



March 6th, 2018.

Subject: Changes in Talent Search Annual Performance Report for 2016-17

Dear Talent Search Director,

It is time to prepare the Annual Performance Report (APR) for the Talent Search (TS) project for program year 2016–17.

Below is summary of changes to the APR as per Department of Education's guidelines:

1. Section II Part J – **Served by other Trio Program**
Change: 'EOC' option removed
2. Section II Part K – **FAFSA Completion**
 - (i) Option 1 – reworded to 'Seniors who completed the FAFSA but did not enroll in postsecondary education'
 - (ii) Option 3 – New option added – 'Seniors who did not complete the FAFSA and/ or whose FAFSA completion could not be confirmed'
3. Section II Part L – NEW FIELD with 4 options added : **Competitive Preference Priorities (CPP)**
 - (i) Participants who received CPP tutoring services only
 - (ii) Participants who received CPP mentoring services only
 - (iii) Participants who received both CPP tutoring and CPP mentoring services
 - (iv) Participants who received neither CPP services
4. Section II Part M – **School**
 - (i) Moved from II L to II M
 - (ii) Option added - Number of participants in the dual enrollment program in each Target School
5. Section III Part A – **Grade/Standing**
 - (i) New option added – 'Students in 4th year of high school in a five-year dual enrollment program'
 - (ii) New option added – 'Students in 5th year of high school in a five-year dual enrollment program'

We have implemented these changes in the BOT software.

Regards,

Blumen Support Team.

Guide to prepare Annual Performance Report (APR)

TALENT SEARCH (TS) for B.O.T. (Blumen Online for TRiO)

For Year 2016-2017

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/triotalent/report.html>
2. Save and/or Print '**Instructions for Completing the TS Annual Performance Report for Program Year 2016-17**'
3. Save and/or Print '**TS Annual Performance Report Form for Program Year 2016-17**'
4. Save and/or Print '**Policies and Procedures for Standard Objectives Assessment: 2016-2021 Grant Cycle**'
5. Please read the instructions carefully

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

This step will identify the changes and new fields that have been added to the new APR.

1. Click on Student Icon
2. Click on Student Data
3. Make sure that you have Fiscal Year selected as '2016'
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 fields for a group of students through 'Quick Change Wizard' option 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. Mouse-over APR Icon
2. Click on APR Sections
3. Click on Annual Performance Report Section 2
4. Select 2016 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 last record, click on save & close
12. Click on Re-Calculate
13. Click on Ok twice
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 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 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 time of first service in the reporting year)

1. Mouse-over APR Icon
2. Click on APR Sections
3. Click on Annual Performance Report Section 3
4. Select 2016 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 save & close
10. Click on Re-Calculate
11. Click on Ok twice
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 for following fall term)

1. Mouse-over APR Icon
2. Click on APR Sections
3. Click on Annual Performance Report Section 4
4. Select 2016 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 last record, click on save & close
12. Click on Re-Calculate
13. Click on Ok twice
14. Repeat steps 6 through 13 until no errors remain
15. Make selections on Part E (a)
16. Click on Print button at the bottom
17. Print APR Section 4 and keep for APR submission

STEP 6: Prepare Section IV E. of APR

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

1. Mouse-over APR Icon
2. Click on APR Sections
3. Click on Annual Performance Report Section 4
4. Select 2016 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.

Note: Once an interpretation had been selected in the 2016-17 APR, it 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 postsecondary attainment status of postsecondary enrollees.

Note: Once a tracking selection had been made in the 2016-17 APR, it cannot be changed for the remainder of the current grant cycle to maintain consistent tracking methodology.

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 Department of Education's instructions/guidelines in preparation of this excel file.

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
2. Select 2016 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 Dept. of Edu. website.

STEP 8: 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