# HIGHER EDUCATION PROGRAMS
# INSTITUTIONAL SERVICE SYSTEM

# ANNUAL PERFORMANCE REPORT
# USER GUIDE

February 2021
version 1.3

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# IS APR QUICK SHEET

This page provides a quick overview of the HEP IS Annual Performance Report system and how to use it.

The APR was revised in October 2020 in an effort to make it more concise and easier to complete.

Returning users should take note of the following changes:

A. There is now one standard APR format for all programs. There are no longer sections or questions that are unique to certain programs.
B. Except where noted, answers are limited to 1500 characters (approximately 250 words).
C. Some long questions in the old Section 1 that required very long answers have been broken down into shorter, more focused questions allowing for briefer answers to each.
D. Questions pertaining to Focus Area Outputs (in the old Section 3B) have been removed from the APR entirely. You no longer need to report on Focus Areas.
E. Some grantees will see a new Section 5 pertaining to Institutionalization.

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 Title III/Title V annual performance reporting process.

1. **Log in to https://hepis.ed.gov with your username and password**
   See **Chapter II** of this user guide for more details about logging into the system.

2. **Review and update your institution and grantee contact information**
   See **Chapter V** for more about the Grantee Information section.

3. **Complete all Sections of the Annual Performance Report**
   See **Chapters VI-X** for more details about each Section of the report.

4. **Review, Certify, and Submit your Annual Performance Report**
   See **Chapter XI** for more information about these steps.

For complete details about this entire process, please read this **User Guide** and the **Blank APR Form (all grants)**, both of which are available for download at https://hepis.ed.gov/help.

# I. About the Annual Performance Reporting System

The Institutional Service Annual Performance Reporting (IS APR) system is used to collect performance data from Title III and Title V grantees for the previous academic year. For example, if you are reporting during the early months of **2021**, the data you're submitting should reflect the **2019-20** academic period.

Title III and Title V grant programs are designed to improve academic quality, institutional management and fiscal stability, and strengthen physical plants and endowments of institutions of higher education, with an emphasis on institutions that enroll large proportions of minority and financially disadvantaged students.

The Title III and Title V Annual Performance Report consists of the following sections:

**Section 1:** Executive Summary
**Section 2:** Institutional Profile
**Section 3:** Grant Project Status and Budget
**Section 4:** Legislatively Allowable Activities
**Section 5:** Institutionalization

To complete your report, you will need the following materials:

1. Your original grant application notice (GAN)
2. Any previously submitted Annual Performance Reports
3. Your grant expenditure information
4. Evaluation/outcome data for the current reporting year

The data you submit is used to help determine if substantial progress is being made toward the goals of your grant, which in turn is used to help determine continuance of funding. Timely submission of annual performance reports is important to remain in compliance with the terms of your grant.

The online reporting tool is designed to ask only those questions that apply to your specific grant program. If you are unsure about how to answer any of the questions, or if you need clarification on anything related to the content of your report, please contact your Program Officer.

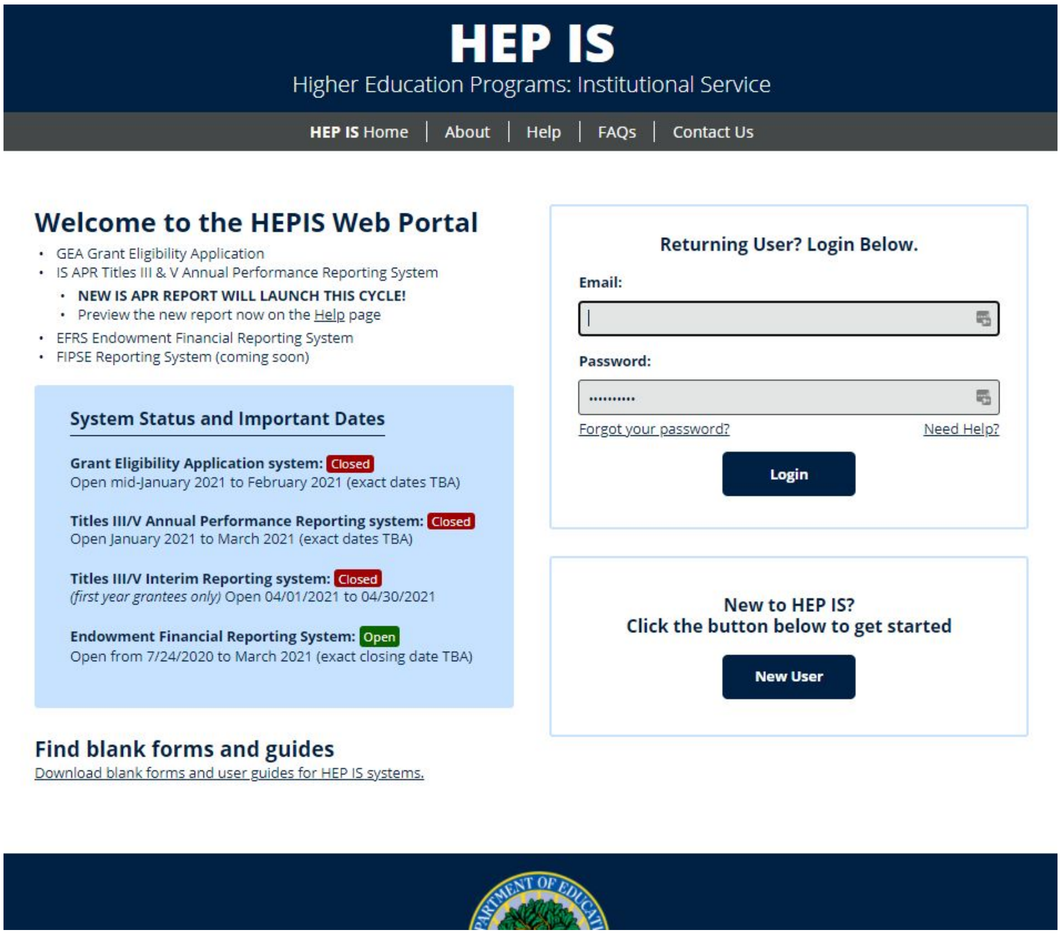
If you have any questions or issues of a technical nature related to the use of the website, please contact the Help Desk. IS APR help desk staff are not qualified to answer any questions of a programmatic nature related to your grant or the content of your report.

The IS APR system typically opens shortly after the start of the calendar year and remains open for approximately 60 days (*note: these dates have been affected by the COVID-19 pandemic*). Always refer to the homepage for the current opening and closing dates.

For more about the programs see: https://www2.ed.gov/about/offices/list/ope/idues/index.html.

## 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.




1. **Main Menu Links**:
   a. **HEP IS Home** - return to the home page
   b. **About** - learn more about the HEPIS website and each of its subsystems.
   c. **Help** - access User Guides, blank forms, and other helpful resources
   d. **FAQs** - review answers to frequently asked questions
   e. **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 Status and Important Dates** - important information about when subsystems are opening and when reports are due (i.e., subsystem closing dates) with an indicator showing whether the system is currently Open or Closed.

3. **New User** - click the New User button to request a new user account for yourself or a colleague.

4. **Blank forms and guides** - another link to the *Help* page in the main menu.

5. **Login fields**:
    a. **Email** - your username is your email address
    b. **Password** - do not share your password with anyone; if additional users need to work on your APR they *must* have their own accounts
    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 in the main menu
    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 (from your GAN letter).

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

**User Accounts:** Email addresses *must* match the server name of the grantee institution. Accounts will not be created for personal email addresses (gmail.com, aol.com, etc.) or for third parties who do not have email addresses that match the grantee institution.

## B. Two-Factor Authentication

All Federal websites are 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 that you receive by text or by telephone call.

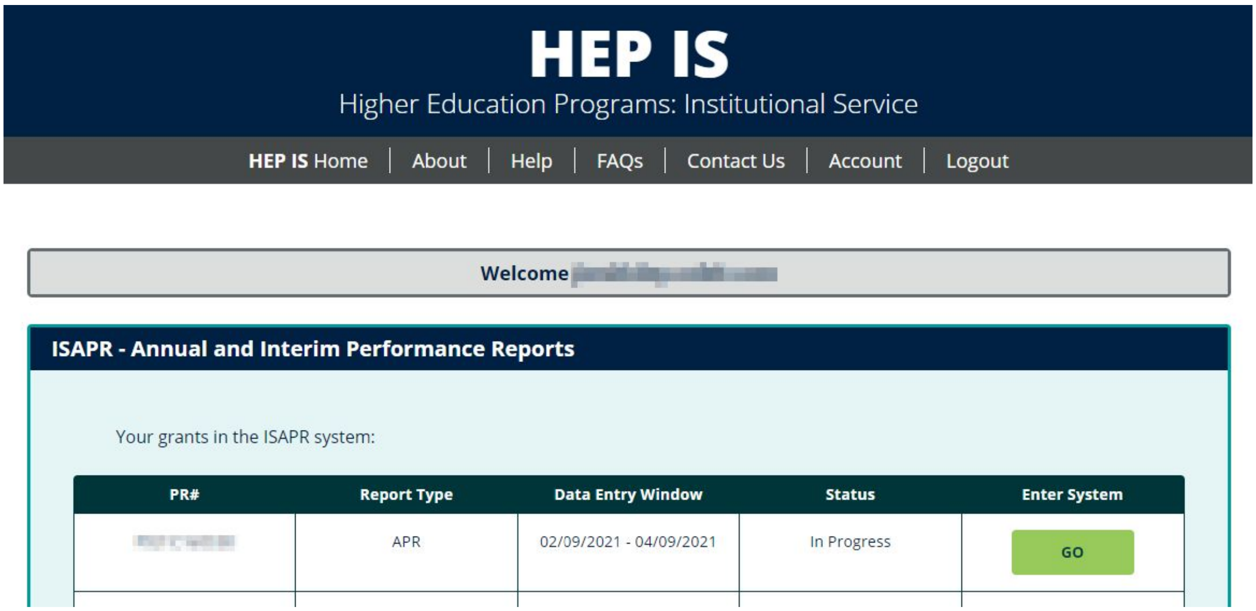
The smartphone app is the recommended option, but we realize not everyone will have the access or the desire to use an app.

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.

**Returning Users:** If due to COVID-19 you do not have access to the office phone number you set up as your second factor authenticator last year, please contact the Help Desk for assistance in resetting your authentication method.

# III. HEP IS Dashboard

After you successfully log into the system, you will be on your HEP IS Dashboard. From here you can access any of the subsystems contained within the HEP IS system that you may need.




Your landing page may look different from the image shown above. You will see a list of the subsystem(s) and grant(s) which you are permitted to access. If you are not required to work in the other subsystems and if you only have one grant, then your dashboard may only show one option.

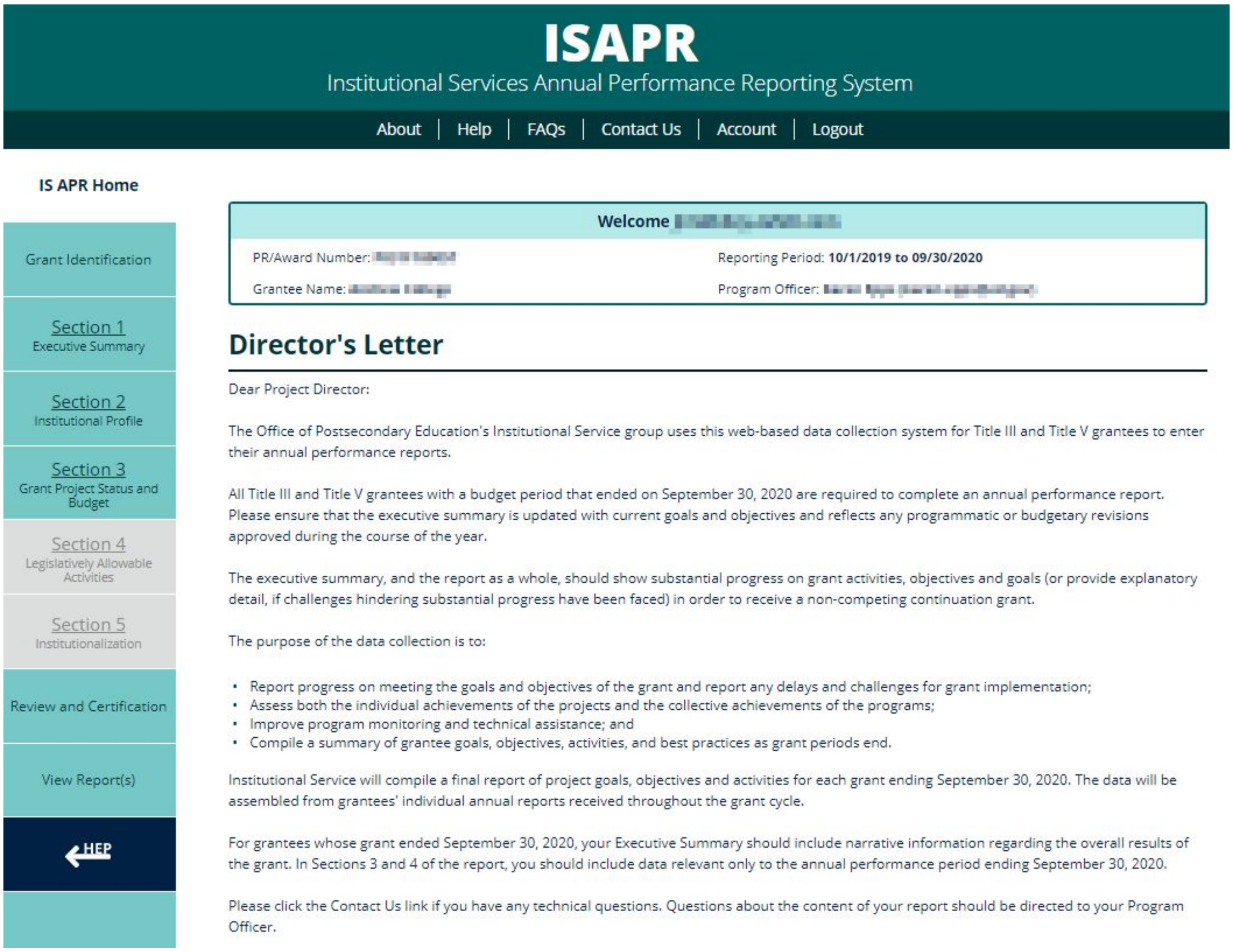
The main menu has two additional links now that you're logged in:

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 Annual Performance Reporting subsystem, click the GO button in the Enter System column on the row that includes your PR Number (masked in the image above, your PR number is an 11-character string starting with the letter P that represents your grant number, and it can be found in your GAN letter).

# IV. IS APR Home Page

The IS APR home page will display a Welcome Letter from the Director.




From the IS APR home page you can navigate to the following sections:

1. **Grant Identification** - every year you should review your Institution and Contact details and make any updates necessary, see Chapter V
2. **Section 1: Executive Summary** - enter summaries of your accomplishments, see Chapter VI
3. **Section 2: Institutional Profile** - enter details about your institution, see Chapter VII
4. **Section 3: Grant Project Status and Budget** - enter details about activities, objectives, performance measures, and costs, see Chapter VIII
5. **Section 4: Legislatively Allowable Activities** - link grant activities to legislative goals, then enter related budget information, see Chapter IX
6. **Section 5: Institutionalization** - enter information about institutionalizing the grant's activities, see Chapter X

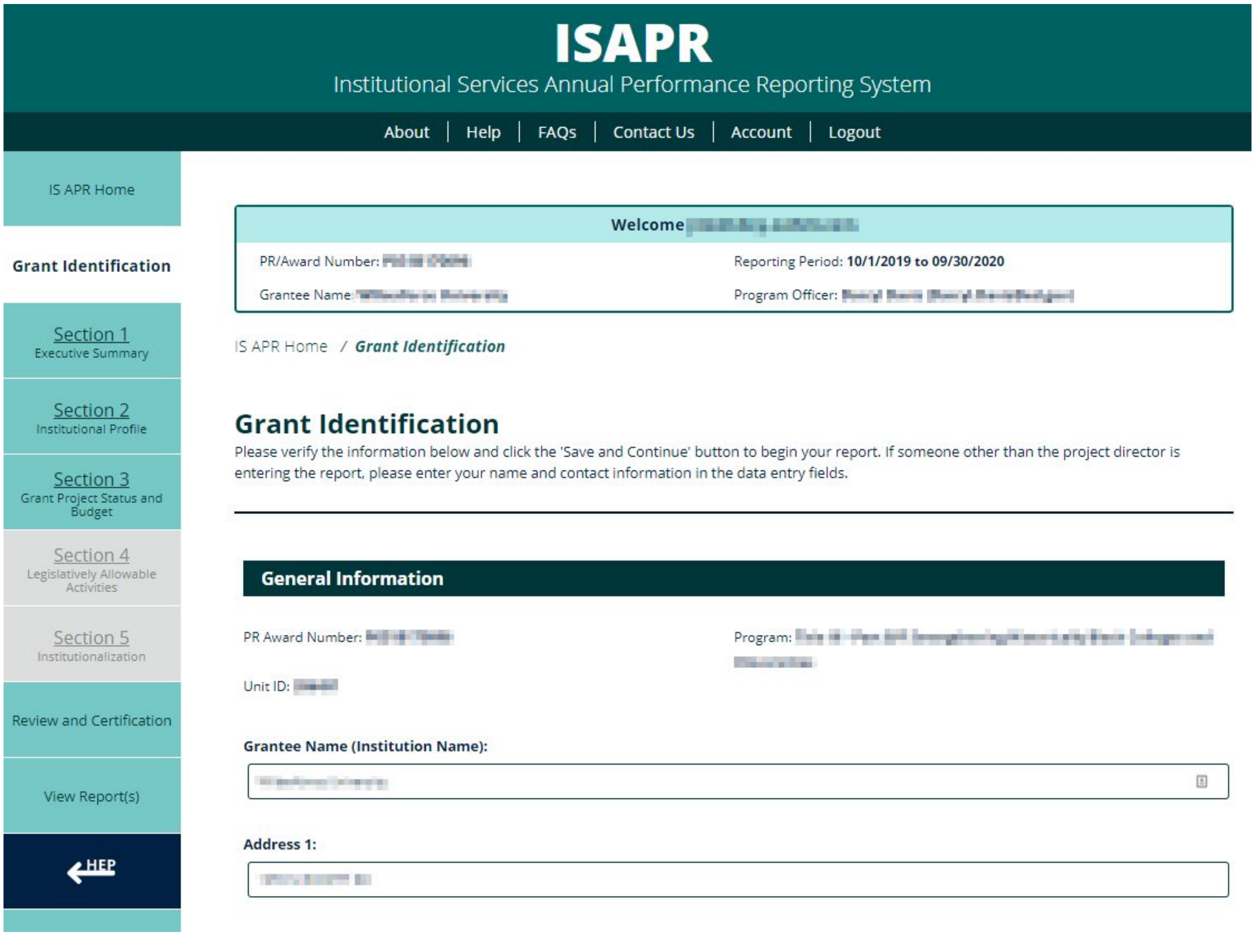
7. **Review and Certification** - verify that all sections are complete, certify that all data is accurate, and submit your report, see Chapter XI
8. **Reports** - download PDFs of reports, see Chapter XII

**Navigation Tip:** You may work on the sections in any order you like with one exception: you *must* enter at least *one* Activity on **Tab 3B** in Section 3 before you can start working on Section 4 or Section 5. Sections 4 and 5 require you to enter details about your Activities, so you have to enter them first.

This is indicated in the side menu by Sections 4 and 5 being greyed out. After the required data has been entered in Section 3, then Sections 4 and 5 will be accessible on the side menu.

## V. Grant Identification

Each year you should review your Institution and Contact details and make any updates necessary.




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). Remember that adding their details here *does not* create user accounts for them. If they need user accounts, please contact the Help Desk.

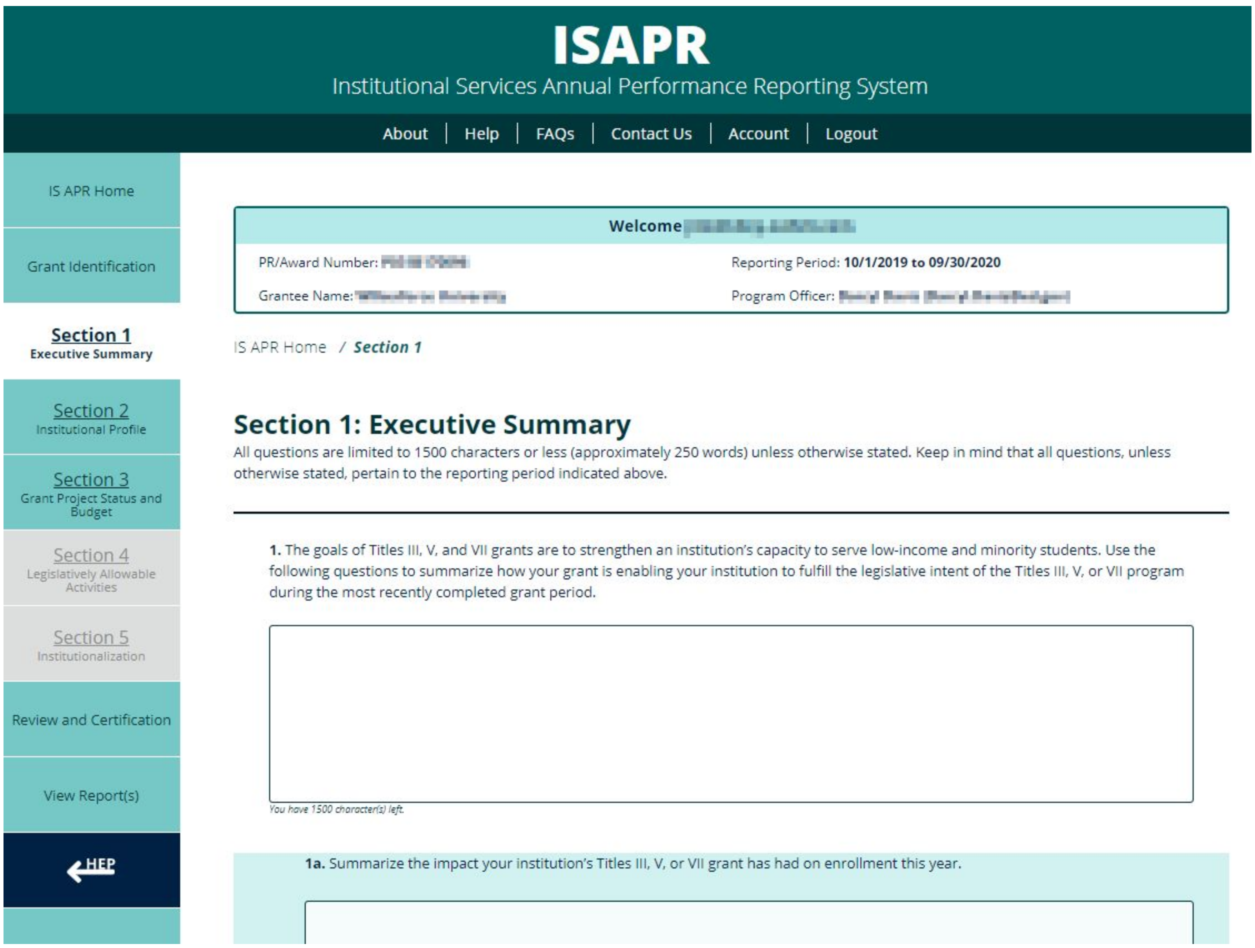
Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to Section 1.

> **TIP:** The system has an automatic "save as you go" feature that helps prevent data loss in case you lose your connection or get pulled away in the middle of your work. The system performs automatic background saves as you work your way down the page, which will minimize potential data loss.

## VI. Section 1: Executive Summary

The Executive Summary allows you to "tell the story" of your grant's impact at your institution. During extensive grantee outreach activities, ED program staff heard the grantee community's need to place project goals and outcomes in an institutional context. ED has responded to this need by designing open-ended questions in the Executive Summary.

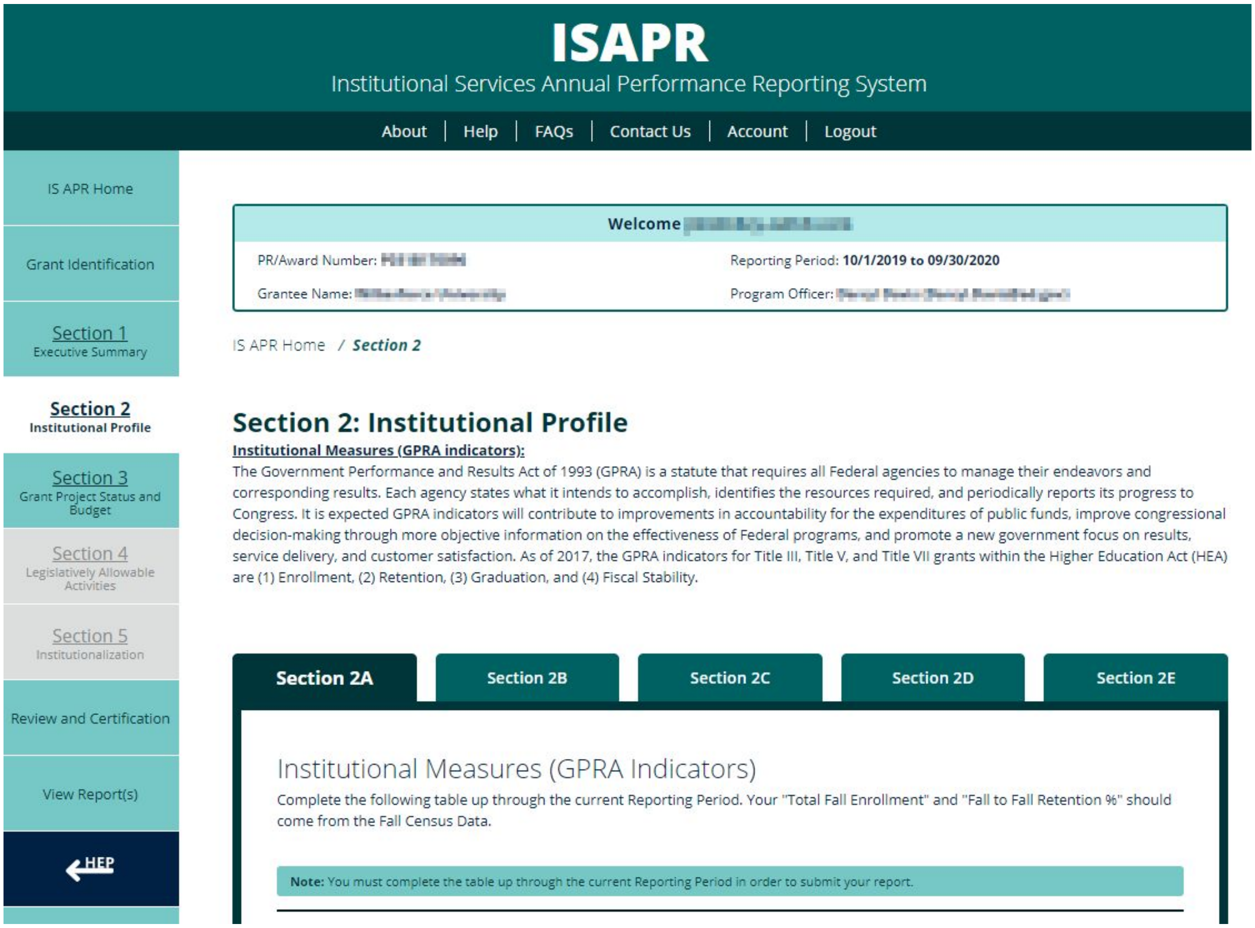
This section allows you to report on successes and challenges that cannot be articulated purely through quantitative responses. Each response is limited to a certain length as noted on screen.




Click **Save** 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 the next Section.

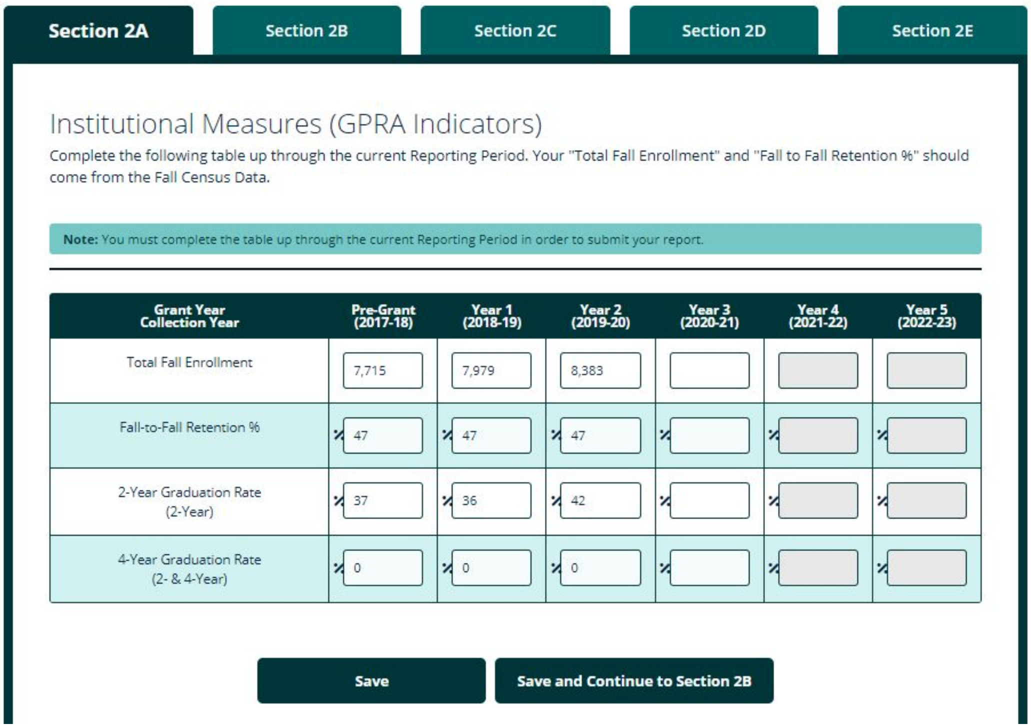
# VII. Section 2: Institutional Profile

In Section 2, you'll provide information about your Institution and the GPRA Indicators.



## A. Tab 2A: Institutional Measures (GPRA Indicators)

On Tab 2A, we collect information pertaining to the GPRA Indicators. Enter your enrollment, retention, and degree information for your institution for every year shown. The first column should represent the year *before* your grant started. Any data you entered on previous APRs will be displayed here so you don’t have to reenter it every year.




| Grant Year Collection Year | Pre-Grant (2017-18) | Year 1 (2018-19) | Year 2 (2019-20) | Year 3 (2020-21) | Year 4 (2021-22) | Year 5 (2022-23) |
|---|---|---|---|---|---|---|
| Total Fall Enrollment | 7,715 | 7,979 | 8,383 | | | |
| Fall-to-Fall Retention % | % 47 | % 47 | % 47 | % | % | % |
| 2-Year Graduation Rate (2-Year) | % 37 | % 36 | % 42 | % | % | % |
| 4-Year Graduation Rate (2- & 4-Year) | % 0 | % 0 | % 0 | % | % | % |

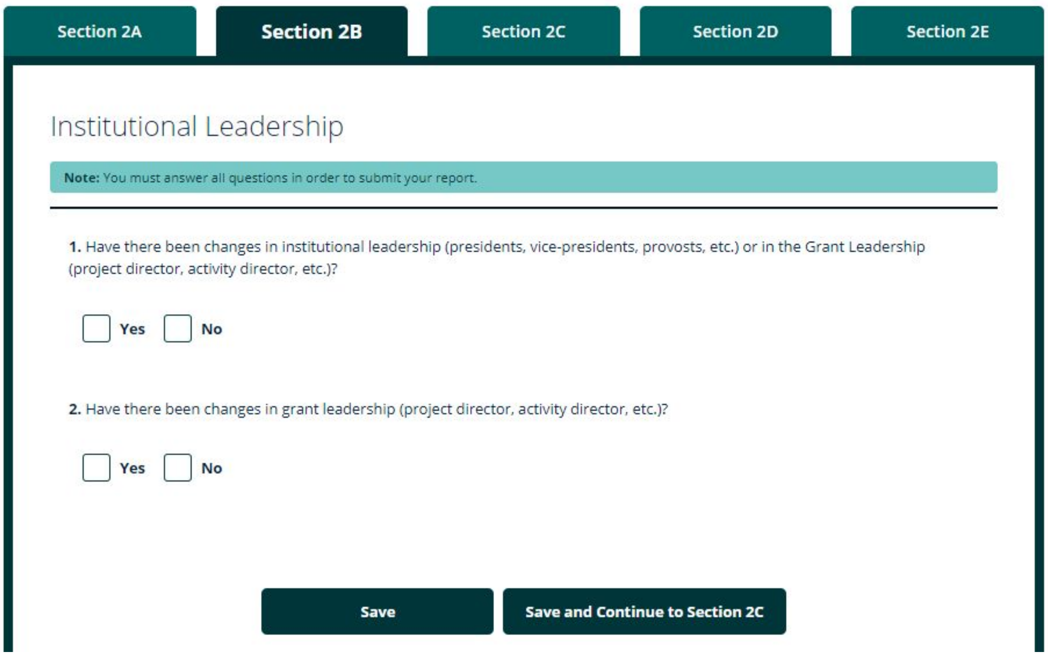
**Two-Year Schools** will be asked about their 2-Year and 4-Year Graduation Rates, as shown above.

**Four-Year Schools** will be asked about their 4-Year and 6-Year Graduation Rates (not shown).

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 tab.

## B. Tab 2B: Institutional Leadership

On Tab 2B answer questions pertaining to your Institution's leadership and any changes that may have occurred during the reporting period.



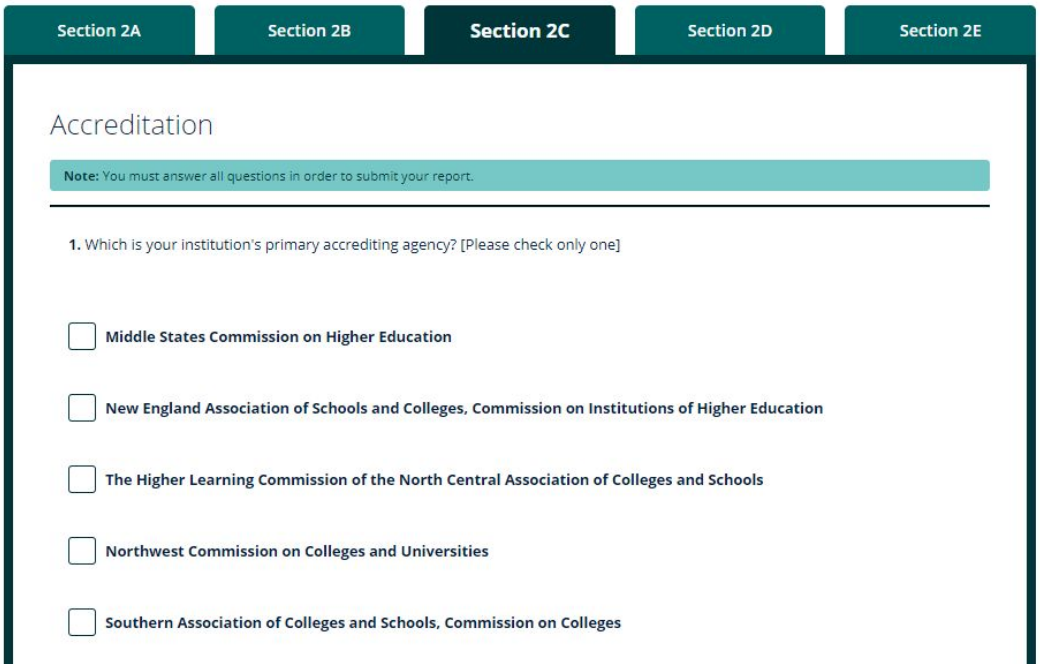

**Conditional Logic:** Some Yes/No questions throughout the report have conditional follow-up questions that will appear only if your initial answer requires follow up information.

Please note that if you *change* your initial response back to the condition that does *not* require any follow up information, the system will ask you to confirm that it is okay to delete your initial selection.

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 tab.

## C. Tab 2C: Accreditation

On Tab 2C answer questions pertaining to your Institution's accrediting agency. If your accrediting agency is not listed in the choices provided, select Other and enter the name in the field provided.

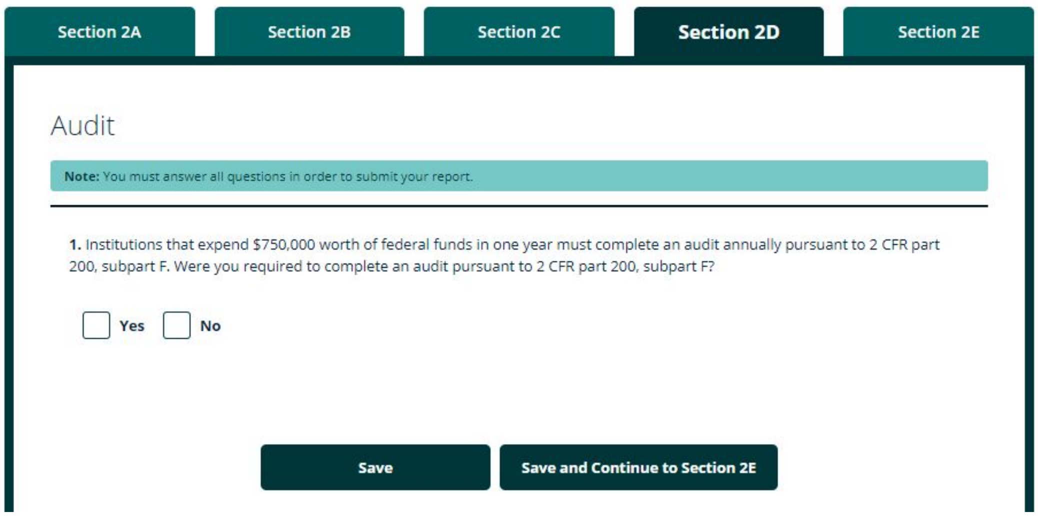



Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

## D. Tab 2D: Audit

On Tab 2D answer questions pertaining to an audit. Please indicate if an audit was completed that complies with 2 CFR part 200, subpart F. If there were any findings, you'll be asked to upload the reports containing those findings.

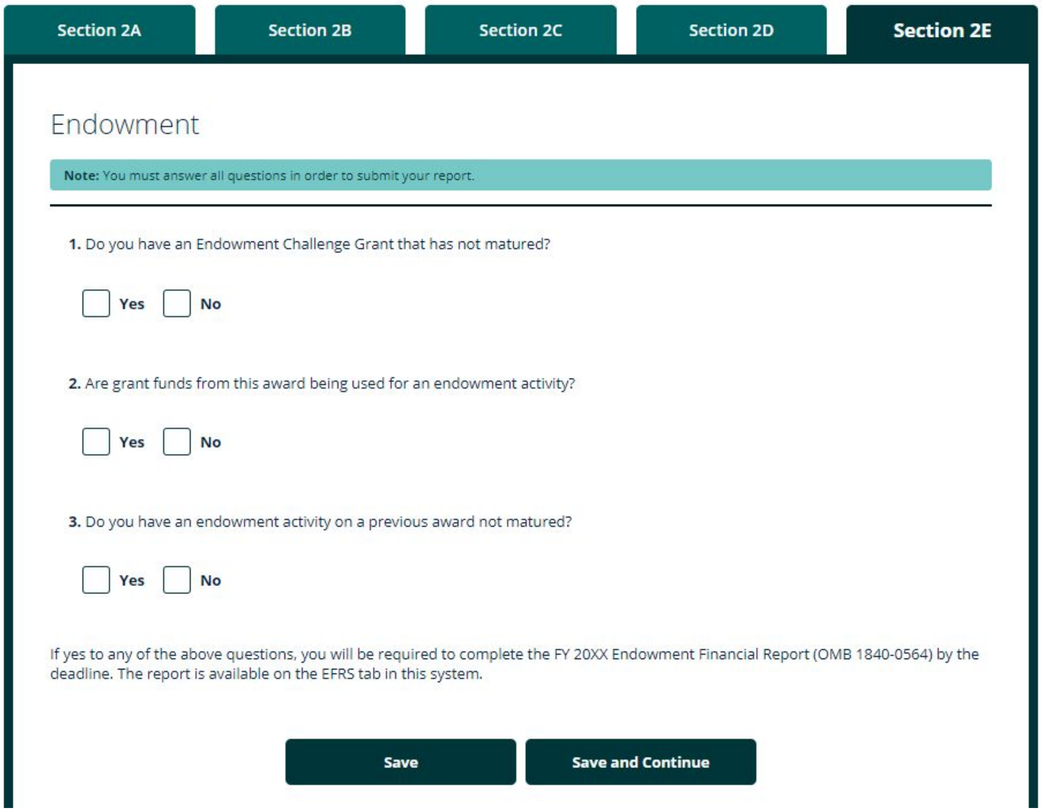
You may upload a maximum of 3 documents. Each file should be no larger than 20 MB and must be in one of the following formats: .txt, .doc, .docx, .xls, .xlsx, or .pdf.




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 tab.

## E. Tab 2E: Endowment

On tab 2E answer questions pertaining to Endowment grants.




| |
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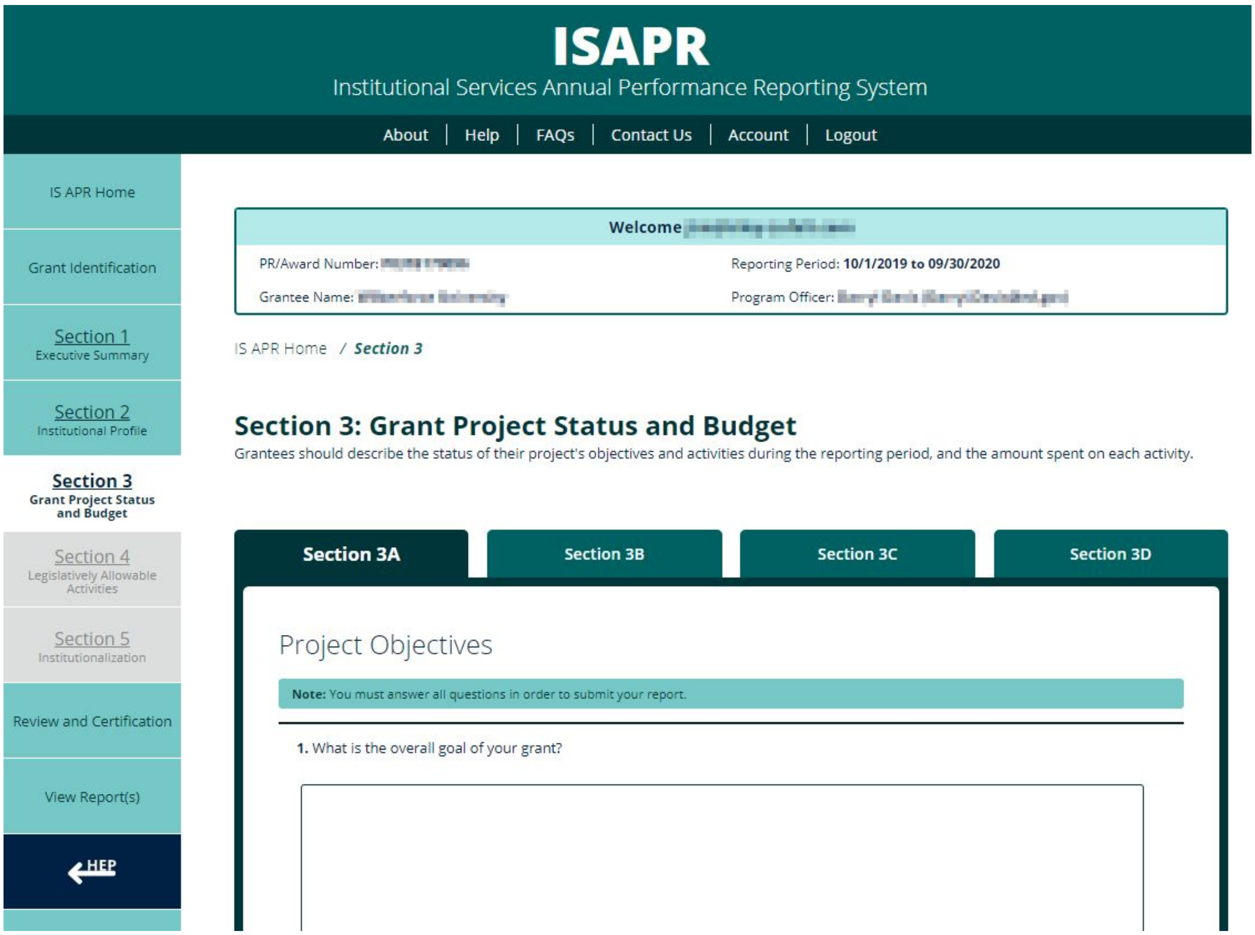
| **IMPORTANT!** If you indicate here that your grant has an endowment component, then you will be required to fill out an Endowment Financial Performance Report in the EFRS subsystem of HEPIS.<br><br>Endowments require twenty (20) years of annual reporting from the date of the initial corpus. Please check with your Program Officer or the EFRS system documentation for more details. |

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.

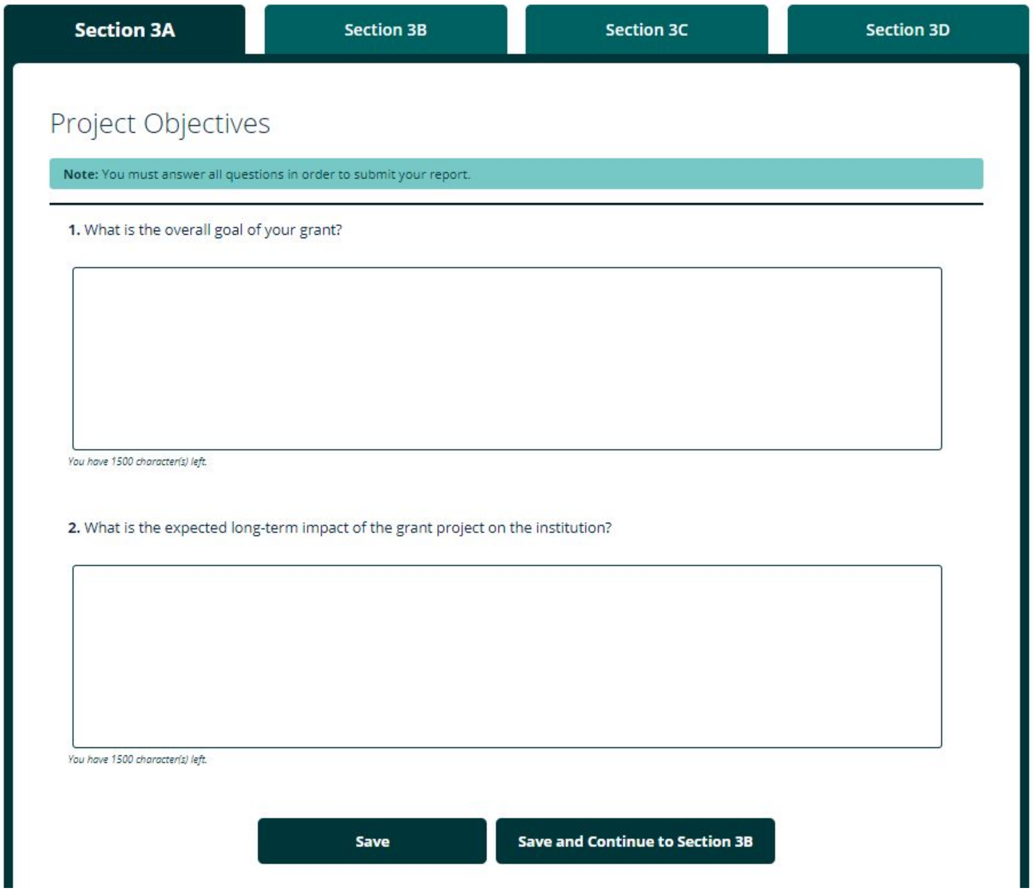
# VIII. Section 3: Grant Project Status and Budget

In Section 3 you will relate your grant activity costs to the legislative language for your particular Title III or Title V program. For most of this section you will be reporting on each activity separately. You should use the original activity structure of your application, incorporating any changes that have been approved by the program office to your original grant application.



## A. Tab 3A: Project Objectives

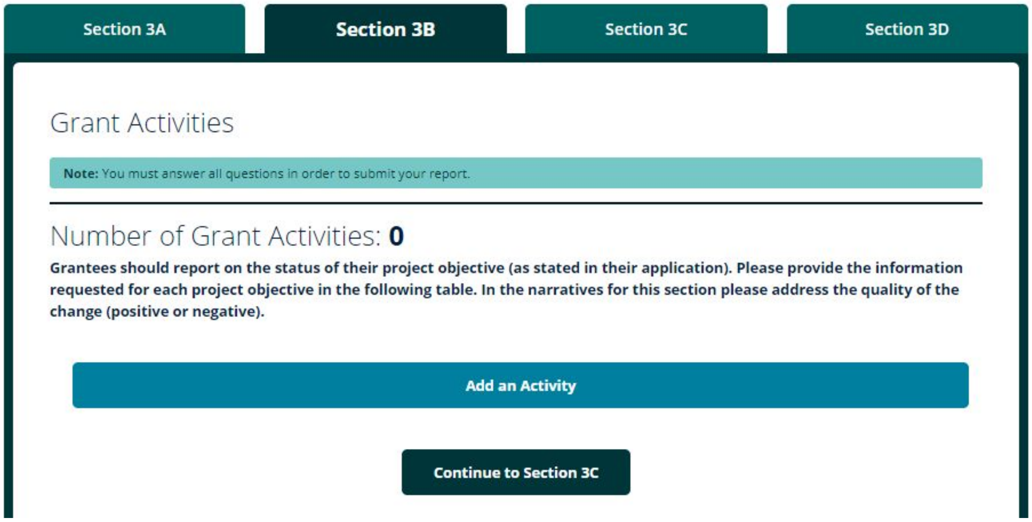
The first step in Section 3 is to enter your Project Objectives on Tab 3A.




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 tab.

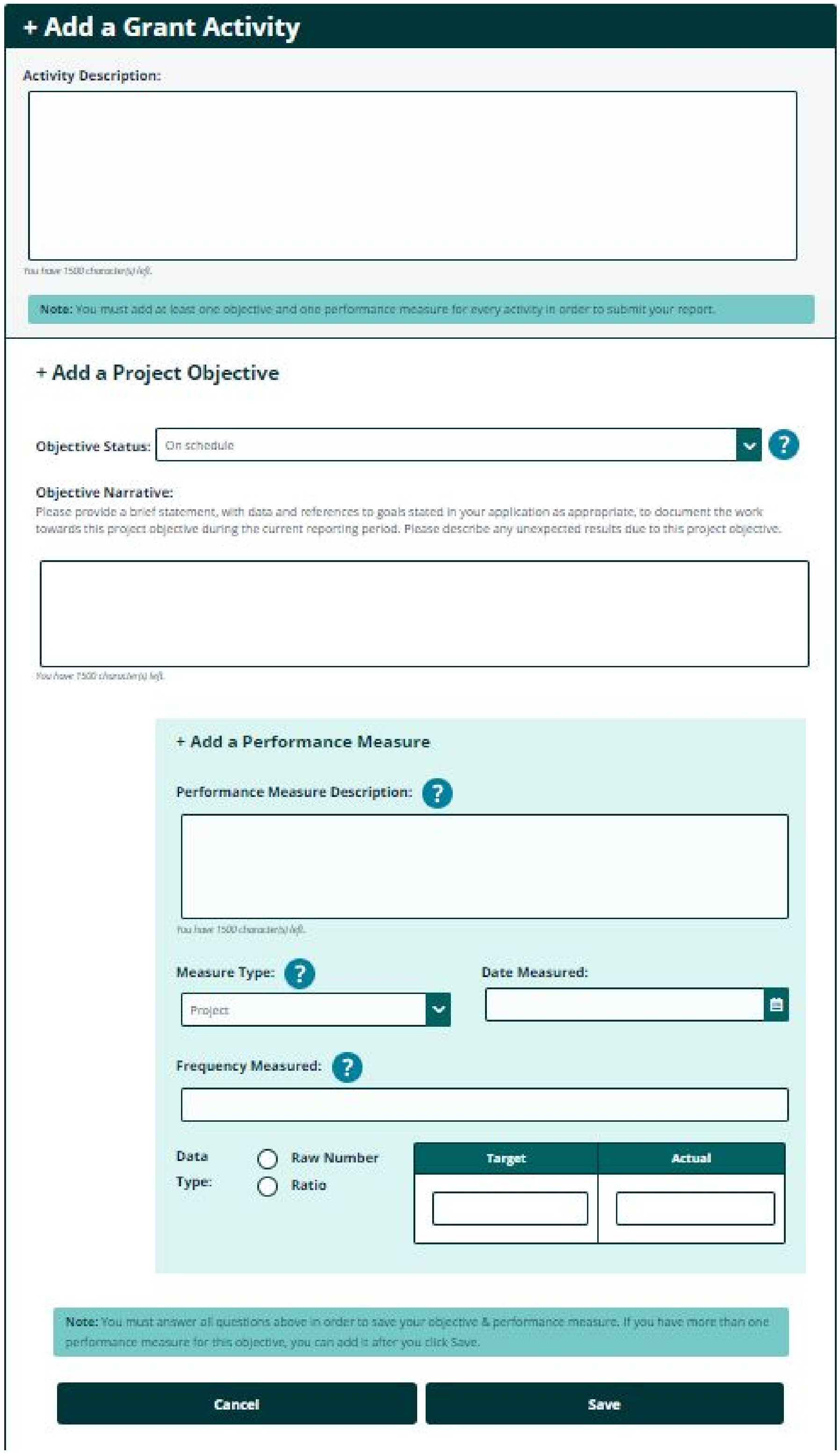
## B. Tab 3B: Grant Activities

The next step in Section 3 is to add your activities on Tab 3B. You should use the original activity structure of your application, incorporating any changes that have been approved by the program office to your original grant application.

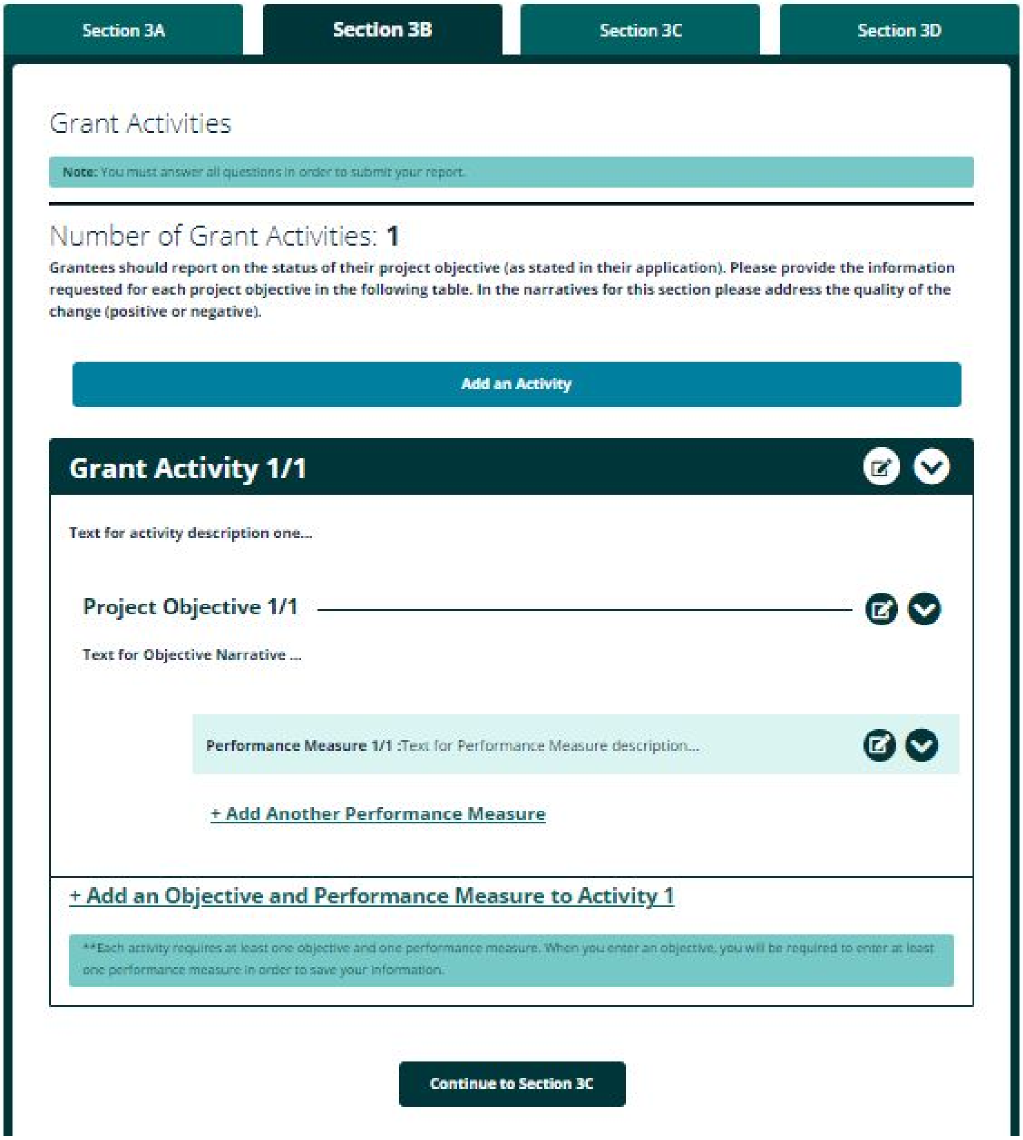



Start by clicking the **Add an Activity** button as shown above. That will open the Add a Grant Activity panel you'll see on the next page.

| |
|---|
| **IMPORTANT:** Every Activity must have *at least one* Project Objective, and every Objective must have *at least one* Performance Measure.<br><br>When you add an Activity, the system will prompt you to complete one Objective and one Performance Measure before allowing you to proceed.<br><br>After saving your Activity with its required one Objective and one Performance Measure, you may add additional Objectives and Performance Measures as needed.<br><br>Once you save your first Activity, Sections 4 and 5 will become available on the side menu bar. |




Click **Save** to save your work. Once Activities, Objectives, and Performance Measure are saved, they will be displayed in a collapsed manner as shown below.




Click the appropriate **ADD LINK** nested under the appropriate parent item in order to add another Performance Measure or Objective.

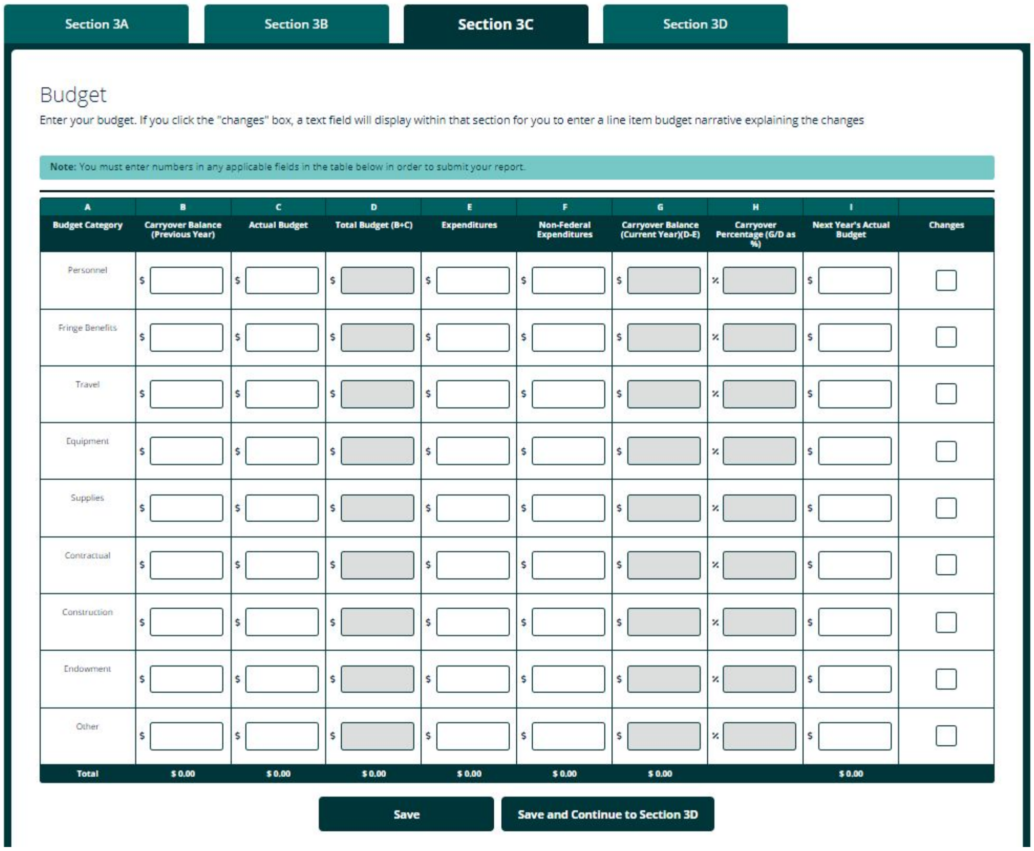
Click the **DOWN ARROW** on the same row as an Activity, Objective, or Measure in order to expand the panel and review what you entered. Click the **EDIT BUTTON** (pencil icon) next to that down arrow to enter Edit mode for that particular item. You may only edit one of these elements at a time. Click the **UP ARROW** to recollapse an item.

Click the **ADD AN ACTIVITY BUTTON** near the top of the Tab in order to add another Activity. The Number of Grant Activities displayed at the top will increment as you go along.

Click the **Continue** button to proceed to the next tab.

## C. Tab 3C: Budget

On Tab 3C you'll provide detailed information about your budget. The budget table allows you to enter dollar amounts for the following line item categories:




- **Personnel:** The total amount spent on staff salaries, which are not part of "fringe benefits." Do not include consultants or other personnel who are not entitled to "fringe benefits." Include those costs under the "Other" category.
- **Fringe Benefits:** Enter the total amount used for fringe benefits, converted from your institution's percentage rate into a dollar amount.
- **Travel:** Total amount spent on transportation and per diem expenses during travel that is necessary and related to achieving the objectives of your project. Do not include freight costs or consultants' travel expenses. Include these costs in the "Other" category.
- **Equipment:** Total purchasing cost of all tangible personal property for both fixed and movable items. Include property having a useful life of more than one year and/or having an acquisition cost of $5,000 or more per unit. Do not include the cost for renting equipment. Include these costs in the "Other" category.
- **Supplies:** Total purchasing cost of all tangible personal property having a useful life of less than one year and/or having an acquisition value of less than $5,000 per unit.

- **Contractual:** The total cost of contractual agreements with another institution of higher education, organization or business. Do not include costs for consultants. Include these costs in the "Other" category.
- **Construction:** Total costs associated with approved construction projects (including renovation costs).
- **Endowment:** Total sum of Federal grant dollars designated as endowment dollars.
- **Other:** Include all other direct costs not covered by the other budget categories, such as training stipends, communications, freight costs (not covered in vendor purchase price), equipment rental, computer use charges, summer employment stipends, consultant costs, etc.
- **Scholarships:** (PPOHA Only)
- **Student Stipends:** (PPOHA Only)

The budget table allows reporting in each of the above categories in the following columns:

- **Carryover Balance from Previous Year:** Enter the amount of any carryover from the previous grant year before the reporting period.
- **Actual Budget:** The budget for the reporting period, which includes the negotiated budget based on your original application budget with any budget adjustments made according to your Program Officer. The total of this column should equal the award amount for the reporting period, which is included in your Grant Award Notification.
- **Total Budget:** *Automatic calculation* of columns A+B; Carryover Balance from Previous FY+Actual Budget.
- **Expenditures:** The amount of grant expenses incurred during the reporting period.
- **Non-Federal Expenditures:** The amount of non-Federal expenses incurred during the reporting period. This should include any program required matching funds such as endowment matching or HBGI matching requirements.
- **Carryover Balance:** *Automatic calculation* of columns D-E; Total Budget - Expenditures.
- **Carryover Percentage:** *Automatic calculation* of columns G/D; Carryover Balance/Total Budget
- **Next Year's Actual Budget:** The budget planned for the next fiscal year. The total costs should match the fiscal year (FY) award amount from your most recent Grant Award Notification.
- **Changes:** If your budget for the line item has changed, check the box and you will be prompted to provide additional narrative information in a pop up field on that particular line item.

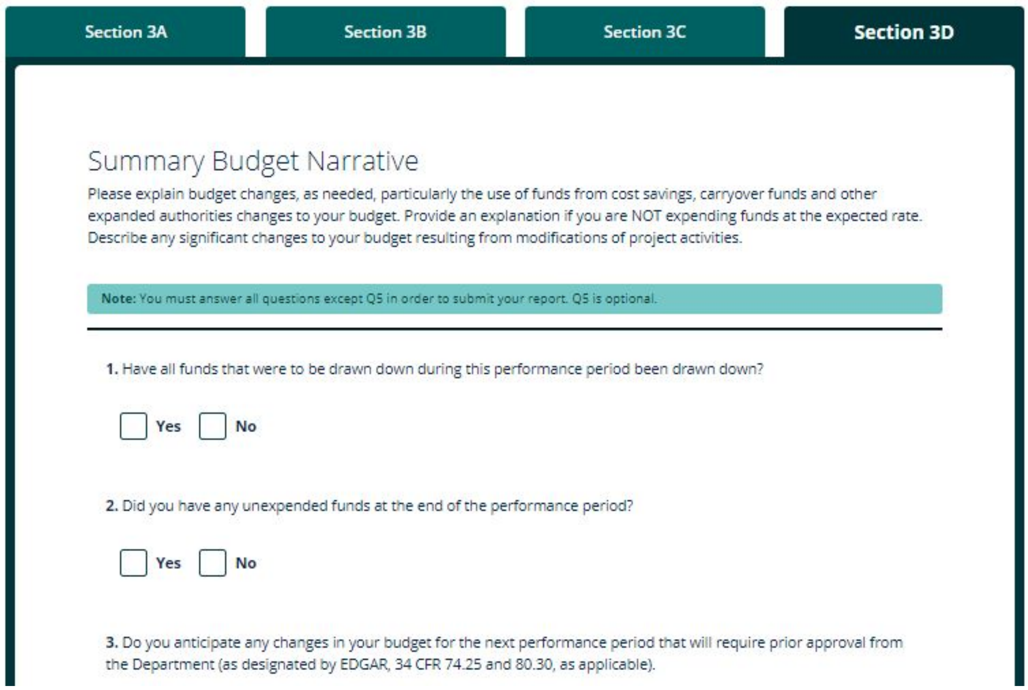
**Automatic calculations:** in addition to the three columns containing automatic calculations that are noted above, every column will be automatically totaled in the last row of the budget table.

| |
|---|
| **IMPORTANT:** The “Save as You Go” feature is triggered by your cursor LEAVING a field. If it looks like the calculations in the budget table aren’t working correctly, try placing your cursor in the last field you entered a number into, then press Tab to exit the field. That will trigger the last calculation. |

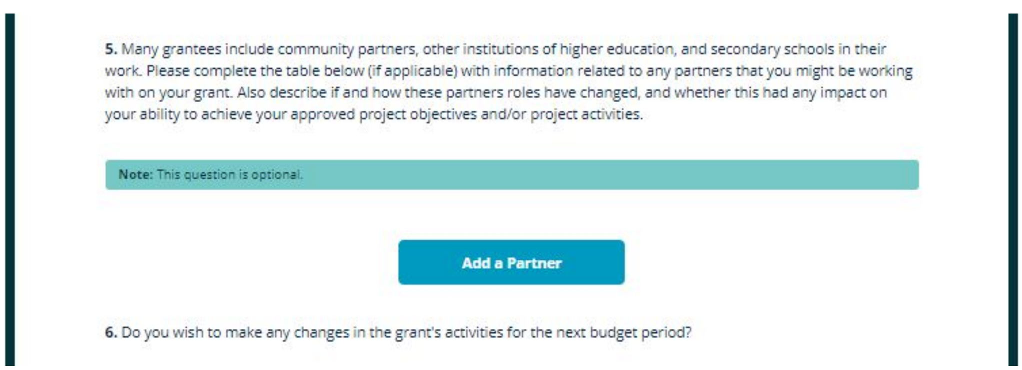
Click **Save** at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

## D. Tab 3D: Summary Budget Narrative

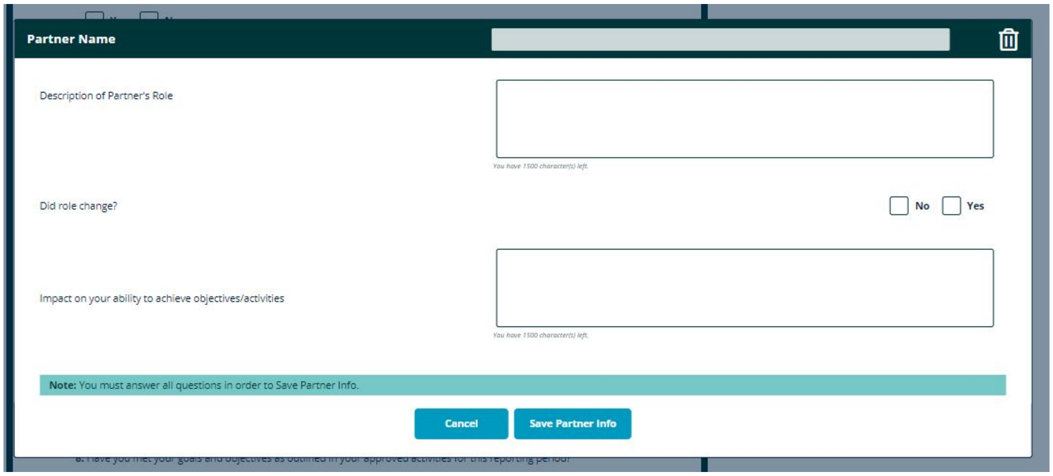
Tab 3D gives you the opportunity to describe any departures from the approved budget or changes to your proposed budget for the next fiscal year.



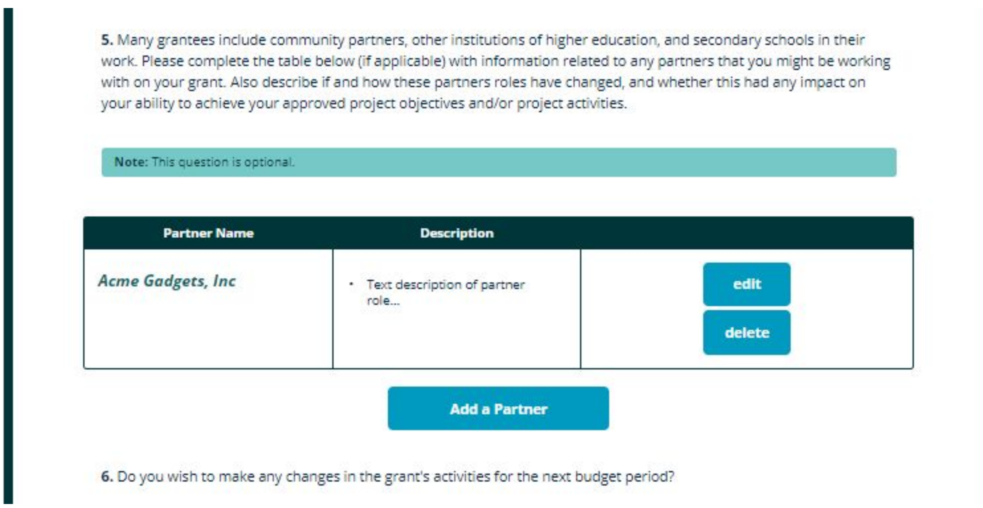

Question 5 on Tab 3D is one of the Optional questions on the report, regarding community partners.




In order to answer Question 5 you will need to click the Add a Partner button. When you do that a pop up window will appear as shown below.




Enter the Partner Name in the **header** row then answer all three questions and click the Save Partner Info button to return to the main screen. After saving a Partner, it will appear in the list as shown below.



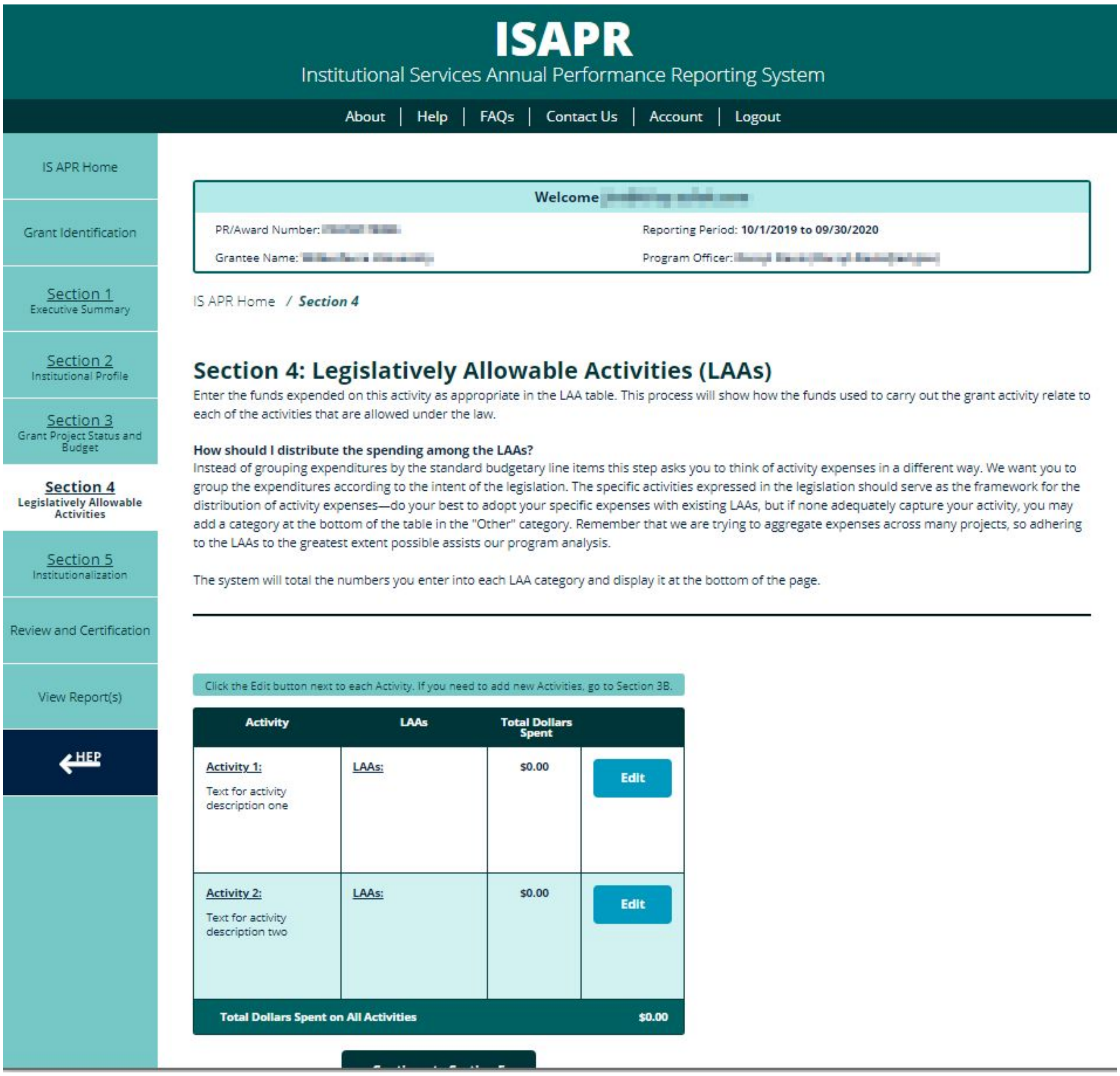

To Edit or Delete a partner click the corresponding button on the appropriate row. To add additional partners click the Add a Partner button again.

Click **Save** 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 the next Section.

# IX. Section 4: Legislatively Allowable Activities (LAAs)

In Section 4, you will relate your grant activity costs to the legislative language for your particular Title III or Title V program. For this section you will be reporting on each activity separately.

| |
|---|
| You must enter your Activities in Section 3 before you can begin working on Section 4. |



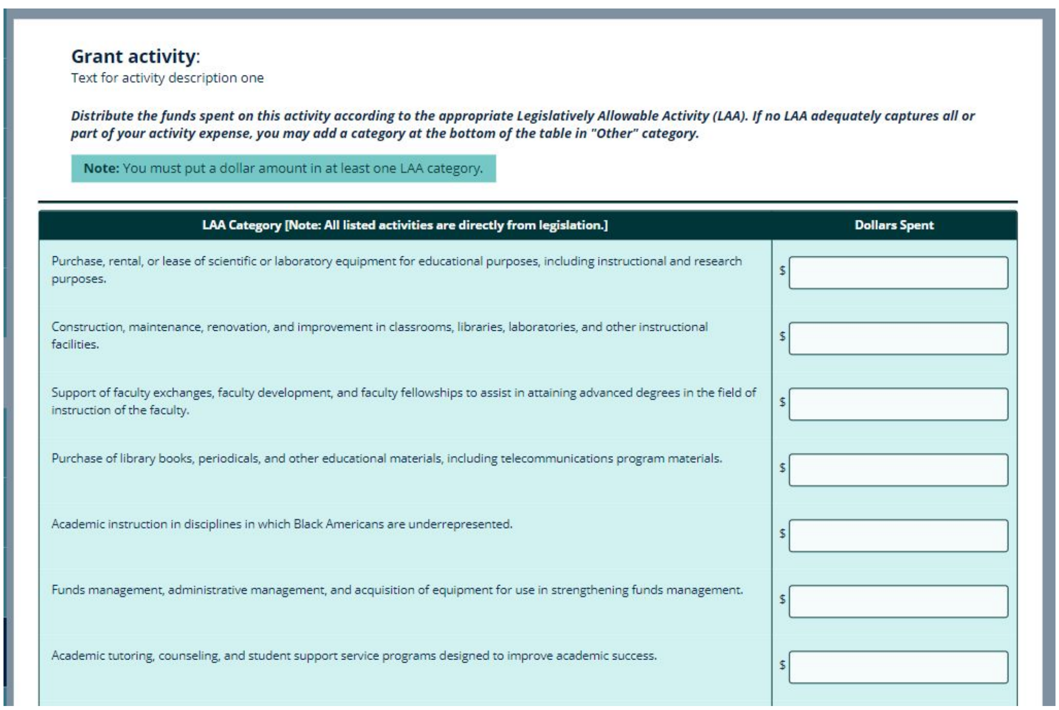
The text you entered on Tab 3B will appear on this page in the “Activity” column. Click the Edit button on the corresponding row to begin assigning funds to specific LAAs under that specific activity.

You will need to do this for each activity. If you need to add additional activities, return to Tab 3B in Section 3.

Distribute the funds spent on this activity according to the appropriate Legislatively Allowable Activity (LAA) displayed in the chart.

**IMPORTANT:** Different programs have different LAAs, so your screen may not look like the sample shown below.

If none of the  LAAs in the list adequately captures all or part of your activity expense, you may add it at the bottom of the table in the “Other” category. Please use the same level of detail in the Other fields as you see used in the fixed categories displayed above.



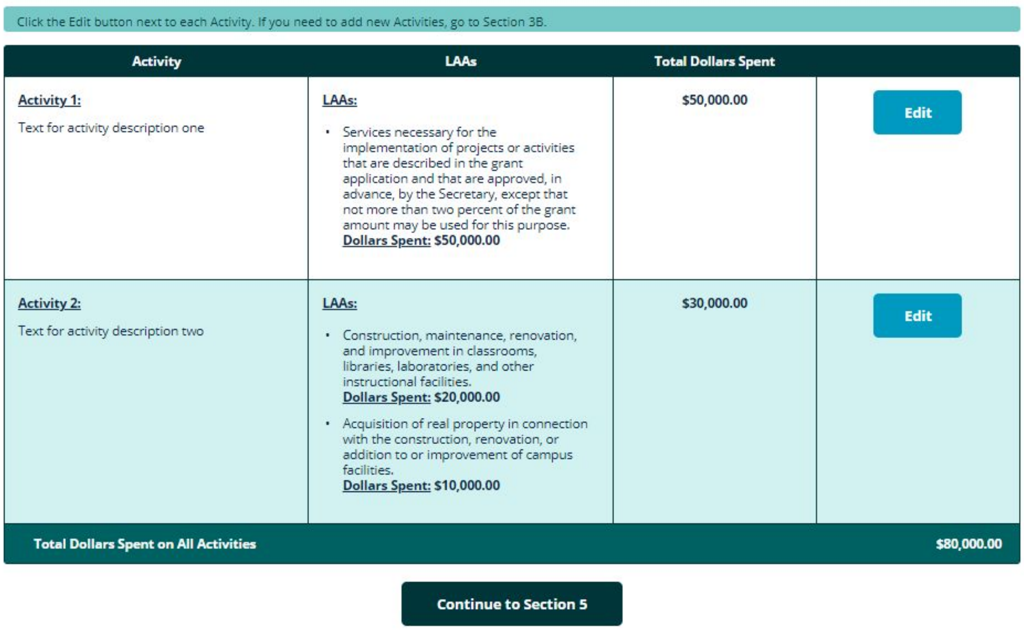

The text you entered on Tab 3B will also appear on this page under the heading “Grant Activity.”

Enter the funds expended on this activity as appropriate in the LAA table. This process will show how the funds used to carry out the grant activity relate to each of the activities that are allowed under the law.

**How should I distribute the spending among the LAAs?**
Instead of grouping expenditures by the standard budgetary line items this step asks you to think of activity expenses in a different way. We want you to group the expenditures

according to the intent of the legislation. The specific activities expressed in the legislation should serve as the framework for the distribution of activity expenses—do your best to adopt your specific expenses with existing LAAs, but if none adequately capture your activity, you may add a category at the bottom of the table in the "Other" category. Remember that we are trying to aggregate expenses across many projects, so adhering to the LAAs to the greatest extent possible assists our program analysis.

The system will total the numbers you enter into each LAA category and display it at the bottom.



Click the Edit button next to each Activity. If you need to add new Activities, go to Section 3B.

| Activity | LAAs | Total Dollars Spent | |
|---|---|---|---|
| **Activity 1:** Text for activity description one | **LAAs:** • Services necessary for the implementation of projects or activities that are described in the grant application and that are approved, in advance, by the Secretary, except that not more than two percent of the grant amount may be used for this purpose. **Dollars Spent:** $50,000.00 | $50,000.00 | Edit |
| **Activity 2:** Text for activity description two | **LAAs:** • Construction, maintenance, renovation, and improvement in classrooms, libraries, laboratories, and other instructional facilities. **Dollars Spent:** $20,000.00 • Acquisition of real property in connection with the construction, renovation, or addition to or improvement of campus facilities. **Dollars Spent:** $10,000.00 | $30,000.00 | Edit |
| **Total Dollars Spent on All Activities** | | | **$80,000.00** |

Continue to Section 5

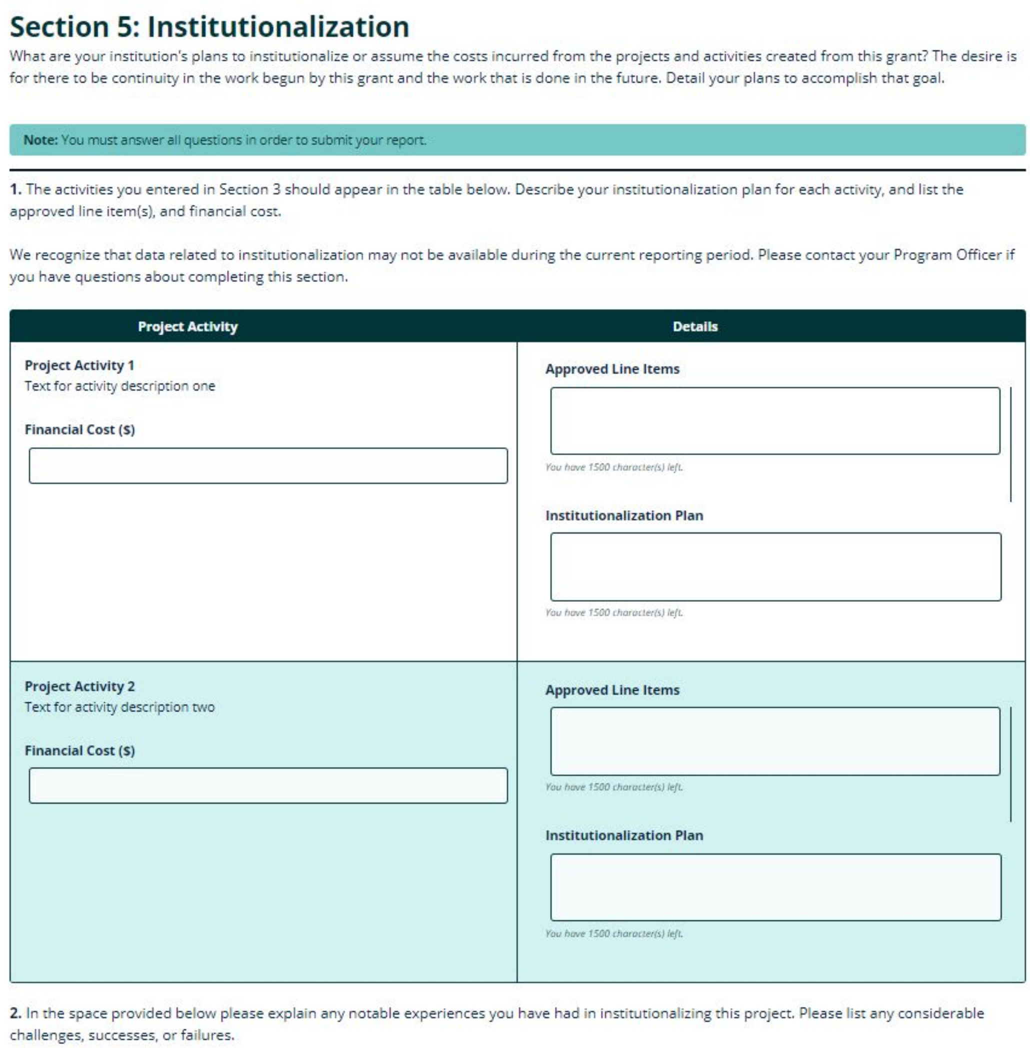
After you've finished entering LAA expenditures for each of your activities, the total dollars you spent on each activity will be totaled on each row, and the total dollars spent on all activities will be displayed in the bottom row.

Click **Continue** to proceed to the next Section.

## X. Section 5: Institutionalization

Section 5 addresses plans to institutionalize, or assume the costs incurred from the projects and activities created from this grant. The goal is for there to be continuity in the work begun by this grant and the work that is done in the future after the grant period ends.

| |
|---|
| You must enter your Activities in Section 3 before you can begin working on Section 5. |



**Section 5: Institutionalization**

What are your institution's plans to institutionalize or assume the costs incurred from the projects and activities created from this grant? The desire is for there to be continuity in the work begun by this grant and the work that is done in the future. Detail your plans to accomplish that goal.

**Note:** You must answer all questions in order to submit your report.

**1.** The activities you entered in Section 3 should appear in the table below. Describe your institutionalization plan for each activity, and list the approved line item(s), and financial cost.

We recognize that data related to institutionalization may not be available during the current reporting period. Please contact your Program Officer if you have questions about completing this section.

| Project Activity | Details |
|---|---|
| **Project Activity 1**<br>Text for activity description one<br>**Financial Cost ($)** | **Approved Line Items**<br>You have 1500 character(s) left.<br>**Institutionalization Plan**<br>You have 1500 character(s) left. |
| **Project Activity 2**<br>Text for activity description two<br>**Financial Cost ($)** | **Approved Line Items**<br>You have 1500 character(s) left.<br>**Institutionalization Plan**<br>You have 1500 character(s) left. |

**2.** In the space provided below please explain any notable experiences you have had in institutionalizing this project. Please list any considerable challenges, successes, or failures.

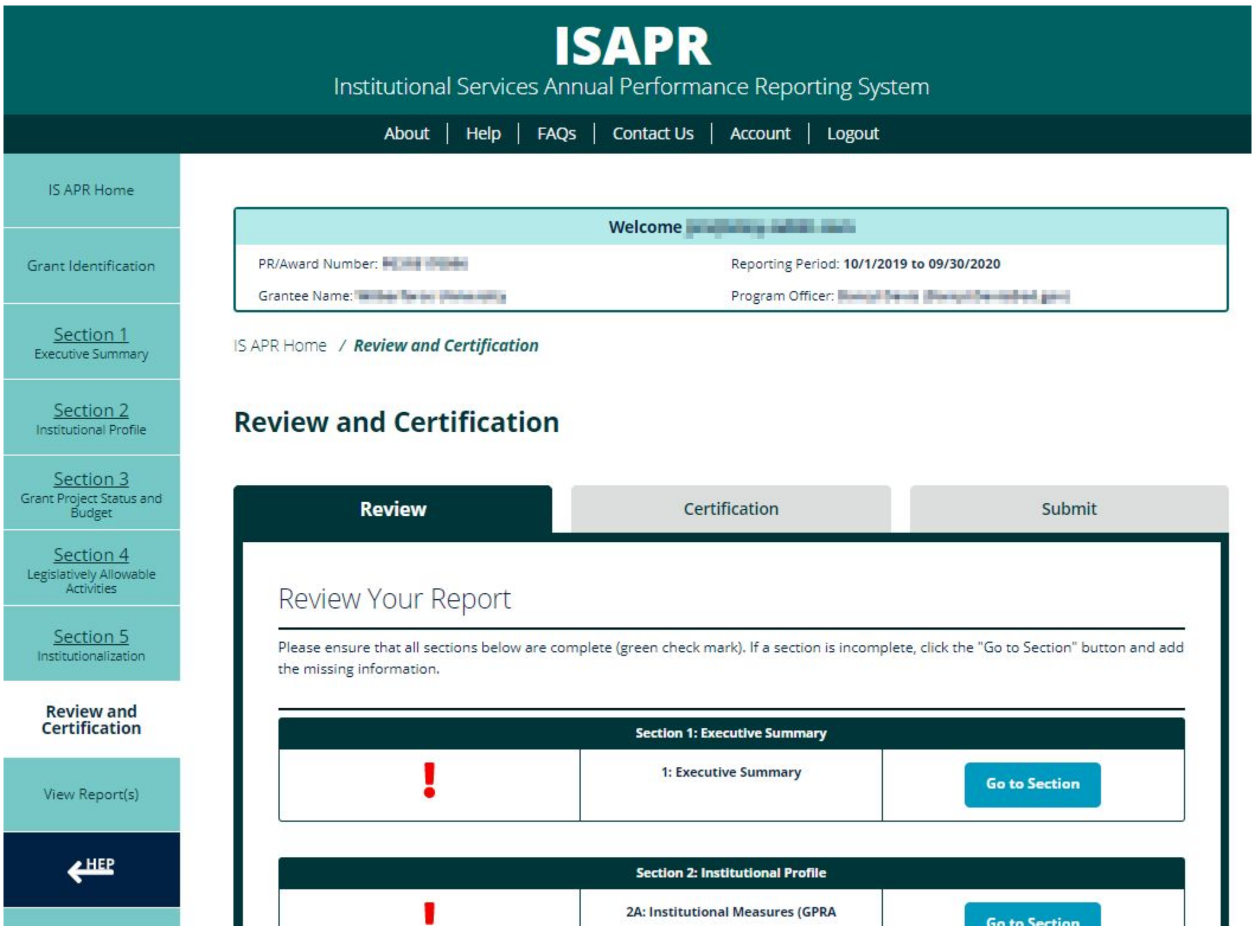
Answer all three questions for each activity. If you need to add more Activities, return to Tab 3B in Section 3.

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. Review and Certification

The Review and Certification Section serves three tasks:

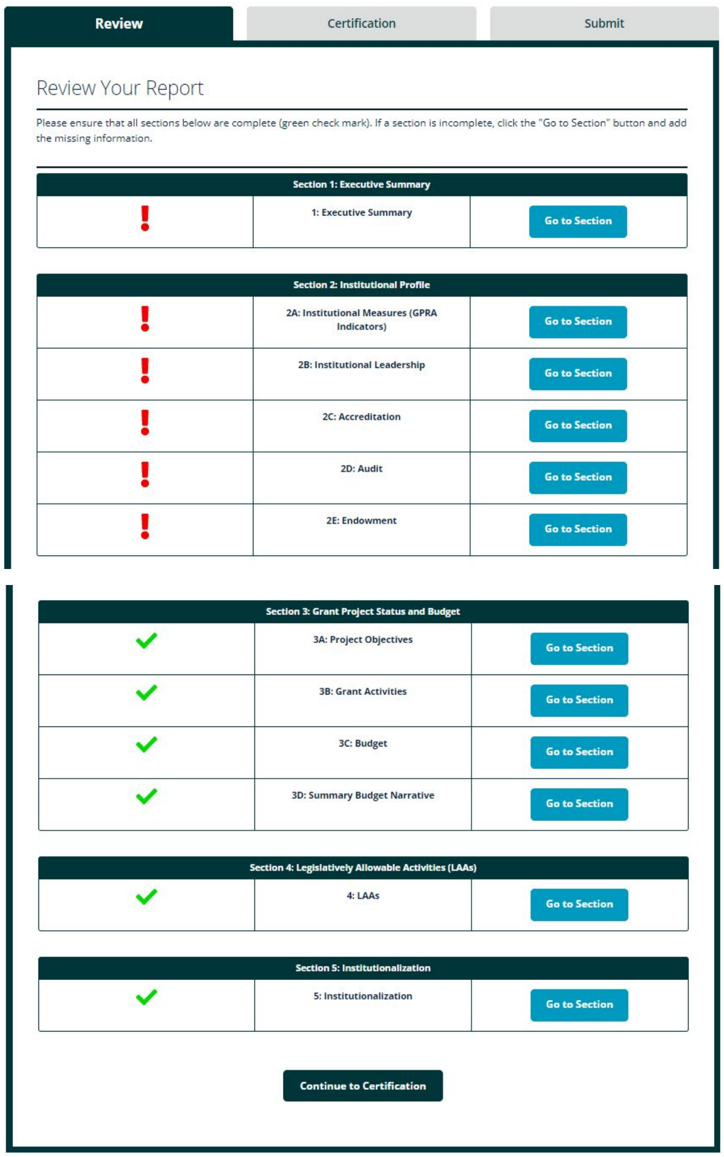
1. **Review:** Check your APR for completeness and verify that all questions on the report have been answered
2. **Certification:** Certify that all information on the report is true and correct to the best of your knowledge
3. **Submit:** Send your report to the Department.



## A. Review

On the Review tab you will be shown the completion status for each section of the report. A green check mark indicates a section is complete; a red exclamation point indicates it is not.

You may click the **Go to Section** button or click the desired Section option in the left hand menu to return to any section and complete the remaining questions. All questions on the report are required except where indicated.

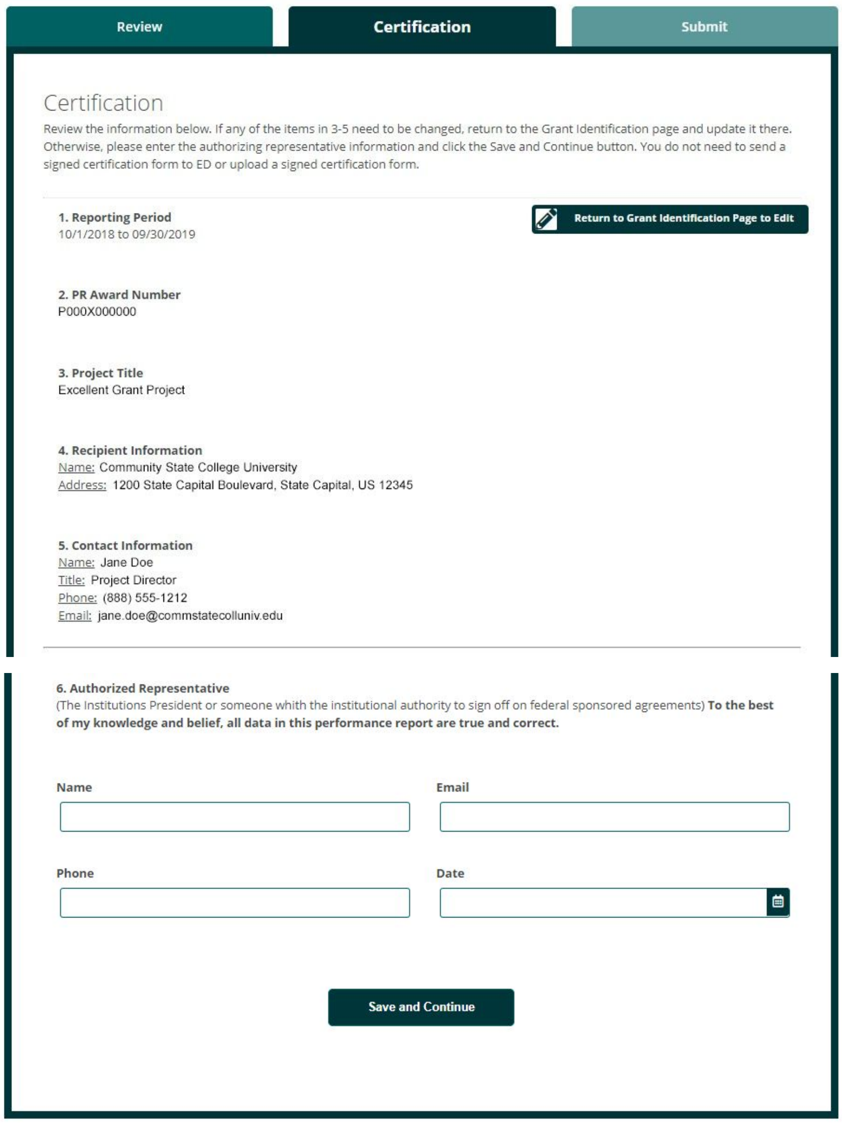



When all sections are marked complete, you will be able to click Continue to go to the Certification tab.

## 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 3-5 need to be changed, return to the Grant Identification page and update it there. Otherwise, please enter the authorizing representative information and click the Save and Continue 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**
10/1/2018 to 09/30/2019

**2. PR Award Number**
P000X000000

**3. Project Title**
Excellent Grant Project

**4. Recipient Information**
Name: Community State College University
Address: 1200 State Capital Boulevard, State Capital, US 12345

**5. Contact Information**
Name: Jane Doe
Title: Project Director
Phone: (888) 555-1212
Email: jane.doe@commstatecolluniv.edu

**6. Authorized Representative**
(The Institutions President or someone whith 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.**

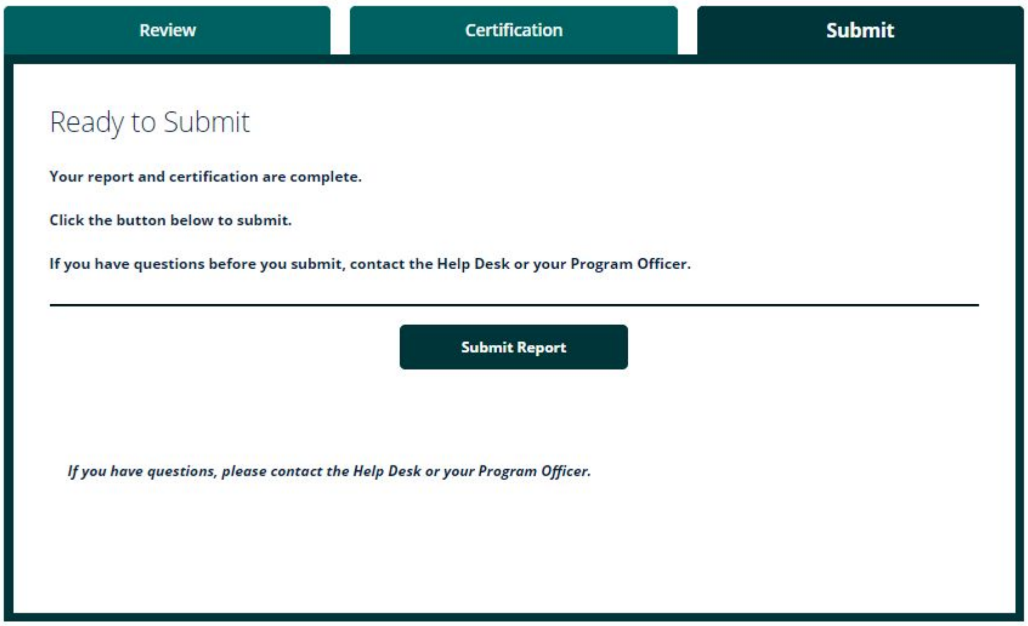
Name | Email
Phone | Date

Save and Continue

You do not need to upload, mail, or fax a signed certification form to the Department.

## A. 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.




Simply click the **Submit** button to send your report to the Department. You will receive an email confirmation upon submission, containing a link where you can download a copy of your report.

| |
|---|
| **IMPORTANT:** Please remember to download and retain a copy of your submitted report in your local records! |

You do not need to upload, mail, or fax a hard copy of the report to the Department.

## B. 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 **before** the submission deadline and the system closes, simply contact the Help Desk and they will "unsubmit" your report for you.

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

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

# XII. View Reports

Click the View Report(s) tab to print a copy of your current year's report on this tab. If your report has not yet been submitted, it will have a Draft indicator in each page header.


In an upcoming release you will also be able to access a list of your previously submitted reports and attachments.