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

The Status Report 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 completing evaluations. The 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 Status Report also allows users to see which contracts are due for an evaluation or see when an evaluation is due. Other features of the Status 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, and the ability to add notes to the evaluation.

Let’s take a look at the differences between the reports for the different user roles.

For Department Point of Contacts or DPOCs the Status Report will display all records 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 Status Report will display all records except archived, 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 and Alternate Focal Points the Status Report will display all records except archived, that have been registered for the contract(s) to which the Focal Point is assigned. For all remaining roles, the Status Report will display all records except archived, to which the user is assigned access.

The Status Report functions the same way for all access levels. For purposes of demonstration, we’ll log in as the Assessing Official and run the report.

At the Home screen, we will click on Evaluations/Contract Status Report. Next, we are presented with the Status Report Parameters screen. This screen enables us to choose which contracts or evaluations are displayed on the report, as well as which data the report should include. We first have to choose which type of report we would like to run. Our Report Type options are: List of Contracts/Evaluations which will allow us to see a list of all of the contracts and evaluations under our cognizance displayed, Contract Counts which will give us a count of how many contracts are at each contract status, or Evaluation Counts which will give us a count of how many evaluations are at each evaluation status. Let’s leave the default of List of Contracts/Evaluations selected under Report Type.

Next, we have our Data Options. If we do not select any items under Data Options the Status 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 Data Options section of the screen. 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 evaluations which have been Completed. We’ll leave the Status Report in Include All mode by not selecting any Data Options.

The bottom of the screen shows our Report Options. Here we are given the option to select additional data columns and or users we want to include on our Status Report. We’ll select Vendor Name, Due Date and Assessing Official.

If we want to save this report to run it again in the future, we enter a report name in the Report Name block and click the Save icon. The Status Report Parameters 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. If we need to change the parameters of a saved report, we would select the report name from the drop-down, update the desired parameters and click the Save icon. To delete a saved report, select the Report Name from the drop-down and click the Delete button.

Once we have finished making our selections, it is time to run the report. We will do this by clicking the Run Report button at the bottom of the screen. It is important to note that the examples in this demo are fictitious and do not represent an actual Organization or Agency.

Let’s take a look at our Status Report. 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 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 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 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 on the Status Report 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 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.

Next, we have the Vendor Name column. Suppose our Status Report contains evaluations for many different vendors and we would like to sort the report by Vendor Name. We can do this quickly by simply clicking on the Vendor Name column heading in order to sort the vendors by alphabetical order. In fact, we can click on any 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 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. If the Evaluation 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 U9910217C0538. The evaluation is in the Initiated status, meaning that it waiting for the Assessing Official Representative to send to the Assessing Official. The evaluation was due on 10/28/2020. The contract is overdue for the evaluation with the Period of Performance of 07/02/2019 – 06/30/2020.

Next, we have the Users column. Here, any user roles that we selected on the Status Report parameters screen will be displayed in one row for that contract number. In this case, since we selected Assessing Official, the Assessing Official is displayed for each contract, to include their User Role, Name, Email Address, and Phone Number. If we wish to see the other users in the CPARS workflow, we can select additional user roles on the Status Report parameters screen. Focal Points, Alternate Focal Points, Assessing Official Representatives, Assessing Officials, and Reviewing Officials may elect to see all the roles in the CPARS workflow on their Status Report. If Include Last Login is selected, the Last Login Date of the selected user or users could be displayed. Contractor Representatives may view the Focal Point and Alternate Focal Point roles only on their Status Report.

Let’s move on to 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 be displayed. The Activity Log shows each action, the date and the 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.

The next column over provides a Delete link. The Delete link allows us to delete any evaluations/contracts that are in the Registered, Initiated, or Drafted status. Let’s say we want to delete this evaluation. 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 Status Report 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 Status Report has refreshed and the contract we deleted is no longer displayed. The Delete Link is available to the Focal Point, Assessing Official Representative and Assessing Official.

Finally, we have the Spreadsheet function in the upper left corner of the screen. When we click the Spreadsheet function, our Status Report will be displayed as a spreadsheet. Now, let’s close the spreadsheet. Once we have finished viewing the Status Report, we can run the report again with different parameters if desired. Let’s click the Run Another Status Report button.

Now, let’s say we want to see a count of how many contracts are at each status. We will click the Contract Counts option under Report Type.

Next, we have our Data Options. If we do not select any items under Data Options, the Status Report will default to Include All mode, where we will see a list of all of the contracts under our cognizance displayed. It is important to remember that Include All mode only displays contracts 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 we wish to include on the report by making selections under the Data Options section of the screen. 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 Due.

The bottom of the screen shows our Report Options. Here we are given the option to group the results by All or Contract Activity. Focal Points in addition have the ability to group by Organization and Assessing Official. In addition, APOCs and DPOCs have the ability to group by Organization and Focal Point. We’ll leave the Status Report in Include All mode by not selecting any Data Options. Once we have finished making our selections, it is time to run the report. We will do this by clicking the Run Report button at the bottom of the screen.

Let’s take a look at our Status Report. As we can see, we have 14 contracts that are current and do not require an evaluation at this time. This represents 27% of this AO’s contracts. 14 contracts are due for an evaluation. This represents 27% of this AO’s contracts. 12 contracts are overdue for an evaluation. This represents 23% of this AO’s contracts. 12 contracts are final for this AO and no more evaluations are required. This AO has a total of 52 contracts that have been registered. It is important to note that there may be multiple evaluations per contract since each contract is evaluated every year. However, each contract is only counted once. A contract must be Registered in order to be counted in the Status Report. Now, let’s take a look at the final Status Report option Evaluation Counts. To do this we will click on the Run Another Status Report button.

We will select the Evaluation Counts option under Report Type. Next, we have our Data Options. If we do not select any items under Data Options the Status Report will default to Include All mode, where we will see a list of all of the evaluations under our cognizance displayed. It is important to remember that Include All mode only displays contracts to which we have been assigned access. If we do not have access to a particular evaluation, 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 Data Options section of the screen. For instance, we can limit the report to just evaluations that have an Evaluation Type of Interim or Addendum or limit the report to those evaluations that are in the Drafted status. We’ll leave the Status Report in Include All mode by not selecting any Data Options.

The bottom of the screen shows our Report Options. Here, we are given the option to group the results by All or Contract Activity. Let’s choose to group the results by Contract Activity. Once we have finished making our selections, it is time to run the report. We will do this by clicking the Run Report button at the bottom of the screen.

Let’s take a look at our Status Report. As we can see, for Contract Activity U99102, 10 evaluations are in the Registered status. This represents 17% of this AO’s evaluations. 11 evaluations are in the Initiated status, awaiting AOR action. This represents 19% of this AO’s evaluations. 8 evaluations are in the Drafted status, awaiting AO action. This represents 14% of this AO’s evaluations. 0 evaluations are in Rated status, awaiting CR action. 5 evaluations are in Reviewed status, awaiting AO action. This represents 9% of this AO’s evaluations. 7 evaluations are in the Finalized status, awaiting RO action. This represents 12% of this AO’s evaluations. 17 evaluations are in the Completed status representing 29% of this AO’s evaluations. This AO has a total of 58 evaluations. It's important to note that there may be more evaluations on the Evaluation Counts Report, than there are contracts on the Contract Counts Report, as there may be multiple evaluations per contract. Since we are done running our Status Report, we are ready to exit CPARS by clicking Log Out.

This concludes the CPARS Evaluations/Contract Status Report Tutorial. Congratulations on completing the tutorial and thank you for participating!