# Guide to prepare the Annual Performance Report (APR)

# TALENT SEARCH (TS)

# For Year 2023-2024

# Desktop Version

**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 ***https://www.ed.gov/grants-and-programs/grants-higher education/trio/talent-search-program#apr***
2. Save and/or Print *'Instructions for Completing the TS Annual Performance Report for Program Year 2023-24'*
3. Save and/or Print *'TS Annual Performance Report Form for Program Year 2023-24'*
4. Save and/or Print '**Policies and Procedures for Assessing the Standardized Objectives: 2021-2026 Grant Cycle**'
5. Please read the downloaded instructions carefully

You require 11.09 version for this year's APR. Contact Blumen Technical Support at 1-800-597-8204 or e-mail: support@compansol.com for 11.09 version.

**STEP 2:** **Prepare the data for 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 '2023'
4. Edit Students' records 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 fields for a group of students through 'Quick Change Wizard' option also.

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

This step will guide you on 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 2023 and click on Ok to Continue
5.     On Part A, enter 'Number of 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 the 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, E and L
16.    Parts F through K & M:        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, 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 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 2023 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 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 the 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 the 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 for following fall term)

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 2023 and click on Ok to Continue
5.    Enter your approved objectives in Part A, B, C and E
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 the 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.   Make selections on Part E (a)
16.   Click on the Print button at the bottom
17.   Print APR Section 4 and keep for APR submission

**STEP 6:      Prepare Section IV of APR (Excel file for postsecondary enrollees)**

This step will guide you how to prepare the excel file required for Tracking Postsecondary Enrollees

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 2023 and click on Ok to Continue
5.     Go to Part E (a)
6.     Please indicate which interpretation of the objective's wording was followed when the project established the objective rate for postsecondary attainment.

      **Please note that the option selected in either APR reporting period 2021-22 or 2022-23 (i.e., for those first funded in FY2022) for the postsecondary attainment objective will be pre-populated. As noted in the APR instructions, the interpretation selected cannot be changed for the remainder of the current grant cycle to maintain consistent PE calculations across all PE assessment years.**

7.     Please indicate the method your project will be implementing to track the post-secondary attainment status of postsecondary enrollees.

      **Please note that the option selected in either APR reporting period 2021-22 or 2022-23 (i.e., for those first funded in FY2022) for the postsecondary attainment objective will be pre-populated. As noted in the APR instructions, the interpretation selected cannot be changed for the remainder of the current grant cycle to maintain consistent PE calculations across all PE assessment years.**

8.     Go to Part E (b)
9.     Follow steps to create an Excel file with the list of postsecondary enrollees based on your selection

Please refer to the Department of Education's instructions/guidelines in preparation of this excel file.

CELEBRATING
30 YEARS
ANNIVERSARY
SERVING TRIO

P.O. Box 821143    Houston, TX 77282    Phone (281) 597-8238
TOLL FREE 1-800-597-8204    www.compansol.com    orders@compansol.com

SOC 2
TYPE 2

**STEP 7:     Prepare data for Postsecondary Attainment Objective**

This step will guide you how to prepare for the Postsecondary Attainment Objective

1.      From the Command Center, click on the Student Icon
2.      Select the Home tab
3.      Double-click on Student Postsecondary Tracking
4.      Make sure to select '2023' for 'Reporting in Fiscal Year'
5.      This section will display seniors of 2017-18 that you need to track
6.      Click on Print button to run Listing or Detail report as needed
7.      Edit the students' records and update APR field – "Highest Degree Completed" (Postsecondary credential earned by 08/31/2024)
8.      This section will also display postsecondary tracking information downloaded via NSCH interface (National Student Clearinghouse); NSCH information will assist you in determining the postsecondary completion status for your students
9.      If you wish to download postsecondary information for postsecondary cohort of 2017-18 through NSCH option, run 'National Student Clearinghouse Data Interface' option under Utilities for this group of students (Please refer to the User Guide for detailed steps)

10.      From the Command Center, Click on the APR Icon
11.      Select the APR Sections tab
12.      Double-click on Annual Performance Report Section 4-Part E
13.      Select 2023 and click on Ok
14.      Click on 'Verify with Excel' button at bottom
15.      Select the 2017-18 PSE Cohort excel file; downloaded from APR website
16.      This option will compare your current data against the postsecondary enrollment cohort file. It will identify the problems/issues with your data. Please select the 2017-18 cohort excel file (Recommended to download from Dept. of Education's website.) (Department has made available the Excel file of the 2017-18 cohort that can be downloaded via the button/link provided on the "Cohort Download" tab on the APR website.)
17.      If any issues are found, then a report will list all the issues in detail
18.      Print the report and correct all errors listed on that report.
19.      If 'Type of postsecondary credential earned' 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.
20.      You can print a list of students with missing data by clicking on the small printer icon.
21.      You can click the small 'magic hat' icon, which will take you to the students' records with missing data
22.      Enter the missing data and click on next to go to next student's record
23.      When you reach the last record, click on close
24.      Click on Re-Calculate
25.      Click on Yes and Ok to Continue
26.      You should have NO count for 'Not Entered or Undefined' which confirms that you have fixed the missing data
27.      Click on the Print button at the bottom
28.      Print APR Section 4-part E and keep for APR submission

**STEP 8:    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 2023 and click Ok to Continue at the bottom
3.    Enter the objective requirements for your grant in the Target Objectives column
4.    Click on the Recalculate button at the bottom right to see your achievements.
5.    If you are meeting an objective, 'Achieved (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.

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

**STEP 9:    Submit your APR on Dept. Of Education Website**

1.    Open any Internet browser and go to https://trio.ed.gov/
2.    Click on Login
3.    Log in to the website with valid credentials
4.    Follow the steps to complete the submission

**Department of Education's 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 TRIO@helpdesk.thetactilegroup.com.