Surveillance Plan (SP)

User Guide
23 MAY 2020
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Click link and the hold ‘CTRL’ key to follow link
FOREWORD
This document does not replace or amend any Department of Defense (DoD) instructions, regulations, and/or policies.

This guide is intended to guide Defense Contract Management Agency (DCMA) personnel in the use of the Product Data Reporting and Evaluation Program – Automated Information System (PDREP-AIS) in the creation of DCMA Surveillance Plans (SP).

A Surveillance Plan is prepared to identify the Quality Assurance Representative's (QAR's) overall plan to evaluate quality system and product related processes. Not only is it intended to provide a strategy for periodic evaluation, it is also a vehicle to document the QAR's concerns as well as a format for communication and coordination of joint audits and inspections with the customer. The Surveillance Plan is a dynamic plan that must be formally updated, as a minimum, every twelve months. Updates are based on factors such as receipt of new contract requirements, contractor's production activity and the contractor's quality and technical performance history. Requirements identified by the customer/delegating activity via the QALI/LOD may necessitate more frequent Surveillance updates.

Refer to the appropriate service instructions and/or manuals for more information.

REFERENCES
1. Secretary of the Navy Instruction (SECNAVINST) 4855.5C
3. Defense Contract Management Agency NSEP Instruction (DCMA-INST 320)
INTRODUCTION

This document is intended to assist Defense Contract Management Agency (DCMA) personnel in the creation of Surveillance Plans in PDREP.

DCMA SURVEILLANCE PLAN (SP)

A Surveillance Plan is prepared to identify the Quality Assurance Representative’s (QAR’s) overall plan to evaluate quality system and product related processes. Not only is it intended to provide a strategy for periodic evaluation, it is also a vehicle to document the QAR’s concerns as well as a format for communication and coordination of joint audits and inspections with the customer. The surveillance plan is a dynamic plan that must be formally updated, as a minimum, every twelve months. Updates will be based on factors such as receipt of new contract requirements, contractor’s production activity and the contractor’s quality and technical performance history. Requirements identified by the customer/delegating activity via the QALI/LOD may necessitate more frequent surveillance updates.

Users that have access to the PDREP SP application are also provided access to other common features that can be used to leverage supplier past performance information and material history via Ad Hoc query, supplier profiles, and an IHS Haystack link.

The PDREP SP application is accessible via the Product Data Reporting and Evaluation Program home page: https://www.pdrep.csd.disa.mil/

First time PDREP users will need to submit a User Access request form. Instructions are available on the PDREP home page as linked above. Click on User Access Request for instructions on filling out an access request form. Follow additional directions on the form itself to submit the request for access to the PDREP team.

Existing PDREP users can submit an access change request. To do this, log into the PDREP-AIS and hover over ‘User Profile’ or [YOUR NAME]’ in the upper right corner of the page and click ‘Access Change Request’. Update access request as desired. Enter a narrative to describe your change request and click submit account change request button.

Requests for assistance, improvement, or changes to any of the PDREP applications or the NSLC Detachment Portsmouth PDREP home page should be submitted to:

**Online in the PDREP Application**

If you are already a PDREP User, log on to PDREP: https://www.pdrep.csd.disa.mil/

Hover over ‘Help’ link at the top of any PDREP page. Select the first option on the fly out to ‘Contact Help Desk with comment, question, or feedback.’

If you wish to provide suggestions to change SAP application or other PDREP-AIS modules, from the same Help menu, select the ‘Suggest a Change’ option. The Customer Service Request (CSR) form will open. Instructions for completion are located at the top of the form.
Also, visit our FAQ Page – your question(s) may be easily answered there.

**NSLC Portsmouth Help Desk**  
Commercial Phone: (207) 438-1690 / DSN 684-1690  
FAX: (207) 438-6535 / DSN 684-6535  
E-Mail: WEBPTSMH@navy.mil

**Mailing Address**  
Naval Sea Logistics Center Portsmouth  
Bldg. 153, 2nd Floor  
Portsmouth Naval Shipyard  
Portsmouth, NH 03804-5000
## 1 SURVEILLANCE PLAN ACCESS

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Level Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Access</td>
<td>Access to this module is prevented. No link appears on Main Menu. Record deletion is not permitted.</td>
</tr>
<tr>
<td>View Only Access</td>
<td>Permits searching and only a view of data. No ability to edit existing records or create new records.</td>
</tr>
<tr>
<td>Non-Management Access (QAR Access)</td>
<td>User can create, search, view, and edit SP records. User can transfer SPs from one Quality Assurance Representative (QAR) to another QAR. Attachment deletion is permitted if the attachment was created by the user with the same USERID or if user has Primary DODAAC of S4306A. Users may only forward a SP to the User listed in their Team Lead field in their User Profile.</td>
</tr>
<tr>
<td>Management Access (Team Lead Access)</td>
<td>User can, search, view, create, and edit SP records. User can complete and forward to Naval Special Emphasis Program (NSEP) customer for Review. User can transfer SPs from one QAR to another QAR. Attachment deletion is permitted if the attachment was created by the user with the same USERID or if user has Primary DODAAC of S4306A.</td>
</tr>
<tr>
<td>Full Access</td>
<td>PDREP Administrators only. Search and view of SP records is provided. System administrators have the ability to access all web pages, forward, transfer SPs, update, and edit any SP record. Record deletion is permitted if the record was created by the user with the same USERID.</td>
</tr>
</tbody>
</table>
2 ACCESSING THE SP MODULE

Once the user has logged in, the PDREP Home page will display as shown in Figure 2.1. Depending on the user’s access level not all of the options may be listed.

*Please refer to PDREP User Access Request and Login Procedures.

2.1 FINDING THE FLY OUTS

Hover your mouse pointer over any PDREP Application (also referred to as ‘Modules’) located on the upper left portion of the screen and a list of fly out hyperlinks for that application will appear (See Figure 2.2).
2.2 SELECTING THE FLY OUT
Selecting either of the hyperlinks will allow the user to go directly to that page within the application.
SURVEILLANCE PLAN WORKFLOW

Figure 3.1
4 UPDATING A QAR’s TEAM LEAD

A. If forwarding a SP to Team Lead for Review, the QAR must select their Team Lead listed in their PDREP profile. If the QAR selects anyone else for the TO field other than Team Lead listed in their PDREP profile they will receive an error.

B. In order to update your Team Lead in your user profile you will need to contact the NSLC Help desk by email at webptsmh@navy.mil or by telephone number at (207) 438-1690.
5 SURVEILLANCE PLAN AD HOC REPORTS

5.1 AD HOC TOOL
Please refer to the Product Data Reporting and Evaluation Program (PDREP) Ad Hoc Search Tool User Guide for assistance using the PQDR Ad Hoc Tool (See Figure 5.1).

![Figure 5.1]

5.2 QUERYING THE AD HOC
The Ad Hoc query generator can be used to generate a variety of reports; all results are downloadable to MS Excel spreadsheets. On screen instructions are available as a reminder on how to create the Ad Hoc query. The web page provides a method for users to choose a record type to query, select specific data elements from that record, and base the query on criteria like date range or code used in the record to get results (See Figure 5.2).

Users can run the query and adjust it if it is not exactly what they are looking for by returning to the Ad Hoc report page after running a query.
Figure 5.2
6 INITIATING A NEW SURVEILLANCE PLAN

6.1 ACCESSING CREATE NEW SURVEILLANCE PLAN

A. When logging into PDREP, you will see Surveillance Plan under your Applications in the left column (applications will vary depending on individual user access). Hover over Surveillance Plan under your listed applications to see the application fly outs select ‘Create New Surveillance Plan’. (See Figure 6.1).

B. Selecting The Create a New Surveillance Plan page will display (See Figure 6.2).
6.2 CREATING NEW SURVEILLANCE PLAN

Enter the CAGE Code of the Contractor the Surveillance Plan is being prepared for (See Figure 6.2). Click the Create/Edit Surveillance Plan button. The Surveillance Plan form displays (See Figure 6.3, Figure 6.4 and Figure 6.5).
Figure 6.4
NOTE: Mandatory fields in the surveillance plan module are marked with (FM) which denotes a mandatory field for Facility Based Surveillance Plan and (CM) denotes a mandatory field for Contract Based Surveillance Plan.

6.3 CAGE CODE INFORMATION

Figure 6.6 Data Fields

A. **CAGE Code:** Cage code that was entered on the Create New Surveillance Plan Tab.

B. **Company Name:** The Company name associated with the Cage code. (This information is directly derived from the Cage code and is a non-editable field).

C. **Street Address:** Address associated with the Cage code entered. (This information is directly derived from the Cage code and is a non-editable field).

D. **City, State, Zip:** City, State, and Zip code associated with the Cage code entered. (This information is directly derived from the Cage code and is a non-editable field).

E. **Facility Based/Contractor Based:** If the Contractor is a Facility Based or Contract Based, click the circle next to desired choice to change from the default.
F. NSEO Administered Supplier
G. Shared Supplier
H. **Active/Inactive:** Here the QAR can change the record from active to inactive.

### 6.4 QUALITY ASSURANCE REPRESENTATIVE (QAR)

![Figure 6.7](image)

**Figure 6.7**

**Figure 6.7 Data Fields**

A. **Activity:** This field will default to the Primary DoDAAC associated with the Preparing QAR's profile, but can be changed if you are entering a surveillance plan on behalf of another QAR.

B. **Name:** This field will default to the Preparing QAR’s Name as it appears in their profile, but can be changed if you are entering a surveillance plan on behalf of another QAR.

C. **Phone Number:** This field will default to the Preparing QAR’s Phone Number as it appears in their profile, but can be changed if you are entering a surveillance plan on behalf of another QAR.

D. **Email Address:** This field will default to the Preparing QAR’s Email Address as it appears in their profile, but can be changed if you are entering a surveillance plan on behalf of another QAR.

E. **Team Code:** This field will default to the Preparing QAR’s Team Code as it appears in their profile, but can be changed if you are entering a surveillance plan on behalf of another QAR.
6.5 CONTRACTOR

Figure 6.8 Data Fields

A. **POC List**: Select the appropriate Contractor Points of Contact from the POC listings for your organization. When you find the appropriate Contractor Information, click ‘Add POC to List’. The selected POC will be identified in a box below the selection screen. Multiple selections can be made by selecting additional POCs and clicking ‘Add POC to List’.

B. **Add POC to List**: This selection allows you to create a POC if the QAR is unable to locate the required POC.

C. **CAGE**: Enter any associated contractor Cage Codes and select ‘Add Cage Code to List’. This will then create a list of the Associated Cage Codes. If you mistakenly add an incorrect Cage code, you may select that Cage Code from the list and select ‘Delete Cage code from List’.

D. **Lookup CAGE**: Selecting this button will allow you to search for a Cage code by the Contractor’s name or their Cage code.
6.6 APPLICABLE NSEP PROGRAMS

Figure 6.9

Figure 6.9 Data Fields

Select all that applies: Identify the applicable NSEP program the products are produced for by this Contractor. Multiple selections can be made by clicking in the boxes next to the appropriate program.

6.7 HIGHEST CONTRACTUALLY IMPOSED QUALITY ASSURANCE PROVISION

Figure 6.10

Figure 6.10 Data Fields

Select Existing Provision: Select from a drop down selection the highest level quality program implemented at the Contractor facility.
6.8 NATURE OF THE SUPPLIER

Figure 6.11

Figure 6.11 Data Fields

**Narrative:** Enter a detailed narrative description of the products supplied by this Contractor.

**FSC:** Enter the FSC Code if known in support of the Products Supplied, and click ‘Add FSC to List’. To add multiple, repeat this for each FSC applicable to this Contractor. To delete an FSC from the listing, select the FSC to delete and click ‘Delete FSC from List’.

6.9 AREAS OF CONCERN

Figure 6.12

Figure 6.12 Data Field

**Narrative:** Enter a detailed description of the areas of concern associated with this Contractor. These concerns are based on the outcome of Quality Data Evaluation and customer input and requirements. Refer to the QARI (DCMA-INST 320) for additional guidance.

6.10 CHANGES IN THE SURVEILLANCE PLAN SINCE THE LAST ISSUE

Figure 6.13
Figure 6.13 Data Field

Narrative: Enter a description of the changes to the surveillance plan since the original issue of the plan. This may be as a result of subsequent Quality Data Evaluation or a change in the Contractor. Refer to the QARI (DCMA-INST 320) for additional guidance.

6.11 SUPPLIER AUDIT PROCESS – IN HOUSE

Figure 6.14

Figure 6.14 Supplier Audit Process Data Pull

At initial creation of the surveillance plan, this field is not editable. When the surveillance plan is saved, the SAP information will be pulled from the SAP module within PDREP for the Contractor.

6.12 PROCESS SURVEILLANCE PROGRAM

Figure 6.15

Figure 6.15 Process Surveillance Program

Process: Select the process utilized by the Contractor from the drop down selection and click ‘Add to List’. Once selected, the process will show in the Add surveillance plan process block.

A. Select the frequency for the process surveillance from the drop down selection (Daily, Weekly, Monthly, Quarterly, Semi-Annual).

B. Click Save Process to add the process to the surveillance plan.
C. Click Cancel Process Add to cancel the addition of the process to the surveillance plan.
D. Add additional processes as appropriate.

6.13 PRODUCT AUDITS/INSPECTIONS, RESULT OF DCMA & OTHER CONCERNS

![Figure 6.16]

**Figure 6.16**

**Figure 6.16 Data Field**

**Narrative:** Enter the products and characteristics to be inspected during in-process inspections or during final inspections.

6.14 DATA COLLECTION & ANALYSIS

![Figure 6.17]

**Figure 6.17**

**Figure 6.17 Data Field**

**Narrative:** Enter the conclusions drawn from the evaluation of QDE, including trends identified by the data, summary of the Corrective Actions, or other data supporting the performance of the Contractor. If DC&A is to be attached to the surveillance plan, then reference the attachment within this field.

6.15 OTHER INFORMATION

![Figure 6.18]

**Figure 6.18**
Figure 6.17 Data Field

**Narrative:** Enter additional information pertinent to the surveillance plan, including the location and nature or Quality Assurance Records, QAR staff training requirements, NSEP certification requirements, etc.

6.16 BUTTONS

![Save, Send for Team Lead Review, Cancel buttons](image)

Figure 6.19

Figure 6.19 Buttons

**Save As Draft:** Click to save any changes to the current page without exiting the page.

**Send for Team Lead Review:** Click to forward the completed Surveillance Plan to the Team Lead for review.

**Cancel:** Click to exit the current page without saving any changes. The system will return you to the last page and unsaved changes will be discarded.
7 SURVEILLANCE PLAN SEARCH TAB

7.1 ACCESSING SEARCH

A. Hover over Surveillance Plan under your listed applications to see the ‘Search’ option (See Figure 7.1).

B. Select Search, the Search page will display (See Figure 7.2).
C. The user can search for an existing Surveillance Plan by either Cage Code or Company Name (See Figure 7.2).

D. After entering the Information click ‘Search’.

E. If the user is a QAR, they will be forwarded to the Surveillance Plan QAR Data Entry screen (See Figure 7.3). If the user is a Team Lead, they will be forwarded to Surveillance Plan Team Lead Data Entry screen (See Figure 7.4).

Figure 7.2

Figure 7.3
F. For instructions for the Surveillance Plan Base Page, see Section 13.
8 SURVEILLANCE PLAN TRANSFER

8.1 ACCESSING TRANSFER

A. Hover over Surveillance Plan under your listed applications to see the ‘Transfer’ option (See Figure 8.1).

B. Select Transfer, the Transfer page will display (See Figure 8.2).
8.2 HOW TO TRANSFER A SURVEILLANCE PLAN

A. Select the ‘From’ transfer either ‘From Team Lead to Team Lead’ or ‘From QAR to QAR’ (See Figure 8.2).

B. From appropriate dropdown box, select the individual that is currently responsible for the record, or input CAGE code (See Figure 8.2).

C. Click Search, and the following screen will appear (Figure 8.3).
D. Under Transfer Records Header, select the Team Lead or QAR that the record will be transferred too.

E. Select the record that will be transferred, either by clicking on ‘Select All’ or individual boxes.

F. Click on ‘Transfer Selected’ (See Figure 8.3).
9 UPDATING AND FORWARDING A SURVEILLANCE PLAN

9.1 UPDATING A SURVEILLANCE PLAN

A. The newly created surveillance plan can be either saved as draft status for completion at a later date, or it can be forwarded to the Team Lead for review.

B. Clicking the ‘Save’ button, and then cancelling out of the form will place the surveillance plan in draft status in the work list (See Figure 9.1).

C. When the record is saved, a message will display indicating the record has been saved successfully. (See Figure 9.2).

D. Add any additional information to the Surveillance Plan.
9.2 FORWARDING THE SURVEILLANCE PLAN

A. When the Surveillance Plan is ready to send for review, click ‘Send for Team Lead Review’ (See Figure 9.2) and the Send Message screen will be displayed (See Figure 9.3).

![Send Message Screen](image)

**Figure 9.3**

B. The following steps describe how to send the Surveillance Plan for review:

1. The Subject drop-down should default to ‘Submit SP for review’.
2. Select Add Email to TO/CC: The activity will default according to the DODAAC of the Surveillance Plan originator.
3. Assure the desired Activity/DODAAC recipient is selected from the ‘Add Email to TO/CC’ drop-down box.
4. Select a specific Email recipient address from the selection box.
5. Click the ‘Add TO Email’ button.
6. If you wish to add CC addresses, then you may do one of two things.
   i. Type them into the CC: box and click the ‘Add CC Email: CC List’ button (this must be done one address at a time).
   ii. Select an address from the email list then click the ‘Add CC Email’ button to add the address to the CC list.
7. Enter any desired message into the Content: box.
8. Click the checkbox next to the ‘Attach Surveillance Plan (in PDF format) to attach a copy of the surveillance plan.
9. Click ‘Cancel’ to cancel the action.
10. Click ‘Send’ to complete the forwarding action and release the surveillance plan to the Reviewer.

![PDREP Message](image)

**Figure 9.4**

11. A PDREP Message indicating the message was sent successfully will display (See Figure 9.4).

C. If forwarding to Team Lead for Review, the QAR must select their Team Lead listed in their PDREP profile.
10 VIEWING THE SURVEILLANCE PLAN WORKLIST/REPORT

10.1 ACCESSING WORKLIST/REPORT

A. Hover over Surveillance Plan under your listed applications to see the ‘Worklist/Report’ option (Figure 10.1).

![Figure 10.1](image)

B. Select Transfer, the Transfer page will display (See Figure 10.2).
10.2 SEARCHING THE WORKLIST/REPORT

A. The Worklist/Report settings will default as shown in Figure 10.2. To Search Surveillance Plans you must enter one of the three mandatory fields: CAGE Code, Team Code or User Code. You can optionally constrain the results by selecting a Start and End Date, Location, Year, Program Type, Report Type, SP Status, Supplier Type, or Facility/Contract Based.

B. When you have selected the criteria, click ‘Run Report’ to view all Surveillance Plans matching the criteria entered (See Figure 10.3).
C. Inputs to the Surveillance Plan Worklist/Report page are described below.

1. **Preparation Start and End Dates**: The Preparation Start Date and End Date are not required fields when searching for a Surveillance plan. However, dates may be entered to constrain the search results. Dates may be selected using the Calendar links provided or may be manually entered in a MM/DD/YYYY format.

2. The mandatories listed are an 'or ' which means you would have to input CAGE Code, User Code, or Team Code.
   i. **CAGE Code (Mandatory)**: Used to restrict the report results to surveillance plans for the CAGE Code entered.
   ii. **QAR User Code (Mandatory)**: Used to restrict the report to surveillance plans where the associated QAR User Code on the Surveillance Plan is the same as the one entered here.
   iii. **Team Code (Mandatory)**: Used to restrict the report to surveillance plans where the Team Code of the QAR is the same as the one entered here.

3. **Year**: Used to restrict the report to surveillance plans created in the same year as the one entered here.

4. **Location**: Used to restrict the report to show only Surveillance Plans at the current location selected. The available locations to select are All, QAR, or Team Lead.

5. **Sort By**: Used to Sort the report results by Preparation Date – ASC, Preparation Date – DESC, SP Number or Cage.

6. **Program Type**: Used to restrict the report results to those programs selected here. Selection of multiple programs will return all surveillance plans with any of the selected programs identified. No selection will return all program type.

7. **Facility/Contract Based**: Used to restrict the report to those surveillance plans where the company type is that selected. Both is the default selection, but can be changed.

8. **Supplier Type**: This field will bring back records of either the NSEO Administered Supplier, Shared Supplier or Both, which is chosen in the record. Both is the default selection, but can be changed.

9. **SP Status**: Used to restrict the report to those surveillance plans where the current status of the surveillance plan is the same as selected here. The default is Active, but can be changed.

D. **Report Result fields are described below**:

1. **Cage Code**: This is the Cage Code for the surveillance plan matching the selection criteria.

2. **Company Name**: This is the name of the company for the surveillance plan matching the selection criteria.
3. **Issue Date**: This is the preparation date for the surveillance plan matching the selection criteria.

4. **Prepared By**: This is the QAR name for the surveillance plans matching the selection criteria.

5. **Activity**: This is the DODAAC of the surveillance plan originator.

6. **Team Code**: This is the Team Code for the surveillance plans matching the selection criteria.

7. **Team Lead**: This is the Team Lead name for the surveillance plans matching the selection criteria.

8. **Program Type(s)**: This is the program types for the surveillance plan.

9. **Current Location**: This is the current review location of the surveillance plan.

10. **Last Update Date**: This is the date for the most recent entry recorded in PDREP for the surveillance plan matching the selection criteria.

11. **Due**: This is the date the annual review is to be completed.

12. **Last Action**: This is the most recent action that occurred with the surveillance plan.

13. **Review**: HTML and PDF link to view a read only version of the Surveillance Plan.

14. **View/Add Attachments**: Select Click Here to view the attachments associated with the Surveillance Plan or to add a new attachment.

E. The Surveillance Plans can be at any of the following process stages:

   1. Surveillance Plans for twelve-month reviews due.
   2. Surveillance Plans awaiting approval by the appropriate Team Leader.
   3. Surveillance Plans with the review completed by the Team Leader.

F. The results of any report can be downloaded directly to Microsoft Excel using the ‘Click Here’ link at the top of the results page. This allows the user to perform additional sorting, filtering or other analytical functions on the report results.
11 TEAM LEAD SURVEILLANCE PLAN REVIEW

A. Upon receipt of a new Surveillance Plan, the Team Leader will look up the Surveillance Plan on the Worklist (See Figure 11.1) and click the Cage Code to take them to the Data Entry Page (See Figure 11.2).

![Figure 11.1]

B. To review the Surveillance Plan, click the View/Edit Surveillance Plan Data. The Surveillance Plan will appear as shown in Figure 11.3.

![Figure 11.2]

C. The Team Lead can modify the data within the Surveillance Plan, or can identify those changes required to the QAR for their action.
D. Click the Save button to save any changes to the current page without exiting the page. A page can only be saved if all mandatory fields are completed. If required information is missing, then an error message will display at the top of the page specifying what information is missing.

E. Click the ‘Approve and Return to QAR’ button to save all changes to the current page and approve the Surveillance Plan with the information contained in the entry page. A confirmation message will display indicating the record was saved successfully and has been marked ‘Reviewed’. The Team Lead will be forwarded to the correspondence page (See Figure 11.4).

F. Click the Cancel button to exit the current page without saving any changes. The system will return you to the last page viewed before you began data entry and all unsaved changes will be discarded.

G. Click Reject and Return to QAR if Surveillance plan needs to be returned to QAR for updating.
Figure 11.4
12 ANNUAL REVIEW

A. Surveillance Plans are reviewed annually to provide updated information concerning the contractor oversight plan. Records that are due for review will be automatically cloned and a new serial number assigned. If the review is done at the yearly time frame the serial number will be changed to ‘02’ at the end of the serial number. If the review is done in the following calendar year, the serial number will be updated to the current year.

B. The Surveillance Plan number is available for editing, but will automatically default to the correct value. The SP is updated with the appropriate information and the record can be saved as a draft or the action canceled. When the updated Surveillance Plan is saved, the QAR can forward the record to the Team Lead in the same manner as the original Surveillance Plan.

C. Surveillance Plans requiring an annual review are identified on the Worklist by the Due column.

D. To review the Surveillance Plan, click the Cage Code and the base page for the Surveillance Plan will be returned (See Figure 12.1).

E. Once the review is complete, the record is saved and processed in the same manner as the original Surveillance Plan.
13 SURVEILLANCE PLAN BASE PAGE
The Surveillance Plan Base Page is the primary working page for a SP after it has been entered into PDREP. Originators may continue to update the information on a Surveillance Plan even after it has been reviewed. The base page also provides originators and others with a method of reviewing current SP data, and sending relevant correspondence (See Figure 13.1).

![Figure 13.1](image)

13.1 VIEW/EDIT SURVEILLANCE PLAN DATA
This link opens the same data entry page (See Figure 13.1) that was used to create the Surveillance Plan (Reference Section 6) and allows the user to add additional information to the record.

13.2 VIEW COMMENTS AND RECOMMENDATIONS
This page displays the comments and recommendations that are given as the Surveillance Plan is routed through the review change (See Figure 13.2).
Figure 13.2
13.3 SEND MESSAGE TO

The page that displays is nearly identical to the forwarding page previously discussed and the same conventions should be followed. Message types include ‘General Message’, ‘Send Correspondence to Supervisor’, ‘Comments Sent to Team Lead’ and ‘Follow-up’. The page that results from clicking the Send Message to General link is displayed in Figure 13.3.

NOTE: The primary benefit of using the messaging features of PDREP is tracking of correspondence in Surveillance Plan History. All Surveillance Plan correspondence generated from within PDREP will be captured in history and therefore provides a comprehensive audit trail.
13.4 QUICK VIEWS
The links in the ‘Quick Views’ section of the Surveillance Plan Base Page provide a way to quickly review the various forms associated with a SP.

13.5 VIEW SP
A. Clicking the View SP link opens the Surveillance Plan in a new window (See Figure 13.4).
B. Users can print a copy of the Surveillance Plan from the View SP screen.

![Surveillance Plan](image-url)
C. This page provides the information for the Contractor that is contained within the PDREP system (including performance data) and the information entered by the QAR. Also displayed is the following information.

1. **Material Inspection Reports (MIRs)**: A three-year view listing of receipt inspection activity, by Report number, Quantity Received, Quantity Rejected, and Inspection Date. Note this listing includes all receipt inspections performed for the Contractor CAGE, regardless of the inspecting activity.

2. **Supplier Audit Program (SAP)**: A three-year view listing the completed and pending audits for the Contractor CAGE, by Audit Number, DCMA Participated, Corrective Action Completed, Date Audited, Process, Process Audit Date, and Audit Results. Note this listing includes all audits associated with the CAGE, regardless of the auditing organization.

3. **Surveys**: A three-year view listing the completed surveys for the Contractor CAGE, by Survey Number, Contract Number, FSC and Survey completion date.

4. **Product Quality Deficiency Reports (PQDRs)**: A three-year view listing the PQDRs associated with the Contractor CAGE, by Report Control Number (RCN), Category, Critical Safety Item identification, Quantity Received, Quantity Deficient, and Closed Date.

**NOTE:** The PQDRs included are all associated with the CAGE, regardless of the final disposition of responsibility or cause.

D. The individual records included on the View can be selected and a view of the record in PDREP is returned. This feature allows the user to view the specific records included within the surveillance plan.

### 13.6 DOWNLOAD SURVEILLANCE PLAN (PDF)

This displays the surveillance plan in a new window in PDF format so the user can save or print the surveillance plan.

### 13.7 HISTORY

This displays a comprehensive history of all forwarding actions and correspondence to date for the subject surveillance plan. The text of all e-mail messages will display on the History page (See **Figure 13.5**).
13.8 **VIEW/UPLOAD FILES**

A. Click this link to see any files that have been attached to the Surveillance Plan to date. The number of currently attached files will appear in parentheses.

1. To attach new files, click the ‘View/Upload Files’ link and then click ‘Add New Attachments’ and follow the instructions on the page.

2. The maximum file size for any single attachment is 10 megabytes (See Figure 13.6).

B. Deleting an attachment can only be done by the QAR that is responsible for the record and his or her Team Lead. Click the delete button and the attachment will be deleted.
14 SUMMARY

This concludes the Surveillance Plan instruction. The NSLC Portsmouth Help Desk is available to answer additional questions or to assist in data changes or exception processing and, can be contacted as follows:

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