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

The Evaluations/Contract Based Status option on the Dashboard is an excellent way to develop metrics to help monitor the status of evaluations and contracts, and is an important tool to assist users in the CPARS workflow. The Evaluations/Contract Based Status Report 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. The report also allows users to see which contracts are due for an evaluation or see when an evaluation is due. Other features of the report include being able to see users assigned to an evaluation, an activity log that identifies the actions that have taken place on the evaluation, the ability to delete an evaluation, and the ability to add notes to the evaluation.

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

For Department Point of Contacts (DPOCs) the Evaluations/Contract Based Status Report will display all except archived, that have been registered for the entire agency. For example, a DPOC for the Veterans Administration (VA) will see all the VA contracts/evaluations.

For Agency Point of Contacts (APOCs) the Evaluations/Contract Based Status Report will display all records, that have been registered 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 contracts/evaluations.

For Focal Points (FP) and Alternate Focal Points (AFP) the Evaluations/Contract Based Status Report will display all records except archived, that have been registered for the contract(s) to which the Focal Point is responsible.

For all remaining roles, the Evaluations/Contract Based Status Report will display all records except archived, to which the user is assigned access.

The Evaluations/Contract Based Status option function 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. Let’s look at the options available to us. First we have our Report Options. This section allows us to select additional data columns and or users we want to include on our report.

We will select Contract Data and select Unique Entity Id. Now, let’s choose Evaluation Data and select Due Date. Finally, we will select User Roles and select Assessing Official.

It is important to note, Contractor Rep and Senior Contractor Rep users will only be able to select Focal Point(s), Alternate Focal Points and Contractor Rep(s).

Once we have made our selections, we will  select the Apply button, to apply it to our report.

Next, we have our Filter By Options. If we do not select any Filter By Options the report will default to Include All mode, where we will see a list of all of the contracts and evaluations under our cognizance displayed. It is important to note that Include All mode only displays contracts and 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 contracts and evaluations we wish to include on the report by making selections under the Filter By Options. For instance, we can limit the report to just contracts that have a Business Sector of Construction or we can limit the report to those Contracts that are Overdue. We’ll leave the report in Include All mode by not selecting any Filter By Options. 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.

Let’s take a look at a few 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 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 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 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. Notes may also be entered and viewed from the To Do List.

Next, we have the Delete Column. The Delete link allows us to delete any evaluations that are in the Drafted status. 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 evaluation. Once 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.

Let’s move on to the Contract Status column. This column indicates whether the contract is Current, Due, Overdue, or Final. Each level of status is defined at the bottom of the screen. For instance, a contract with a status of Due means that the latest evaluation for this contract should be in process at this time. A contract with a status of Overdue means that the latest evaluation for this contract has not been completed within the 120 day timeframe.

Next, we have the Contract Due Date column. This column shows the date each contract is due for its next evaluation. The Contract Due Date is automatically calculated by the system. Suppose we want to sort our List by Contract Due Date. We can do this quickly by simply clicking on the Contract Due Date column heading in order to sort the Due Date in Ascending or Descending order. In fact, we can click on the majority of the column headings in the report to sort by that particular column.

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.

The next column displays the Unique Entity ID (UEI) of the vendor that is the recipient of the contract/order displayed.

The next column displays the Due Date. The 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 Due Date column indicates the due date for the individual evaluation. Thus, if one of the evaluations for this contract is in the Completed Status, it will not have a Due Date. However, any evaluations for that contract which are not completed will have an entry in the Due Date column. If the Due Date on one of the evaluations has passed, the contract itself will be overdue for the evaluation and thus will be listed as Overdue in the Contract Status column. Note that each time the contract number is listed, the Contract Status will display as Overdue, even if an individual evaluation for that contract is already in the Completed status. Let’s look at an example of this. There is an evaluation in process for contract U9930417C0714. The evaluation is in the Drafted status, meaning that it is waiting for the Assessing Official signature. The evaluation was due on 06/10/2023. The contract is overdue for the evaluation with the Period of Performance of 12/27/2022 – 02/10/2023.

Next, we will have the Users column. Here, we can see the users assigned to the contract. The users are displayed in one row for that contract number. In this case since we selected Assessing Official we see the Assessing Official or Officials displayed for each contract, to include their User Role, Name, Email Address, and Phone Number.

Finally, we have the Activity Log. If we click on the word Log next to one of our Contracts or evaluations, a pop up showing all of the activities that have taken place on that contract or evaluation will display. 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.

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 Evaluations/Contract Based Status report, we are ready to exit CPARS by clicking Log Out.

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