HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

ANNUAL PERFORMANCE REPORT USER GUIDE

March 2026
Version 2.2

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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 fall of 2023 to include a new **Section 6: Final Performance Report**. This section will only appear when you are filling out your last report. That is determined by identifying the last report you file after your Grant End Date has passed. See Chapter XI for more details on when your Final Performance Report will be submitted.

For returning users, the following questions will be pre-populated from the report submitted the prior year. You may make edits if necessary, by clicking directly into the appropriate field:

A. Section 3A - Questions 1 & 2
B. Section 3B - All Activities and Objectives, but NOT Performance Measures. *All Performance Measures must be re-entered manually every year as per Program Office requirements.*
C. Section 3C - Budget: Carryover Balance (Previous Year) column

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 Institutional Services 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. ***New in 2024*** **- Section 6: Final Performance Report**
   See **Chapter XI** for more information about these steps.

5. **Review, Certify, and Submit your Annual Performance 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 APR Form**, 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 grantees for the previous academic year. For example, if you are reporting during Spring of **2025**, the data you're submitting should reflect the **2023-2024** academic year.

Institutional Services 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 IS 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
Section 6: Final Performance Report *(final year grantees only)*

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.

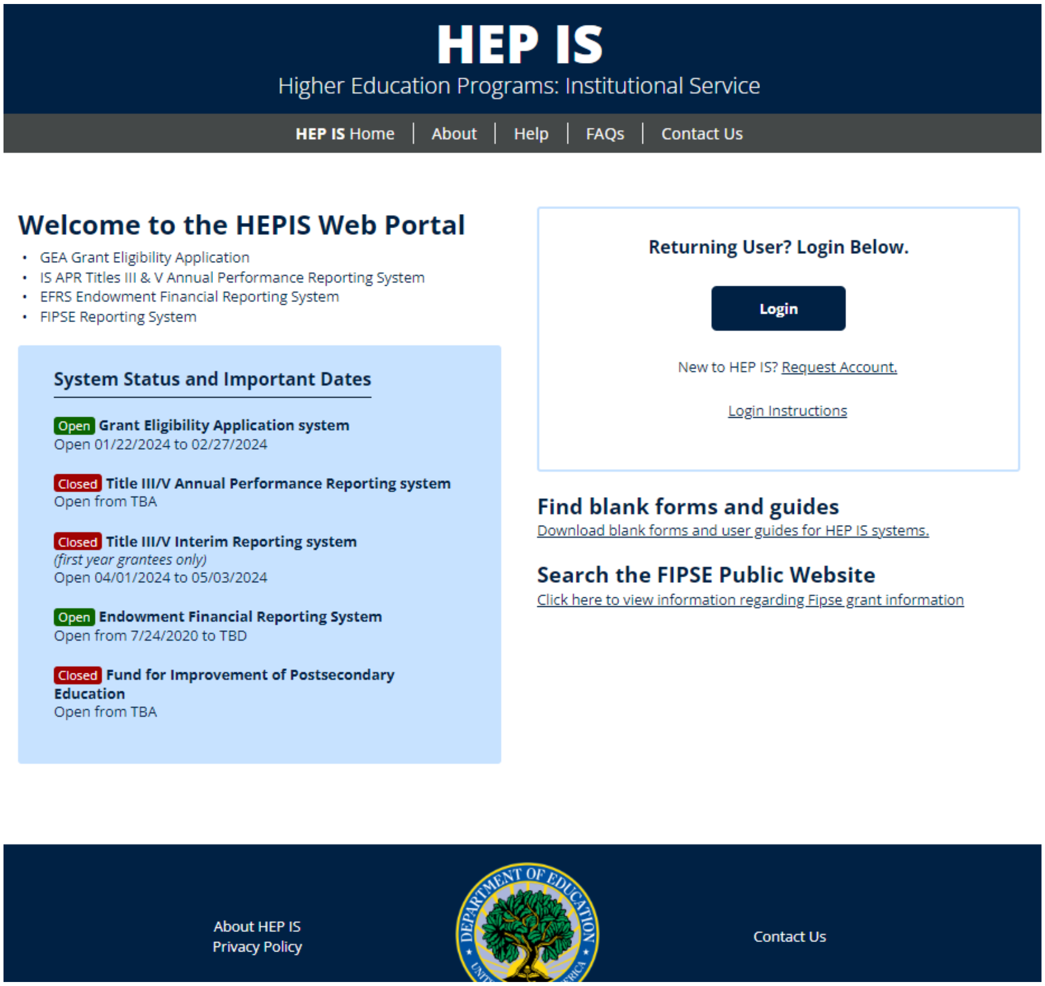
If you have any questions or issues of a technical nature related to the use of the website, please contact the Help Desk. IS APR help desk staff are not qualified to answer any questions of a programmatic nature related to your grant or the content of your report.

The IS APR system typically opens shortly after the start of the calendar year and remains open for approximately 60 days. Always refer to the homepage for the current opening and due 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** - look here for important information about when various HEPIS subsystems are opening and when reports are due.

3. **Find blank forms and guides** - another link the the *Help* page described above

4. **Login**
    a. **Login button** - in this system your username is your email address
    b. **Request Account** - remember not to share your password with anyone; additional users require their own accounts linked to their own email addresses
    c. **Login Instructions** - to request a link via email to reset your password

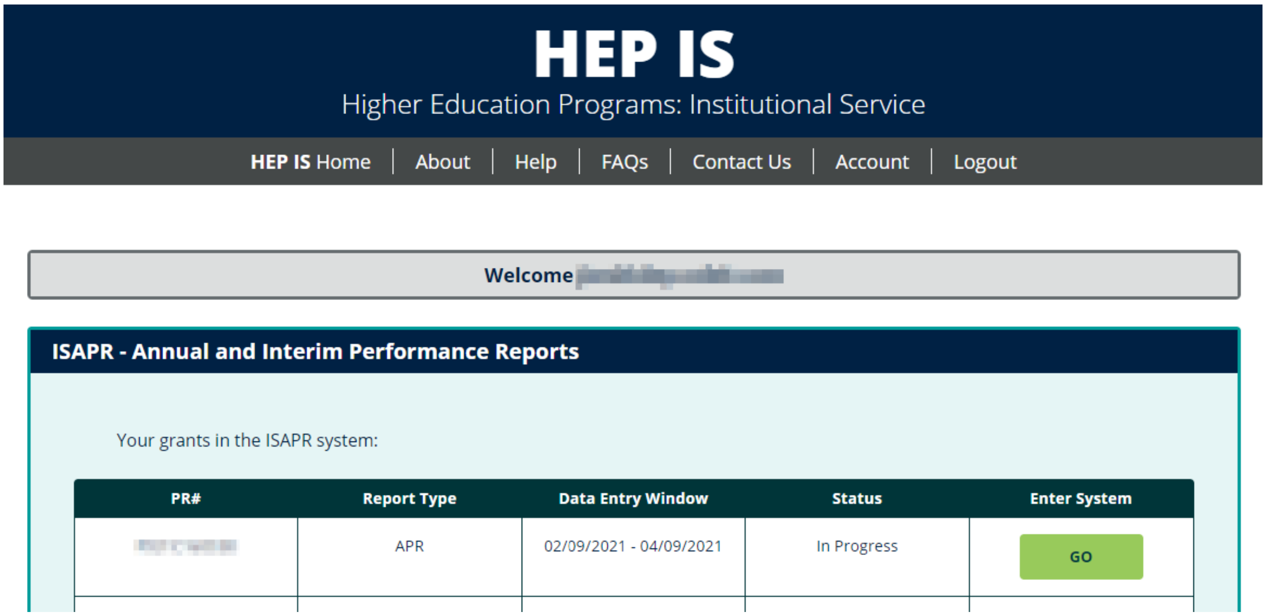
A. Logging In

The Federal Government has transitioned to a new Single Sign-On (SSO) login and Multifactor Authentication (MFA) process that is managed by the Login.gov service.

For details about logging in and requesting new accounts, see Appendix A.

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.

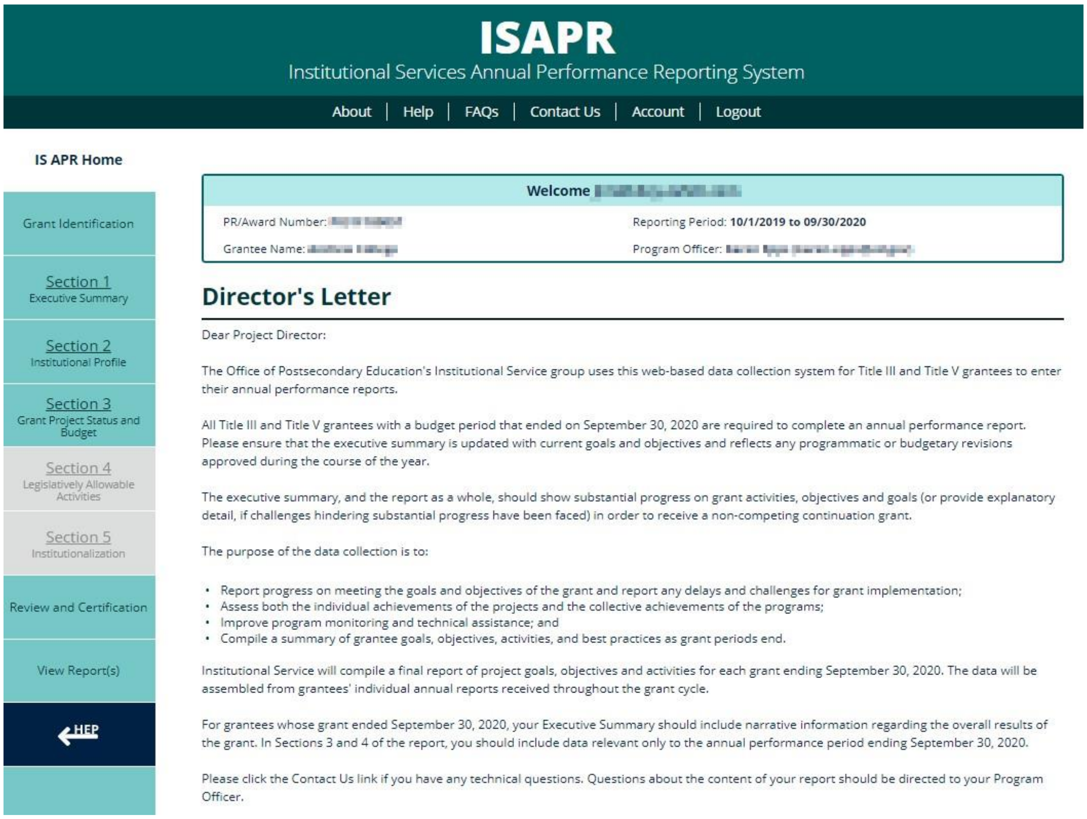
The main menu has two additional links now that you're logged in:

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

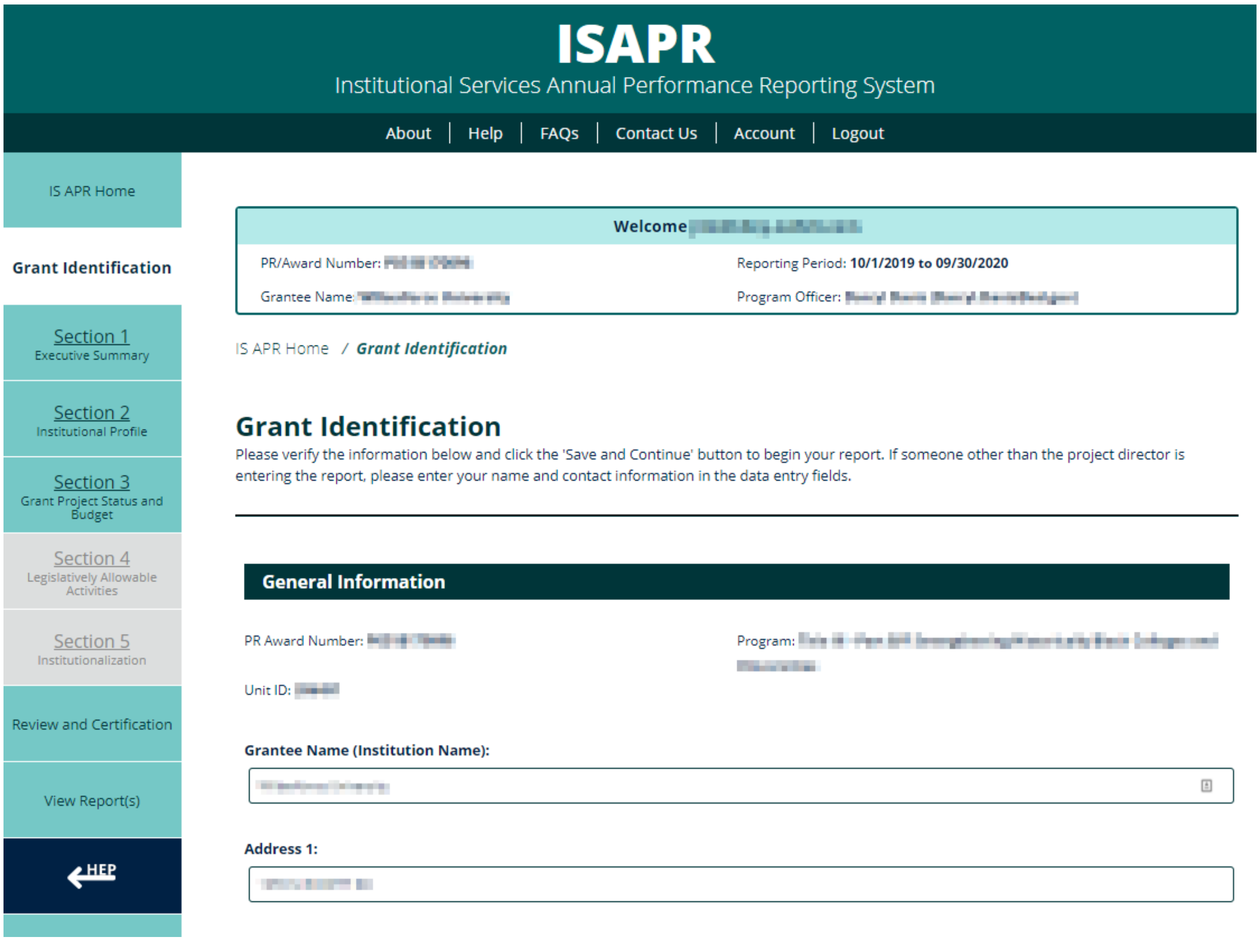
7. **Review and Certification** - verify that all sections are complete, certify that all data is accurate, and submit your report, see Chapter XI
8. **Reports** - download PDFs of reports, see Chapter XII

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.

You also *must* enter your LAA data in Section 4 prior to working on Section 5. Section 5 refers back to your LAA data, so you must enter it first.

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.

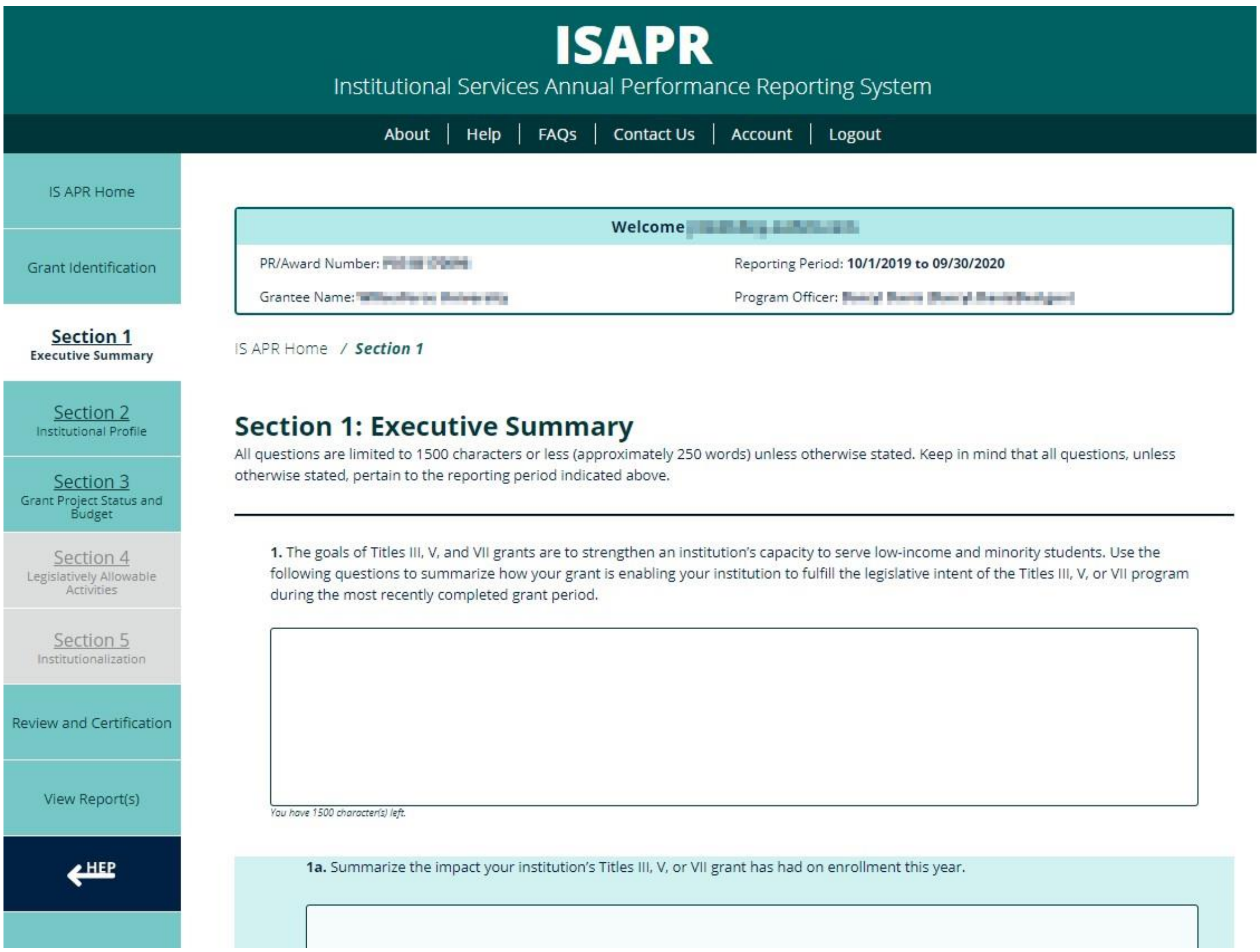
Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to Section 1.

> **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.

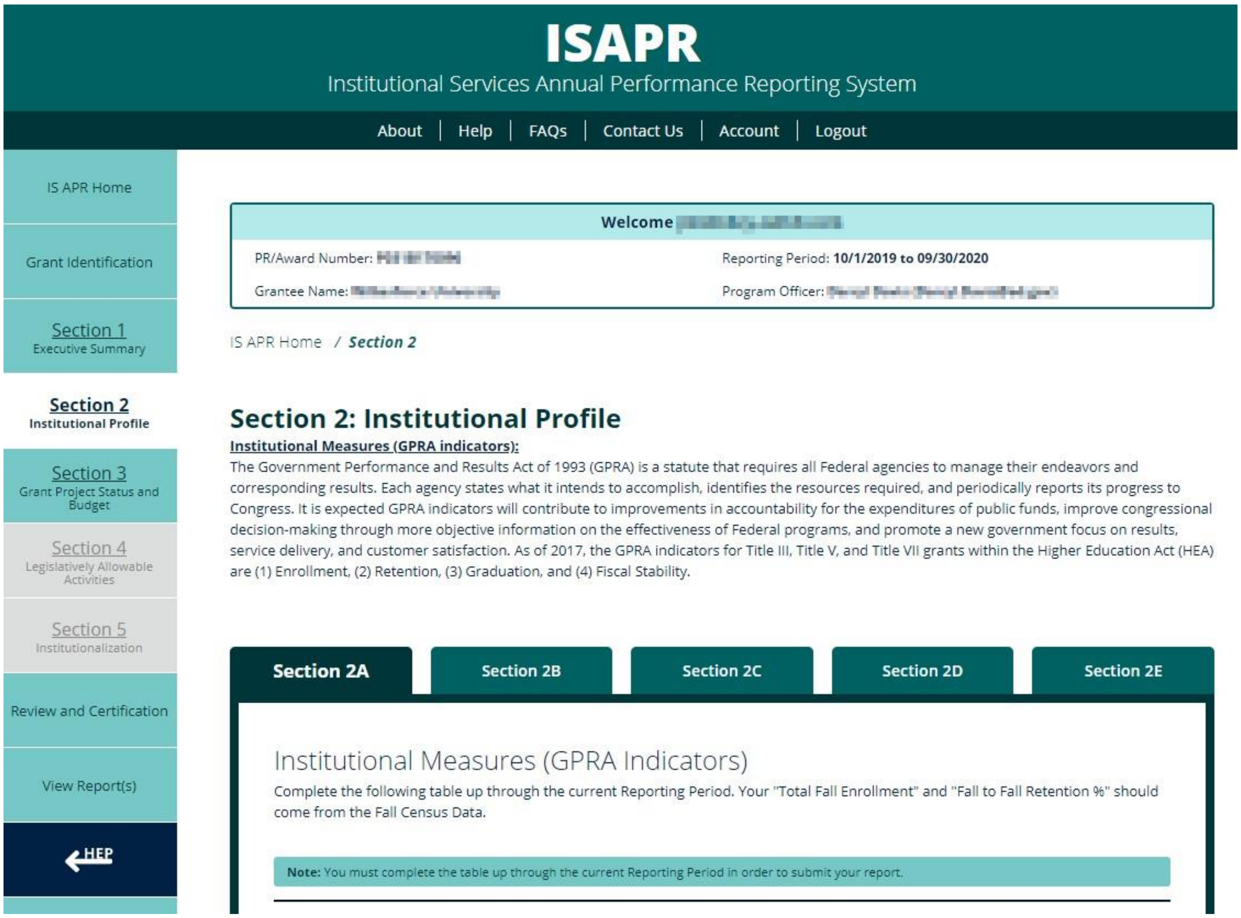
This section allows you to report on successes and challenges that cannot be articulated purely through quantitative responses. Each response is limited to a certain length as noted on screen.



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.

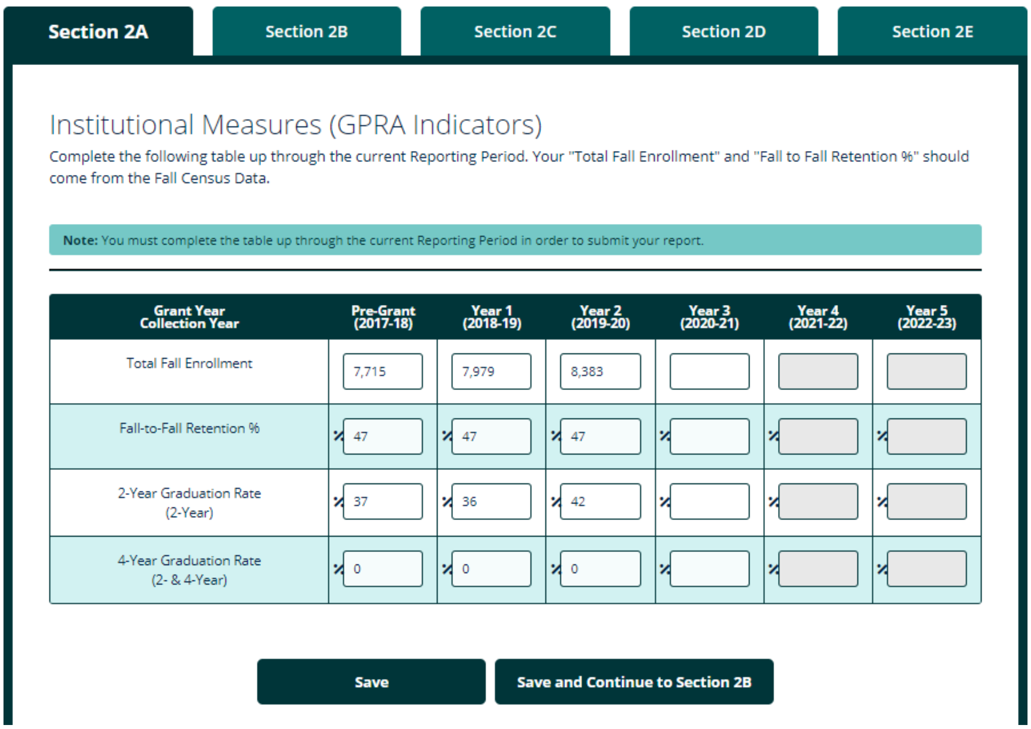
VII. Section 2: Institutional Profile

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.



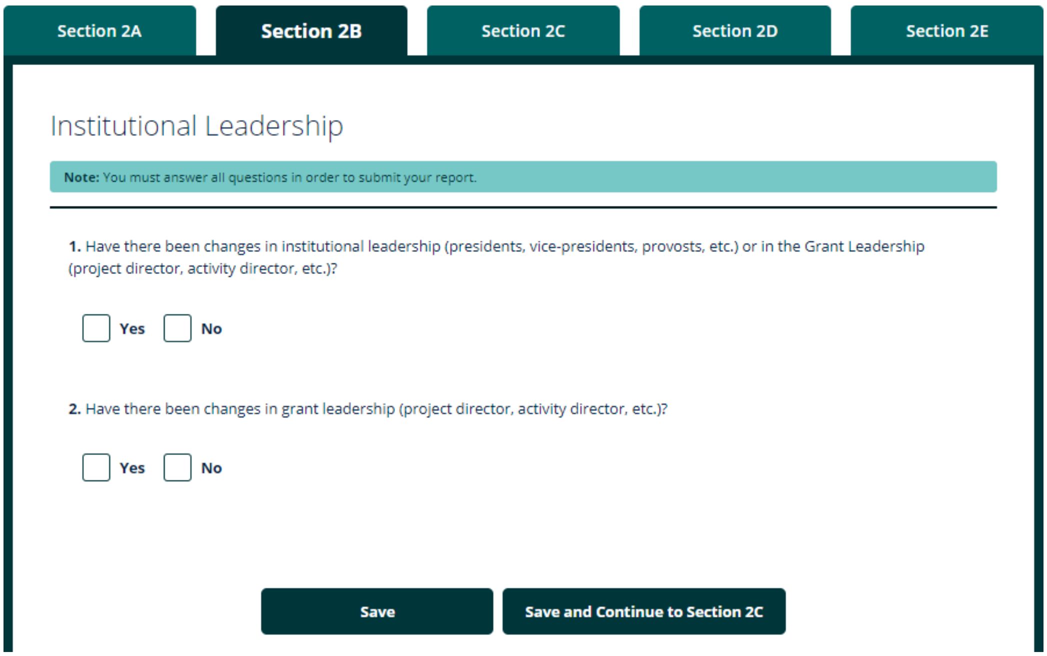
Two-Year Schools will be asked about their 2-Year and 4-Year Graduation Rates, as shown above.

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.

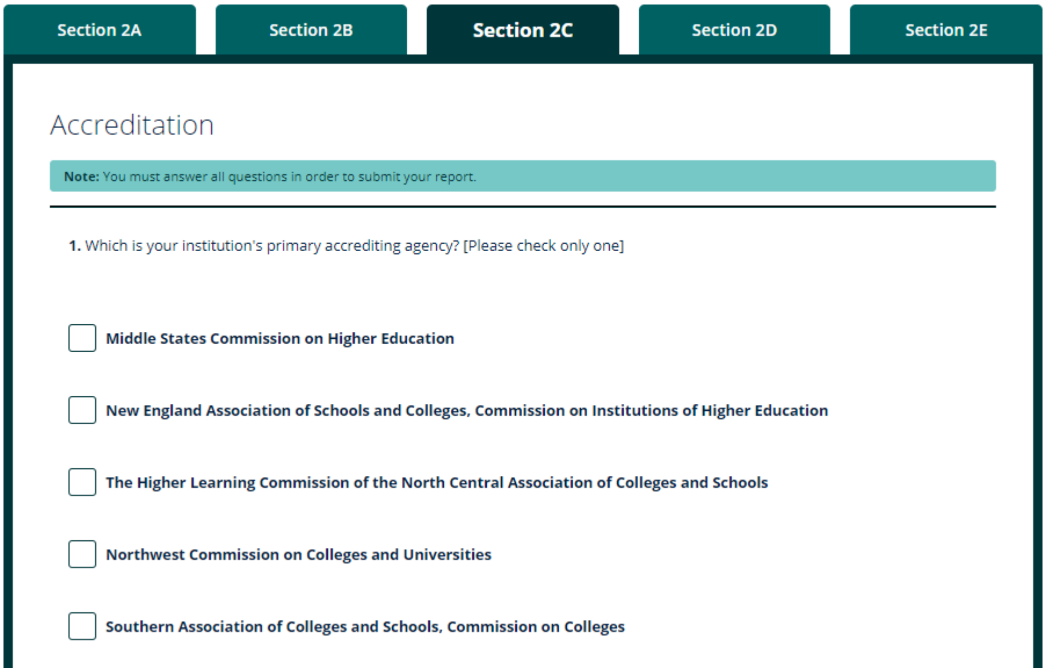


Conditional Logic: Some Yes/No questions throughout the report have conditional follow-up questions that will appear only if your initial answer requires follow up information. Please note that if you *change* your initial response back to the condition that does *not* require any follow up information, 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.

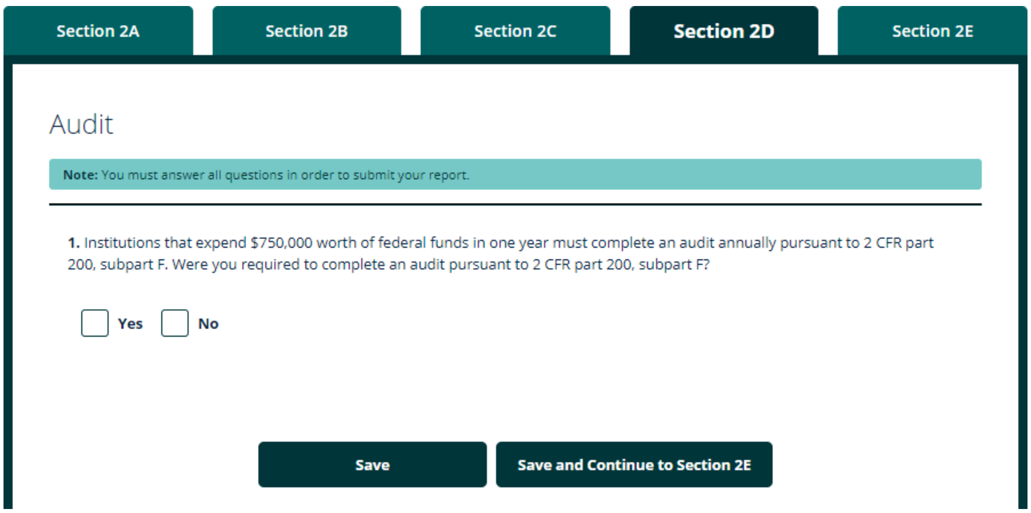


Click **Save** to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

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.

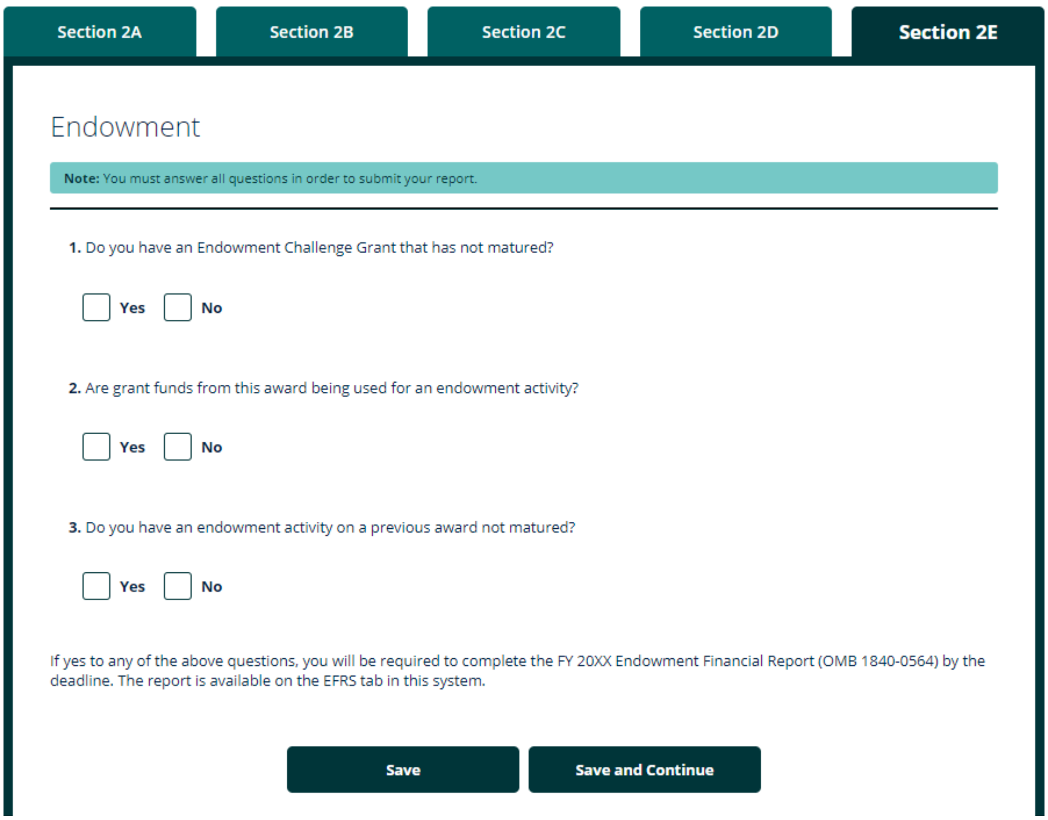
You may upload a maximum of 3 documents. Each file should be no larger than 20 MB and must be in one of the following formats: .txt, .doc, .docx, .xls, .xlsx, or .pdf.



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.

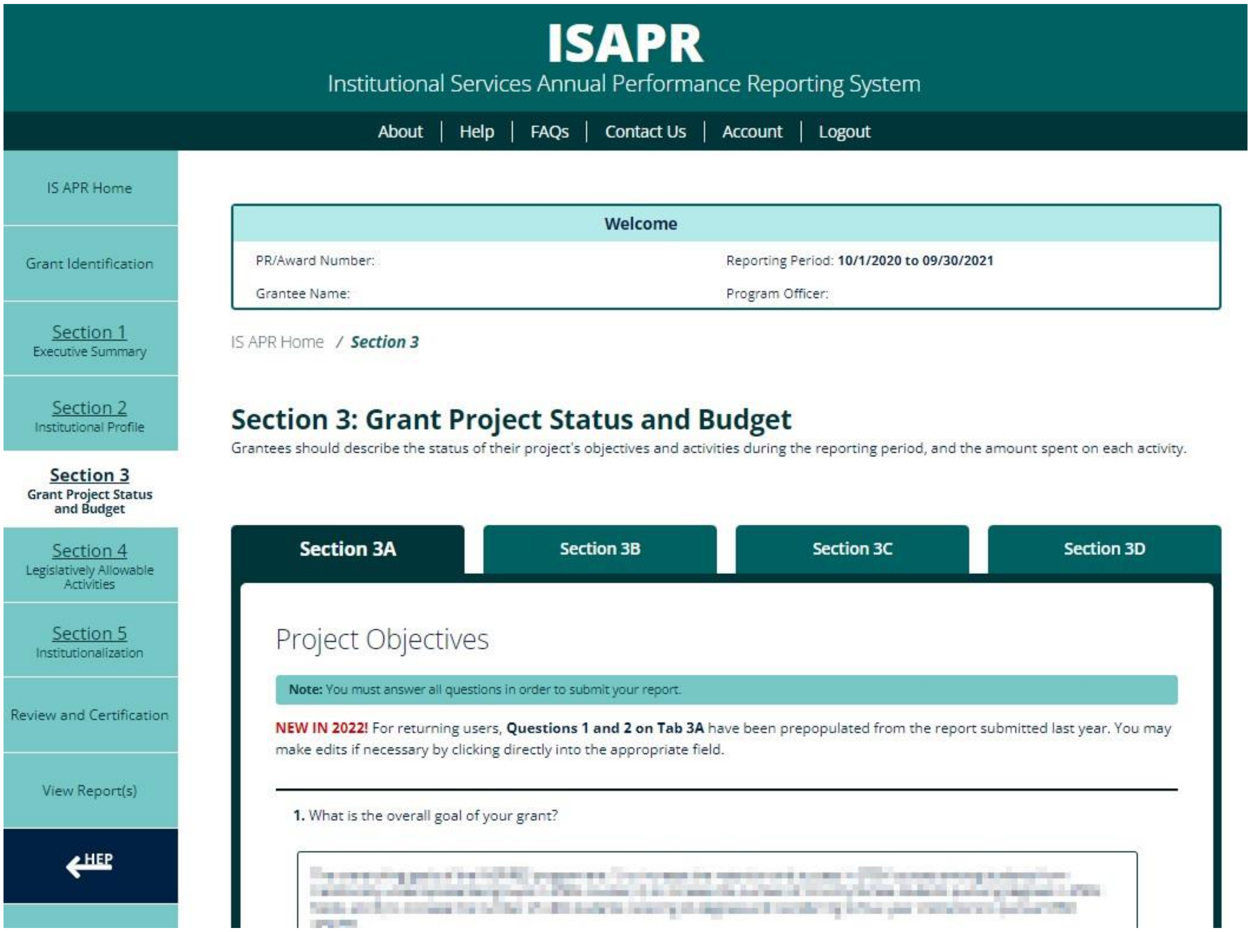


IMPORTANT! If you indicate here that your grant has an endowment component, then you will be required to fill out an Endowment Financial Performance Report in the EFRS subsystem of HEPIS. Endowments require twenty (20) years of annual reporting from the date of the initial corpus. Please check with your 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

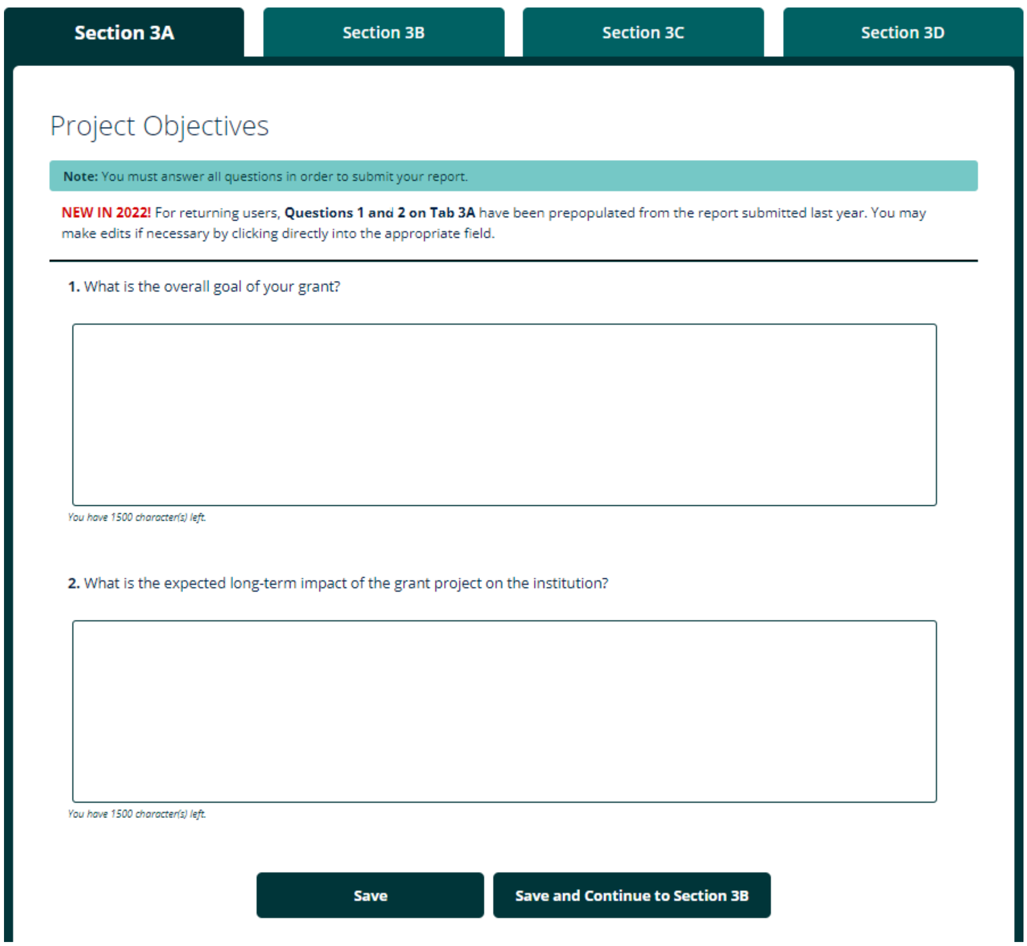
In Section 3 you will relate your grant activity costs to the legislative language for your particular IS grant program. For most of this section you will be reporting on each activity separately. You should use the original activity structure of your application, incorporating any changes that have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

NEW IN 2022! For returning users, **Questions 1 and 2 on Tab 3A** have been pre-populated from the report that you submitted last year. You may make edits if necessary by clicking directly into the appropriate field.



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 & Examples

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.

First let's think about what is meant by Grant Activities, Objectives, and Performance Measures.

Grant Activities – The intended development, implementation, or restructuring of project, programs, or services. Grant activities may have multiple interconnected objectives designed to increase the success of projects, programs, and services.

Objective – The plan to affect change within an activity. Applicants develop objectives within their grant applications with the goal to achieve change within the institution. There may be multiple project objectives for each grant activity.

Performance Measure – Any quantitative indicator, statistic, or metric used to gauge GPRA, project, or performance. There may be multiple performance measures associated with each project objective.

EXAMPLE ONE:

- GRANT ACTIVITY: Increase Student Success and Student Supplemental Instruction Programs
    - OBJECTIVE: Increase the number of students eligible for admission to the XYZ Program by 10% by May 31, 2020
        - PERFORMANCE MEASURE: Number of students passing Course 101 will increase from 50 to 75 in December 2019
        - PERFORMANCE MEASURE: Number of students eligible for TEST ABC will increase from 40 to 55 by March 2020
    - OBJECTIVE: Increase the number of students eligible for admission to the XYZ Program – Level II by 10% by May 31, 2020
        - PERFORMANCE MEASURE: Number of students passing Course 101 will increase from 10 to 12 in December 2019
        - PERFORMANCE MEASURE: Number of students eligible for TEST ABC will increase from 20 to 25 by March 2020

EXAMPLE TWO:

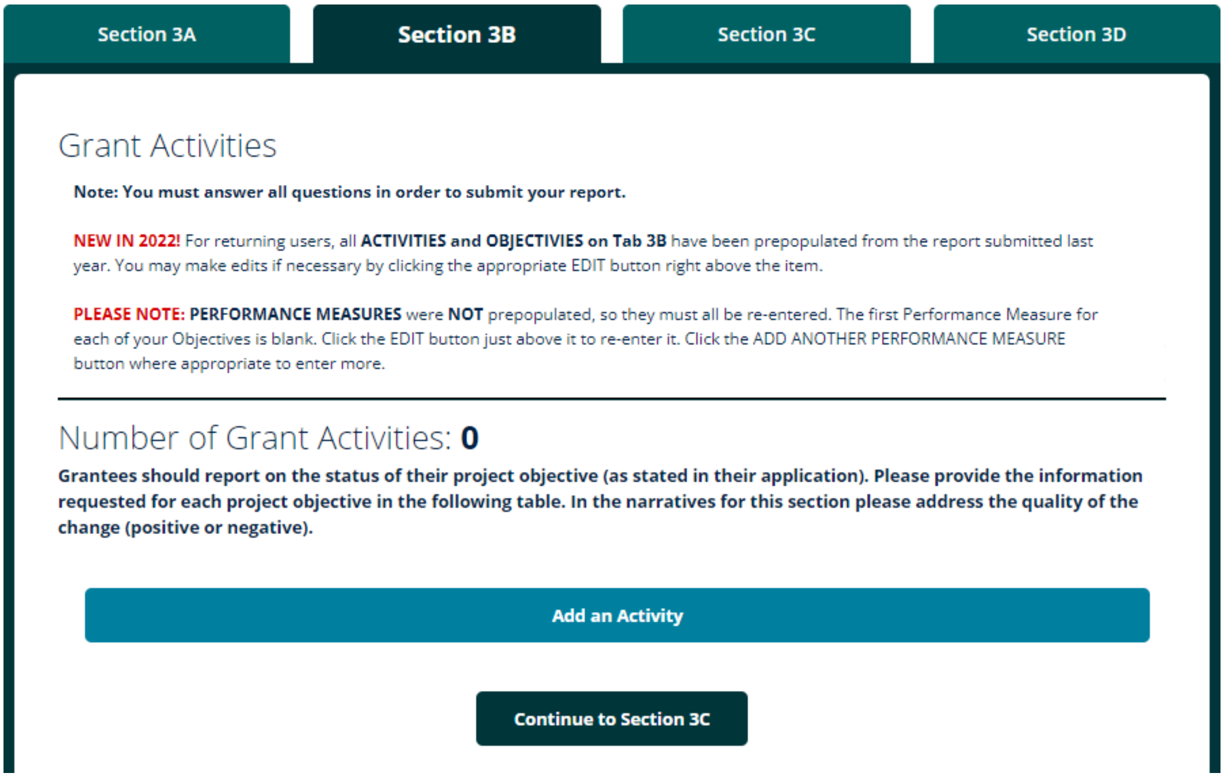
- GRANT ACTIVITY: Decrease the time through Supplemental Instruction (non-credit) Courses into introductory college-level Math and English; baseline of 1.5 years of non-credit course work
    - OBJECTIVE: Conduct a six-week Summer Bridge Program (SBP) that enrolls 100 students during initial year
        - PERFORMANCE MEASURE: 50% of enrollees will be students from local school district

    - PERFORMANCE MEASURE: 60% of students who complete all four weeks will test at least one level higher in English
    - PERFORMANCE MEASURE: 45% of students who complete all four weeks will test at least one level higher in Math
    - PERFORMANCE MEASURE: 65% of SBP 2021 enrollees will register and enroll in Fall 2021 courses
    - PERFORMANCE MEASURE: 40% of SBP 2021 enrollees will register and enroll in Spring 2022 courses
- OBJECTIVE: Conduct a three-week Winter Bridge Program (WBP) that enrolls 30 students during initial year
    - PERFORMANCE MEASURE: 40% of enrollees will be students from local school district
    - PERFORMANCE MEASURE: 40% of students who complete all four weeks will test at least one level higher in English
    - PERFORMANCE MEASURE: 25% of students who complete all four weeks will test at least one level higher in Math
    - PERFORMANCE MEASURE: 65% of WBP enrollees will register and enroll in Spring 2022 courses
    - PERFORMANCE MEASURE: 40% of WBP enrollees will register and enroll in Fall 2022 courses

It might help to think of these records in terms of a *Family* – Parents, Children, and Grandchildren.

- The GRANT ACTIVITY is the *Parent* record. Every report must have at least one Grant Activity.
    - The OBJECTIVE is the *Child* record. Every Grant Activity needs at least one Objective.
        - The PERFORMANCE MEASURE is the *Grandchild* record. Every Objective needs at least one Performance Measure.

Grant Activities can have more than one <u>Objective</u>, and Objectives can have more than one <u>Performance Measure</u>, but it's important to remember that they *each need at least* ***one*** *of the other*.



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.

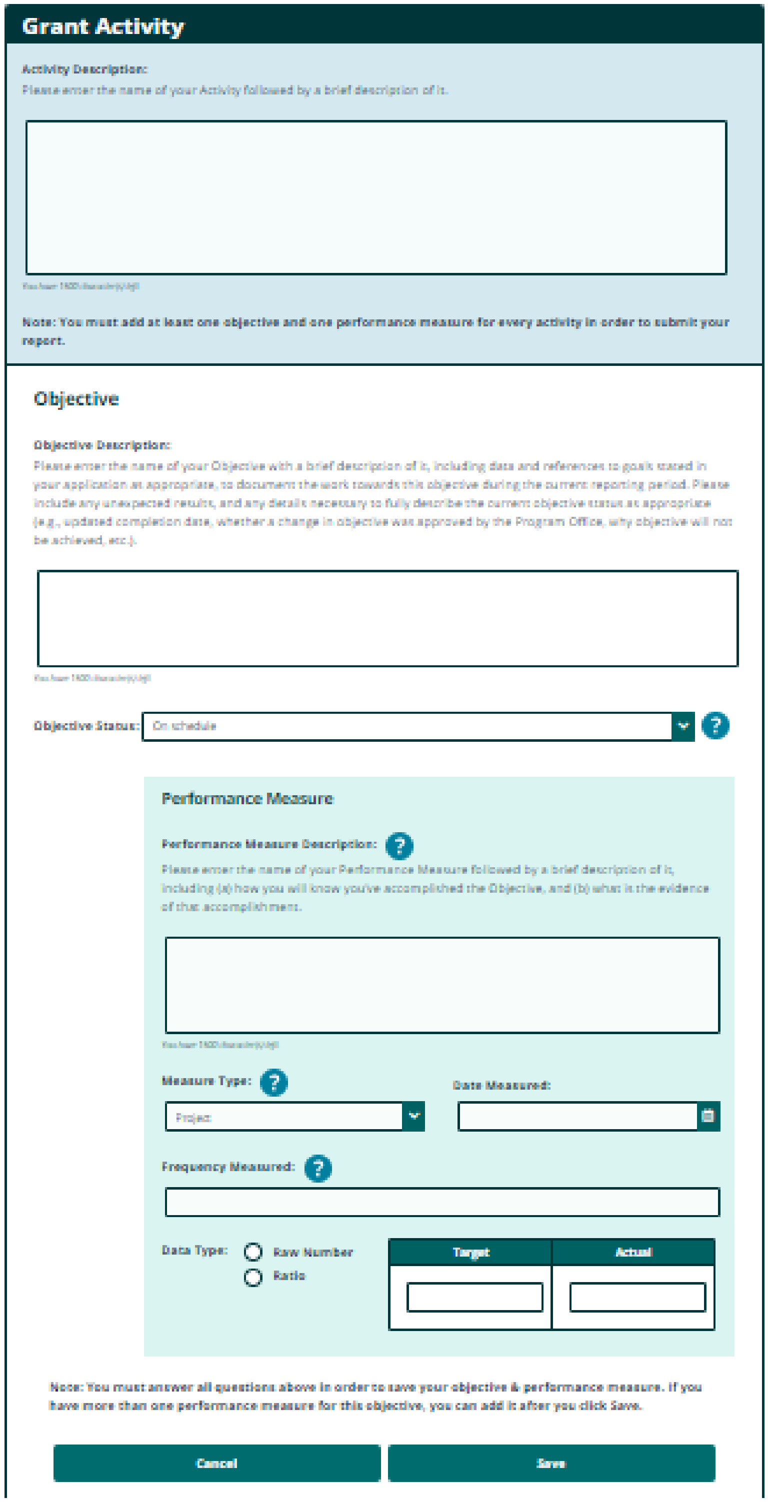
After saving your Grant Activity with its required one Objective and one Performance Measure, you may then add additional Objectives and Performance Measures to that Grant Activity as needed.

Once you save your first Activity, Sections 4 and 5 will become available on the side menu bar.

NEW IN 2022! For returning users, all **ACTIVITIES and OBJECTIVES on Tab 3B** have been pre-populated from the report submitted last year. You may make edits if necessary by clicking the appropriate **EDIT** button right above the item.

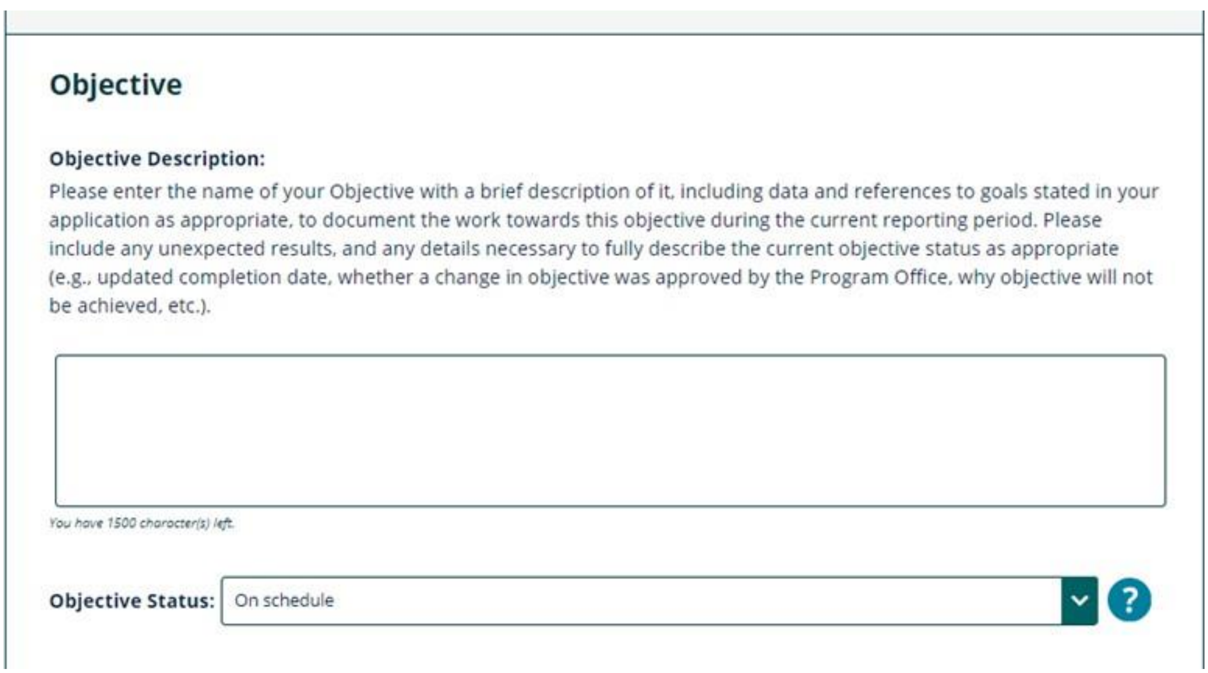
PLEASE NOTE: **PERFORMANCE MEASURES** were **NOT** pre-populated, so they must all be re-entered. The first Performance Measure for each of your Objectives is blank. Click the **EDIT** button just above it to re-enter it. Click the **ADD ANOTHER PERFORMANCE MEASURE** button where appropriate to enter more.

NOTE: Returning users - because your fields are pre-populated, your screen will start off looking more like the one on **page 26** than the one on the following page (23).

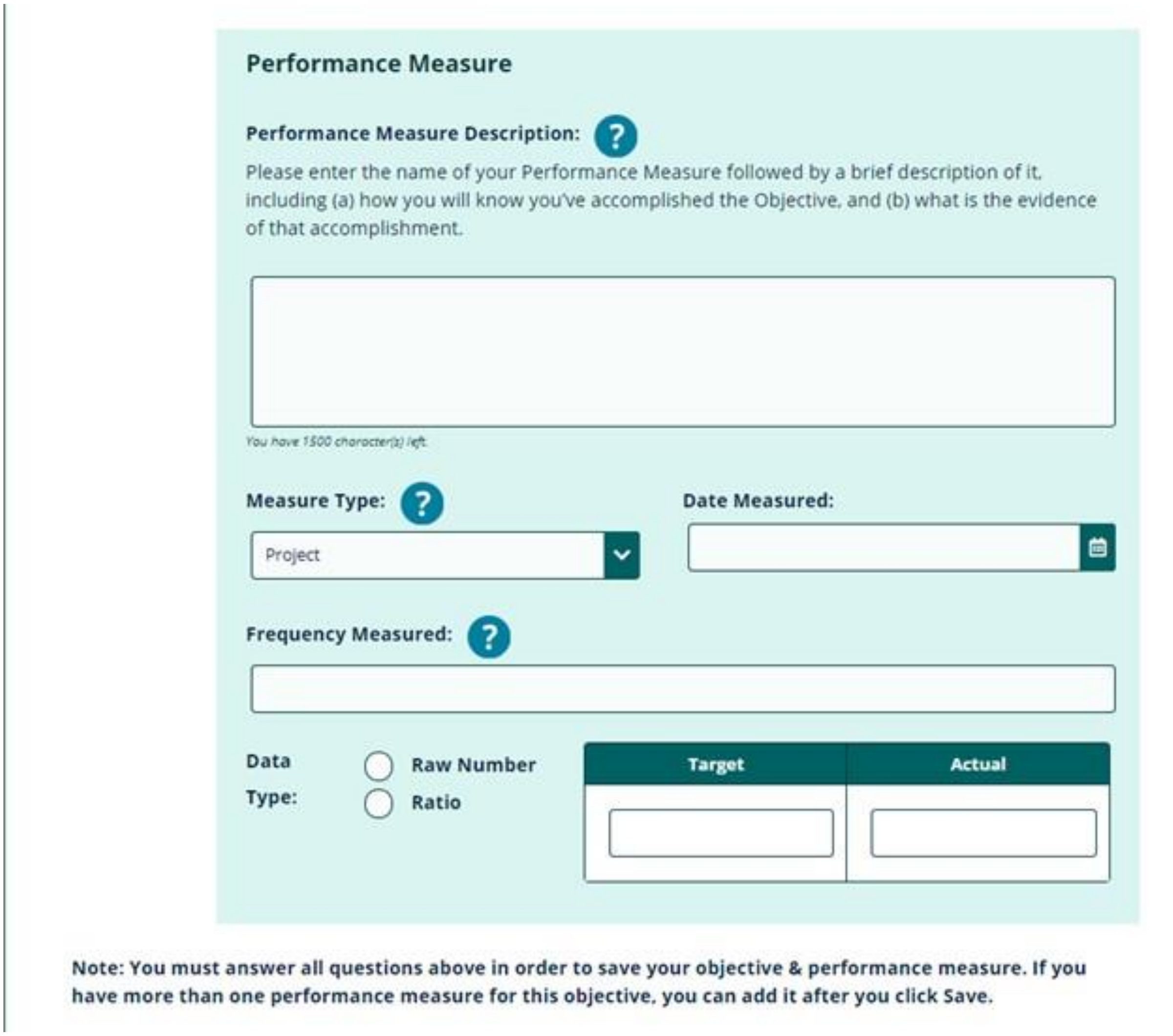


This is a very long form so the next few pages of the User Guide look at each individual part of the form.

GRANT ACTIVITY: There is only one field in this part. Enter both the NAME and a DESCRIPTION into the Activity Description field.

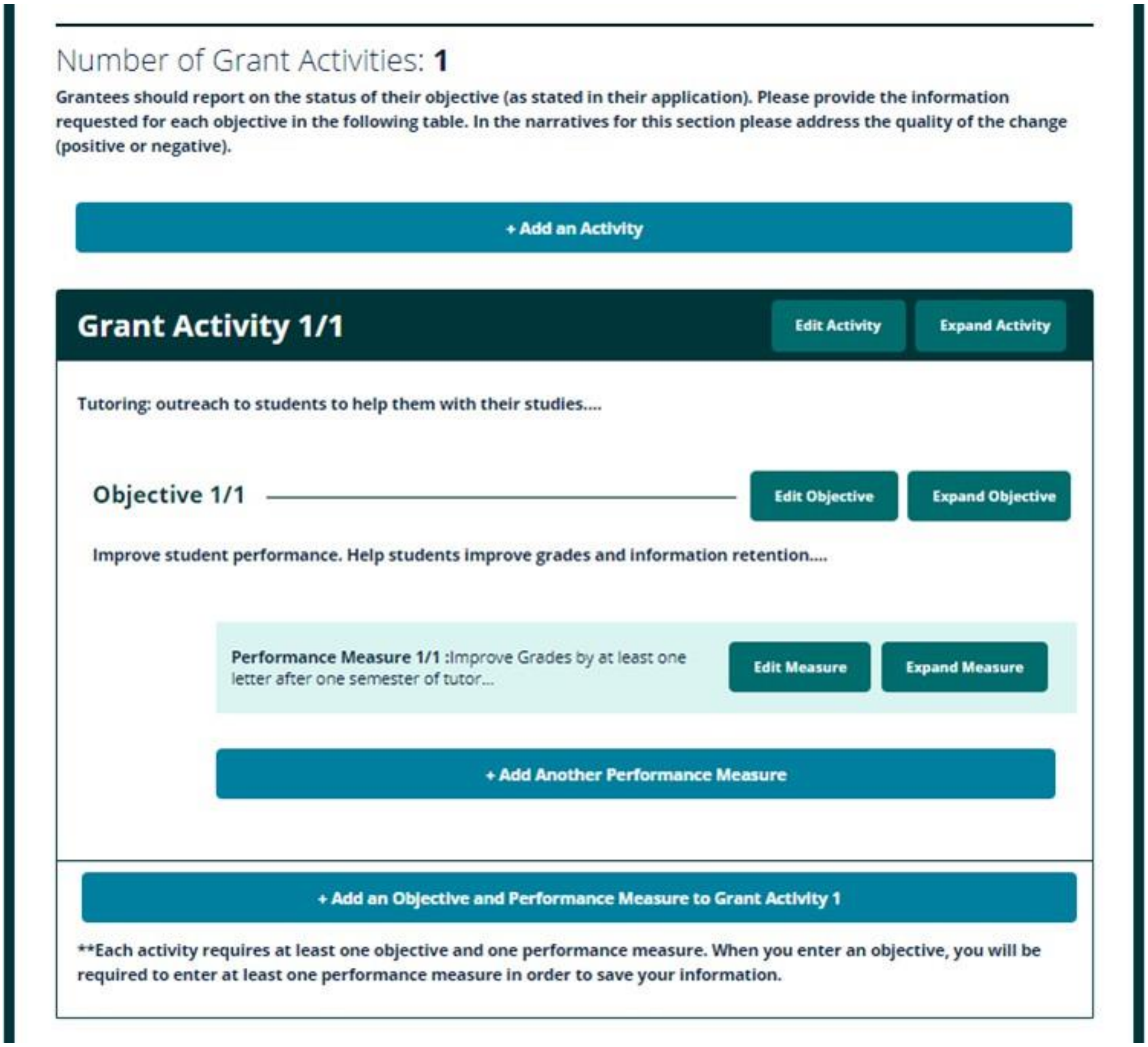


OBJECTIVE: There are only two fields in this part. Enter both the NAME and a DESCRIPTION into the Objective Description field, then select the appropriate Objective Status from the drop down.



PERFORMANCE MEASURE: Enter both the NAME and a DESCRIPTION into the Performance Measure Description field. Then fill out the remaining fields.

Click the **Save** button at the bottom of the page to save your work. Once Grant Activities, Objectives, and Performance Measure are saved, they will be displayed in a collapsed manner as shown on the next page.



Now that you have saved your first "family" of fields created (Grant Activity / Objective / Performance Measure), it will look like the page you see above. As you add more Grant Activities, this will become a very large page. For convenience, we display the data for you in a collapsed manner as seen above.

This view has three important sets of buttons: **Add, Edit,** and **Expand**. They appear in multiple places, giving you the ability to add, edit, or expand (view) exactly what you need.

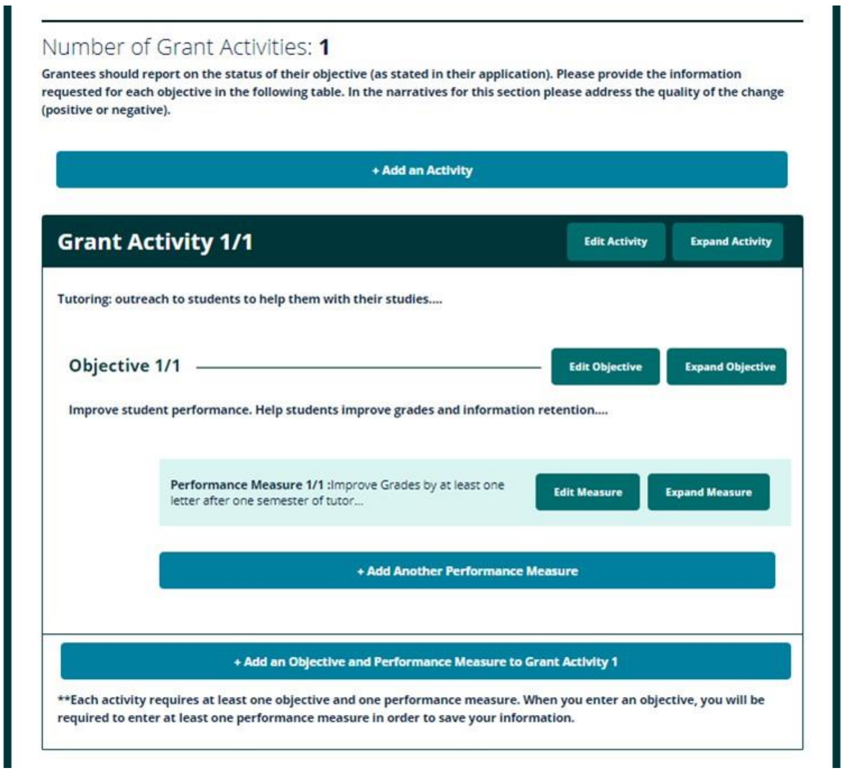
> **NOTE:** Returning users - your screen will start off looking more like the one on this page than the one on page 23! You may Add or Edit your Activities and Objectives, but you **MUST** re-enter all of your Performance Measures from scratch.

ADD: Let's start with the Add buttons.

Note where each of the ADD buttons are. To add another Grant Activity, go to the *top* of the page. This will allow you to create a new "family" of fields (Grant Activity / Objective / Performance Measure)

To add another Objective (child), look for the "Add an Objective and Performance Measure…" button nested under the appropriate Grant Activity (parent).

To add another Performance Measure (grandchild), look for the "Add Another Performance Measure" button nested under the appropriate Objective (child) and Grant Activity (parent).



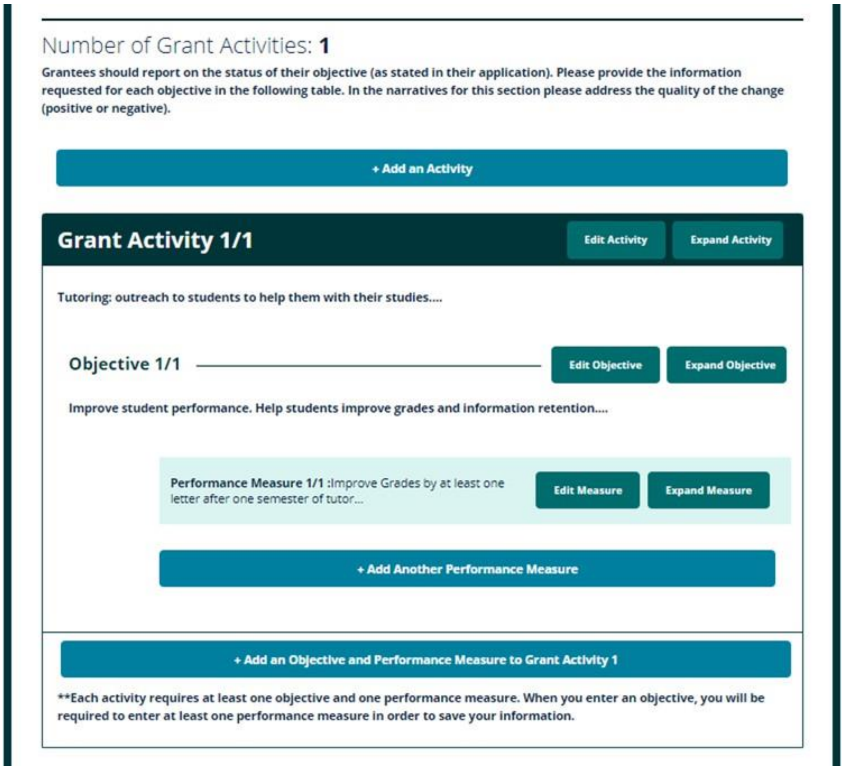
< Add a new Grant Activity

< Add another Performance Measure *to this Objective*

< Add another Objective and Performance Measure *to this Grant Activity*

EXPAND: Now let's move on to the Expand buttons. Click on an Expand button to view all of the data you entered, not just the abbreviated version.

Note where each of the EXPAND buttons are. To view an Activity, an Objective, or a Performance Measure, click the Expand button next to the appropriate element.



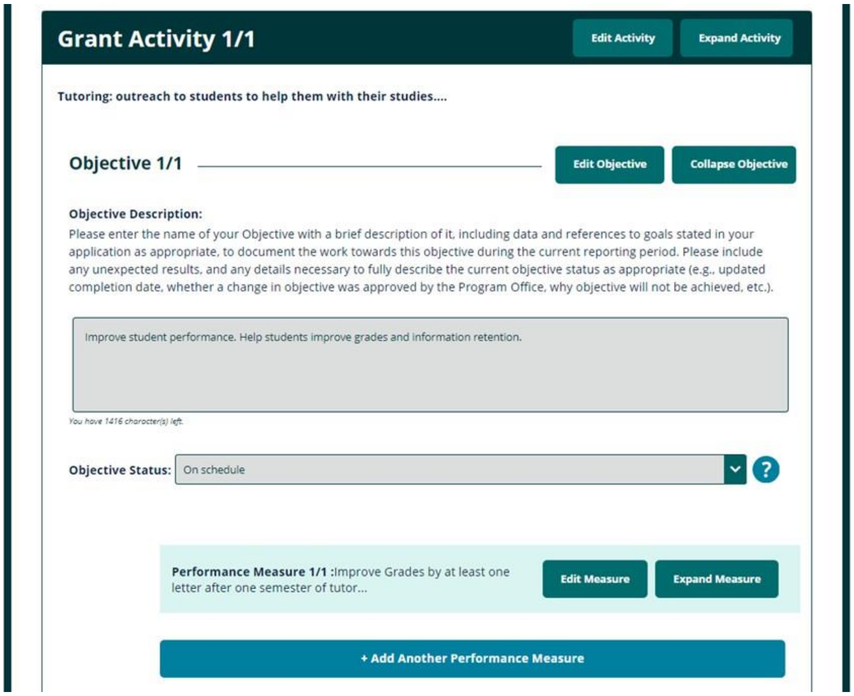
< Expand Grant Activity to view its details

< Expand this Objective to view its details

< Expand this Performance Measure to view its details

When you expand an element, the Expand button changes to a Collapse button. Click the Collapse button to hide the fields that you just expanded.

When a field is “greyed out” it means it’s not editable.

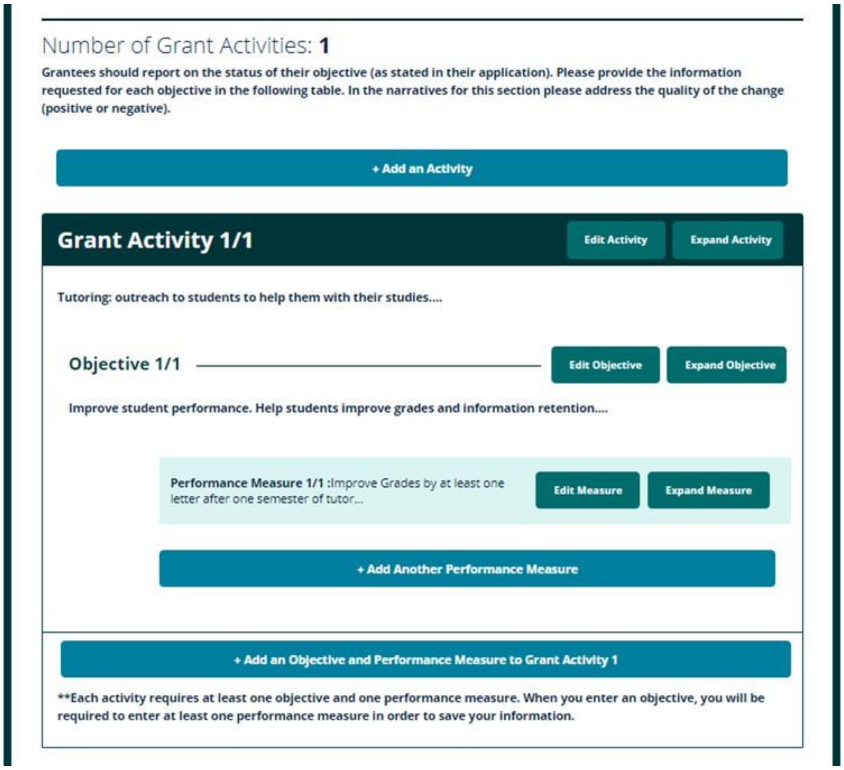


< The Expand button has now changed to a Collapse button.

< Greyed Out fields are not editable. Click the Edit button to enter Edit mode.

EDIT: Now let’s move on to the Edit buttons.

Note where each of the EDIT buttons are. To edit a particular Activity, Objective, or Performance Measure, click the Edit button in line with and next to the appropriate element (i.e., Grant Activity, Objective, or Performance Measure). You may only edit one element at a time.



< Edit this Grant Activity

< Edit this Objective

< Edit this Performance Measure

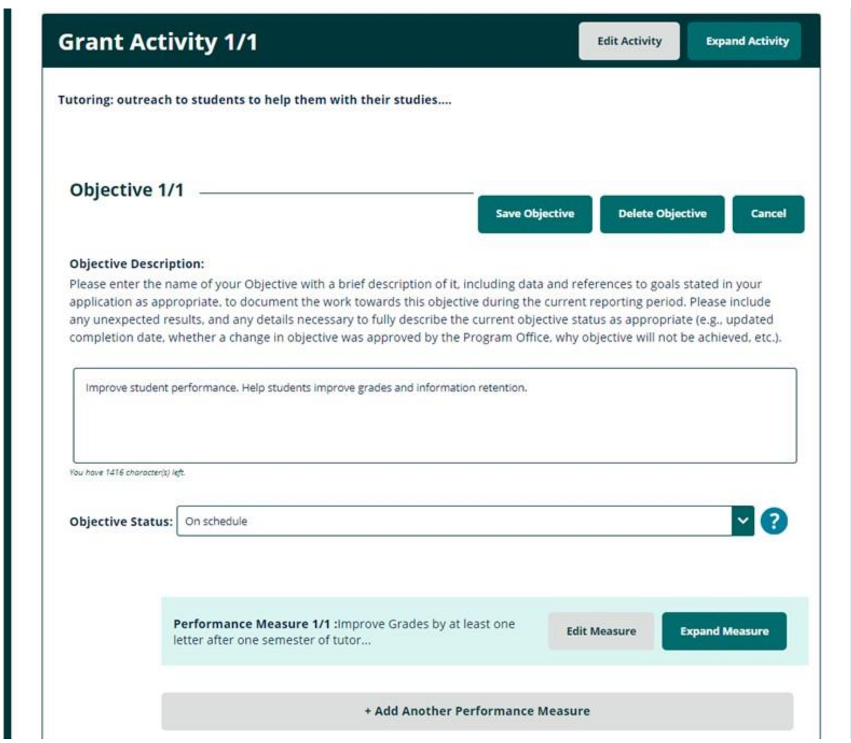
EDIT MODE: When you enter Edit mode, the buttons change once again.

1. Click the Save button to save your changes.
2. Click the Cancel button to back out and not save any of your changes.
3. Click the Delete button to delete this element from your report.

BE CAREFUL !

There is no Undo feature and there is no Recycle bin. Once you delete something from your APR, it's gone for good. Even the Help Desk cannot get it back for you.

When you click a Delete button you will be asked, "Are you sure?" and you will have to Confirm every deletion request. It will be difficult to delete something by accident.



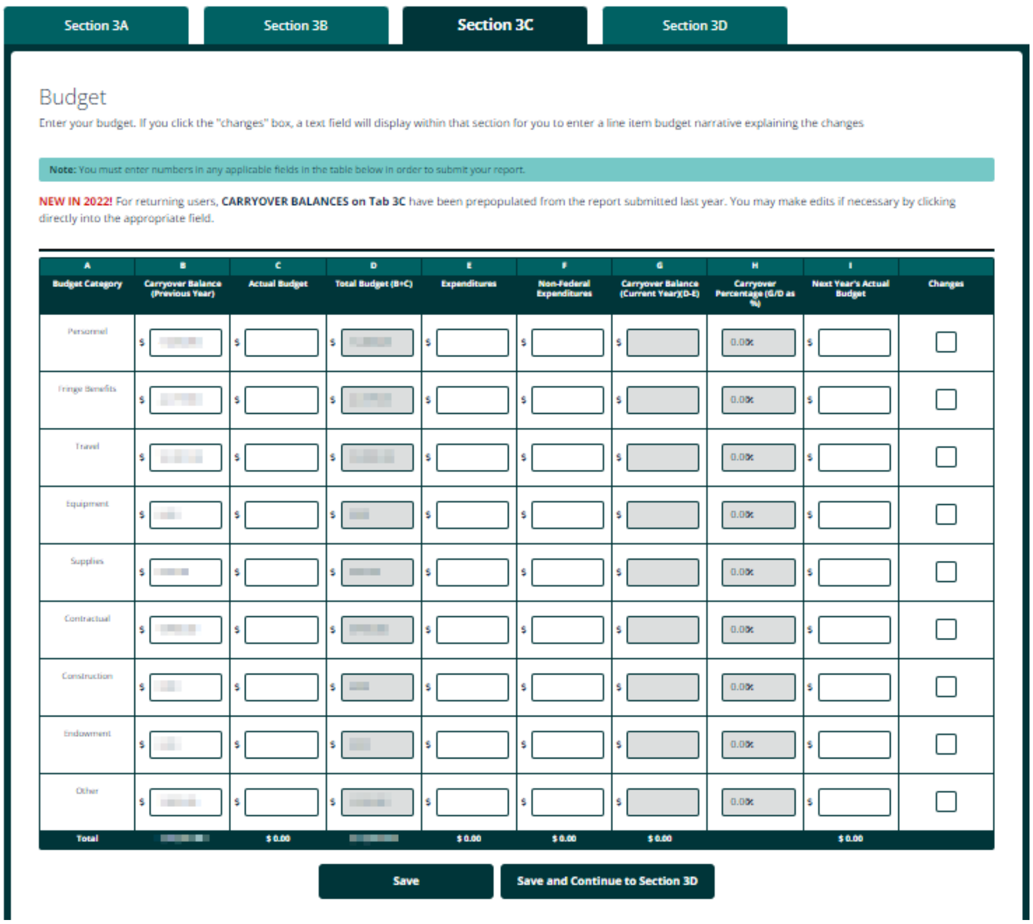
< Save, Delete, and Cancel buttons

< Since it's not greyed out, you may now Edit this Objective

C. Tab 3C: Budget

On Tab 3C you'll provide detailed information about your budget.

For returning users, **CARRYOVER BALANCES on Tab 3C** have been pre-populated from the report submitted last year. You may make edits if necessary by clicking directly into the appropriate field.



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.

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.

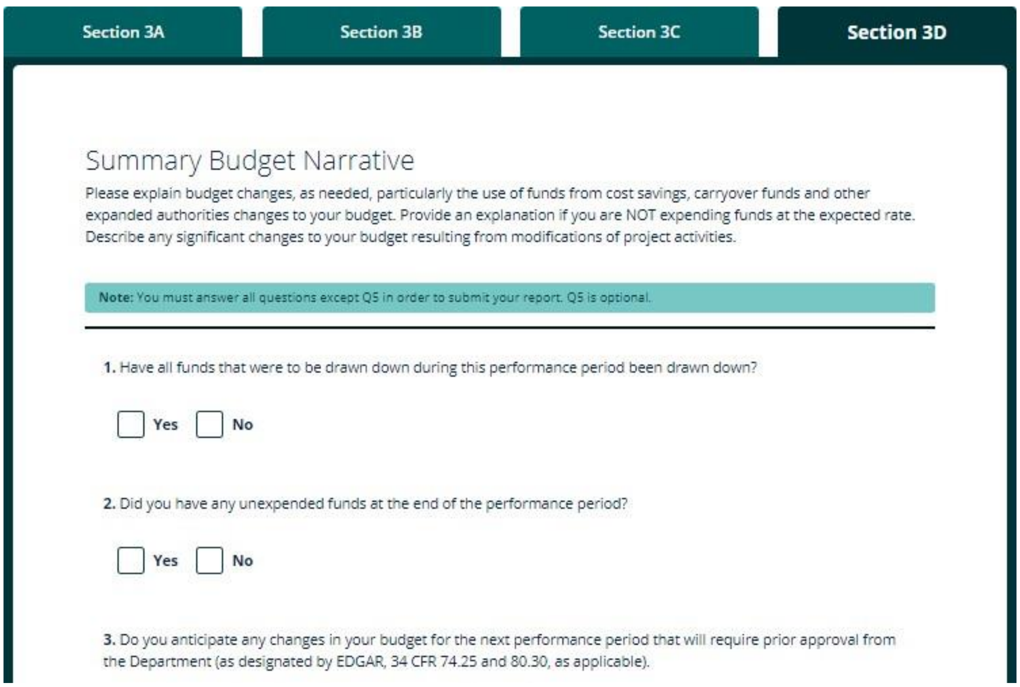
Automatic calculations: in addition to the three columns containing automatic calculations that are noted above, every column will be automatically totaled in the last row of the budget table.

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.

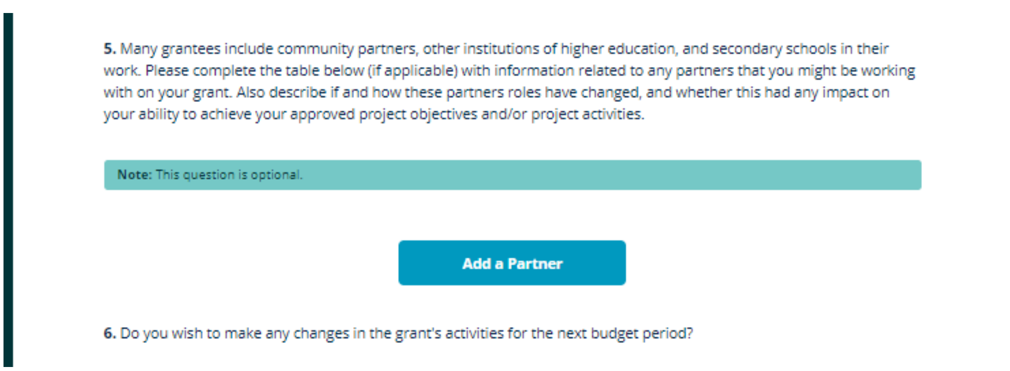
Click **Save** at the bottom of the page to save your work and remain on this page, or click **Save and Continue** to save your work and proceed to the next tab.

D. Tab 3D: Summary Budget Narrative

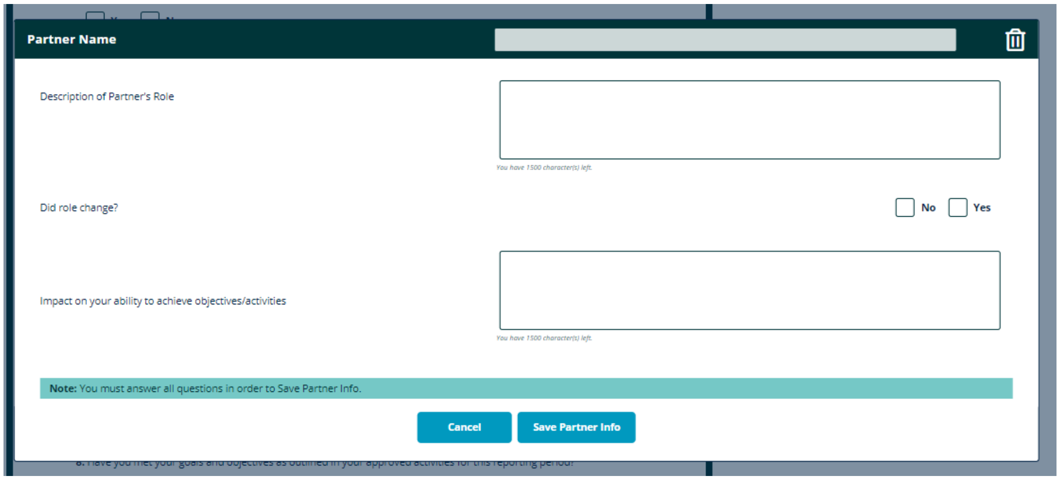
Tab 3D gives you the opportunity to describe any departures from the approved budget or changes to your proposed budget for the next fiscal year.



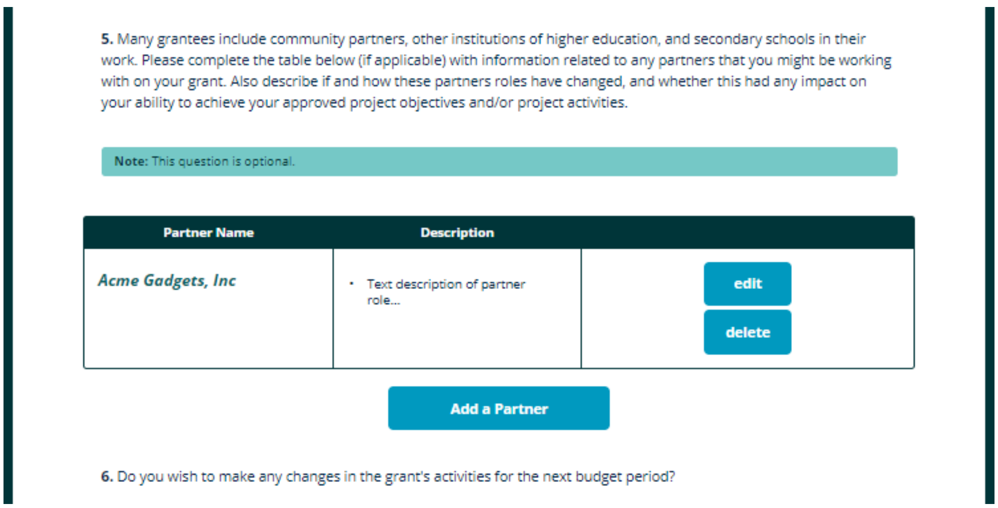
Question 5 on Tab 3D is one of the Optional questions on the report, regarding community partners.



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.



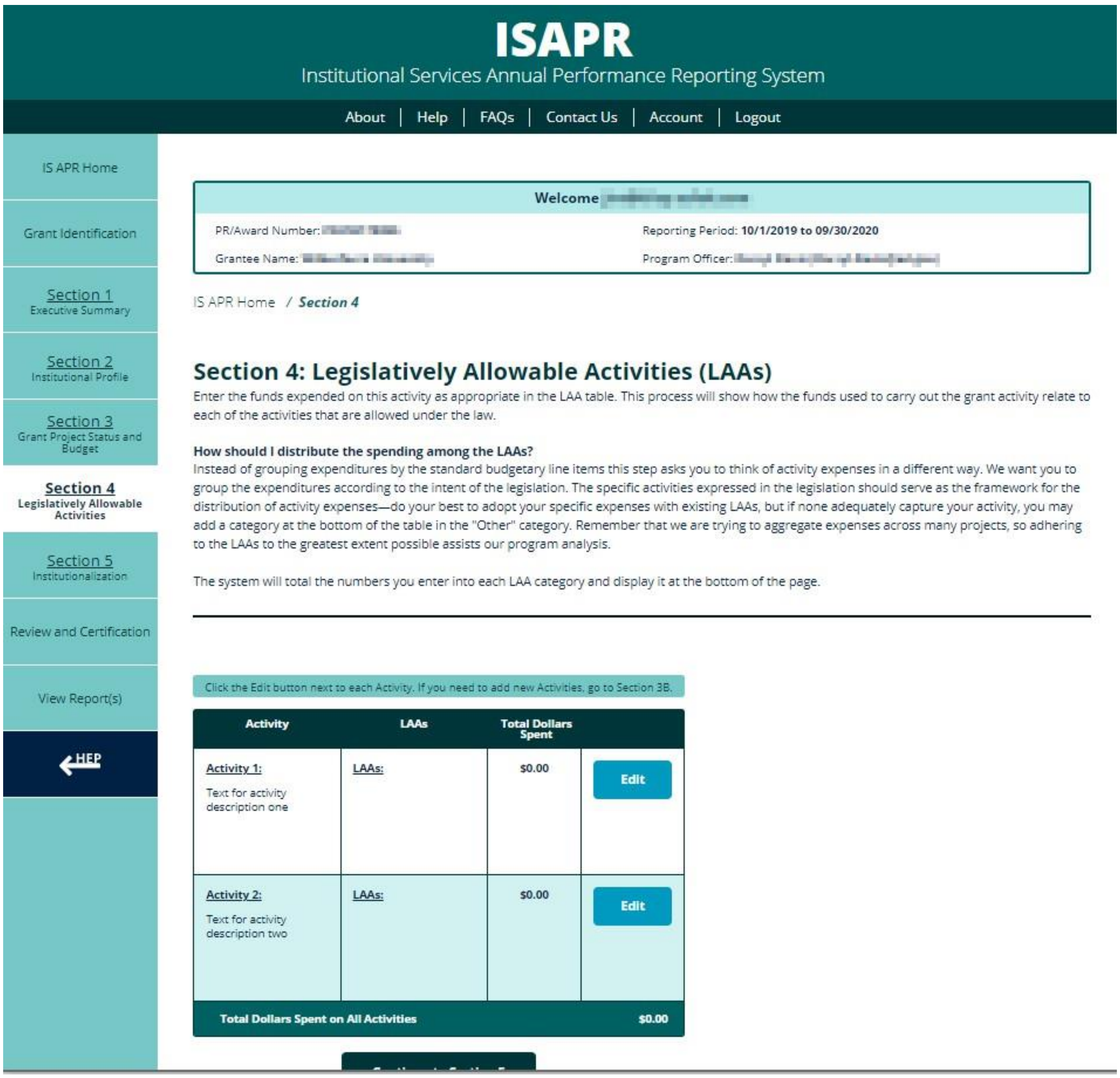
To Edit or Delete a partner click the corresponding button on the appropriate row. To add additional partners click the Add a Partner button again.

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 IS grant 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.



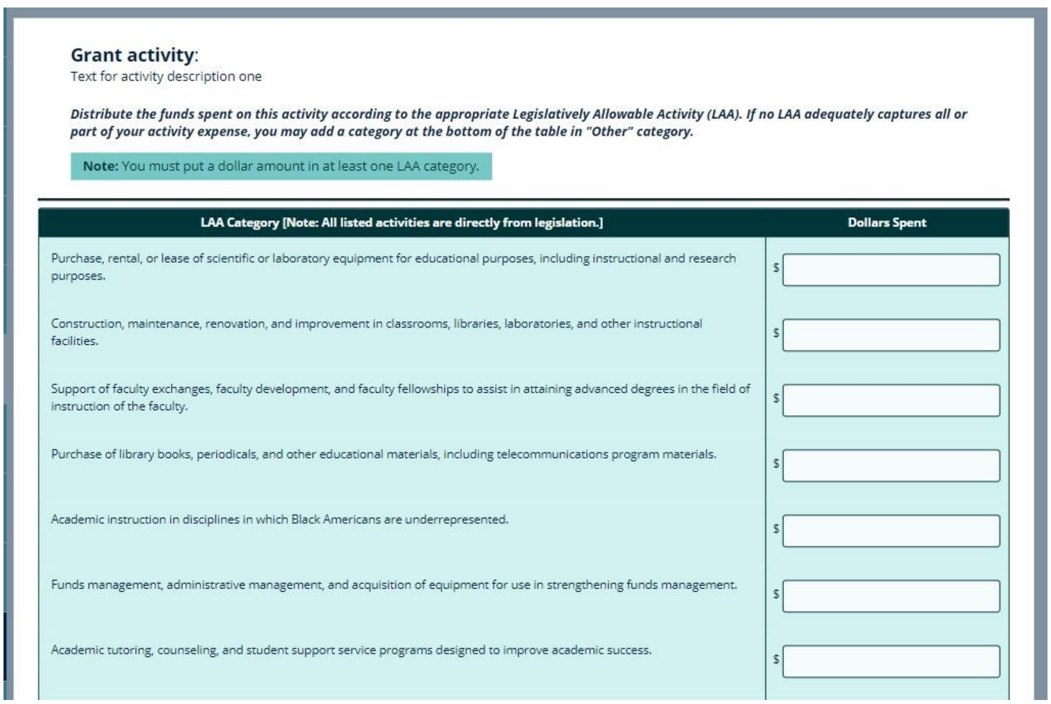
The text you entered on Tab 3B will appear on this page in the “Activity” column. Click the Edit button on the corresponding row to begin assigning funds to specific LAAs under that specific activity.

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

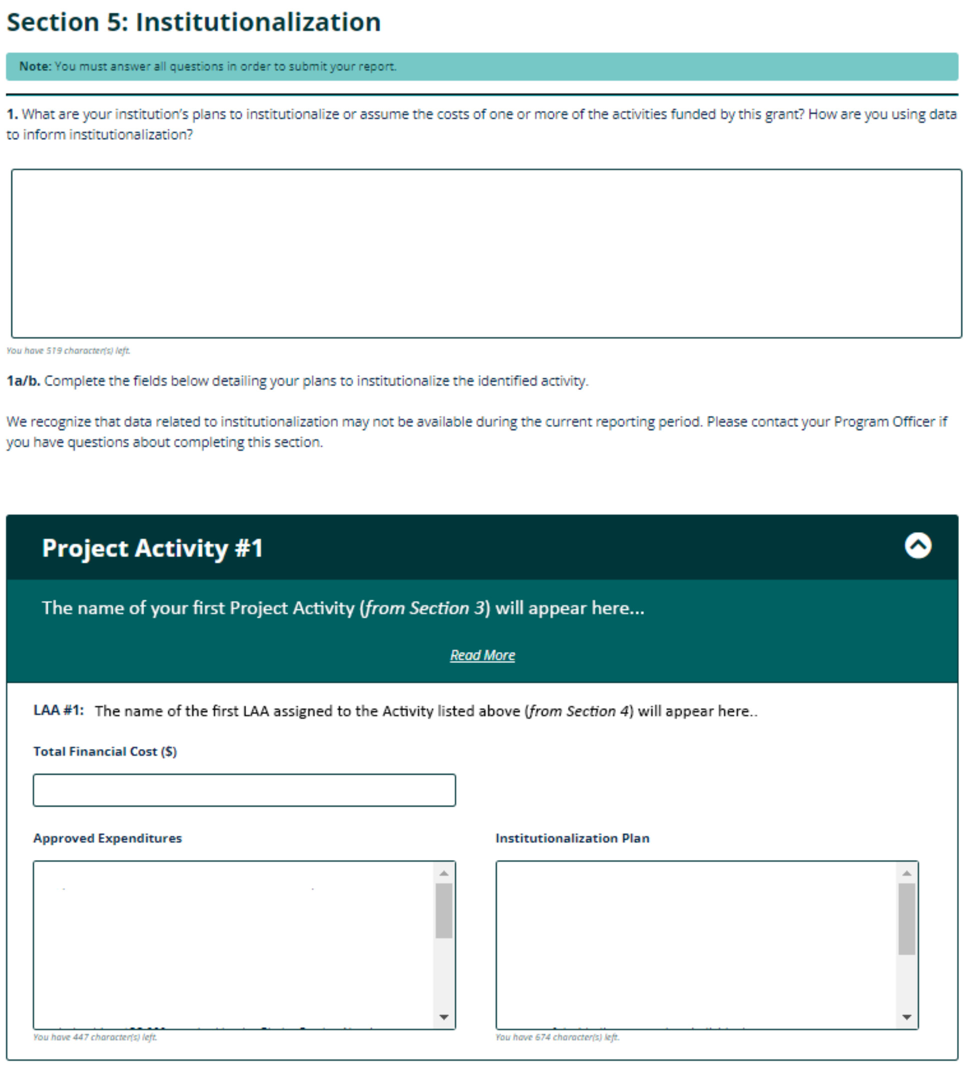
After you've finished entering LAA expenditures for each of your activities, the total dollars you spent on each activity will be totaled on each row, and the total dollars spent on all activities will be displayed in the bottom row.

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

X. Section 5: Institutionalization

All grants must complete Section 5, which addresses your plans to institutionalize, or to assume the costs incurred from the projects and activities created from this grant. The goal is for continuity in the work begun by this grant and work performed after the grant period ends.

You must enter your **Activities in Section 3** before you can begin working on Section 5. You must also enter your **LAAs in Section 4** before you can begin working on Section 5.



Answer all questions for each Activity. If you need to add more Activities, return to Tab 3B in Section 3 and also add LAAs to them in Section 4 before returning to Section 5.

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 6: Final Performance Report

Every performance reporting period covers a time span from October 1 of one year through September 30 of the next. That performance period is reported on in spring of the *following* year.

For example, the performance period of October 1, 2022 through September 30, 2023, is reported on in spring of 2024. That's the first reporting window after the completion of the performance period in question.

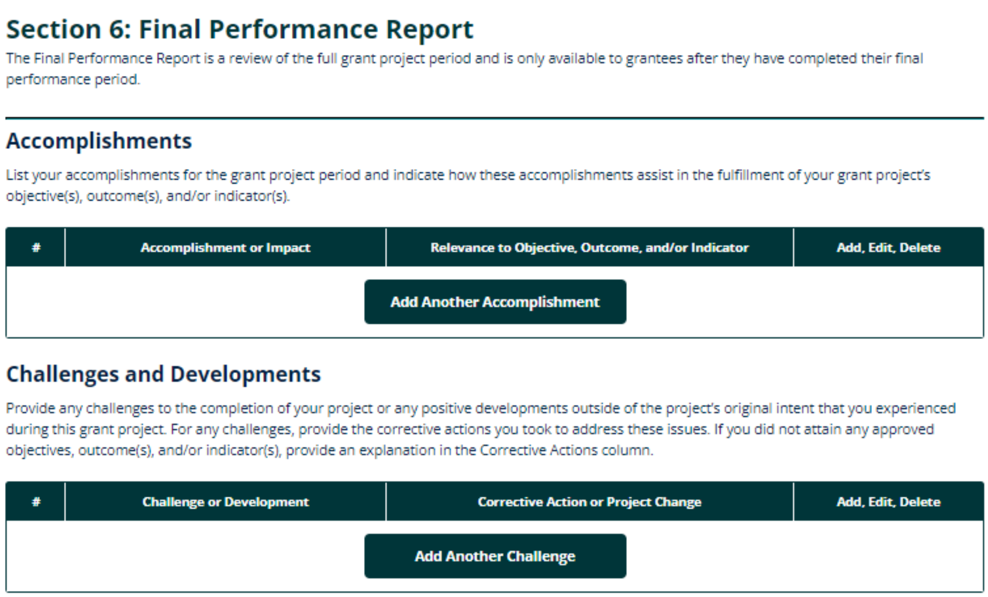
To anticipate when your Final Performance Report (FPR) will be due, take a look at your Grant End Date. If your grant ends on September 30 of 2023, then your FPR will be due in spring of 2024.

If, however, your grant ends on January 31 of 2024, you will not submit your FPR in the spring of 2024. Your FPR will be due in spring of 2025. This is because your grant activites did not end by September 30, 2023. Since grant activities occurred during the time span between October 1, 2023 and September 30, 2024, you'll need to report on those activities in spring of 2025.

Please contact your Program Specialist or the Help Desk if you have questions about the final performance reporting window.

The system will know when it's time for your Final Performance Report to be submitted. Upon login you'll see Section 6 near the bottom of the left-hand navigation menu.

The questions will ask you to reflect on your project's accomplishments, challenges, expenditures, and lessons learned. When it comes time for you to submit your Final Performance Report, all questions in Section 6 are required in order to submit your report.



Award Funding and Expenditures

Original Amount Awarded	Supplement Amount Awarded (if any)	Federal Funds Expended	Unexpended Federal Funds ($)	Unexpended Federal Funds (%)
$ 0.00	$ 0.00	$ 0.00	$ 0.00	0.00 %

Evidence

1. What results were achieved, if any, that are specifically associated with your grant project's implementation of the evidence-based component(s) that were submitted?

2. Did the results lead to achieving the relevant outcome(s) during the grant project period?

☐ Yes ☐ No

Project Reflections

3. Provide recommendations or advice that others may use to improve their performance in implementing similar projects.

4. Based on your grant implementation efforts, how is the project changing institutional practices (e.g., at the classroom or institutional level)?

5. What specific actions have you taken to sustain or institutionalize any positive impacts from this project?

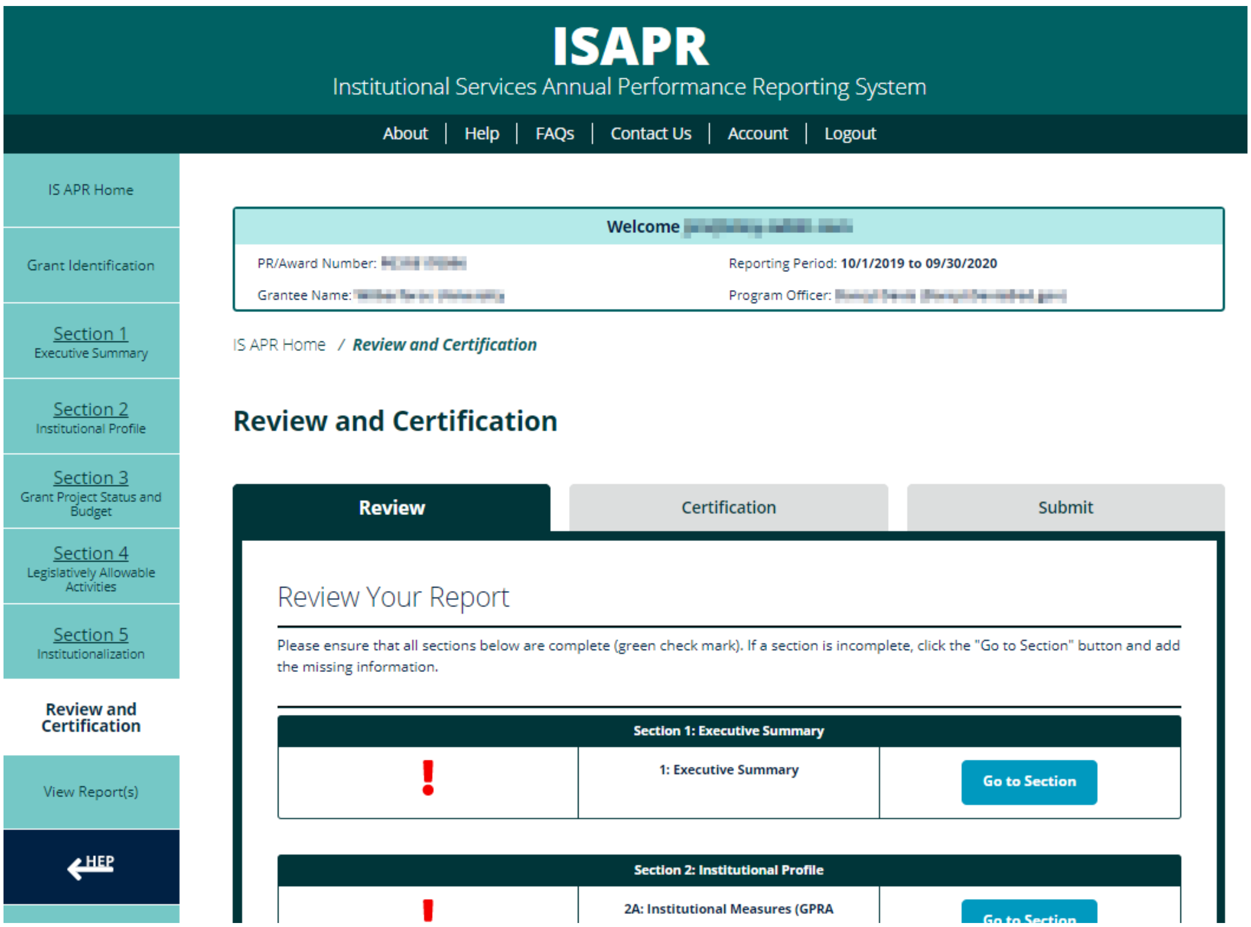
6. Do you have any other thoughts that you would like to share regarding your grant project?

Save | Save and Continue

XII. Review and Certification

The Review and Certification Section serves three tasks:

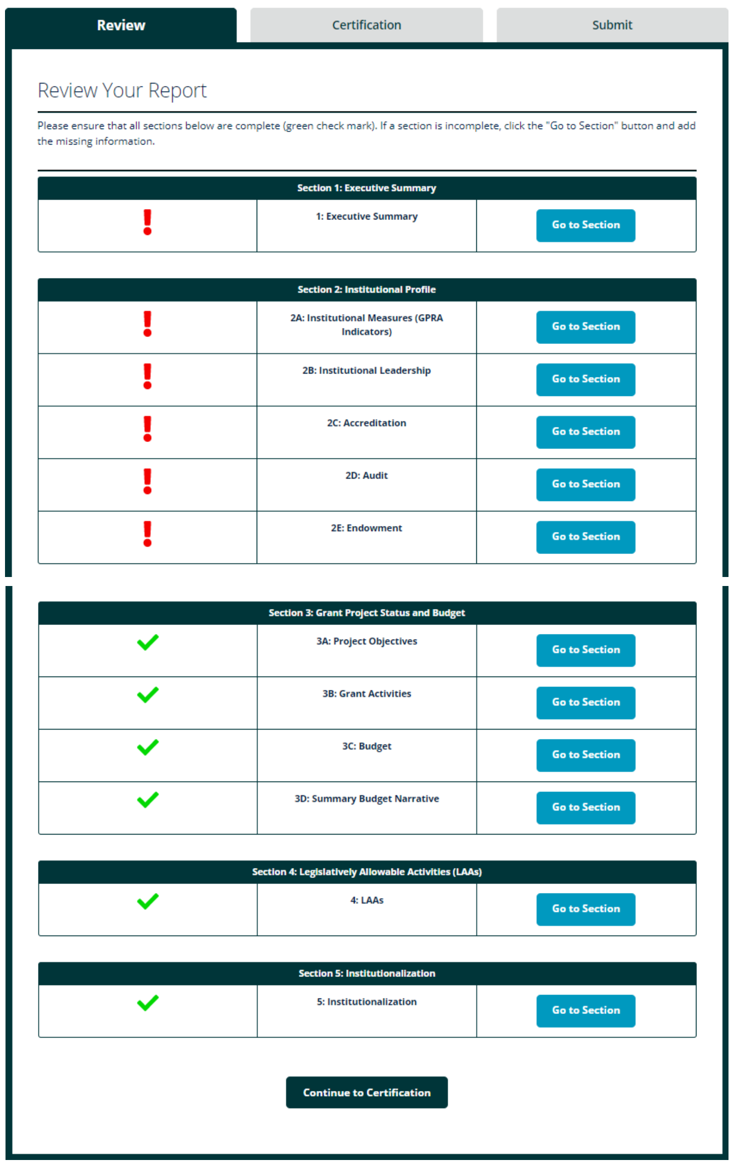
1. **Review:** Check your APR for completeness and verify that all questions on the report have been answered
2. **Certification:** Certify that all information on the report is true and correct to the best of your knowledge
3. **Submit:** Send your report to the Department.



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.

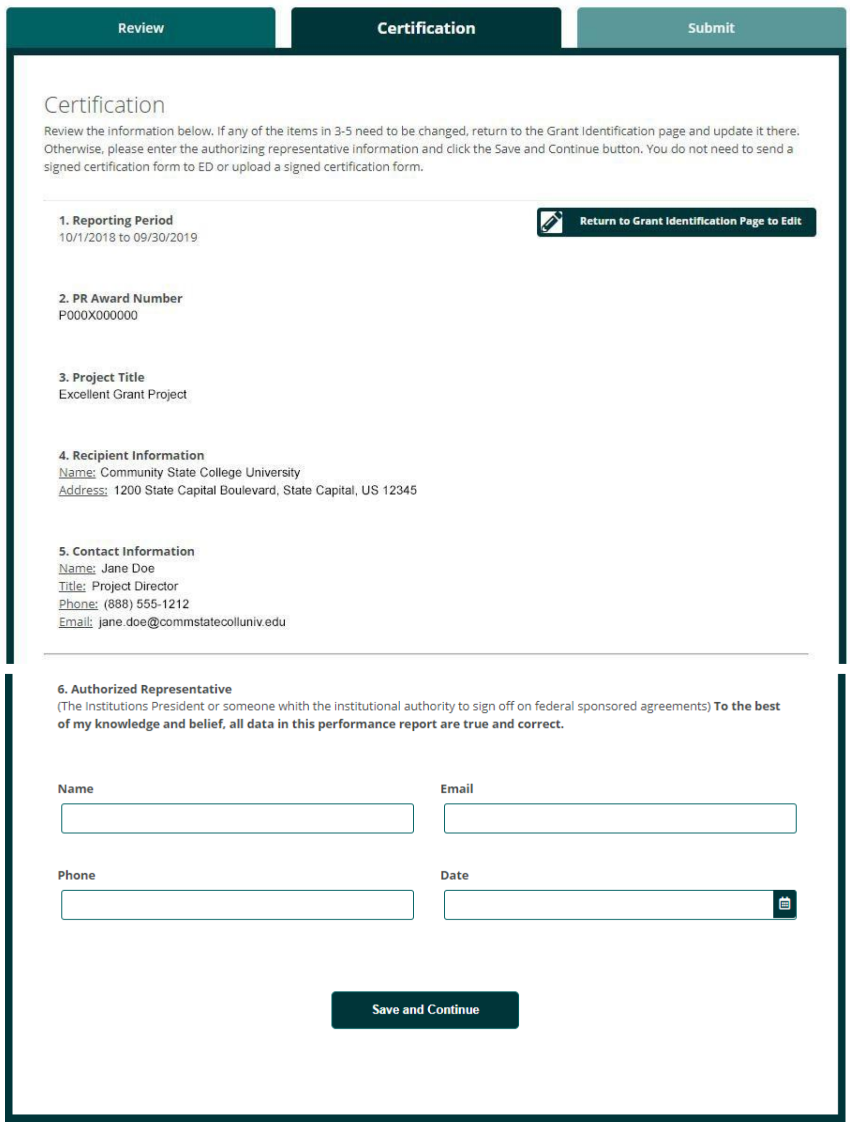


When all sections are marked complete, you will be able to click Continue to go to the Certification tab.

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.

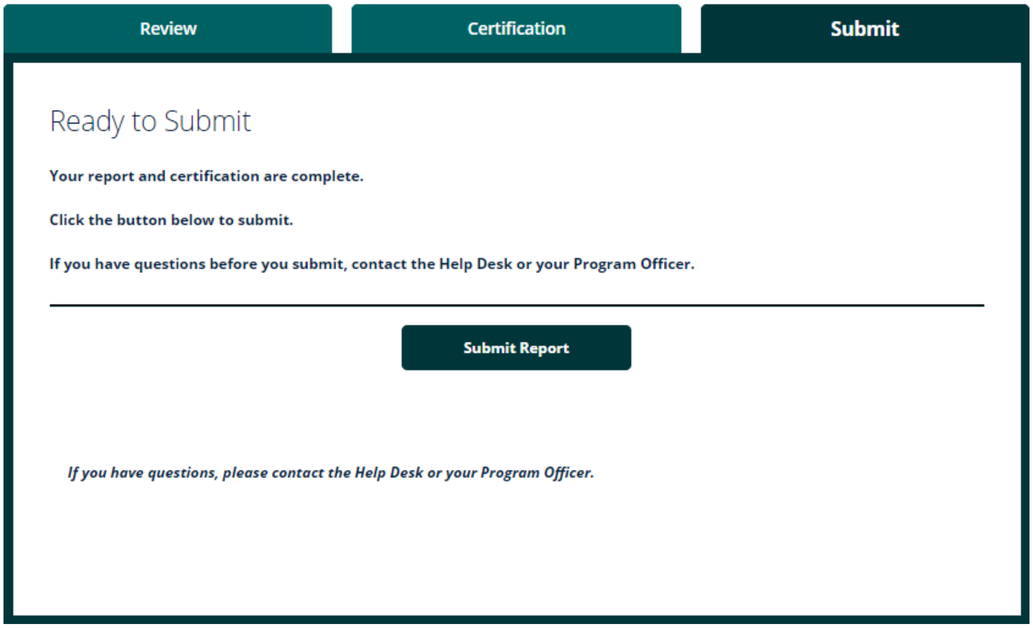
First verify that the information at the top of the tab is correct. If any changes need to be made, either click the **Return to Grant Identification Page to Edit** button, or click the Grant Identification option at the top of the left hand menu.



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.

XIII. 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.

Appendix A: Logging into HEPIS with Login.gov

The Federal Government has transitioned to a new Single Sign-On (SSO) login and Multifactor Authentication (MFA) process that is managed by the Login.gov service. With one username and password, you will be able to access multiple Federal websites.

To use the HEPIS system, you will need:

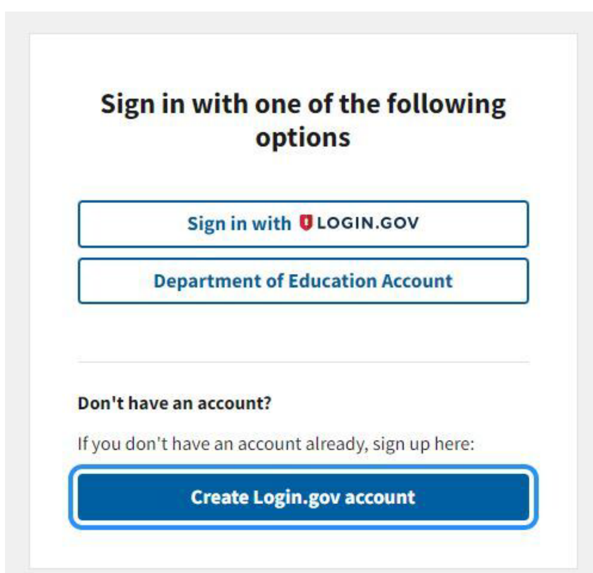
A. an account in HEPIS, *and*
B. an account in Login.gov using the ***same email address*** as your account in HEPIS.

Quick Links

Do you have a HEPIS account, but do not have a Login.gov account?
Do you have both a HEPIS account and a Login.gov account?
Do you need to create a new HEPIS account?
Do you need further assistance?

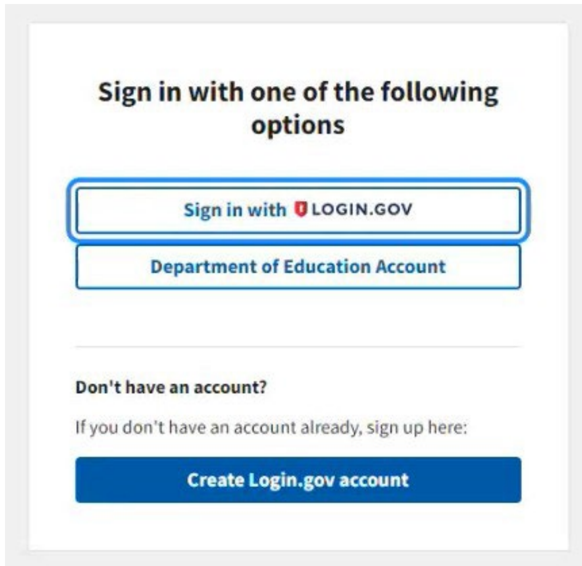
Do you have (A) a HEPIS system account, but do not have (B) a Login.gov account?

1. Go to the HEPIS system home page (https://hepis.ed.gov)
2. Click the "Login" button. You will be taken to the Login.gov website.
3. Click the "Create Login.gov account" button (*see image below*).
4. Follow the prompts to create your Login.gov account. **You must use the same email address for Login.gov that you use in HEPIS. If the emails do not match, you WILL NOT be able to access HEPIS**. ***Find detailed Login.gov instructions in the External Users Login.gov Guide***.
5. Once your Login.gov account is set up, you will be able to log in to HEPIS.



Do you have both (A) a HEPIS system account and (B) a Login.gov account?

1. The email address you use in Login.gov MUST match the address we have on file for you in HEPIS (i.e., your .edu work email).
2. Go to the HEPIS home page (https://hepis.ed.gov).
3. Click the "Login" button. You will be taken to a partner site called Login.gov.
4. Click the "Sign in with Login.gov" button and enter your username and password (*see image below*).



Do you need to create a new HEPIS account?

1. Click the Request Account link on the home page.
2. Fill out the form. Help Desk will create an account for you and send you an email with further instructions for creating your Login.gov account and logging in for the first time.

Do you need further assistance?

If you need further assistance, please reach out to the HEPIS Help Desk at the address below. (Note: this is a new email address, but the old address still works. Please consider adding this address to your Safe Senders list.)

- HEP IS: hepis@helpdesk.thetactilegroup.com