

# HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

## ENDOWMENT FINANCIAL REPORTING SYSTEM (EFRS) USER GUIDE



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ver 1.0

## TABLE OF CONTENTS

EFRS REPORT QUICK SHEET	2
I.    About the EFRS Reporting System	3
A.    EFRS Reporting Requirements	3
II.   HEP IS Home Page	4
A.    New User Accounts	5
III.  Two-Factor Authentication	6
IV.   HEP IS Landing Page	7
V.    EFRS Reporting Home Page	8
VI.   Grant Identification	9
VII.  Section 1: General Information	11
VIII. Section 2: Reporting Period	12
IX.   Section 3: Investment Distribution (For Corpus Only)	13
X.    Section 4: Income Earned	15
XI.   Section 5: Income Used	16
XII.  Review and Certification	17
A.    Review	18
B.    Certification	19
C.    Submit	20
D.    Unsubmit	21

# EFRS REPORT QUICK SHEET

This page provides a quick overview of the EFRS Reporting system and how to use it. We recommend you review this entire User Guide to learn more about how each part of the system works so you can fully understand the Endowment Financial Reporting System process.

1. **Log in to <https://hepis.ed.gov> with your username and password**

See **Chapters II & III** of this user guide for more details about logging into the system.

2. **Verify your institution and grantee contact information and update it, if necessary**

See **Chapter VI** for more about the Grant Identification section.

3. **Complete all five Sections of your EFRS Report**

See **Chapters VII-XI** for more details about each Section of the report.

4. **Review, Certify, and Submit your EFRS Report**

See **Chapter XII** for more information about these steps.

For complete details about this entire process, please read this **User Guide** and the **Blank EFRS Form**, both of which are available for download under the EFRS Resources header on the HEP IS Help page at <https://hepis.ed.gov/main/help>.

## I. About the EFRS Reporting System

The Institutional Service EFRS Reporting system is used to collect endowment performance data from Title III and Title V grantees that have an endowment component to their grant. *You will know if your grant has an endowment component*, however if you have any questions about your endowment, the endowment reporting requirements, or how to fill out these reports, please contact your Program Officer, who is listed at the top of the page once you enter the system for a particular PR Number.

The EFRS Report consists of the following sections:

- **Section 1:** General Information
- **Section 2:** Reporting Period
- **Section 3:** Investment Distribution (*For Corpus Only*)
- **Section 4:** Income Earned
- **Section 5:** Income Used

Please complete your reports as soon as possible so that program staff can review the information in a timely manner. If you are unsure about how to answer any of the questions in the online reporting tool, or if you need clarification on anything related to the content of your report, please contact your Program Officer.

If you have any questions or issues of a technical nature related to the use of the website, please contact the help desk. IS APR help desk staff are not qualified to answer any questions of a programmatic nature related to your grant.

The EFRS Reporting system is currently open year round, but in the future it may open and close on the same schedule as the IS APR system, which is generally open shortly after the start of the calendar year for approximately 60 days. Please refer to the HEPIS homepage for information about which subsystems are currently open.

### A. EFRS Reporting Requirements

If you are permitted to and choose to invest grant funds in an endowment, then financial reports are required to be submitted once a year for *twenty years* from the date of the initial corpus.

## II. HEP IS Home Page

After accepting a standard disclaimer regarding usage of a Federal website, you will be able to access the HEP IS system home page.

The screenshot shows the HEP IS Home Page. At the top, there is a dark blue header with the text "HEP IS" in large white letters, followed by "Higher Education Programs: Institutional Service" in smaller white text. Below this is a navigation bar with a red circle containing the number "1" next to the text "HEP IS Home | About | Help | FAQs | Contact Us".

The main content area has a white background. It starts with the heading "Welcome to the new HEP IS web portal!" followed by a disclaimer: "Institutional Service (IS) administers programs authorized under Title III and Title V of the Higher Education Act of 1965, as amended. For more information, see the About section." Below this is a red circle with the number "2" next to two lines of text: "The Grant Eligibility Application system will be open from 12/16/2019 through 1/31/2020." and "The Titles III and V Annual Performance Reporting system will be open from 1/6/2020 through 3/6/2020."

There are two main boxes. The left one is light blue and titled "New to HEP IS?". It says "Click the button below to get started" and has a red circle with the number "3" next to a dark blue button labeled "New User". Below this is another light blue box titled "Find blank forms and guides" with a red circle with the number "4" next to it. It contains the text "Click here to view blank report forms and user guides for HEP IS systems." with a link.

The right box is white with a light blue border and titled "Returning User? Login Below.". It has a red circle with the number "5" next to it. It contains two input fields: "Email:" and "Password:". Below the password field are two links: "Forgot your password?" and "Need Help?". At the bottom of this box is a dark blue button labeled "Login".

At the bottom of the page is a dark blue footer. On the left is the text "About HEP IS", in the center is the logo of the Department of Education (a tree inside a circle with the text "DEPARTMENT OF EDUCATION"), and on the right is the text "Contact Us".

### 1. Main Menu Links:

- HEP IS Home** - return to the home page
- About** - learn more about the HEPIS website and each of its subsystems.
- Help** - access User Guides, blank forms, and other helpful resources
- FAQs** - review answers to frequently asked questions
- Contact Us** - fill out a contact form to request assistance from the Help Desk (staffed Mon-Fri, 9 am-5 pm Eastern time; telephone support is not available)

2. **System Information** - look here for important information about when various HEPIS subsystems are opening and closing.

3. **New User** - click here if you need to request a new user account

4. **Blank forms and guides** - another link the the *Help* page described above

### 5. Login fields:

- Email** - your username is your email address

- b. **Password** - do not share your password with anyone; if you need additional users to fill out your APR they must have their own accounts linked to their own email addresses
- c. **Forgot your password** - click here to request a link via email to reset your password
- d. **Need help** - another link to the *Contact Us* page described above
- e. **Login** - after entering your username and password, click this button to login

## A. New User Accounts

If you need a new user account, click the **New User** button and enter your email address into the field provided. The system will check to see if your email is already registered.

If your email address is not in the system, you'll be presented with a form to request a new user account. Make sure you provide the new user's:

- First Name
- Last Name
- Email Address,
- Institution Name, and
- Grant PR Number

The Help Desk must verify that the new user is authorized to access the application by contacting an individual that is currently in the system from a previous year.

Please allow up to one business day for new accounts to be created.

To save a step and expedite this process, you may choose to have someone who is already listed on the grant, such as the Project Director, fill out the new account request form on behalf of the new user.

### III. Two-Factor Authentication

All Federal websites are now required to include **TWO-FACTOR AUTHENTICATION** in the login process. You may have seen this on other websites, especially those for banks and credit card companies.

Two-factor authentication requires that you login first with something you *know* (i.e., your username and password), and then with something you *have* (e.g., your phone).

You'll have the option to authenticate to the HEPIS website by means of:

- a smartphone app,
- a text message, or
- a voice telephone call.

You'll authenticate by confirming a request in the app, or by entering a 6-digit code onto the website sent to you by text or by voice.

The smartphone app is the recommended option, but we realize not everyone will have the access or the desire to use an app.

No matter which method you choose, the website will walk you through the setup process step by step. Setting it up will take less than five minutes, and using it each time you login will take only a few seconds.

## IV. HEP IS Landing Page

**HEP IS**  
Higher Education Programs: Institutional Service

[HEP IS Home](#) | [About](#) | [Help](#) | [FAQs](#) | [Contact Us](#) | [Account](#) | [Logout](#)

Welcome test@statecollege.edu

**EFRS - Endowment Financial Reporting System**

Your grants in the EFRS system:

PR#	Institution Name	Enter System
P031A070000	Community State College University	<a href="#">GO</a>

After you successfully log into the system, you will find yourself on the HEP IS Landing Page. From here you can access each of the individual subsystems contained within the HEP IS system (there are a total of five subsystems, but you may not have access to all of them).

Your landing page may look different from the one displayed above. You will have access to whichever subsystem(s) apply to your particular grantee scenario. If you are not required to work in one of the subsystems, then it will not appear on your landing page. Each user will only see the subsystems that they need to work in. If you don't need it, you won't see it.

The main menu has two additional links now that you're logged in:

1. **Account** - click here to change your password and manage your two-factor authentication method(s)
2. **Logout** - click here to end your user session and logout of the system

To enter the EFRS Reporting subsystem, click the **GO** button in the Enter System column on the row that corresponds to your grant's PR Number (represented above and in later screenshots by **P031A070000**).

## V. EFRS Reporting Home Page

The EFRS Home page will display a list of all the financial reports that have been submitted for the selected grant.

**EFRS**  
Endowment Financial Reporting System

About | Help | FAQs | Contact Us | Account | Logout

EFRS Home

Welcome test@statecollege.edu

PR/Award Number: P031A070000      Reporting Period:  
Grantee Name: Community State College University      Program Officer: Jane Doe (Jane.Doe@ed.gov)

EFRS Home

**Welcome**

[Add New Report](#)

Report #	Reporting Period	Report Status		
1	07/01/2007 - 06/30/2008	Incomplete	<a href="#">Download Report</a>	<a href="#">Edit Report</a>
2	07/01/2008 - 06/30/2009	Complete	<a href="#">Download Report</a>	<a href="#">Edit Report</a>

**Paperwork Burden Statement**

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 15-25 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 and reference the OMB Control Number 1840-0766 which expires on 07/29/2020.

From your EFRS Home page, click the **Add New Report** button to start a new report, or click the **Edit Report** button to edit an existing report.

The “Reporting Period” section in the header on this page will always be blank.

## VI. Grant Identification

Once you select a report to work on, you will land on that report's Grant Identification tab.

EFRS Home

**Grant Identification**

Section 1  
General Information

Section 2  
Reporting Period

Section 3  
Investment Distribution -  
For Corpus Only

Section 4  
Income Earned

Section 5  
Income Used

Review and  
Certification

← HEP

Welcome test@statecollege.edu

PR/Award Number: P031A070000      Reporting Period:

Grantee Name: Community State College University      Program Officer: Jane Doe (Jane.Doe@ed.gov)

EFRS Home / Grant Identification

### Grant Identification

Please verify the information below and click the 'Save and Continue' button to begin you report. If someone other than the project director is entering the report, please enter your name and contact information in the data entry fields.

#### General Information

**PR Award Number:** P031A070091

**Program:** Title III - Part A Strengthening Institutions

**Unit ID:** 129808

**Grantee Name (Institution Name):**  
Three Rivers Community College

**\* Address 1:**  
574 New London Turnpike

**Address 2: (Optional)**

**\* City:** New Haven      **\* State:** CONNECTICUT      **\* Zip:** 06360      **Zip + 4:**

Most of the information in this section will be pre-populated for you. Please review the information carefully to make sure that it is accurate. Make any corrections necessary and fill in any missing fields, especially the names and contact information for the Project Director (required) and an Additional Contact Person (optional, but recommended).

Please note that entering information in the Project Director and/or Additional Contact fields *does not* create new user accounts for them. New user accounts must be requested from the Help Desk.

Click the **Save** button at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to Section 1.

From the Grant Identification tab you will be able to navigate to the following sections of your report and work on them in any order you choose:

1. **Grant Identification** - every year you should review your Institution and Contact details and make any updates necessary
2. **Section 1: General Information** - enter general information about your endowment, see Chapter VII
3. **Section 2: Reporting Period** - enter the begin and end date for this period this report covers, see Chapter VIII
4. **Section 3: Investment Distribution (*For Corpus Only*)** - enter investment distribution information about the Corpus only, see Chapter IX
5. **Section 4: Income Earned** - enter information about income earned, see Chapter X
6. **Section 5: Income Used** - enter information about income used, see Chapter XI
7. **Review and Certification** - verify that all sections are complete, certify that all data is accurate, and submit your report, see Chapter XII

The “Reporting Period” section in the header will display as soon as Section 2 is completed.

## VII. Section 1: General Information

Section 1 allows you to enter general information about your grant and the original Corpus.

EFRS Home

Grant Identification

**Section 1**  
General Information

Section 2  
Reporting Period

Section 3  
Investment Distribution -  
For Corpus Only

Section 4  
Income Earned

Section 5  
Income Used

Review and  
Certification

← **HEP**

Welcome test@statecollege.edu

PR/Award Number: P031A070000      Reporting Period:

Grantee Name: Community State College University      Program Officer: Jane Doe (Jane.Doe@ed.gov)

EFRS Home / **General Information**

### Section 1: General Information

Please address the following questions

---

1. Enter the initial fiscal year (FY) this grant was awarded: \*     

2. For which fiscal year did the institution submit the initial financial report? \*     

3a. Enter the amount of the institution's original Endowment Fund Corpus from Federal funds: \*      \$

3b. Enter the amount of the institution's original Endowment Fund Corpus from Matching funds:      \$

**Total Original Corpus**      \$

i. Enter the source of the institution's raised/matched funds:

ii. Enter the kind of eligible funds raised:

4. On what date was the corpus initially deposited? \*

*You may either key in dates manually or select the date with your mouse using the pop up calendar.*

Respond to each question in the spaces provided. If a required field is left blank you will receive an on screen notification about it, but you may proceed to work on another section by clicking on the appropriate tab in the left side menu.

You will not be able to submit your report unless all required fields have been completed.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

## VIII. Section 2: Reporting Period

The Reporting Period section allows you to enter your institution's fiscal year or budget period that is covered by this report.

The screenshot shows the EFRS Reporting Period section. On the left is a vertical navigation menu with the following items: EFRS Home, Grant Identification, Section 1 General Information, Section 2 Reporting Period (highlighted), Section 3 Investment Distribution - For Corpus Only, Section 4 Income Earned, Section 5 Income Used, Review and Certification, and a HEP button with a left arrow. The main content area has a header 'Welcome test@statecollege.edu' and a table with the following information: PR/Award Number: P031A070000, Reporting Period: (blank), Grantee Name: Community State College University, Program Officer: Jane Doe (Jane.Doe@ed.gov). Below the header is a breadcrumb 'EFRS Home / Reporting Period' and the section title 'Section 2: Reporting Period'. The main form area contains the instruction 'Enter your institution's fiscal year or budget period covered by this report: \*' followed by two date input fields (mm/dd/yyyy) with calendar icons, separated by 'to'. Below the input fields is the instruction 'You may either key in dates manually or select the date with your mouse using the pop up calendar.' and two buttons: 'Save' and 'Save and Continue to Section 3'. At the bottom of the page is a dark blue footer with a partial logo of the Department of Education.

You may Add your reports in any order you like. You are not required to create them in sequential order. They will display on the EFRS Home page in order from oldest to newest, and will be numbered accordingly.

Once you define what reporting period this report covers in this Section, the “Reporting Period” in the header will display.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

## IX. Section 3: Investment Distribution *(For Corpus Only)*

In Section 3 you will enter the type of savings account or security, the amount invested, and the financial institution(s) managing your Endowment Fund Corpus (see Section 628.43 of the program regulations).

EFRS Home	Welcome test@statecollege.edu																						
Grant Identification	PR/Award Number: P031A070000	Reporting Period:																					
Section 1 General Information	Grantee Name: Community State College University	Program Officer: Jane Doe (Jane.Doe@ed.gov)																					
Section 2 Reporting Period	EFRS Home / <i>Investment Distribution - For Corpus Only</i>																						
Section 3 Investment Distribution - For Corpus Only	<h3>Section 3: Investment Distribution - For Corpus Only</h3> <p>Enter the amount and the name of the financial institution under the appropriate category for your investment(s). Reference: Section 628.43 of the program regulation.</p>																						
Section 4 Income Earned	<table border="1"> <thead> <tr> <th style="background-color: #4a7ebb; color: white;">Type of Savings Account Security</th> <th style="background-color: #4a7ebb; color: white;">Amount</th> <th style="background-color: #4a7ebb; color: white;">Name of Financial Institution</th> </tr> </thead> <tbody> <tr> <td>A federally insured bank savings account:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> <tr> <td>A comparable interest bearing account:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> <tr> <td>A money market fund:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> <tr> <td>Certificates of deposit:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> <tr> <td>Mutual funds:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> <tr> <td>Stocks:</td> <td>\$ <input type="text" value="0"/></td> <td><input type="text"/></td> </tr> </tbody> </table>		Type of Savings Account Security	Amount	Name of Financial Institution	A federally insured bank savings account:	\$ <input type="text" value="0"/>	<input type="text"/>	A comparable interest bearing account:	\$ <input type="text" value="0"/>	<input type="text"/>	A money market fund:	\$ <input type="text" value="0"/>	<input type="text"/>	Certificates of deposit:	\$ <input type="text" value="0"/>	<input type="text"/>	Mutual funds:	\$ <input type="text" value="0"/>	<input type="text"/>	Stocks:	\$ <input type="text" value="0"/>	<input type="text"/>
Type of Savings Account Security			Amount	Name of Financial Institution																			
A federally insured bank savings account:			\$ <input type="text" value="0"/>	<input type="text"/>																			
A comparable interest bearing account:			\$ <input type="text" value="0"/>	<input type="text"/>																			
A money market fund:			\$ <input type="text" value="0"/>	<input type="text"/>																			
Certificates of deposit:			\$ <input type="text" value="0"/>	<input type="text"/>																			
Mutual funds:	\$ <input type="text" value="0"/>	<input type="text"/>																					
Stocks:	\$ <input type="text" value="0"/>	<input type="text"/>																					
Section 5 Income Used																							
Review and Certification																							
← HEP																							

After the first year, the amount of money reported to be invested should be the “Corpus” plus all the unspent or unused endowment fund income. This figure should be the amount at the beginning of the investment period.

Examples of investment entities include but are not limited to:

- A. A federally insured bank savings account
- B. A comparable interest bearing account
- C. Money market fund
- D. Certificates of deposit
- E. Mutual funds
- F. Stocks
- G. Bonds

#### H. Exchange Traded Funds

If the appropriate investment entity is not listed in the table, please enter the type of investment account in the last row, "Other". You may add as many "Other" rows as you need.

When finished adding all of your Project Objectives and Performance Measures, click **Save** to save your work, or click **Save and Continue** to save your work and proceed to the next Section.

## X. Section 4: Income Earned

In Section 4, you'll provide information about the income earned.

EFRS Home

Grant Identification

**Section 1**  
General Information

**Section 2**  
Reporting Period

**Section 3**  
Investment Distribution -  
For Corpus Only

**Section 4**  
Income Earned

**Section 5**  
Income Used

Review and Certification

← HRP

Welcome test@statecollege.edu

PR/Award Number: P031A070000      Reporting Period:

Grantee Name: Community State College University      Program Officer: Jane Doe (Jane.Doe@ed.gov)

EFRS Home / *Income Earned*

### Section 4: Income Earned

Please address the following questions

---

Enter the amount of the endowment fund income earned during the 12-month period covered by this financial report. \*

\$

Enter the cumulative (aggregate) amount (to date) of all endowment fund income earned since the initial investment. \*

\$

**Save**      **Save and Continue to Section 5**



Enter the amount of Endowment Fund Income Earned during the 12-month period covered by this financial report, and the cumulative (aggregate) amount earned to date since the initial investment.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

# XI. Section 5: Income Used

In Section 5, you'll provide information about the income used.

EFRS Home

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Grant Identification

---

Section 1  
General Information

---

Section 2  
Reporting Period

---

Section 3  
Investment Distribution -  
For Corpus Only

---

Section 4  
Income Earned

---

**Section 5  
Income Used**

---

Review and Certification

---

← HEP

**Welcome test@statecollege.edu**

PR/Award Number: P031A070000

Reporting Period:

Grantee Name: Community State College University

Program Officer: Jane Doe (Jane.Doe@ed.gov)

EFRS Home / *Income Used*

## Section 5: Income Used

Enter in the appropriate space(s) below, the amount of endowment fund income used, both for the 12-month period covered by this report, and in the aggregate, for the following purposes:

Type	Current	Aggregate
a) Operations and maintenance:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
b) Administration and management of the endowment fund:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
c) Buying and selling securities:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
d) Academic and support personnel:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
e) Construction and renovation:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
f) Community and student services programs and technical assistance:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
Other: <input style="width: 150px;" type="text"/>	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
<a href="#" style="background-color: #4a7ebb; color: white; padding: 5px 15px; border-radius: 3px;">Add Another Row</a>		
<b>Total Invested:</b>	<b>\$0</b>	<b>\$0</b>

Enter the current reporting year amount and the cumulative amount of the Endowment fund Income used for any of the purposes listed. As in Section 3, if the appropriate type is not listed in the table, please enter the type in the last row, "Other". You may add as many "Other" rows as you need.

Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next Section.

## XII. Review and Certification

The Review and Certification Section serves three tasks:

1. **Review:** Check your report for completeness and verify that all required questions have been answered
2. **Certification:** Certify that all information on the report is true and correct to the best of your knowledge
3. **Submit:** Send your report to the Department and lock it to prevent future changes.

The screenshot displays the EFRS Review and Certification interface. On the left is a navigation sidebar with the following items: EFRS Home, Grant Identification, Section 1 (General Information), Section 2 (Reporting Period), Section 3 (Investment Distribution - For Corpus Only), Section 4 (Income Earned), Section 5 (Income Used), and a 'Review and Certification' section with a back arrow labeled 'HEP'. The main content area features a header with the user's name 'test@statecollege.edu' and a box containing report details: PR/Award Number: P031A070000, Reporting Period: (blank), Grantee Name: Community State College University, and Program Officer: Jane Doe (Jane.Doe@ed.gov). Below this is a breadcrumb trail: EFRS Home / Review and Certification. The main heading is 'Review and Certification'. A tabbed interface has three tabs: 'Review' (active), 'Certification', and 'Submit'. Under the 'Review' tab, the heading is 'Review Your Report' with the instruction: 'Please ensure that all sections below are complete (green check mark). If a section is incomplete, click the "Go to Section" button and add the missing information.' Two sections are listed: 'Section 1: General Information' and 'Section 2: Reporting Period'. Each section has a red exclamation mark icon and a 'Go to Section' button.

## A. Review

On the Review tab you will be shown the completion status for each section of the report. If any section is incomplete, click the **Go to Section** button or click the desired Section option on the left hand menu to return to that section and complete the remaining questions.

The screenshot displays a web interface for reviewing a report. At the top, there are three tabs: 'Review' (active), 'Certification', and 'Submit'. Below the tabs, the heading 'Review Your Report' is followed by a instruction: 'Please ensure that all sections below are complete (green check mark). If a section is incomplete, click the "Go to Section" button and add the missing information.' The main content area contains five sections, each with a status indicator and a 'Go to Section' button:

Section 1: General Information	
!	<a href="#">Go to Section</a>

Section 2: Reporting Period	
✓	<a href="#">Go to Section</a>

Section 3: Investment Distribution - For Corpus Only	
✓	<a href="#">Go to Section</a>

Section 4: Income Earned	
✓	<a href="#">Go to Section</a>

Section 5: Income Used	
✓	<a href="#">Go to Section</a>

At the bottom of the interface is a button labeled 'Continue to Certification'.

All questions on the report are required except where indicated.

When all sections are complete, you will be able to proceed to the Certification tab.

## B. Certification

The Certification tab allows your Certifying Official to enter their name and contact information, which serves as an electronic signature. Their electronic signature certifies that all information on the report is true and correct to the best of their knowledge.

First verify that the information at the top of the tab is correct. If any changes need to be made, either click the **Return to Grant Identification Page to Edit** button, or click the Grant Identification option at the top of the left hand menu.

Review Certification Submit

### Certification

Review the information below. If any of the items in 4-5 need to be changed, return to the Grant Identification page. Otherwise, enter the authorizing representative information and click the Submit button.

You do NOT need to send a signed certification form to ED or upload a signed certification form.

[Return to Grant Identification Page to Edit](#)

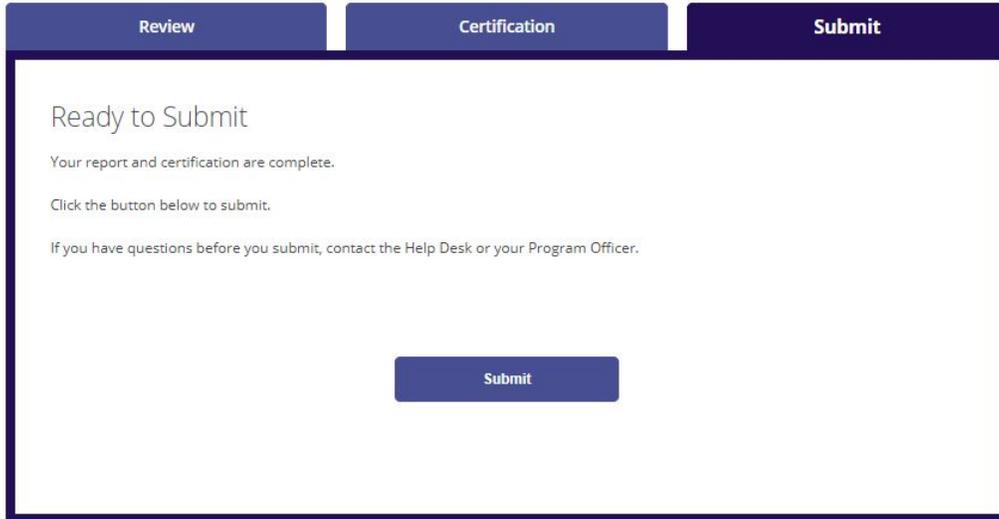
- 1. Reporting Period**  
07/01/2008 to 06/30/2009
- 2. PR Award Number**  
[Redacted]
- 3. Project Title**  
[Redacted]
- 4. Recipient Information**  
Name: [Redacted]  
Address: [Redacted]
- 5. Contact Information**  
Name: [Redacted]  
Title: [Redacted]  
Phone: [Redacted]  
Email: [Redacted]
- 6. Authorized Representative**  
(The Institution's President or someone with the institutional authority to sign off on federal sponsored agreements)  
To the best of my knowledge and belief, all data in this performance report are true and correct.  
Name:  Email:   
Phone:  Date:

[Save and Continue](#)

You do NOT need to mail or fax a signed certification form to the Department.

## C. Submit

Once your report has passed the completion review and your Certifying Official has entered their electronic signature, you will be able to Submit your report.



The screenshot shows a web interface with three tabs at the top: 'Review', 'Certification', and 'Submit'. The 'Submit' tab is active. The main content area is titled 'Ready to Submit' and contains the following text: 'Your report and certification are complete.', 'Click the button below to submit.', and 'If you have questions before you submit, contact the Help Desk or your Program Officer.' A blue 'Submit' button is centered at the bottom of the content area.

Click the **Submit** button to send your report to the Department.

You do NOT need to send a hard copy of the report to the Department.

#### D. Unsubmit

Once your report is submitted it is locked and you cannot make any further changes.

If you need to make changes to your submitted report, simply contact the Help Desk and they will “unsubmit” your report for you.

You will then be able to login as normal, make your edits as needed, and then resubmit your report yourself.

You do not need to contact the Help Desk to resubmit your report.