - Clicking on the user's name allows the Focal Point to view the user's profile information including name, title, organization, email, and phone number(s).

Focal Point - Clicking on the Focal Point's name allows the Department POC to view the profile information including name, title, organization, email, and phone number(s).

Activity Log - Click on the **[Log]** link 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 record.

Compliance

The Compliance option is used to review compliance with Integrity reporting requirements for Terminations for Default and Cause. The Integrity Compliance Metrics compare contracts/orders entered into the Federal Procurement Data System (FPDS) with those contracts/orders reported in Integrity. The Compliance report option is available to **Focal Points and Department POCs**.



Report Format – Clicking on an option allows the user to display the data as a Bar Chart, Counts, or List.

Group By – Clicking on an option in the drop-down allows the user to display the data by Agency/Command/Office.

Filter By Options – Selecting Filter by options from the available drop-downs, allows users to filter the data by Agency/Command/Office, or Date.

[Spreadsheet] – Clicking on this link allows the user to download counts data or the list data into spreadsheet format.

Reports (Admin)

The CPARS application provides the Ad Hoc Report functionality depending on the user's access level. The Ad Hoc report is used to help users monitor the status of the CPARS processes. You will note some of the report parameters or options vary slightly depending on the user's access level, but the report function the same and as described in the following sections.

Ad Hoc Report

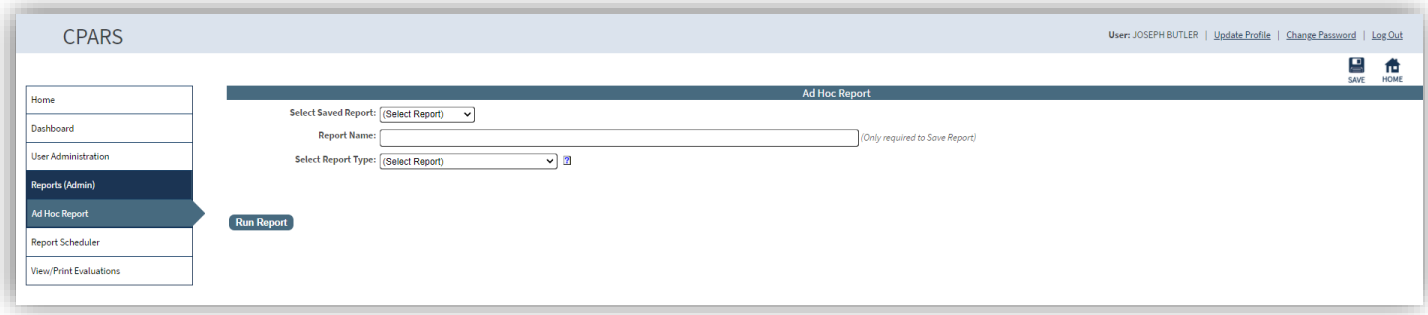
The **Ad Hoc Report** option is available to **Department POCs, Owner (View Performance), Manager (View Performance), Access (View Performance), and Senior Contractor Representatives**. The Ad Hoc Report allows the user to generate reports used for management and oversight of their agency or organizations data. Department POCs may display data on Contracts Requiring Evaluation, Evaluation Activity Log, Evaluation Workflow Users, and Performance Evaluations-Agency Only. Owner (View Performance), Manager (View Performance), Access (View Performance), and Senior Contractor Representatives may display data on Integrity Reports and Performance Evaluations-Source Selection.

NOTE: Senior Contractor Representatives only have access to their organization's data.

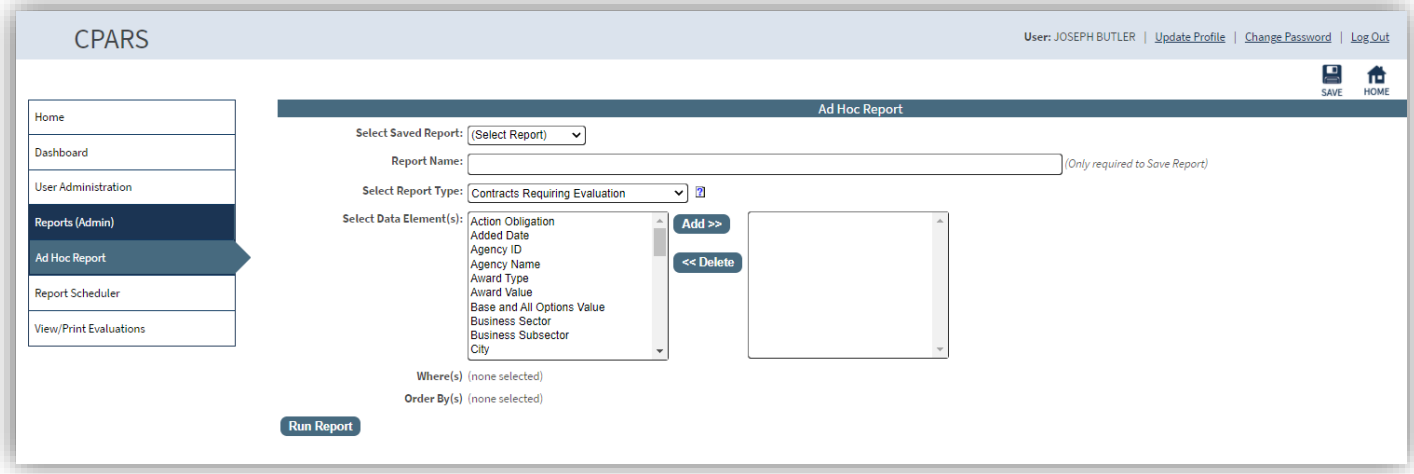
These reports can help the Agency/Organization ensure they are complying with all requirements. The Ad Hoc Reports feature allows users to save successful reports to run in the future as well as sortable options. Users will only see data for the Agency/Unique Entity ID to which they are assigned. This functionality can be used to provide data for oversight agencies such as the Inspector General (IG) offices and internal management.

To run the Ad Hoc Report, click the **Reports (Admin)** option. Click **Ad Hoc Report**. The Ad Hoc Report screen will display.

The Department POCs Ad Hoc Report screens are displayed in the following examples.

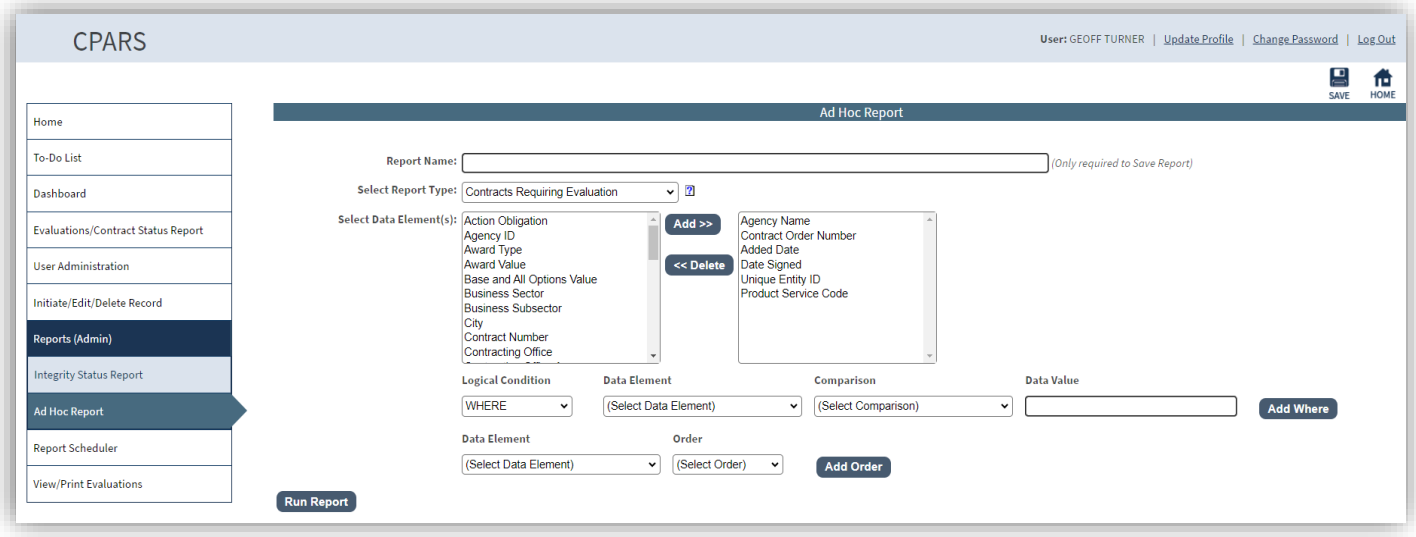


The **Select Report Type** drop-down box allows the user to choose the type of Ad Hoc Report they want to run. Available Options are: Contracts Requiring Evaluation, Evaluation Activity Log, Evaluation Workflow Users, and Performance Evaluations-Agency Only. Choose the desired report type from the drop down menu. The data elements associated with the selected report type will display in the **Select Data Elements** box.



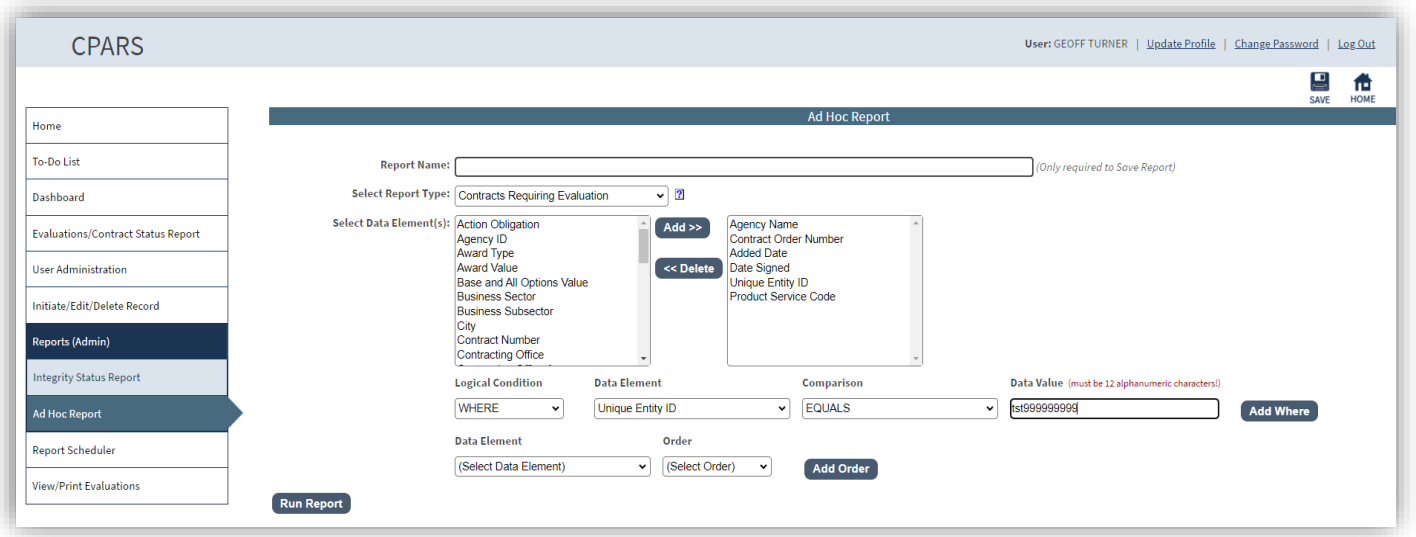
Select the applicable data elements to include in the report from the **Select Data Elements** box. Multiple elements

can be selected by holding the CTRL key and clicking each element to be included. To select multiple elements that are adjacent, click on the first element, hold the SHIFT key, and then click on the last element to be included.

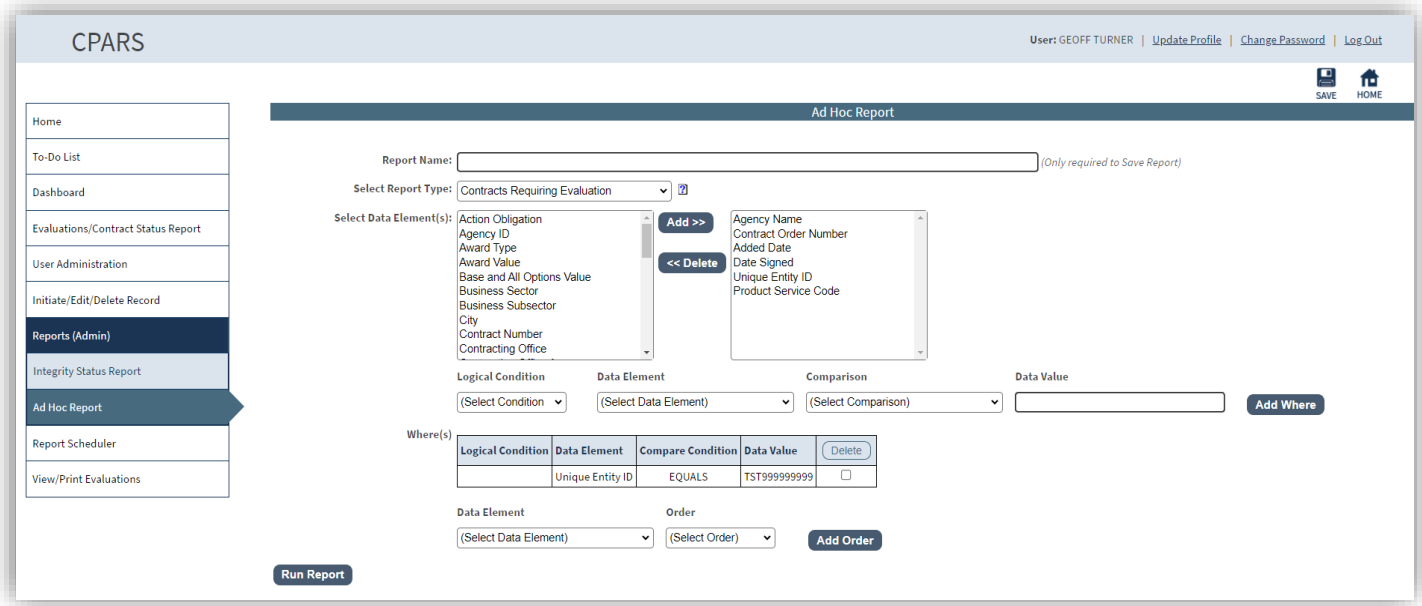


Once all desired data elements have been selected, click the **Add** button to add the data elements to the selected data elements box. To remove elements from the selected data elements box, highlight an element and select the **Delete** button.

To set the criteria for what records will appear in the results of the report, select one of the available Data Elements from the Data Element drop-down box to the right of the Logical Condition box. Select the comparison from the **Comparison** drop-down, and enter the applicable data value in the **Data Value** field.



Select the **Add Where** button and a table will appear below with the element in the first row for the first element. Continue to build query table as required. To delete a where clause, check off the clause and click the **Delete** button.

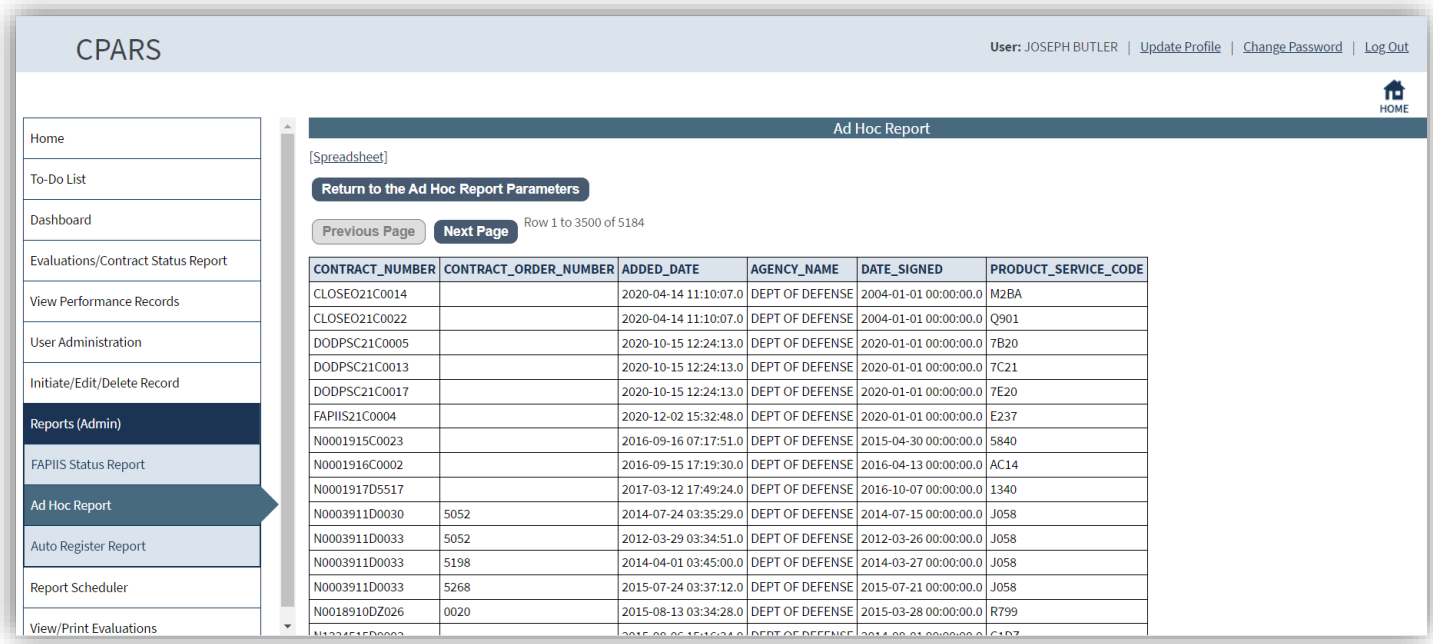


If the user wishes to add a specific order when displaying the Ad Hoc results, the user would select a data element from the **Data Element** drop-down in the Add Order section. From the **Order** drop-down, the user would select either Ascending or Descending. Select the **Add Order** button and a table will appear below with the element in the first row for the first element. Continue to build order table as required. To delete an order, place a check the applicable order box and click the **Delete** button.

If the user wishes to save this report to run it again in the future, the user enters a Report Name in the **Report Name** box and clicks the **Save** icon. The Ad Hoc Report screen will refresh and a Select Saved Report drop-down will appear. To run the report, click the **Run Report** button.

To run the saved report in the future, the user would select the Report Name from the drop-down and click **Run Report**.
To change the parameters of a saved report, select the **Report Name** from the drop-down, select/de-select the desired parameters, and click the **Save** icon.

To delete a saved report, select the **Report Name** from the drop-down and click **Delete**.



CONTRACT_NUMBER	CONTRACT_ORDER_NUMBER	ADDED_DATE	AGENCY_NAME	DATE_SIGNED	PRODUCT_SERVICE_CODE
CLOSEO21C0014		2020-04-14 11:10:07.0	DEPT OF DEFENSE	2004-01-01 00:00:00.0	M2BA
CLOSEO21C0022		2020-04-14 11:10:07.0	DEPT OF DEFENSE	2004-01-01 00:00:00.0	Q901
DODPSC21C0005		2020-10-15 12:24:13.0	DEPT OF DEFENSE	2020-01-01 00:00:00.0	7B20
DODPSC21C0013		2020-10-15 12:24:13.0	DEPT OF DEFENSE	2020-01-01 00:00:00.0	7C21
DODPSC21C0017		2020-10-15 12:24:13.0	DEPT OF DEFENSE	2020-01-01 00:00:00.0	7E20
FAPIIS21C0004		2020-12-02 15:32:48.0	DEPT OF DEFENSE	2020-01-01 00:00:00.0	E237
N0001915C0023		2016-09-16 07:17:51.0	DEPT OF DEFENSE	2015-04-30 00:00:00.0	5840
N0001916C0002		2016-09-15 17:19:30.0	DEPT OF DEFENSE	2016-04-13 00:00:00.0	AC14
N0001917D5517		2017-03-12 17:49:24.0	DEPT OF DEFENSE	2016-10-07 00:00:00.0	1340
N0003911D0030	5052	2014-07-24 03:35:29.0	DEPT OF DEFENSE	2014-07-15 00:00:00.0	J058
N0003911D0033	5052	2012-03-29 03:34:51.0	DEPT OF DEFENSE	2012-03-26 00:00:00.0	J058
N0003911D0033	5198	2014-04-01 03:45:00.0	DEPT OF DEFENSE	2014-03-27 00:00:00.0	J058
N0003911D0033	5268	2015-07-24 03:37:12.0	DEPT OF DEFENSE	2015-07-21 00:00:00.0	J058
N0018910DZ026	0020	2015-08-13 03:34:28.0	DEPT OF DEFENSE	2015-03-28 00:00:00.0	R799

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

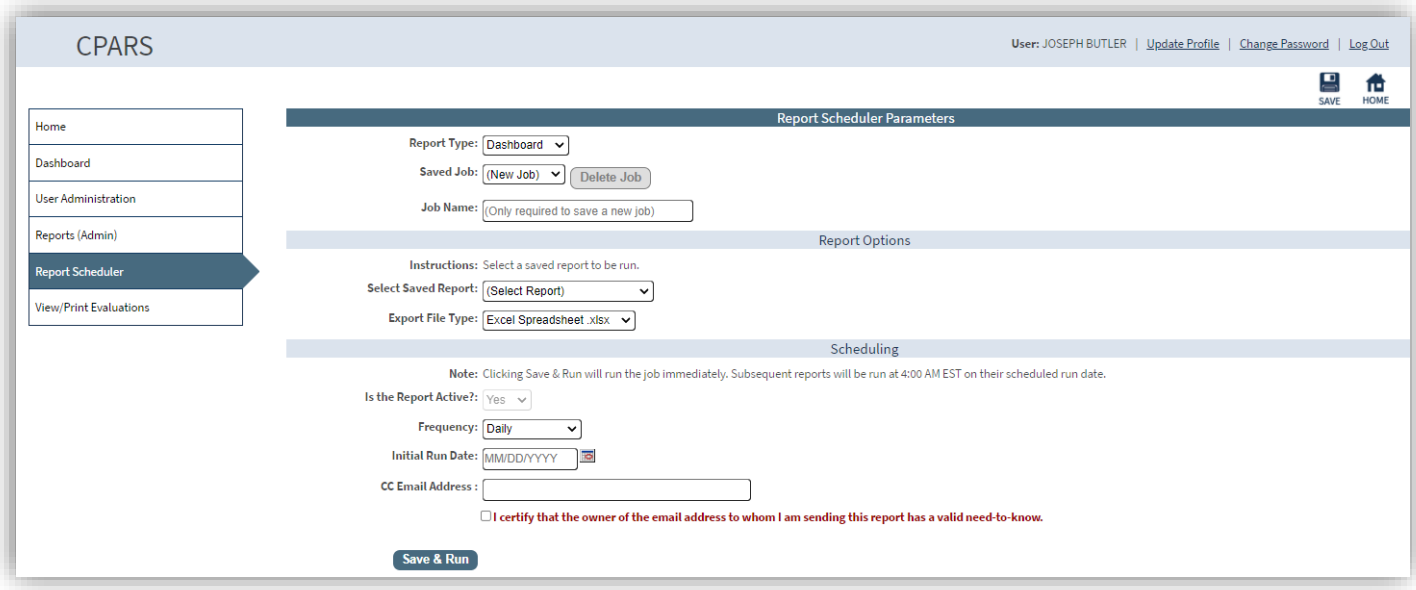
To run a new Ad Hoc Report, click the **Return to Ad Hoc Parameters** button.

Report Scheduler

This tool allows Agency POC and Department POC users to request that certain reports be automatically run and sent to their email inbox as file attachments. Current available reports are the Ad Hoc Reports and the Registration, Contract Status, Compliance, Evaluation Status, Evaluation Metrics, Evaluation Processing Times, Integrity Status, and Integrity Compliance report from the Dashboard.

To begin a scheduled job, select either Ad Hoc or Dashboard from within **Report Type**. This selection will change the **Options** portion of the page. New jobs will require a **Job Name**. **Saved Jobs** can be selected from the drop down and edited and saved, or deleted.

Choose the saved report name from the Select Saved Report drop-down. For information about saving an Ad Hoc or Dashboard Report, refer to that section of the manual.



The user can have their jobs sent as either Excel (.xlsx), .xml, or .json file attachments. If a bar chart has been saved and selected to be sent, it can only be sent as a .jpg.

In the Scheduling portion of the Report Scheduler, users can set existing jobs as inactive by checking **No** in the **Is the Report Active?** Dropdown and clicking the **Save** icon in the top right of the page.

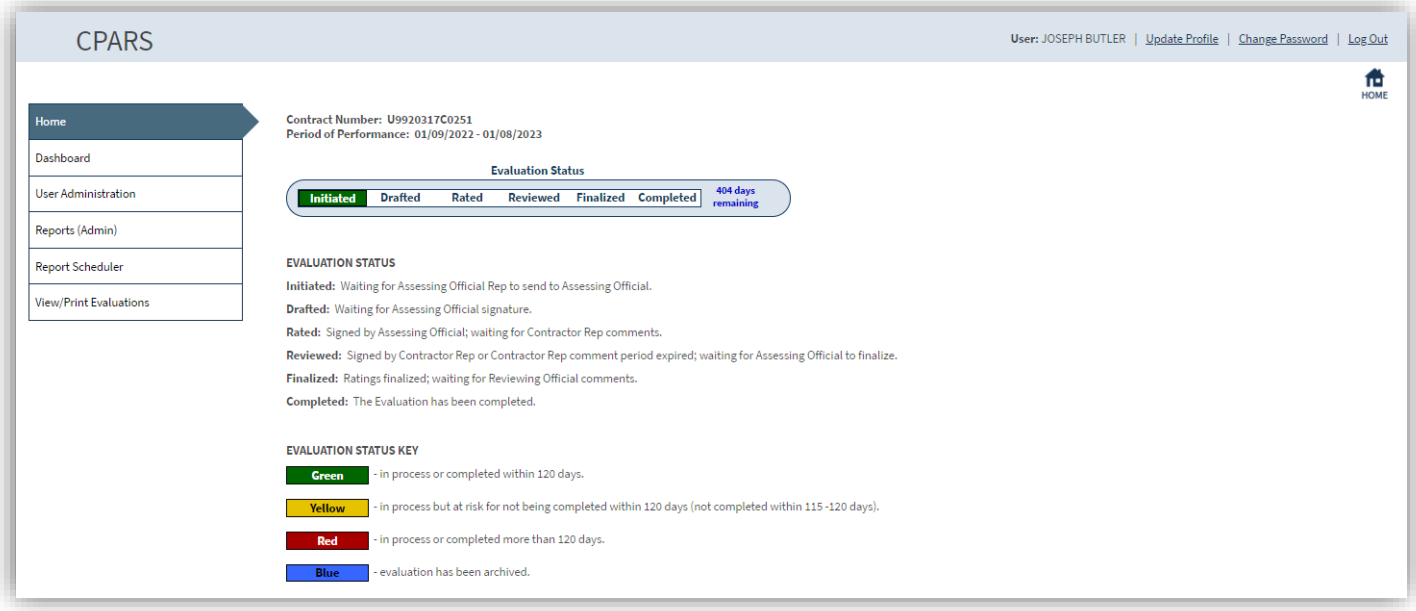
This section is also where users select **Frequency** and **Initial Run Date**. Both of these fields are used to calculate when a job is to be run.

The CC Email Address block, allows users to send a copy of the scheduled report to another email address. The email address must be a government email address. To send the report to another email, enter the email address in the **CC Email Address** block. Users must then check the box to certify that the email address copied has a valid need to know.

When finished selecting job options, select **Save & Run**. The user will receive a notification that the job has been sent and they can validate their report data immediately as the job commences its regularly scheduled runs.

Status Tracker

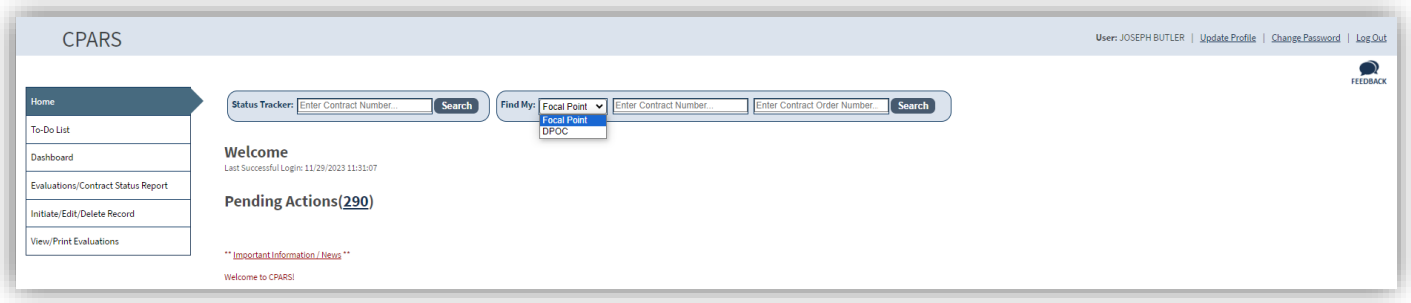
This search bar allows all roles, except View Performance, to view the status of an evaluation that the user has access to. To search, users must enter a full contract number. If a user has access to multiple orders on the same contract number, they will be brought to a selection screen to specify the order number.



The results page lists all steps in the evaluation process, displays the most recent evaluation for the searched contract number, and shows the current evaluation status. The results also display the days remaining to complete an evaluation on time. A key is provided to explain each status and color code.

Find My: (Focal Point/DPOC)

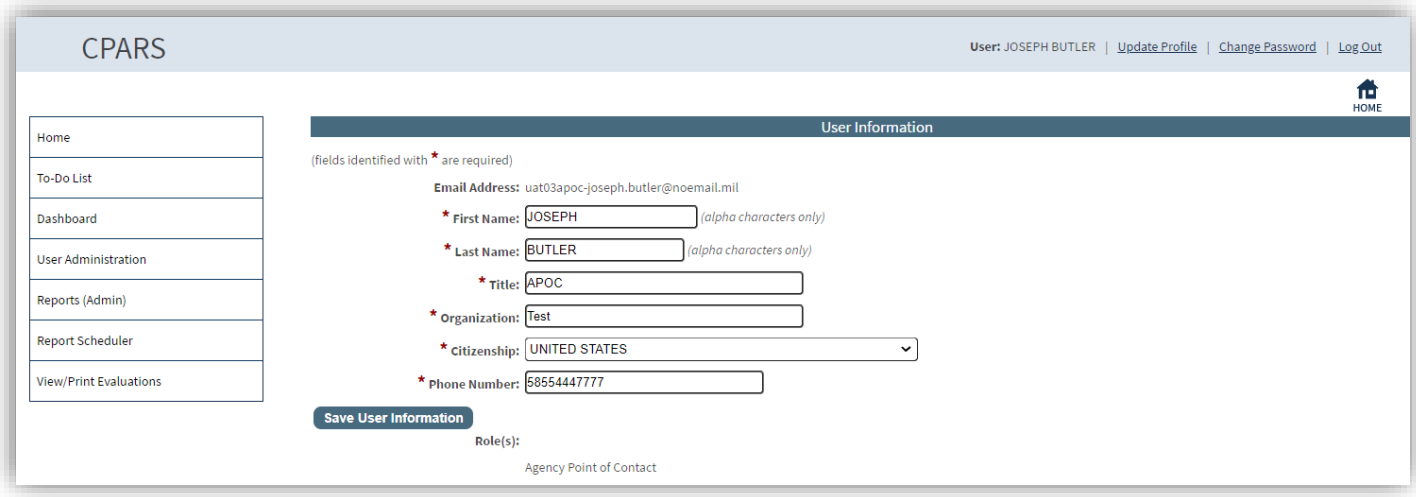
This search bar allows users to view the contact details for a Focal Point/Alternate Focal Point(s) or Department Point of Contact (DPOC). To search, users need to select either “Focal Point” or “DPOC” from the dropdown menu. When “Focal Point” is selected the user will enter a valid contract number then click on “Search”. When “DPOC” is selected the user will click on “Search”. Focal Point and Alternate Focal Point(s) will display for all CPARS roles. DPOC will display for all roles with the exception of Department Point of Contact (DPOC), Contractor Rep (CR), and Senior Contractor Rep (SCR). This will not display for users with View Performance or Integrity Data Entry only roles.



The results page will list the contact details for the Focal Point and Alternate Focal Point(s) of the contract entered or for the DPOC associated with that user’s profile.

Update Profile

The Update Profile option is very important, as it is the primary method that users, at all access levels, keep their profile information up-to-date. For example, if a user's phone number changes, the user would access the **Update Profile** button to update the phone number. Additionally, users may view their currently assigned application roles below the **Save User Information** button. To update user information, click **Update Profile**. The User Information screen displays.

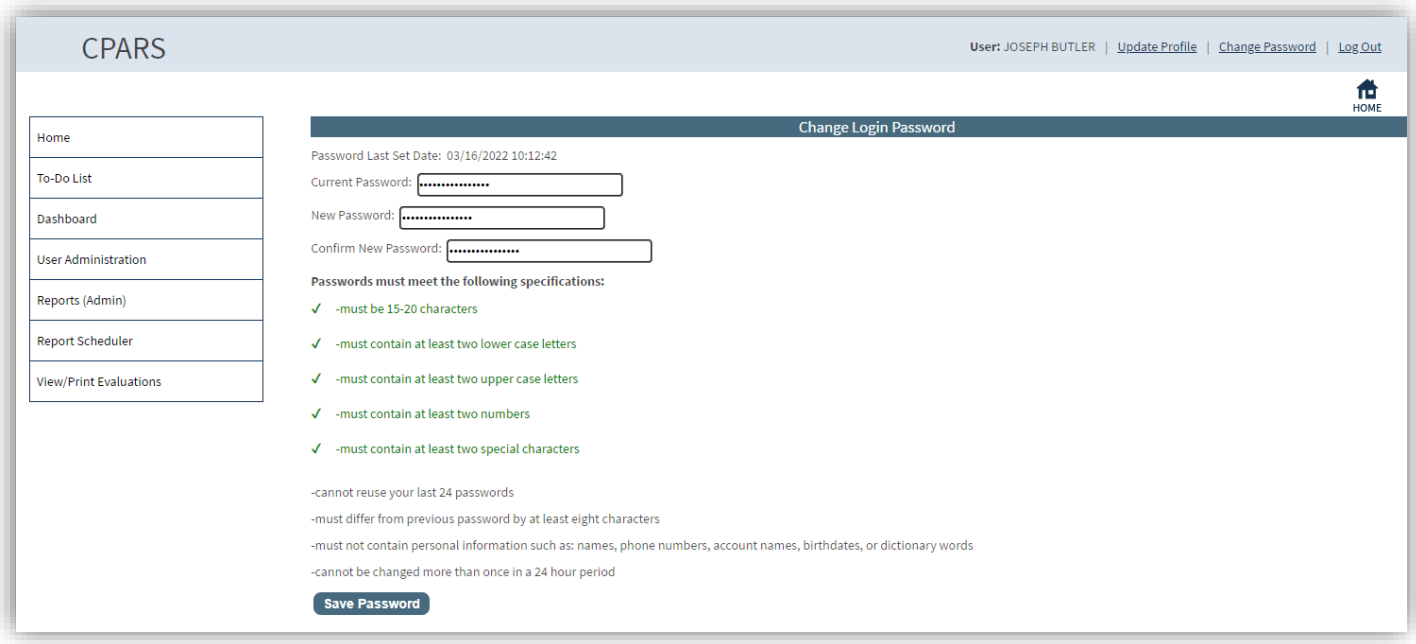


The user is able to update any of the profile information fields noted above. Fields identified with a red asterisk **(*)** are required. After all necessary changes are made, click the **Save User Information** button and a confirmation pop-up screen displays. Click the **OK** button.

Change Password

The Change Password option is very important as it is the primary method that users, at all access levels, change their password. To change a login password, click **Change Password**. The Change Login Password screen displays.

NOTE: Passwords cannot be changed more than once in a 24-hour period.



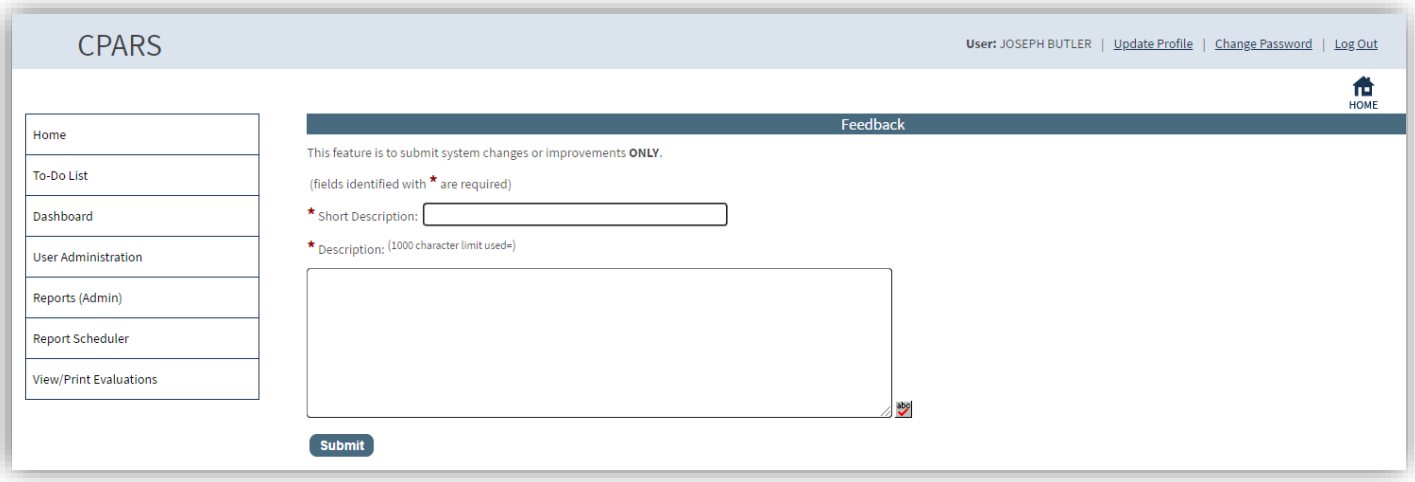
Enter the current password in the **Current Password** box. Enter a new password in the **New Password** box. The password will display as asterisks. Re-type the password in the **Confirm New Password** box. As criteria is met, the requirements will change from X's to check marks and the color will change from red to green.

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 24 passwords are kept and may not be reused. Passwords must differ from previous passwords by at least four characters. Passwords must not contain personal information such as: names, phone numbers, account names, birthdates, or dictionary words. If a user logs onto CPARS with an expired password, the Change Login Password screen is presented and the user will be required to establish a new password.

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

Feedback

The **Feedback** feature is available at all access levels and allows 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 **Feedback** icon from the Home Screen and the Feedback 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 Feedback is 1000 characters.

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

Email Notifications

CPARS Email Notifications

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

Integrity Email Notifications

- Department POC assigned
- Focal Point assigned
- Alternate Focal Point assigned
- Integrity Data Entry assigned
- Integrity Data Entry assigned/records transferred
- Overdue notification (record incomplete)
- Contractor notification that Integrity record is available for source section/comment

View Performance Records Email Notifications

- Owner (View Performance) assigned
- Manager (View Performance) assigned
- Access (View Performance) assigned
- An automatic notification is sent to the Owner (View Performance) or Manager (View Performance) when they have a pending access request.
- An automatic notification is sent when a request is denied.

Using CPARS Effectively

System Information

- A small calendar link is located adjacent to a date field and 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.

- 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.

- At the bottom of every page in the CPARS application there are links to the CPARS Guidance and Training Opportunities.

- The system has a time-out feature of 10 minutes. If the user has a data entry screen open and no work is performed for 8 minutes, the system will perform an automatic save. The time-out clock is re-set whenever the user performs a save or click between tabs in the evaluation at the Initiated or Drafted status.
- Clicking HOME icon will return the user to their Home screen. Clicking this icon will not save any information entered.
- Clicking SAVE icon will save the in-process records or evaluations. It will also save various reports for future use.
- Clicking PRINT icon will open an HTML view for the user to print.

When Registering Contracts/Orders or Working on Evaluations

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

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

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

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

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

When Entering Records

- A red asterisk (*****) designates a required field. All required fields must be completed to save and mark a record for release for source selection and public access. However, records can be started and saved without all required fields being completed.