Guide to prepare 2025-26 Annual Performance Report (APR)

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

STEP 1: Download Last Year's Section II Excel file from Department of Education's APR Website

This step will show you how to retrieve your Last Year excel file (Section II) from Department of Education's APR 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's APR excel file to your desktop or any other folder
5. Log out from Department of Education's APR Website.

Please print APR guidelines/instructions from Department of Education's APR website: https://trio.ed.gov/Home/UBDocs; these documents will answer lot of your questions regarding 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. Click on APR in left side menu
2. Click on Annual Performance Report Section II tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Click on Verify with Excel at bottom
5. Click on Select, browse to Desktop or the folder where you had saved Last Year's excel file in step 1
6. Select Last Year's Excel file and click on Open
7. If any issues are found, then a report will list all the issues in detail
8. Print the report and correct all errors listed in that report

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 2025-26. Please follow the steps below to add the missing students:

1. Click on Utilities in left side menu
2. Click on Add To
3. Click on Fiscal Year tile
4. Change fiscal year to 0
5. Click on RECALL LIST at the bottom
6. Click on RECORDS TO ADD FOR APR-2025
7. Click on RECALL
8. Click on CONTINUE
9. Click on Next
10. Type 2025 as fiscal year
11. Click on Finish
12. Click on Yes

NOTE: Please verify 'Participant Status (field # 27)' 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. Click on APR in left side menu
2. Click on Annual Performance Report Section II tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Click on Update Case Numbers at bottom
5. Click on Select, browse to Desktop or the folder where you had saved last year's APR excel file in step 1
6. Select last year's APR excel file and click on Open
7. 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
8. Click on Update Casenumber at top-left of the report
9. Click on Update button to update the case number for the students.
10. Click on OK
11. Click on 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 2025-26.

1. Click on APR in left side menu
2. Click on Annual Performance Report Section II tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Click on Verify with Excel at bottom
5. Click on Select, browse to Desktop or the folder where you had saved Last Year's excel file in step 1
6. Select Last Year's Excel file and click on Open
7. This step should identify that no more students are required to be added to fiscal year 2025-26, confirming that you have successfully added the required students in step 3
8. 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 the Department of Education.

1. Click on APR in left side menu
2. Click on Annual Performance Report Section II tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Click on Verify Data at top-right
5. This option will identify all issues with your data - missing data, invalid data, data not matching up with one field to another etc.
6. It will select the group of students with the suggested error, and you will get following options:

- Correct Data: To display students with the listed error
- 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
- Next field: To move to next error.

7. If you clicked on Correct Data; it will display all the students with the listed error
8. Double click on the first student's record on the list
9. Fix the error on selected student's record
10. Click on Save
11. Repeat steps 8-10 for remainder records

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 APR in left side menu
2. Click on Prior Experience (PE) Assessments tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Enter the objective requirements for your grant in the Objective column
5. Click on the Re-calculate at the bottom to see Objectives Outcome
6. If you have met an objective, corresponding Outcome will be green, if you haven't met an objective then Outcome will be red
7. 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 the Department of Education APR website.

1. Click on APR in left side menu
2. Click on Annual Performance Report Section II tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. Click on Create Data File at the bottom
5. Click Excel Format and choose XLSX or CSV
6. Your APR Data file will be saved in your downloads folder

STEP 9: Print report for APR Section I Part 3

1. Click on APR in left side menu
2. Click on Annual Performance Report Section I Part 3 tile
3. Change fiscal year to 2025 if other, Click on CONTINUE
4. APR Section I Part 3 report will be displayed
5. Click on printer icon to print the report and save for submission

STEP 10: Submit your APR on Department of Education APR 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, Part 1 through 3 then click on ‘Save and go to next section’ button.
4. Use report printed in Step 9, to complete Section I-Part 3
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 8 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 6 to 8, so data in Blumen is in sync with data on Department of Education’s APR website.

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