March 28, 2023

Dear Upward Bound (UB) and Upward Bound Math and Science (UBMS) Project Directors:

It is time to prepare your annual performance report (APR) for reporting year 2021-22, the fifth and final year of the 2017–22 grant cycle. As of March 28, 2023, you will find the APR form and instructions, plus links to the secured UB-UBMS APR website maintained by our contractor, at [Upward Bound Program Annual Performance Report (ed.gov)](https://www2.ed.gov/programs/trioupbound/report.html) . On March 28, 2023, you may begin your submission process at the following web location: <https://trio.ed.gov/>. **Your APR is due to us by April 28, 2023.**

*Preview of APR results:* As was the case last year, at the end of the APR’s “Review and Submit” section, you will be able to view your APR data and the results of PE calculations for your project in advance of formally submitting your APR. With this information, before submission, you will thus be able to review your data and correct any errors you might have made, thus reducing any need to ask the Help Desk to “unsubmit” your APR at the last minute.

Do not rely solely on the UB-UBMS APR website in completing your APR; be sure to read thoroughly the U.S. Department of Education’s APR documents at the web address above. Should you wish to revise your report after having submitted it, you may ask the Help Desk to “unsubmit” it, but you must make final submission **no later than the due date**. Also remember that, **within five business days after final submission of your completed online APR,** you must scan and upload a signed copy of Section I of the report form. Section I must be signed both by the project director and certifying official; you may wish to alert your certifying official of this requirement in advance.

*Content of Section I:* This section retains last year’s four components: Part 1 (project identification, certification, and warning); Part 2 (the competitive preference priority); Part 3 (information on supplemental funding that you may have received in 2018 and 2019 for activities involving STEM education); and Part 4 (data on target schools). Please pay careful attention to Part 3 as some, but not all, grantees will need to provide information here.

*Dropping older participant records from the APR:* Grantees that have participated in UB-UBMS for many years—primarily those that held grants in the 2007–12 cycle—are aware that TRIO has identified a large number of prior-year participant records that the Department no longer needs for PE calculations or for other important measures. We are continuing to eliminate such records from this year’s download file. **If one or more of your old records are among those we deleted, you will not be able to report on those specific individuals in 2021-22 or thereafter.** Please see pages 2-3 of the General Instructions, available at the web address above, for further information.

# Other important reminders

*Establishing cohort year 2022:*For the members of the 2022 postsecondary enrollment cohort—that is, those participants who graduated with a regular secondary school diploma during school year 2021-22 and enrolled in postsecondary education by fall term 2022, or who received notification from their postsecondary institution of acceptance but deferred enrollment until the next academic semester—for your benefit, please make every effort to report all relevant data in this year’s APR (2021-22). Not only must the dates of high school graduation and postsecondary enrollment be correct in your APR if a student is to be included in the 2022 cohort; you must also have coded the student as 3 (Received regular secondary school diploma) in the High School Graduation Status field (#34). **Once the Department accepts the 2021-22 APR, participants cannot be added to the 2022 postsecondary education enrollment cohort.**

**For summer bridge participants in June- and July-start projects,** you must provide postsecondary enrollment data **in the 2021-22 APR** on participants served in 2022 summer bridge to include such students in the 2022 cohort, even though summer 2022 is part of the 2022-23 reporting period for summer-start projects.

## *The Help Desk*: If you encounter technical problems accessing the website or using the web application, please contact the Help Desk by either telephone at (703) 885-8008 or email at [Trio.Helpdesk@thetactilegroup.com](mailto:Trio.Helpdesk@thetactilegroup.com). Please note that the Help Desk will try to contact projects within two business days of receiving a telephone call or email. The Help Desk will be available to respond to your questions on weekdays that are not Federal holidays from the “go-live” date of the web application through April 28, 2022. During peak times, it may take longer for you to receive a response; thus, I encourage you to prepare and submit your performance report as soon as you have collected complete data. For any questions regarding the APR requirements, please contact your program specialist directly; to ascertain the specialist’s name, telephone number, and email address, please visit our [staff directory](https://www2.ed.gov/about/offices/list/ope/trio/staffdirectory-cupt.html).

Thank you for the time and effort you devote to preparing your APR each year and for your commitment to providing complete and accurate data. Please retain source documents in readily accessible form so that they can be verified during an on-site visit.

Sincerely,   
  
Sharon Easterling  
Director  
TRIO Upward Bound and Educational Opportunity Centers Division  
Student Service