Guide to prepare Annual Performance Report (APR)

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For Program Year 2024-25

BOT (BLUMEN ONLINE for TRIO)

STEP 1: **Download Last Year's Section II Excel file from Dept. of Education's Website**

This step will show you how to retrieve your Last Year excel file (Section II) from Dept. of Education's Website so you can use it to compare and verify your current year's data.

1.   Open any Internet browser and go to https://trio.ed.gov/
2.   Log in to the website with valid credentials
3.   Click on 'Section II' on top menu, then click on 'Getting Started'
4.   Click on 'Download' under 'Download Excel File With Last Year's APR Data - For Previously Funded Projects Only' to save last year APR excel file to your desktop or any other folder
5.   Log out of Department of Education's APR Website.

We recommend that you download and/or print and review the APR guidelines/instructions from the Department of Education's website: https://trio.ed.gov/Home/McNairDocs; these documents will answer lot of your questions regarding the APR.

Department of Education APR Website Help Desk: If you encounter technical problems accessing the Web site or using the Web application, please contact the TRIO Help Desk by either telephone at (703) 885-8008 or e-mail: TRIO@helpdesk.thetactilegroup.com

STEP 2: **Verify current APR data with Last Year's Excel file**

This step will guide you how to check your current APR data against last year's excel file and check for data inconsistencies.

1.   Mouse over on the APR Icon
2.   Click on APR Sections
3.   Click on Annual Performance Report Section 2
4.   Change fiscal year to '2024' if other, Click on Ok to Continue
5.   Click on 'Verify with Excel' button at bottom.
6.   Click on 'Select' then 'Browse', go to 'Desktop' or the folder where you had saved Last Year's excel file in step 1.
7.   Select Last Year's Excel file and click on 'Open'.
8.   If any issues are found, then a report will list all the issues in detail
9.   Print the report and correct all errors listed in that report.

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STEP 3: **Rectify errors based on 'Verify with Last Year APR' process**

This step will guide you on how to correct the major issue that was indicated on the report in step 2.

The report that you printed in step 2 will identify the students that you need to add from previous years to fiscal year 2024-25. Please follow the steps below to add the missing students:

1. Mouse over on Utilities icon
2. Click on 'Add To'
3. Click on Fiscal Year
4. Change fiscal year to '0'
5. Click on the Filters button at the bottom
6. Click on Recall list
7. Click on 'RECORDS TO ADD FOR APR-2024'
8. Click on Select
9. Click on Ok
10. Click on 'Ok to continue'
11. Click on Next
12. Type 2024 as fiscal year
13. Click on Finish
14. Click on Yes
15. Click on Ok

NOTE: **Please verify 'Participant Status (field # 22)' of students that have been added to the fiscal year in step above as 'Prior-Year' participants may still be marked as 'Continuing'.**

STEP 4: **Update Case Numbers with Last Year's APR Excel file**

This step will guide you on how to update the case number for your participants as listed on last year's APR excel file.

1. Mouse over on the APR Icon
2. Click on APR Sections
3. Click on Annual Performance Report Section 2
4. Change fiscal year to '2024' if other, click on Ok to Continue
5. Click on 'Update Case Numbers' button at bottom.
6. Click on 'Select', then 'Choose File', browse to 'Desktop' or the folder where you had saved last year's APR excel file in step 1.
7. Select last year's APR excel file and click on 'Open'.
8. A summary report will provide details like list of students whose case number will be updated and any other issues that may need to be resolved regarding case numbers
9. Print the report
10. Click on 'Yes' to update the case number for the students.
11. Click on 'Ok' on message – "Blumen has updated case numbers for x student(s) from last year's APR file.
12. Click on 'Save & Close'

STEP 5:   Verify current APR data with Last Year's Excel file, AGAIN

This step will confirm that you have added all the students that needed to be added to fiscal year 2024-25.

1.   Mouse over on the APR Icon
2.   Click on APR Sections
3.   Click on Annual Performance Report Section 2
4.   Change fiscal year to '2024' if other, Click on Ok to Continue
5.   Click on 'Verify with Excel' button at bottom.
6.   Click on 'Select' then 'Choose File', browse to 'Desktop' or the folder where you had saved Last Year's excel file in step 1.
7.   Select Last Year's Excel file and click on 'Open'.
8.   This step should identify that no more students are required to be added to fiscal year 2024-25, confirming that you have successfully added the required students in step 3.
9.   Correct data issues if any, as listed in the report; example: change of first name, last name, date of birth etc.

STEP 6:   Verify APR Data

It is important and critical that you check for all possible data errors and inconsistencies and correct the same before submission of your APR data to Dept. of Education.

1.   Mouse over on the APR Icon
2.   Click on APR Sections
3.   Click on Annual Performance Report Section 2
4.   Change fiscal year to '2024' if other, Click on Ok to Continue
5.   Click on 'Verify Data' button at top-right
6.   This option will identify all the issues with your data - missing data, invalid data, data not matching up from one field to another etc.
7.   It will select the group of students with the suggested error, and you will get the following options:

- Correct Data: To correct the errors on selected students, once you fix the data on a student then click on 'Next' button to move to next student's record.
- Print List: To print the list of students with the listed error.
- Save List: To save the list of students with the listed error. This saved list can be recalled from 'Recall List' option in 'Global Filter Screen'.
- Continue to Next field: To move to the next error.

8.   Correct all errors as listed.

STEP 7:   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.   Click on the PE Points icon at top-right
2.   Change fiscal year to '2024' if other, Click on Ok to Continue
3.   Enter the objective requirements for your grant in the Objectives column
4.   Click on the Recalculate button at the bottom right to see your achievements.
5.   If you are meeting an objective, 'Outcome' box will be 'Green', if you are not meeting 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

STEP 8:   Create your APR Data File for submission

Once you have fixed your APR data of all errors in step 6, you can create the data file for APR submission on Dept. of Education website.

1.   Mouse over on the APR Icon
2.   Click on APR Sections
3.   Click on Annual Performance Report Section 2
4.   Change fiscal year to '2024' if other, Click on Ok to Continue
5.   Click on 'Create Data File' button at the bottom
6.   Select Excel
7.   Change the folder to where you want to save the file, say 'Desktop'
8.   Rename the file name if needed and click on Save

STEP 9:   Submit your APR on Dept. of Education Website

1.   Open any Internet browser and go to https://trio.ed.gov/
2.   Log in to the website with valid credentials
3.   Complete Section I then click on 'Save and go to next section' button.
4.   Click on 'Getting Started' button.
5.   Under 'Upload an Excel File to the Web Data Entry Form' section, click on 'Choose File' button
6.   Select APR data file created in Step 8 and click on Upload file
7.   Follow the steps to complete the submission

If any data needs to be corrected then correct the data in Blumen, repeat step 6 to 8, so data in Blumen is in sync with data on Dept. of Education's website.

Please contact Blumen Support if you need any help or have any questions.