Welcome to the Contractor Performance Assessment Reporting System, or CPARS, Dashboard Evaluation Based Status Report Tutorial. During this tutorial you will learn how to run the Dashboard Evaluation Based Status Report to monitor the status of evaluations. This tutorial is designed for all CPARS access levels.

The Evaluation Based Status option on the Dashboard is an excellent way to develop metrics to help monitor the status of evaluations, and is an important tool to assist users in the CPARS workflow. The Evaluation Based Status option allows users to see the stages of the CPARS workflow in which evaluations are currently located and identify which role in the workflow process has the required action on the evaluation. Other features of the Evaluation Based Status option include, an activity log that identifies the actions that have taken place on the evaluation, the ability to add notes to the evaluation and the ability to delete an in-process evaluation. Users have the option to see the report displayed as a bar chart, counts matrix, or in list format.

Let’s take a look at the differences of the report for the different user roles.

For Department Point of Contacts (DPOCs) the Evaluation Based Status Report will display all evaluations except archived, for the entire agency. For example, a DPOC for the Veterans Administration (VA) will see all the VA evaluations.

For Agency Point of Contacts (APOCs) the Evaluation Based Status Report will display all evaluations except archived, for the organization(s) to which the APOC is assigned. For example, an APOC that has access to the VA SAO Central HQ organization will only see VA SAO Central HQ evaluations.

For Focal Points (FP) and Alternate Focal Points (AFP) the Evaluation Based Status Report will display all evaluations except archived, to which the Focal Point is responsible.

For all remaining roles, the Evaluation Based Status Report will display evaluations except archived, to which the user is assigned access.

The Evaluation Based Status option functions the same way for all access levels. Slight variations occur at different access levels and are described as applicable. For purposes of demonstration, we’ll log in as the Assessing Official and run the report.

At the Home screen, we will click on Dashboard.

It is important to note that the examples in this demo are fictitious and do not represent an actual Organization or Agency.

Next, we are presented with the Dashboard. The Dashboard defaults to Evaluations/Contract Based Status Report. We will select Status under Evaluation Based Reports. Let’s look at the information displayed. As we can see, 9 evaluations are in the Registered Status. This represents 18% of this AO’s evaluations. 11 evaluations are in the Initiated status, awaiting AOR action. This represents 22% of this AO’s evaluations. 13 evaluations are in the Drafted status, awaiting AO action. This represents 26% of this AO’s evaluations. 0 evaluations are in Rated status, awaiting CR action. This represents this AO’s evaluations. 7 evaluations are in the Reviewed status, awaiting AO action. This represents 14% of this AO’s evaluations. 1 evaluation are in Finalized status, awaiting RO action. This represents 2% of this AO’s evaluations. 9 evaluations are in the Completed status representing 18% of this AO’s evaluations. This AO has 50 total evaluations.

It’s important to note that the Evaluation Counts Report and Contract Counts Report cannot be compared. There may be more evaluations on the Evaluation Counts Report than there are contracts on the Contract Counts Report because there may be multiple evaluations per contract.

Now, let’s take a look at the options available to us to sort and limit the data. We can see that we have that ability to group the results by All or Contract Activity. Focal Points also have the ability to group by Organization and Assessing Official. APOCs and DPOCs also have the ability to group by Organization and Focal Point.

It is important to note that the report defaults to Include All mode which only displays evaluations to which we have been assigned access. If we do not have access to a particular contract, it will not be included in the report. If we do not wish to use Include All mode, we can choose which types of evaluations we wish to include on the report by making selections under the Filter By Options section of the screen. The Filter By options allow us to choose to limit our report based on a specific Business Sector or Evaluation status. We also have the ability to further filter the Data by selecting an available option from the Additional Filters drop down and entering the corresponding data into the box below and clicking Apply. Additional filters include options such as Contract Number, Contract Activity, and Vendor Name. Different additional filters are available depending on the access level logged in. We’ll leave the Evaluation Based Status Report in Include All mode by not selecting any Data Options.

If we want to see the counts matrix displayed in a graphical Bar Chart format, we click on Bar Chart under Report Format. Each color options represents a level of status as defined at the bottom of the screen.

Now, let’s say, we want to see the individual contracts that make up these counts. We will click on List under Report Format. It’s important to remember, that if we had select a Group By option, that selection would not have transferred over to the List Report Format.

Let’s take a look at some of the columns of information displayed.

We’ll start by looking at the Notes feature in the far left column. The Notes feature enables us to add temporary notes to the Evaluation Based Status Report where we can elaborate on the status of the evaluation. For instance, let’s say that our evaluation is in the Finalized status, meaning that we are waiting for comments and closure from the Reviewing Official. Now, let’s say that the Reviewing Official is out of the office and will not be able to provide comments and close the evaluation for another 30 days. This information could be useful to someone else viewing the Evaluation Based Status Report, and so we may wish to add it in a note for that evaluation. We can do this by clicking on the Notes link next to our contract number. We will receive a pop-up box where we can enter our note. We will enter our note in the New Notes block and click Save. Our note will be displayed at the bottom of the pop up box. Once we are finished entering notes, we will click the Close button. Notes may be entered and viewed on the Evaluation Based Status Report by the Focal Point, Alternate Focal Point, Assessing Official Representative, Assessing Official, and Reviewing Official. The Contractor Representative may not enter or view notes. Notes are temporary, are not an official part of the evaluation record, and are deleted once the evaluation is completed. There is a red check mark next to the Notes column for evaluations on which notes have been entered.

Next, we have the Delete Column. The Delete Link is available to the Focal Point, Assessing Official Representative and Assessing Official. 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.

We will click the Delete link, adjacent to the applicable contract/order number to be deleted. The Delete Contract Confirmation screen will display. We will verify the correct contract/order number that we want to delete from CPARS is shown on the screen. If we are ready to delete this evaluation, we will click the Confirm Delete button. If we do not wish to delete this evaluation and return to the Dashboard we would click the Cancel button. We will click the Confirm Delete button to delete this evaluation. We will receive a pop-up stating that this evaluation has been deleted, and we will click OK. As we can see, the Dashboard has refreshed and the contract we deleted is no longer displayed. It is important to note that Clicking on Confirm Delete is irreversible and the deleted evaluation will add an entry to the Activity Log.

Next, we have the Contract Number and Order Number columns. If we click on one of the contract numbers in this column, it will open the evaluation for that contract and period of performance. When we have finished viewing the evaluation, we will click the Close button. Once we have viewed a particular evaluation, a green X will be placed in the Viewed column to indicate that we have already viewed that evaluation. The Focal Point, Alternate Focal Point, Assessing Official Representative, Assessing Official, and Reviewing Official may view an evaluation at any status in the workflow. The Contractor Representative may only view evaluations with a status of Rated, meaning that the evaluation is awaiting contractor comments, or with a status of Completed. The next column displays the Period of Performance. It is important to note that if there is more than one evaluation for a particular contract, such as when the contract has both an Interim and a Final evaluation, all evaluations for that contract will be displayed along with their corresponding periods of performance. In addition, whenever an Interim evaluation is closed by the Assessing Official or Reviewing Official, and a follow-on evaluation is automatically generated, it appears on the Status Report.

Let’s move on to the Evaluation Status column. This column displays the stage of the workflow in which the evaluation currently resides. Definitions for each level of status are displayed at the bottom of the screen. For instance, if an evaluation is in the Drafted status it means that the evaluation is awaiting signature by the Assessing Official. The Evaluation Status column is a very useful tool when determining which access level needs to take action on an evaluation. For instance, let’s say that we are the Assessing Official and that we are unable to find a particular evaluation on our To-Do List. If we run the Status Report and see that our evaluation is in a status of Initiated, we can determine that the evaluation is still with the Assessing Official Representative and has not yet been sent to us for action. Suppose we want to sort our List by Evaluation Status. We can do this quickly by simply clicking on the Evaluation Status column heading in order to sort the statuses in alphabetical order. In fact, we can click on the majority of the column headings in the report to sort by that particular column.

The next column displays the Evaluation Due Date. The Evaluation Due Date is the date that the individual evaluation is due for completion and is calculated by the system. It is important to note that the Evaluation Due Date column indicates the due date for the individual evaluation. Thus, if one of the evaluations for this contract is in the Completed Evaluation Status, it will not have an Evaluation Due Date. However, any evaluations for that contract which are not completed will have an entry in the Evaluation Due Date column.

Let’s move on to the Activity Log. If we click on the word Log next to one of our evaluations, a pop up showing all of the activities that have taken place on that evaluation will be displayed. The Activity Log shows each action, the date and time that the action took place, and the name of the individual who completed the action. When we have finished viewing the Activity Log, we will click Close. The Activity Log is available to the Focal Point, Alternate Focal Point, Assessing Official Representative, Assessing Official, and Reviewing Official. The Activity Log is not available to the Contractor Representative.

Let’s take a look at the remaining Dashboard Options. First, we can download any of our reports into a Spreadsheet. When we click the Spreadsheet function, our Status Report will be displayed as a spreadsheet. It’s important to note, if downloading the bar chart, only the counts matrix not the bar chart will display in the spreadsheet.

If we want to save this report or any other reports, to run again in the future, we enter a report name in the Report Name block and click 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, we would select the report name from the drop-down and click Run Report. To delete a saved report, select the Report Name from the drop-down and click the Delete button.

Since we are done running our Dashboard Reports, we are ready to exit CPARS by clicking Log Out.

This concludes the CPARS Dashboard Evaluation Based Status Report Tutorial. Congratulations on completing the tutorial and thank you for participating!