

HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

ANNUAL PERFORMANCE REPORT USER GUIDE



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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/itudes/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.

HEP IS
Higher Education Programs: Institutional Service

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

Welcome to the HEPIS Web Portal

- GEA Grant Eligibility Application
- IS APR Titles III & V Annual Performance Reporting System
- EFRS Endowment Financial Reporting System
- FIPSE Reporting System

System Status and Important Dates

Open Grant Eligibility Application system
Open 01/22/2024 to 02/27/2024

Closed Title III/IV Annual Performance Reporting system
Open from TBA

Closed Title III/IV Interim Reporting system
(first year grantees only)
Open 04/01/2024 to 05/03/2024

Open Endowment Financial Reporting System
Open from 7/24/2020 to TBD

Closed Fund for Improvement of Postsecondary Education
Open from TBA

Returning User? Login Below.

[Login](#)


New to HEP IS? [Request Account.](#)

[Login Instructions](#)

Find blank forms and guides
[Download blank forms and user guides for HEP IS systems.](#)

Search the FIPSE Public Website
[Click here to view information regarding Fipse grant information](#)

About HEP IS
Privacy Policy



Contact Us

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

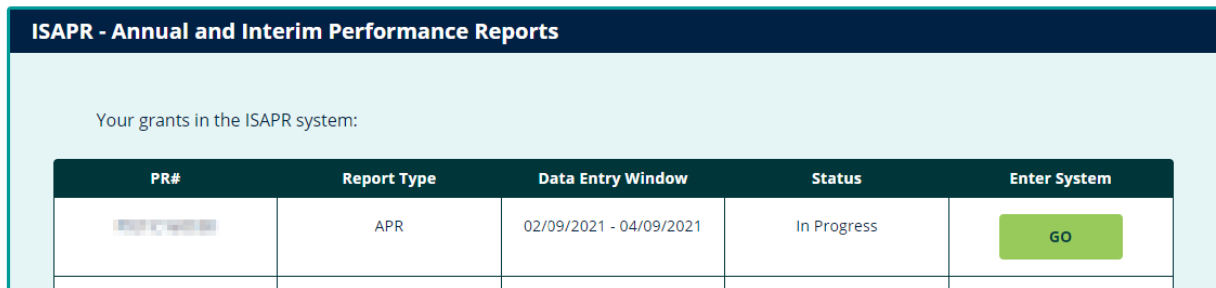
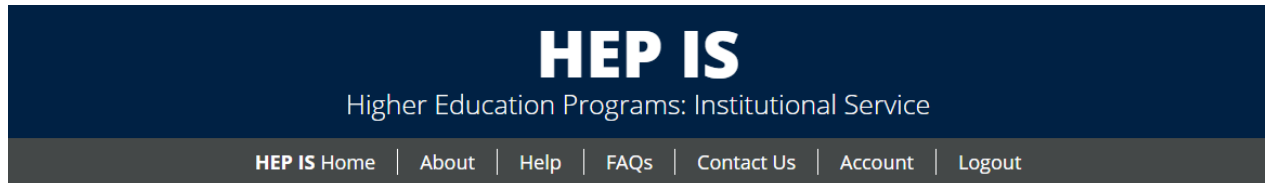
A. Logging In

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.

The screenshot shows the IS APR Home Page. At the top, there is a dark teal header with the text "ISAPR Institutional Services Annual Performance Reporting System" and a navigation bar with links for "About", "Help", "FAQs", "Contact Us", "Account", and "Logout". Below the header, the page is divided into a left sidebar and a main content area. The sidebar contains a "IS APR Home" section and a list of navigation options: "Grant Identification", "Section 1 Executive Summary", "Section 2 Institutional Profile", "Section 3 Grant Project Status and Budget", "Section 4 Legislatively Allowable Activities", "Section 5 Institutionalization", "Review and Certification", and "View Report(s)". A dark blue button with a white arrow and the text "HELP" is located at the bottom of the sidebar. The main content area features a "Welcome" message with a blurred name, a "PR/Award Number" and "Reporting Period: 10/1/2019 to 09/30/2020", and a "Grantee Name" and "Program Officer" (blurred). Below this is the "Director's Letter" section, which begins with "Dear Project Director:" and contains several paragraphs of text regarding the reporting process, including instructions for grantee updates and the purpose of the data collection.

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.

ISAPR
Institutional Services Annual Performance Reporting System

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

IS APR Home

Grant Identification

Section 1
Executive Summary

Section 2
Institutional Profile

Section 3
Grant Project Status and Budget

Section 4
Legislatively Allowable Activities

Section 5
Institutionalization

Review and Certification

View Report(s)

← HELP

Welcome [User Name]

PR/Award Number: [Pre-populated] Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [Pre-populated] Program Officer: [Pre-populated]

IS APR Home / **Grant Identification**

Grant Identification

Please verify the information below and click the 'Save and Continue' button to begin your 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: [Pre-populated] Program: [Pre-populated]

Unit ID: [Pre-populated]

Grantee Name (Institution Name):
[Pre-populated]

Address 1:
[Pre-populated]

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.

The screenshot displays the ISAPR (Institutional Services Annual Performance Reporting System) interface. At the top, the header includes the ISAPR logo and the text 'Institutional Services Annual Performance Reporting System'. Below the header is a navigation bar with links for 'About', 'Help', 'FAQs', 'Contact Us', 'Account', and 'Logout'. On the left side, there is a vertical menu with options: 'IS APR Home', 'Grant Identification', 'Section 1 Executive Summary', 'Section 2 Institutional Profile' (highlighted), 'Section 3 Grant Project Status and Budget', 'Section 4 Legislatively Allowable Activities', 'Section 5 Institutionalization', 'Review and Certification', 'View Report(s)', and a 'HEP' button with a left-pointing arrow.

The main content area shows a 'Welcome' message for 'University of Wisconsin'. Below this, a box displays the following information: PR/Award Number: **HEP 101 1000**, Reporting Period: **10/1/2019 to 09/30/2020**, Grantee Name: **University of Wisconsin**, and Program Officer: **David Pate/David Pate@uw.edu**. Below this box, the breadcrumb 'IS APR Home / Section 2' is visible.

Section 2: Institutional Profile

Institutional Measures (GPRA indicators):
The Government Performance and Results Act of 1993 (GPRA) is a statute that requires all Federal agencies to manage their endeavors and corresponding results. Each agency states what it intends to accomplish, identifies the resources required, and periodically reports its progress to Congress. It is expected GPRA indicators will contribute to improvements in accountability for the expenditures of public funds, improve congressional decision-making through more objective information on the effectiveness of Federal programs, and promote a new government focus on results, service delivery, and customer satisfaction. As of 2017, the GPRA indicators for Title III, Title V, and Title VII grants within the Higher Education Act (HEA) are (1) Enrollment, (2) Retention, (3) Graduation, and (4) Fiscal Stability.

Below the text, there is a horizontal navigation bar with five tabs: 'Section 2A', 'Section 2B', 'Section 2C', 'Section 2D', and 'Section 2E'. The 'Section 2A' tab is currently selected.

Institutional Measures (GPRA Indicators)

Complete the following table up through the current Reporting Period. Your "Total Fall Enrollment" and "Fall to Fall Retention %" should come from the Fall Census Data.

Note: You must complete the table up through the current Reporting Period in order to submit your report.

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.

Section 2A
Section 2B
Section 2C
Section 2D
Section 2E

Institutional Measures (GPRA Indicators)

Complete the following table up through the current Reporting Period. Your "Total Fall Enrollment" and "Fall to Fall Retention %" should come from the Fall Census Data.

Note: You must complete the table up through the current Reporting Period in order to submit your report.

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	<input type="text" value="7,715"/>	<input type="text" value="7,979"/>	<input type="text" value="8,383"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fall-to-Fall Retention %	<input type="text" value="47"/>	<input type="text" value="47"/>	<input type="text" value="47"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2-Year Graduation Rate (2-Year)	<input type="text" value="37"/>	<input type="text" value="36"/>	<input type="text" value="42"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4-Year Graduation Rate (2- & 4-Year)	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save
Save and Continue to Section 2B

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.

The screenshot shows a web interface for 'Section 2B: Institutional Leadership'. At the top, there are five tabs: 'Section 2A', 'Section 2B' (which is active and highlighted in dark teal), 'Section 2C', 'Section 2D', and 'Section 2E'. Below the tabs, the title 'Institutional Leadership' is displayed. A teal note bar states: 'Note: You must answer all questions in order to submit your report.' Below this, there are two questions, each with 'Yes' and 'No' radio button options:

1. Have there been changes in institutional leadership (presidents, vice-presidents, provosts, etc.) or in the Grant Leadership (project director, activity director, etc.)?
 Yes No
2. Have there been changes in grant leadership (project director, activity director, etc.)?
 Yes No

At the bottom of the form, there are two buttons: 'Save' and 'Save and Continue to Section 2C'.

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.

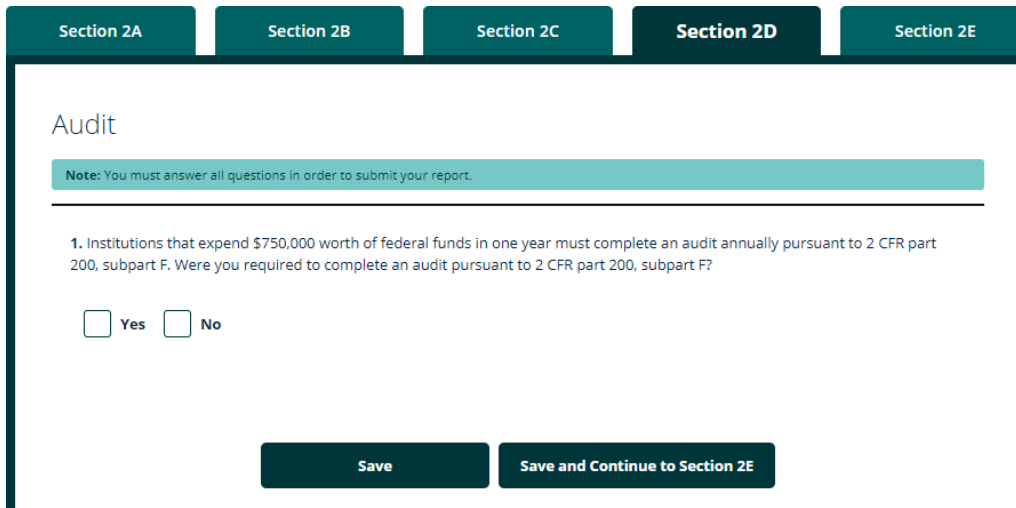
The screenshot shows a web-based form interface with five tabs at the top: Section 2A, Section 2B, Section 2C (which is highlighted), Section 2D, and Section 2E. The main content area is titled "Accreditation" and contains a teal note box that reads "Note: You must answer all questions in order to submit your report." Below the note is a question: "1. Which is your institution's primary accrediting agency? [Please check only one]". There are five radio button options listed vertically: "Middle States Commission on Higher Education", "New England Association of Schools and Colleges, Commission on Institutions of Higher Education", "The Higher Learning Commission of the North Central Association of Colleges and Schools", "Northwest Commission on Colleges and Universities", and "Southern Association of Colleges and Schools, Commission on Colleges".

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.



The screenshot shows a web application interface with a navigation bar at the top containing five tabs: Section 2A, Section 2B, Section 2C, Section 2D (which is highlighted in dark teal), and Section 2E. Below the navigation bar, the main content area is titled "Audit". A teal-colored note box states: "Note: You must answer all questions in order to submit your report." Below the note, a question is displayed: "1. Institutions that expend \$750,000 worth of federal funds in one year must complete an audit annually pursuant to 2 CFR part 200, subpart F. Were you required to complete an audit pursuant to 2 CFR part 200, subpart F?". Below the question are two radio button options: "Yes" and "No". At the bottom of the form, there are two buttons: "Save" and "Save and Continue to Section 2E".

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.

Section 2A Section 2B Section 2C Section 2D **Section 2E**

Endowment

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

1. Do you have an Endowment Challenge Grant that has not matured?

Yes No

2. Are grant funds from this award being used for an endowment activity?

Yes No

3. Do you have an endowment activity on a previous award not matured?

Yes No

If yes to any of the above questions, you will be required to complete the FY 20XX Endowment Financial Report (OMB 1840-0564) by the deadline. The report is available on the EFRS tab in this system.

Save **Save and Continue**

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.

The screenshot displays the ISAPR (Institutional Services Annual Performance Reporting System) web application. At the top, a dark teal header contains the ISAPR logo and the full name of the system. Below the header is a navigation bar with links for About, Help, FAQs, Contact Us, Account, and Logout. A left-hand sidebar menu lists various sections: IS APR Home, Grant Identification, Section 1 (Executive Summary), Section 2 (Institutional Profile), Section 3 (Grant Project Status and Budget), Section 4 (Legislatively Allowable Activities), Section 5 (Institutionalization), Review and Certification, View Report(s), and a Home button with a left-pointing arrow.

The main content area features a 'Welcome' box with the following information:
PR/Award Number: Reporting Period: 10/1/2020 to 09/30/2021
Grantee Name: Program Officer:

Below the welcome box, the breadcrumb trail reads 'IS APR Home / Section 3'. The main heading is 'Section 3: Grant Project Status and Budget', followed by a sub-heading: 'Grantees should describe the status of their project's objectives and activities during the reporting period, and the amount spent on each activity.'

The interface includes a tabbed navigation system with four tabs: Section 3A, Section 3B, Section 3C, and Section 3D. The 'Section 3A' tab is active, displaying the 'Project Objectives' section. A teal note box states: 'Note: You must answer all questions in order to submit your report.' Below this, a red 'NEW IN 2022!' alert indicates that 'Questions 1 and 2 on Tab 3A' are prepopulated from the previous year's report. The first question is: '1. What is the overall goal of your grant?'. A text input field is provided for the answer, with a small, illegible placeholder text visible at the bottom of the field.

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.

The screenshot shows a web interface for 'Section 3A: Project Objectives'. At the top, there are four tabs: 'Section 3A' (selected), 'Section 3B', 'Section 3C', and 'Section 3D'. Below the tabs, the title 'Project Objectives' is displayed. A teal note box states: 'Note: You must answer all questions in order to submit your report.' Below this, a red text box reads: 'NEW IN 2022! For returning users, Questions 1 and 2 on Tab 3A have been prepopulated from the report submitted last year. You may make edits if necessary by clicking directly into the appropriate field.' The form contains two questions:

1. What is the overall goal of your grant?
A large text input field is provided below the question. Below the field, it says 'You have 1500 character(s) left.'
2. What is the expected long-term impact of the grant project on the institution?
A large text input field is provided below the question. Below the field, it says 'You have 1500 character(s) left.'

At the bottom of the form, there are two buttons: 'Save' and 'Save and Continue to Section 3B'.

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:

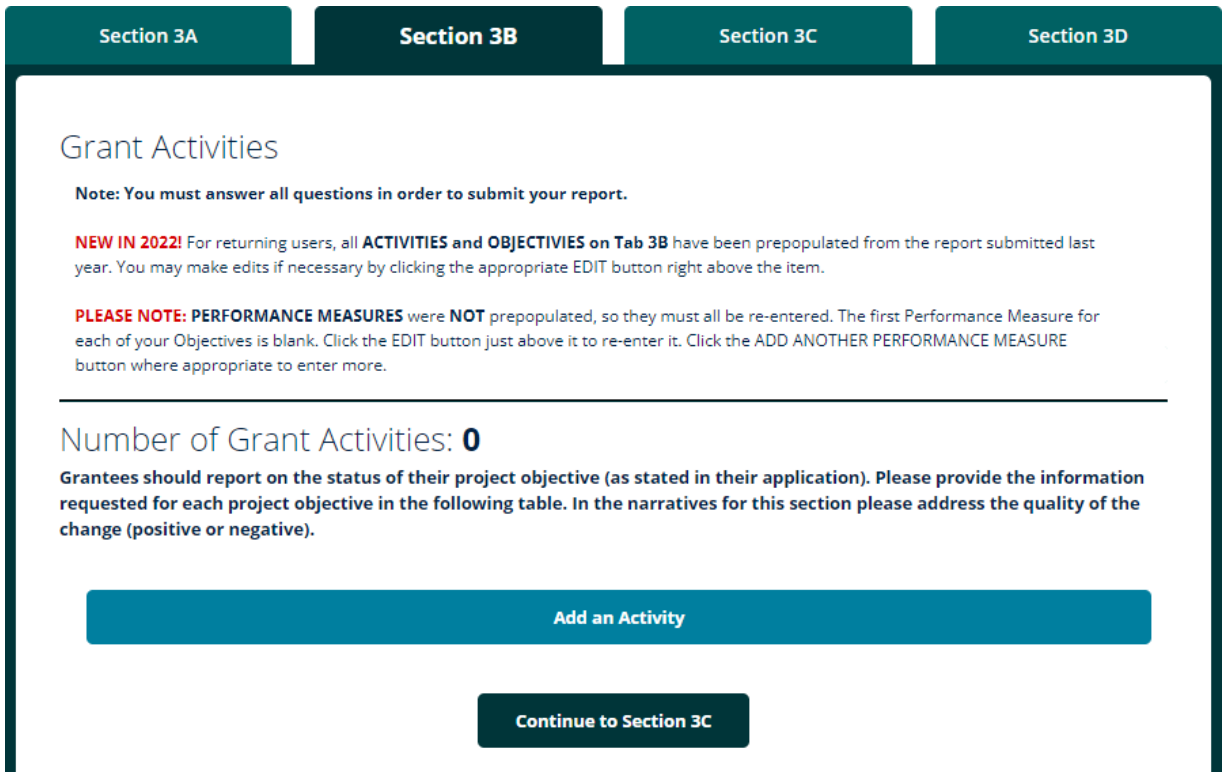
- GRANT ACTIVITY: Decrease the time through Supplemental Instruction (non-credit) Courses into introductory college-level Math and English; baseline of 1.5 years of non-credit course work
 - OBJECTIVE: Conduct a six-week Summer Bridge Program (SBP) that enrolls 100 students during initial year
 - PERFORMANCE 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 Objective, and Objectives can have more than one Performance Measure, 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).

Grant Activity

Activity Description:
Please enter the name of your Activity followed by a brief description of it.

You have 1000 characters left

Note: You must add at least one objective and one performance measure for every activity in order to submit your report.

Objective

Objective Description:
Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).

You have 1000 characters left

Objective Status: On schedule ?

Performance Measure

Performance Measure Description: ?
Please enter the name of your Performance Measure followed by a brief description of it, including (a) how you will know you've accomplished the Objective, and (b) what is the evidence of that accomplishment.

You have 1000 characters left

Measure Type: ? Project ? **Date Measured:**

Frequency Measured: ?

Data Type: Raw Number Ratio

Target	Actual

Note: You must answer all questions above in order to save your objective & performance measure. If you have more than one performance measure for this objective, you can add it after you click Save.

Cancel
Save

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

Activity Description:
Please enter the name of your Activity followed by a brief description of it.

You have 1500 character(s) left.

Note: You must add at least one objective and one performance measure for every activity in order to submit your report.

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

Objective

Objective Description:
Please enter the name of your Objective with a brief description of it, including data and references to goals stated in your application as appropriate, to document the work towards this objective during the current reporting period. Please include any unexpected results, and any details necessary to fully describe the current objective status as appropriate (e.g., updated completion date, whether a change in objective was approved by the Program Office, why objective will not be achieved, etc.).

You have 1500 character(s) left.

Objective Status: ▼ ?

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

Performance Measure Description: ?

Please enter the name of your Performance Measure followed by a brief description of it, including (a) how you will know you've accomplished the Objective, and (b) what is the evidence of that accomplishment.

You have 1500 character(s) left.

Measure Type: ?

Date Measured:

Frequency Measured: ?

Data Type: Raw Number Ratio

Target	Actual
<input type="text"/>	<input type="text"/>

Note: You must answer all questions above in order to save your objective & performance measure. If you have more than one performance measure for this objective, you can add it after you click Save.

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.

Number of Grant Activities: 1

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1

[Edit Activity](#) [Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1 _____ [Edit Objective](#) [Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor... [Edit Measure](#) [Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

****Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.**

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).

The screenshot shows a web interface for managing grant activities. At the top, it indicates 'Number of Grant Activities: 1' and provides instructions for reporting on objectives. Below this is a large blue button labeled '+ Add an Activity'. The main content area is titled 'Grant Activity 1/1' and includes 'Edit Activity' and 'Expand Activity' buttons. The activity description is 'Tutoring: outreach to students to help them with their studies...'. Underneath, there is an 'Objective 1/1' section with 'Edit Objective' and 'Expand Objective' buttons. The objective description is 'Improve student performance. Help students improve grades and information retention...'. Below the objective is a 'Performance Measure 1/1' section with 'Edit Measure' and 'Expand Measure' buttons. The performance measure description is 'Improve Grades by at least one letter after one semester of tutor...'. At the bottom of the main content area is a large blue button labeled '+ Add Another Performance Measure'. Below the main content area is another large blue button labeled '+ Add an Objective and Performance Measure to Grant Activity 1'. A footer note states: '**Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.'

< 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.

Number of Grant Activities: **1**

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1 [Edit Activity](#) [Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1 [Edit Objective](#) [Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor... [Edit Measure](#) [Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

****Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.**

< 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 screenshot shows a web form titled "Grant Activity 1/1". At the top right, there are two buttons: "Edit Activity" and "Expand Activity". Below the title, the text "Tutoring: outreach to students to help them with their studies...." is displayed. The main section is for "Objective 1/1", which has a greyed-out text field and two buttons: "Edit Objective" and "Collapse Objective". Below this is the "Objective Description" section, with a greyed-out text area containing the text "Improve student performance. Help students improve grades and information retention." and a character count "You have 1416 character(s) left". Below the description is the "Objective Status" dropdown menu, currently set to "On schedule" with a question mark icon. At the bottom, there is a "Performance Measure 1/1" section with a greyed-out text field and two buttons: "Edit Measure" and "Expand Measure". A large blue button at the very bottom says "+ Add Another Performance Measure".

< 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.

Number of Grant Activities: **1**

Grantees should report on the status of their objective (as stated in their application). Please provide the information requested for each objective in the following table. In the narratives for this section please address the quality of the change (positive or negative).

[+ Add an Activity](#)

Grant Activity 1/1 [Edit Activity](#) [Expand Activity](#)

Tutoring: outreach to students to help them with their studies....

Objective 1/1 [Edit Objective](#) [Expand Objective](#)

Improve student performance. Help students improve grades and information retention....

Performance Measure 1/1 :Improve Grades by at least one letter after one semester of tutor... [Edit Measure](#) [Expand Measure](#)

[+ Add Another Performance Measure](#)

[+ Add an Objective and Performance Measure to Grant Activity 1](#)

****Each activity requires at least one objective and one performance measure. When you enter an objective, you will be required to enter at least one performance measure in order to save your information.**

< 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.

The screenshot shows a web interface for editing a grant activity. At the top, there's a header 'Grant Activity 1/1' with 'Edit Activity' and 'Expand Activity' buttons. Below the header, the text 'Tutoring: outreach to students to help them with their studies....' is visible. The main section is titled 'Objective 1/1' and contains three buttons: 'Save Objective', 'Delete Objective', and 'Cancel'. Below these buttons is the 'Objective Description' section, which includes a text area containing the text 'Improve student performance. Help students improve grades and information retention.' and a character count 'You have 1416 character(s) left.'. Below the text area is the 'Objective Status' dropdown menu, which is currently set to 'On schedule' and has a question mark icon. At the bottom, there's a section for 'Performance Measure 1/1' with the text 'Improve Grades by at least one letter after one semester of tutor...' and buttons for 'Edit Measure' and 'Expand Measure'. A final button at the bottom says '+ Add Another Performance Measure'.

< 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.

Section 3A
Section 3B
Section 3C
Section 3D

Budget

Enter your budget. If you click the "changes" box, a text field will display within that section for you to enter a line item budget narrative explaining the changes

Note: You must enter numbers in any applicable fields in the table below in order to submit your report.

NEW IN 2022! For returning users, **CARRYOVER BALANCES on Tab 3C** have been prepopulated from the report submitted last year. You may make edits if necessary by clicking directly into the appropriate field.

A Budget Category	B Carryover Balance (Previous Year)	C Actual Budget	D Total Budget (B+C)	E Expenditures	F Non-Federal Expenditures	G Carryover Balance (Current Year/D-E)	H Carryover Percentage (B/D as %)	I Next Year's Actual Budget	Changes
Personnel	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Fringe Benefits	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Travel	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Equipment	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Supplies	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Contractual	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Construction	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Endowment	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Other	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	0.00%	\$ <input type="text" value="0.00"/>	<input type="checkbox"/>
Total	<input type="text" value="0.00"/>	\$ 0.00	<input type="text" value="0.00"/>	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00	

Save
Save and Continue to Section 3D

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.

The screenshot shows a web interface with four tabs at the top: Section 3A, Section 3B, Section 3C, and Section 3D. Section 3D is selected. The main content area is titled "Summary Budget Narrative" and contains the following text: "Please explain budget changes, as needed, particularly the use of funds from cost savings, carryover funds and other expanded authorities changes to your budget. Provide an explanation if you are NOT expending funds at the expected rate. Describe any significant changes to your budget resulting from modifications of project activities." Below this is a teal note box: "Note: You must answer all questions except Q5 in order to submit your report. Q5 is optional." There are three numbered questions, each with "Yes" and "No" radio button options. Question 1: "Have all funds that were to be drawn down during this performance period been drawn down?" Question 2: "Did you have any unexpended funds at the end of the performance period?" Question 3: "Do you anticipate any changes in your budget for the next performance period that will require prior approval from the Department (as designated by EDGAR, 34 CFR 74.25 and 80.30, as applicable)."

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

The screenshot shows a question titled "5. Many grantees include community partners, other institutions of higher education, and secondary schools in their work. Please complete the table below (if applicable) with information related to any partners that you might be working with on your grant. Also describe if and how these partners roles have changed, and whether this had any impact on your ability to achieve your approved project objectives and/or project activities." Below the question is a teal note box: "Note: This question is optional." At the bottom of the question area is a blue button labeled "Add a Partner". Below the button is question 6: "6. Do you wish to make any changes in the grant's activities for the next budget period?"

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.

5. Many grantees include community partners, other institutions of higher education, and secondary schools in their work. Please complete the table below (if applicable) with information related to any partners that you might be working with on your grant. Also describe if and how these partners roles have changed, and whether this had any impact on your ability to achieve your approved project objectives and/or project activities.

Note: This question is optional.

Partner Name	Description	
<i>Acme Gadgets, Inc</i>	• Text description of partner role...	<input type="button" value="edit"/> <input type="button" value="delete"/>

6. Do you wish to make any changes in the grant's activities for the next budget period?

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.

ISAPR

Institutional Services Annual Performance Reporting System

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← **HELP**

Welcome [redacted]

PR/Award Number: [redacted]
Reporting Period: **10/1/2019 to 09/30/2020**

Grantee Name: [redacted]
Program Officer: [redacted]

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Section 4: Legislatively Allowable Activities (LAAs)

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 of the page.

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:	\$0.00	<div style="background-color: #00a69d; color: white; padding: 2px 5px; border: 1px solid #00a69d;">Edit</div>
Activity 2: Text for activity description two	LAAs:	\$0.00	<div style="background-color: #00a69d; color: white; padding: 2px 5px; border: 1px solid #00a69d;">Edit</div>
Total Dollars Spent on All Activities			\$0.00

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.

Grant activity:
Text for activity description one

Distribute the funds spent on this activity according to the appropriate Legislatively Allowable Activity (LAA). If no LAA adequately captures all or part of your activity expense, you may add a category at the bottom of the table in “Other” category.

Note: You must put a dollar amount in at least one LAA category.

LAA Category [Note: All listed activities are directly from legislation.]	Dollars Spent
Purchase, rental, or lease of scientific or laboratory equipment for educational purposes, including instructional and research purposes.	\$ <input type="text"/>
Construction, maintenance, renovation, and improvement in classrooms, libraries, laboratories, and other instructional facilities.	\$ <input type="text"/>
Support of faculty exchanges, faculty development, and faculty fellowships to assist in attaining advanced degrees in the field of instruction of the faculty.	\$ <input type="text"/>
Purchase of library books, periodicals, and other educational materials, including telecommunications program materials.	\$ <input type="text"/>
Academic instruction in disciplines in which Black Americans are underrepresented.	\$ <input type="text"/>
Funds management, administrative management, and acquisition of equipment for use in strengthening funds management.	\$ <input type="text"/>
Academic tutoring, counseling, and student support service programs designed to improve academic success.	\$ <input type="text"/>

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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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.

Section 5: Institutionalization

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

1. What are your institution's plans to institutionalize or assume the costs of one or more of the activities funded by this grant? How are you using data to inform institutionalization?

You have 519 character(s) left.

1a/b. Complete the fields below detailing your plans to institutionalize the identified activity.

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 #1 ▲

The name of your first Project Activity *(from Section 3)* will appear here...
[Read More](#)

LAA #1: The name of the first LAA assigned to the Activity listed above *(from Section 4)* will appear here..

Total Financial Cost (\$)

Approved Expenditures **Institutionalization Plan**

You have 447 character(s) left. You have 674 character(s) left.

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 activities 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.

Section 6: Final Performance Report

The Final Performance Report is a review of the full grant project period and is only available to grantees after they have completed their final performance period.

Accomplishments

List your accomplishments for the grant project period and indicate how these accomplishments assist in the fulfillment of your grant project's objective(s), outcome(s), and/or indicator(s).

#	Accomplishment or Impact	Relevance to Objective, Outcome, and/or Indicator	Add, Edit, Delete
Add Another Accomplishment			

Challenges and Developments

Provide any challenges to the completion of your project or any positive developments outside of the project's original intent that you experienced during this grant project. For any challenges, provide the corrective actions you took to address these issues. If you did not attain any approved objectives, outcome(s), and/or indicator(s), provide an explanation in the Corrective Actions column.

#	Challenge or Development	Corrective Action or Project Change	Add, Edit, Delete
Add Another Challenge			

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.

ISAPR
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Institutionalization

Review and Certification

View Report(s)

← HER

Welcome [\[redacted\]](#)

PR/Award Number: [\[redacted\]](#) Reporting Period: 10/1/2019 to 09/30/2020

Grantee Name: [\[redacted\]](#) Program Officer: [\[redacted\]](#)

IS APR Home / [Review and Certification](#)

Review and Certification

Review Certification Submit

Review Your Report

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.

Section 1: Executive Summary		
!	1: Executive Summary	Go to Section

Section 2: Institutional Profile		
!	2A: Institutional Measures (GPRA)	Go to Section

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.

The screenshot displays the 'Review Your Report' interface. At the top, there are three tabs: 'Review' (active), 'Certification', and 'Submit'. Below the tabs, the title '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 report is organized into five sections, each with a table of sub-sections:

- Section 1: Executive Summary**
 - 1: Executive Summary (Incomplete, red exclamation point)
- Section 2: Institutional Profile**
 - 2A: Institutional Measures (GPRA Indicators) (Incomplete, red exclamation point)
 - 2B: Institutional Leadership (Incomplete, red exclamation point)
 - 2C: Accreditation (Incomplete, red exclamation point)
 - 2D: Audit (Incomplete, red exclamation point)
 - 2E: Endowment (Incomplete, red exclamation point)
- Section 3: Grant Project Status and Budget**
 - 3A: Project Objectives (Complete, green check mark)
 - 3B: Grant Activities (Complete, green check mark)
 - 3C: Budget (Complete, green check mark)
 - 3D: Summary Budget Narrative (Complete, green check mark)
- Section 4: Legislatively Allowable Activities (LAAs)**
 - 4: LAAs (Complete, green check mark)
- Section 5: Institutionalization**
 - 5: Institutionalization (Complete, green check mark)

Each row in the tables includes a status icon (red exclamation point or green check mark), the sub-section name, and a 'Go to Section' button. At the bottom of the interface, there is a 'Continue to Certification' button.

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.

1. Reporting Period
10/1/2018 to 09/30/2019 [Return to Grant Identification Page to Edit](#)

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 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

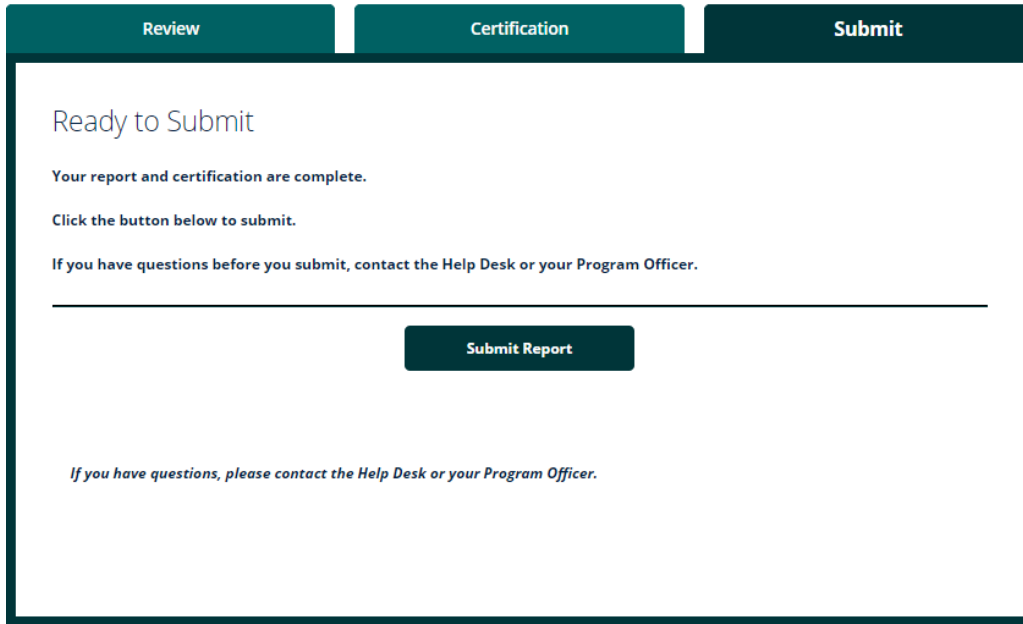
Phone Date

[Save and Continue](#)

You do not need to 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.



Review Certification Submit

Ready to Submit

Your report and certification are complete.

Click the button below to submit.

If you have questions before you submit, contact the Help Desk or your Program Officer.

Submit Report

If you have questions, please contact the Help Desk or your Program Officer.

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.

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Grant Identification

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Legislatively Allowable Activities

Section 5
Institutionalization

Review and Certification

View Report(s)

← HER

Welcome [User Name]

PR/Award Number: [Redacted] Reporting Period: 10/1/2019 to 09/30/2020
Grantee Name: [Redacted] Program Officer: [Redacted]

IS APR Home / **Reports**

View Reports

Current Year

[APR Report DRAFT](#)

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?](#)

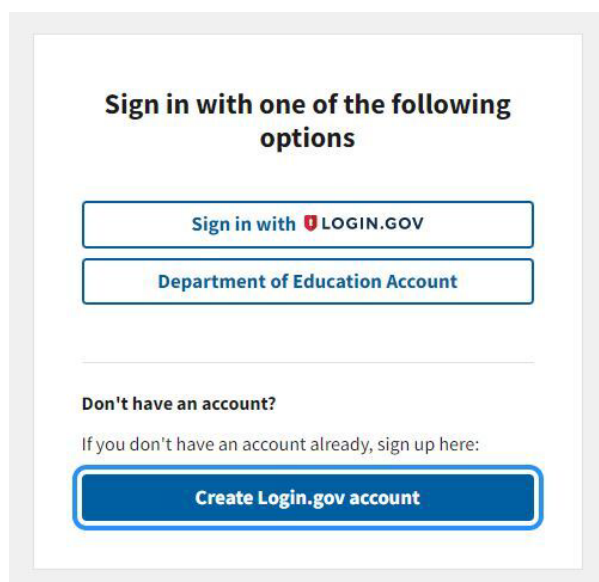
[Do you have both a HEPIS account and a Login.gov account?](#)

[Do you need to create a new HEPIS account?](#)

[Do you need further assistance?](#)

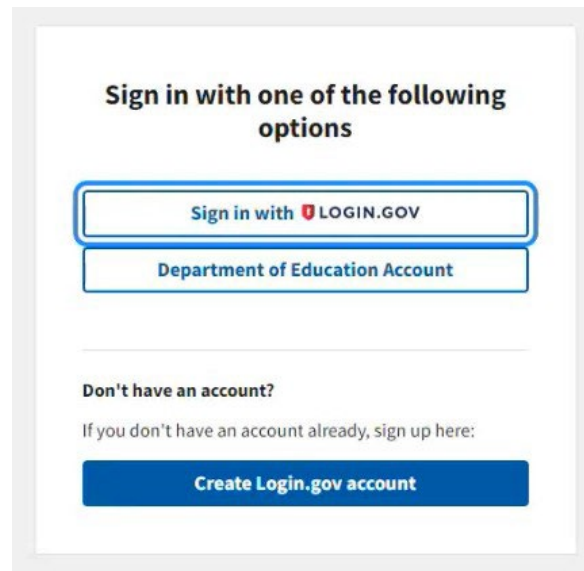
Do you have (A) a HEPIS system account, but do not have (B) a Login.gov account?

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