

## **Guide to prepare Annual Performance Report (APR)**

### **Educational Opportunity Centers (EOC) Program**

#### **For Year 2017-2018**

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##### **STEP 1: Download APR Instructions from Department of Education's Website**

We recommend that you download and print the instructions for the Annual Performance Report from Department of Education's website.

1. Open any Internet browser and go to <http://www2.ed.gov/programs/trioeoc/report.html>
2. Save and/or Print '**APR Instructions for Completing the Annual Performance Report**'
3. Save and/or Print '**Policies and Procedures for Prior Experience (PE) Assessment -- 2016-2021 Grant Cycle**'
4. Save and/or Print '**Annual Performance Report Form for Program Year 2017-18**'
5. Please read the instructions carefully

Make sure that you have Blumen 10.18 version; if not then please update to 10.18 version.

##### **STEP 2: Prepare the data as per New Annual Performance Report**

1. From the Command Center, Click on Student Icon
2. Double click on Student Data under Home tab
3. Make sure that you have Fiscal Year selected as '2017'
4. Edit Students' record and update required information as per APR requirements (All APR fields are labeled in 'Red') on 'Current Status' tab
5. Update data on 'End of Year Status' tab

You can update APR Section 4 fields for a group of students through 'Quick Change Wizard' and 'Generate Similar - End Status' options also.

**STEP 3: Prepare Section II of APR**

This step will guide you how to correct the issues in APR Section 2: Demographic Profile.

1. From the Command Center, Click on the APR Icon
2. Select the APR Sections tab
3. Double-click on Annual Performance Report Section 2
4. Select 2017 and click on Ok to Continue
5. On Part A, enter 'Participants Funded to Serve'
6. Part A: Types of Participants Assisted:
7. If the data is missing for any of your students, you will see a count in red for 'Not Entered or Undefined'.  
This is the number of students with missing data for this part.
8. You can print a list of students with missing data by clicking on the small printer icon.
9. You can click the small 'magic hat' icon, which will take you to the students' records with missing data
10. Enter the missing data and click on next to go to next student's record
11. When you reach last record, click on close
12. Click on Re-Calculate
13. Click on Yes and Ok to Continue
14. You should have NO count for 'Not Entered or Undefined' which confirms that you have fixed the missing data for this part of Section 2.
15. Repeat steps 7 through 14 for Parts B, C, D and E
16. Parts F through I: Please verify if the count is correct. These sections do not have to match up with any section so there is no verification if data is missing for these parts
17. If all parts are complete then click on Print button at the bottom
18. Print APR Section 2 and keep for APR submission

**STEP 4: Prepare Section III of APR**

This step will guide you how to correct the issues in APR Section 3: Educational Status (at the time of first service in the reporting year)

1. From the Command Center, Click on the APR Icon
2. Select the APR Sections tab
3. Double-click on Annual Performance Report Section 3
4. Select 2017 and click on Ok to Continue
5. If the data is missing for any of your students, you will see a count in red for 'Not Entered or Undefined'. This is the number of students with missing Educational Status.
6. You can print a list of students with missing data by clicking on the small printer icon.
7. You can click the small 'magic hat' icon, which will take you to the students' records with missing data
8. Enter the missing data and click on next to go to next student's record
9. When you reach last record, click on close
10. Click on Re-Calculate
11. Click on Yes and Ok to Continue
12. You should have NO count for 'Not Entered or Undefined' which confirms that you have fixed the missing data for this section.
13. Click on Print button at the bottom
14. Print APR Section 3 and keep for APR submission

**STEP 5: Prepare Section IV of APR**

This step will guide you how to correct the issues in APR Section 4: Educational Status (at end of reporting period or the following fall)

1. From the Command Center, Click on the APR Icon
2. Select the APR Sections tab
3. Double-click on Annual Performance Report Section 4
4. Select 2017 and click on Ok to Continue
5. Enter your approved objectives in Part A, B, C and D
6. Click on Verify Data at top-right
7. Any errors detected in your data will be displayed on the screen
8. Click on Print List to print a list of students that have the mentioned data issue
9. Click on Correct Data which will take you to the students' records with mentioned data issue
10. Correct the data issue and click on next to go to next student's record
11. When you reach last record, click on close
12. Click on Re-Calculate
13. Click on Yes and Ok to Continue
14. Repeat steps 6 through 13 until no errors remain
15. Click on Print button at the bottom
16. Print APR Section 4 and keep for APR submission

**STEP 6: Check your Program Objectives**

The Department of Education uses Annual Performance Report information to award prior experience (PE) points for meeting your objectives. These points count in your favor when your grant is up for renewal. You can use the PE Points section to view your progress on your objectives once your APR information has been entered into Blumen.

1. From the Command Center, Click on the PE Points icon
2. Select 2017 and click on Ok to Continue
3. Enter the objective requirements for your grant in the Target Objective column
4. Click on the Recalculate button at the bottom right to see your achievements.
5. If you have met an objective, 'Achieved (Outcome)' box will be 'Green', if you haven't met an objective then box will be 'Red'.
6. Each objective has a small printer icon to the right. Clicking this printer will allow you to print a summary (percentages) or a detail (listing) report of the applicable student data for that objective.

**PE Points section is for reference only & does not require to be submitted on Dept. of Education website.**

**STEP 7: Submit your APR on Dept. Of Education Website**

1. Open any Internet browser and go to <https://trio.ed.gov/tseoc/>
2. Login with your UserID and Password.
3. At 'Warning' screen, click on 'Ok' then click on 'Continue'.
4. Click on 'Save and go to next section' button.
5. Click on 'Getting Started' button.
6. Follow the steps to complete the submission

**Dept. of Education Website Help Desk:** If you encounter technical problems accessing the Web site or using the Web application, please contact the Help Desk by either telephone at (703) 885-8008 or e-mail at [generaltrio@collabralink.com](mailto:generaltrio@collabralink.com)