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

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

PC/Desktop Version

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. 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 '2025' if other, Click on Ok to Continue
6. Click on 'Verify with Excel' button at bottom.
7. Click on 'Select', browse 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-2025' 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 on how to correct the major issue that was indicated on the report on 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. 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-2025'
8. Click on Select
9. Click on Ok
10. Click on 'Ok to continue'
11. Click on Next
12. Type 2025 as fiscal year
13. Click on Finish
14. Click on Yes
15. Click on Close

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. 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 '2025' if other, click on Ok to Continue
6. Click on 'Update Case Number' button at bottom.
7. Click on 'Select', go to desktop or the folder where you had saved last year's APR excel file in step 1.
8. Select last year's APR excel file and click on select.
9. 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
10. Print the report
11. Click on 'Yes' to update the case number for the students.
12. Click on 'Ok' on message – "Blumen has updated case numbers for x student(s) from last year's APR file."

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. 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 '2025' 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 2025-26, confirming that you have successfully added the required students in step 3.
9. Correct data issues if any, as listed on 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. 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 '2025' 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 get following options:

- Correct Data: 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's record.
- Print List: To print the list of students with the listed error.
- Continue to Next field: To move to next error message

8. Correct all errors as listed.

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 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. From the Command Center, Click on the PE Points icon
2. Change fiscal year to '2025' 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 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 Department of Education APR 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 '2025' 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 9: Print report for APR Section I-Part 3 (Formerly Part 4)

1. From the Command Center, Click on the APR Icon
2. Select the APR Sections tab
3. Double-click on Annual Performance Report Section 1-Part 4
4. Change fiscal year to '2025' if other, Click on Ok to Continue
5. APR Section I-Part 4 (Information on Target Schools) report will be displayed
6. 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’ button
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.