

Guide to prepare Annual Performance Report (APR)

UPWARD BOUND (UB) / UPWARD BOUND MATH SCIENCE (UBMS)

for B.O.T. (Blumen Online for TRiO)

For Year 2017-2018

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/ub/'
2. Login with your UserID and Password
3. Click on available 'Section II' excel file, select save, select desktop and click on save.
4. 'Log Out' of Dept. Of Education Website.

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

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 '2017' 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 on that report.

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

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

Report that you printed in step 2, will identify the students that you need to add from previous years to fiscal year 2017-18. 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 Mark Students
6. Select students that you wish to add to fiscal year 2017-2018 as per report on step 2
7. Click on 'Ok to continue'
8. Click on Next
9. Type 2017 as fiscal year
10. Click on Finish
11. Click on Yes
12. Click on Ok

STEP 4: 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 2017-18.

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 '2017' 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. This step should identify that no more students are required to be added to fiscal year 2017-18, confirming that you have successfully added the required students in step 3.
9. This step should also confirm that there are no more issues that need to be rectified as indicated in step 2.

STEP 5: 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 '2017' if other, Click on Ok to Continue
5. Click on 'Verify Data' button at top-right
6. This option will identify all 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 have following options:
 - Correct Inconsistencies: 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.
 - Continue to Next field: To move to next error
8. Correct all errors as listed.

Please print APR guidelines/instructions from Department Of Education's website:

<http://www2.ed.gov/programs/trioupbound/report.html>

These documents will answer lot of your questions regarding APR.

NOTE: When updating data, click on 'Save' button at regular intervals to save the data in that session.

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. Click on the PE Points icon at top-right
2. Change fiscal year to '2017' 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 have met an objective, '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.

STEP 7: Create your APR Data File for submission

Once you have fixed your APR data of all errors in step 5, 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 '2017' 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 8: Submit your APR on Dept. Of Education Website

1. Open any Internet browser and go to '<https://trio.ed.gov/ub/>'
2. Login with your UserID and Password.
3. At 'Warning' screen, click on 'Ok' then click on 'Continue'.
4. Complete Section I, Part 1 and Part 2 then click on 'Save and go to next section' button.
5. Click on 'Getting Started' button.
6. Under 'Upload an Excel File to the Web Data Entry Form' section, click on 'Browse' button
7. Select APR data file created in Step 7 and click on Upload file
8. Follow the steps to complete the submission

If any data needs to be corrected then correct the data in Blumen, repeat steps 5 to 7, 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.