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## Guide to prepare Annual Performance Report (APR)

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

For Year 2015-2016

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#### **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) 846-8248 or e-mail at [generaltrio@cbmiweb.com](mailto:generaltrio@cbmiweb.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.

If you have 10.05a or earlier version then **please update to 10.09 version.**

1. Start Blumen
2. From the Command Center, Click on the APR Icon
3. Select the APR Sections tab
4. Double-click on Annual Performance Report Section 2
5. Change fiscal year to '2015' if other, Click on Ok to Continue
6. Click on 'Verify with Excel' button at bottom.
7. Click on 'Select', go to 'Desktop' or the folder where you had saved Last Year's excel file in step 1.
8. Select Last Year's Excel file and click on select.
9. If any issues are found then a report will list all the issues in detail
10. Print the report and correct all errors listed on that report.
11. A custom list named 'RECORDS TO ADD FOR APR-2015' will be saved in your filters. This list may be used to add students to the current fiscal year.

**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 2015-16. Please follow the steps below to add the missing students:

1. From the Command Center, click on Utilities icon
2. Select the 'Add To' tab
3. Double-click on Fiscal Year
4. Change fiscal year to '0'
5. Click on Filters button at the bottom
6. Click on Recall list
7. Click on 'RECORDS TO ADD FOR APR-2015'
8. Click on Select
9. Click on Ok
10. Click on 'Ok to continue'
11. Click on Next
12. Type 2015 as fiscal year
13. Click on Finish
14. Click on Yes
15. Click on Close

**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 2015-16.

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. Change fiscal year to '2015' if other, Click on Ok to Continue
5. Click on 'Verify with Excel' button at bottom.
6. Click on 'Select', 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 select.
8. This step should identify that no more students are required to be added to fiscal year 2015-16, confirming that you have successfully added the required students in Step 3.



**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. 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. Change fiscal year to '2015' 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, 'Close' out of APR Section 2 at regular intervals to save the data in that session as there is no 'Save' button in APR Section 2.**

**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. Change fiscal year to '2015' 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 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. 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. Change fiscal year to '2015' 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
9. Click on No and click on close

**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 step 5 to 7, so data in Blumen is in sync with data on Dept. Of Education.

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