Welcome to the View Performance Overview training. This is Lesson 1: Introduction to View Performance.

In this lesson, we will discuss the policy behind View Performance and how to look up past performance information in the View Performance section of the Contractor Performance Assessment Reporting System or CPARS. If you are a View Performance Owner or Manager and need assistance with assigning access, please take the automated Access Authorization tutorial located at <https://www.cpars.gov/webtrain_videos.htm>. If you need help with the various Integrity Reports, please take the automated Integrity Overview training available at <https://www.cpars.gov/webtrain_videos.htm>. For help with running the Ad Hoc Report, please take the Ad Hoc Tutorial located at <https://www.cpars.gov/webtrain_videos.htm>.

What is View Performance? View Performance serves as the single source Federal Repository that provides timely and pertinent contractor past performance information to the Department of Defense or DoD and Federal acquisition community for use in making competitive source selection decisions. View Performance provides access to view evaluations that contain ratings and supporting narratives which address an offeror’s history of performance. View Performance also allows contractors to access their own company’s assessments that are available for source selection purposes.

Finally, retrieving past performance evaluations are required by the Federal Acquisition Regulation or FAR, and Office of Federal Procurement Policy or OFPP.

Let’s take a look at where to find the FAR requirements for the use of View Performance.

FAR 9.105-1 states that before making a determination of responsibility, the contracting officer shall possess or obtain information sufficient to be satisfied that a prospective contractor has a satisfactory performance record.

FAR 13.106-2(c) requires that contracting officers evaluate quotations or offers when using price and other factors, such as past performance; which is found in CPARS.

FAR 42.1502 requires that contractor past performance evaluations be prepared at least annually and at the time the work under the contract or order is completed. These evaluations must be entered into the automated CPARS system.

FAR 42.1503 requires that contractors be evaluated on their performance in the areas of technical, cost control, schedule, management, small business subcontracting, and other areas as applicable.

FAR 15.304 requires that source selection officials consider past performance as an evaluation factor in all competitive acquisitions expected to exceed the simplified acquisition threshold.

It is important to remember that evaluations are source selection information, and they must be treated in accordance with FAR 2.101, 3.104, and 42.1503. CPARS evaluations are pre-decisional in nature because they are used to support source selections on an ongoing basis. The only people that can view ratings, narratives, etc. for a specific contract are personnel with a need to know and the contractor who is the subject of the evaluation. In addition, evaluations are not releasable under the Freedom of Information Act, or FOIA. Evaluations are retained for three years after contract completion, with the exception of Architect-Engineer and Construction contracts, which remain in the system for six.

Let’s take a look at the past performance process.

CPARS is the automated tool that is used to draft the contractor performance evaluation. The evaluation contains ratings and narratives to address the contractor’s performance in accordance with the requirements in the contract. The evaluation is written by government officials such as Program Managers, Contracting Officers, and Contracting Officer’s Representatives. The contractor may also provide comments on the government’s evaluation using the CPARS system. It is important to provide the contractor with an opportunity to comment in order to ensure that both the government and contractor perspectives are available to source selection officials reviewing the evaluation. A source selection official may view evaluations from any government agency. Contractor senior management may also view their own company’s performance evaluations under government contracts, but may not view those written against any other company.

View Performance provides source selection officials a robust library of information they can use to assist in assessing a contractor’s ability to fulfill their government contract resulting in making best value contract award decisions. By considering recent, current, and relevant past performance information as part of the source selection, the government is better able to award contracts to proven performers. Evaluations also serve to motivate good performance under currently active contracts. Contractors take the ratings and narratives they receive on evaluations very seriously as they impact a contractor’s ability to obtain future business. Since evaluations are written on an annual basis, the system provides up to date documentation of a contractor’s performance. In addition, the evaluation provides the contractor with valuable feedback as to whether their performance is meeting contract requirements. Evaluations may also be used in responsibility determinations of prospective contractors.

Let’s take a look at the options for logging into CPARS as a View Performance User.

When our view performance account is approved, we will receive an email notification with instructions for obtaining a temporary password. Once we have obtained the temporary password, we will be able to log into the system. If we are a DoD user or a Federal user with a Personal Identity Verification, or PIV card, a password is required only the first time that we log in. Following the first log in, we will begin using our Email Address and our Public Key Infrastructure, or PKI, certificate. If we are a DoD user, our PKI certificate is found on our Common Access Card, or CAC. If we are a Federal user, our PKI certificate is found on our Personal Identity Verification (PIV), or PIV card. We will use our PKI certificate for all subsequent logins. It is important to note that when we receive a new CAC or PIV card, we must contact the CPARS Customer Service Desk for assistance with our next log in. If we are a government user from outside of the DoD and do not have a PIV card, we will log in to CPARS using our Email Address and a password. Furthermore, to help prevent unauthorized access, users are required to enter a one-time access code when using a password to log into the system. The one-time access code is good for 24 hours and will be automatically emailed to the user when logging in.

We can access the CPARS website at https://www.cpars.gov. The CPARS website contains lots of useful information that will assist us. The bottom of every page of the website provides the CPARS Customer Service Desk contact information. The Customer Service Desk is an excellent resource to assist us when we have questions regarding CPARS guidance, the workflow process, and how the automated system operates. At the top of the page there is an options to view Help, which includes the software user manual. There is also an option to access the Learning Center for additional training and tutorial opportunities.

Now, let’s log in to CPARS by clicking the Sign In link.

Next we are presented with the Notice and Consent Banner. After reading the banner, we must choose if we wish to login with PKI or login with a password. Let’s select Accept/Login with PKI.

Next, let’s login as a View Performance user. The first time we log in to CPARS, we will use the Forgot/Reset Password link to obtain a temporary password, which will be provided to us via email. Once we have received the temporary password, we can enter our Email Address and the temporary password at the log in screen. We should remember that, if we are using a PKI certificate, we will only need a password for our initial log in. Once we have logged in for the first time, we will be able to use our Email Address and our CAC, PIV card, or PKI certificate to login in the future. Therefore, the Password block will no longer be displayed. Let’s login by clicking the Login with PKI button. The first time that we login, we will be prompted to verify our user profile information and change our temporary password. We will enter our current temporary password and then enter a New Password. We should refer to the password specifications on the screen to assist us in creating our new password. Next we will confirm our New Password. When we have completed the information on this screen, we will click the Save User Password and Information button. We will receive a notification that our password and information have been changed and click OK.

Next we will read the Rules of Behavior and click Accept. Each screen of the CPARS application contains links to the Customer Service Desk, Guidance for CPARS document, and training opportunities.

Let’s view a company’s past performance. At the Home screen, we will click on View Performance Records, then on Assessment Reports.

It is important to remember that the examples used in this demo are fictitious and do not represent an actual agency, organization, or contractor.

There are two options to retrieve our Assessment Report. The first option is to use the basic search option. This option should be used for retrieving evaluations when conducting source selection and the Vendor Name or Unique Entity ID (UEI), or UEI is known. The second option is to use the advanced search option. This option should be used when needing to retrieve evaluations that meet certain criteria such as a specific dollar amount or Product/Service Code or PSC.

Let’s search by Unique Entity ID. We will enter our UEI and click Add. It is important to note that we can choose to search for up to five UEIs at a time. If we would like to search on multiple UEIs, we enter the UEI and click Add. If we have entered an incorrect UEI, highlight the UEI in the Selected Unique Entity ID box and click Remove. To remove all UEIs, click Remove All. Once we have entered our search criteria, we click Show Report.

Let’s take a look at our Report.

We’ll start by looking at the data columns available to us. First we have the Contract Number and Order Number columns. Next we have the Evaluation Date column. This column displays the period of performance being assessed. Next we see the CAGE Code of the Vendor displayed. The next column displays the Product/Service Code for the contract/order. The next column displays the Business Sector of the contract/order. The next two columns display the Unique Entity ID and Vendor Name of the Entity we searched for. The next columns display the ratings for the adjacent evaluation. We can click on the majority of the column headings in the report to sort by that particular column.

Let’s take a look at one of our evaluations in detail.

If we wanted to view the evaluation for this contract, we could click the HTML or XML link. Let’s click on HTML. At the top we can see that we have the ability to view the attachment that was uploaded when the evaluation was created. We can scroll through the evaluation to see the Basic Contract Information, the governments ratings and narratives, and contractor comments. As we can see, the Contractor Comments section indicates that we should see the original evaluation in order to view the contractor comments. If we keep scrolling down we will notice the original ratings, narratives, and contractor comments. When we have finished viewing the evaluation, we will click the Close button.

If we wanted to display the information in a chart format, we click chart. The displayed charts show the evaluation information within the last three or six years for the Business Sector displayed. The pie chart, shows how many of each rating we have received. In this case we can see that this entity has received 256 Exceptional ratings for the Non Systems Business Sector. The bar chart shows how many of each rating we have received for each of the evaluation areas. Again it is important to remember, that this does not apply specifically for the evaluation we clicked on, but for the entire Business Sector.

Let’s return to our report and take a look at some of the other features. First off we can choose to download up to five evaluations into one HTML or PDF document. In order to this we check off the evaluations we want to download, then click the Here (HTML) or Here (PDF) link. If we wish to download the information displayed into a spreadsheet, click the Spreadsheet function.

Since we are done running our Assessment Report we are ready to exit CPARS by clicking Log Out.

Congratulations! You have completed Lesson 1 Introduction to View Performance. In this lesson, you have learned about the policy behind View Performance and how to look up past performance evaluations in the View Performance Section of CPARS. You are now ready to move onto Lesson 2: Compliance Metrics.

Welcome to Lesson 2: Compliance Metrics and Conclusion!

The Compliance Metrics Report is used to review compliance with past performance reporting requirements by comparing contracts entered into the Federal Procurement Data System or FPDS and completed evaluations entered in CPARS. The Compliance Metrics Report is available to government View Performance users only.

Let’s discuss how the compliance report is calculated.

CPARS receives the eligible contract actions from FPDS that meet the reporting thresholds. The Compliance Metrics Report removes any actions from the eligible contract actions that are not yet due for an evaluation, to determine how many of the eligible contract actions need completed evaluations. The Compliance Metrics Report then divides the number of completed evaluations by the eligible contract actions. This number is displayed as a percentage.

Here are some important things to remember about the Compliance Metrics Report.

If contracts are not reported on, this can negatively impact compliance numbers. If actions are listed that do not require reporting based on FAR regulations, please contact the CPARS Customer Service Desk for removal. Otherwise they will appear on the Compliance Metrics Report as part of the eligible pool of contract actions that should have been reported on—which will negatively impact your compliance metrics. Removal from the Compliance Metrics Report must be based on FAR reporting requirements. Credit is only given to completed CPARS evaluations. Finally, the Compliance Metrics Report is calculated once weekly, on Thursday evening. If an evaluation is completed in CPARS, it will not be immediately marked as compliant on the Compliance Metrics Report. It is best to check the Compliance Metrics Report on Friday to see the current compliance metrics.

The Compliance Metrics Report functions the same way for all View Performance users. Let’s log into CPARS and take a closer look at the Compliance Metrics Report.

At the Home screen, we will click on View Performance, then on Compliance Metrics Report.

It is important to remember that the examples used in this demo are fictitious and do not represent an actual agency or organization.

We need to decide how we want to search for our compliance. The first option is to search based on a Fiscal Year, Fiscal Quarter, and Agency ID and click Run Report. The second option is to select an Agency ID from the drop - down and click Run Report. The third option is to click Run Report. It is best to either search by Agency ID or by leaving the defaults selected and clicking Run Report. For purposes of demonstration, we will select an Agency ID from the drop-down and click Run Report.

Let’s look at our Compliance Metrics Report at the Agency ID level. We’ll start by looking at the Agency ID and Agency Name columns; these columns display the Agency ID and Agency Name and are populated from the list of contracting offices in FPDS.

Next, we can see the Contract Count. This is the number of eligible contract actions that should have an evaluation completed.

The next column displays the Contract Completed Count. This is how many contracts of the eligible contract actions have a completed evaluation.

Finally, we have the Percentage column. This column divides the Contract Completed Count by the Contract Count to identify compliance with reporting requirements for a specific Agency Code.

If we click the Here button above the table, the data displayed on the screen will be displayed in a Spreadsheet. Click the Get Detail button to receive a Spreadsheet of all the Agency’s contract numbers and their individual compliance.

Now, let’s say we wanted to see the Compliance Metrics Report at the Contracting Office ID level for Agency ID 1700. We will click the hyperlinked Agency ID 1700. First, we can see the Agency ID, Agency Name, Contracting Office ID, and Contracting Office columns. This information comes from the list of contracting offices in FPDS.

Next, we can see the Contract Count. This is the number of eligible contract actions that should have an evaluation completed.

The next column displays the Contract Completed Count. This is how many contracts of the eligible contract actions have a completed evaluation.

Finally, we have the Percentage column. This column divides the Contract Completed Count by the Contract Count to identify compliance with reporting requirements for a specific Agency Code.

If we click the Here button above the table, the data displayed on the screen will be displayed in a Spreadsheet.

Now, let’s say we wanted to see the Compliance Metrics Report at the Detailed Office ID level for Agency ID 1700. We will click the hyperlinked Agency ID 1700. First, we can see the Agency ID, Agency Name, Contracting Office ID, and Contracting Office columns. This information comes from the list of contracting offices in FPDS.

Next, we have the Contract Number and Contract Order Number columns.

Next, we have the Date Signed column. This is the signed date of the contract action from FPDS.

Next, we have the Est. Ultimate Completion Date/Last Date to Order column. This is the last possible date of contract or order performance. Contracts are removed from compliance three years after the Est. Ultimate Completion Date/Last Date to Order for NonSystems or Systems contracts, and six years for Architect-Engineer or Construction contracts.

Next, we have the Base and All Options Value. This column is the aggregate value of the contract including unexercised options.All contracts that meet the reporting threshold will be displayed. The Compliance Metrics Report does not recognize agency-specific thresholds.

Next, we have the Unique Entity ID and Vendor Name for the contract/order displayed.

Next, we have the Compliant column. The Compliant column indicates whether or not an evaluation has been completed for that contract/order number. For those contracts that display NO in the Compliant column, no evaluations have been completed, and therefore the contract is counting against the agency’s compliance. If the Compliant column displays YES, a completed evaluation exists for the contract and reporting requirements have been met.

Suppose we want to sort our List by the Compliant column. We can do this quickly by simply clicking on the Compliant 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.

If we click the Here button above the table, the data displayed on the screen will be displayed in a Spreadsheet.

Since we are done running our Compliance Metrics Report, we are ready to return to the Home screen.

Next, let’s take a look at the Update Profile Option. Update Profile functions the same way for all CPARS access levels. For purposes of demonstration, we’ll remain logged in as the View Performance Access user. We can use Update Profile to update our user information such our Name and Phone Number. We will be prompted to review and update our information on an annual basis. Once we have made any necessary changes, we will click Save User Information. We will click OK at the pop up.

Next, let’s click Change Password. We can use Change Password to update our Login Password. Users with a PKI certificate will not have to update their password. If we do not have a PKI certificate, we will be required to change our password every 60 days. If we need to change our password, we would enter our Current Password, our New Password, and Confirm our New Password. The specifications for passwords are noted at the bottom of the screen. Once we had made our changes, we would click Save Password. At this point, we are ready to exit CPARS by clicking Log Out.

If we have questions regarding CPARS, the Customer Service Desk is a ready resource to assist us. The Customer Service Desk can be reached at phone number 207-438-1690 or email cpars-helpdesk@us.navy.mil. Customer service is available Monday through Friday from 6:30 am through 6:00 pm Eastern Time. The CPARS website also contains much information to assist us including the CPARS User Manual, and information on additional training. The CPARS website is located at https://www.cpars.gov.