Perkins V Final Report Submission Instructions

Due Date: September 15, annually

This guide outlines the step-by-step process to successfully prepare and submit the Perkins Final Report via the Perkins Portal. Follow each step carefully to ensure your report is accurate and submitted on time.

Step 1: Log onto the Perkins Portal

1. Open your web browser and navigate to the Perkins Portal.
2. Enter your login credentials.
3. Once logged in, click on the ****Prepare Amendment/Report**** tab.
4. Locate the ****Final Report**** selection box and click ****Continue****.

Note: The selection box displays the status (In Progress, Submitted, Approved) of your amendments, expenditure reports, or final reports. To prepare or edit a document for submission, choose a document and click ****Continue****.

Step 2: Navigate to Final Report Contents

1. After clicking **Continue**, you will be directed to the **Final Report Contents** tab. This section includes:

- **Section 1**: Special Populations
- **Section 2**: Project Goals and Outcomes
- **Section 3**: Narratives
- **Section 4**: Certification
- **Budget Details**: View details automatically generated from approved expenditure reports.
- **View Report:** View Sections 1-4 along with Budget Details.
- **Submit Report:** Navigate to submit your report.

2. To build, edit, or view any section, click the corresponding button next to each item. See steps 3-9 for instructions on completing each section.

Note: Click ****Back to Main Menu**** to access other documents or exit the application.

Step 3: Complete Section 1 - Special Populations

1. Click on ****Section 1: Special Populations**.**
2. ****Table 1****: Enter the number of students served by demographic group. Include only unique (unduplicated) students.
3. ****Table 2****: Enter the number of students who are members of various special populations. This can involve duplicating counts for students who identify in multiple categories.
4. Click the ****Save Data**** button at the bottom of the page to save your entries.
5. To continue, click on ****Section 2**,** or click ****Back to Report Contents**** if needed.

Step 4: Complete Section 2 - Project Goals and Outcomes

All project goals and activities come from the original application and any approved amendments.

1. From the Section 1 page, click **Section 2: Project Goals and Outcomes**.
2. Edit completion status and narratives for each goal and its activities by clicking the corresponding **edit buttons**.
3. Click **View All** to read all project goals.
4. To navigate further, click on **Section 3**, or click **Back to Report Contents**.

Step 5: Complete Section 3 - Narratives

1. Click **Section 3: Narratives**. You will have six narratives to complete:

Narrative 1: Obstacles Encountered
Prompt: *Please outline any obstacles encountered during the implementation or activity phase during this reporting period and how those obstacles were addressed.*

Narrative 2: Partnership Development and Coordination
Prompt: Please describe partnership development and coordination including partnerships with employers, community colleges, workforce solution offices, community partners, etc. during this reporting period.

Narrative 3: Best Practices Identified
Prompt: *Please describe the best practices identified during this reporting period.*

Narrative 4: Areas Needing Improvement
Prompt: Please list areas needing improvement identified during this reporting period.

Narrative 5: Lessons Learned
Prompt: Please list areas needing improvement identified during this reporting period.

Narrative 6: Additional Information
Prompt: Is there any additional information you would like to share?

2. For each narrative, provide detailed information as required.
3. Click the **Save Data** button at the bottom of the page to save your work.
4. Navigate by clicking **Section 4** or go back using **Back to Report Contents**.

Step 6: Complete Section 4 - Certification

1. Click **Section 4: Certification**.
2. Read the **Certification Statement** and understand its implications regarding accurate reporting.
3. After reviewing, click the **Save Data** button to save your entries.
4. Navigate back to Section 3 or click Back to Report Contents to view Budget Details.

Step 7: View Budget Details

1. Click the **Budget Details** tab.
2. No manual data entry is required here; the budget details will auto-populate from approved reports.
3. Since printing is not recommended, click **Back to Report Contents** to proceed.

Step 8: View Report

1. Click the ****View Report**** tab to see your completed sections including Budget Details.
2. Since printing is not formatted here, you might want to save it for future records:
   - Press ****CTRL+A**** to select all text.
   - Press ****CTRL+C**** to copy the text.
   - Open a new Word document, press ****CTRL+V**** to paste, and save the file.
3. To continue with your submission, click ****Back to Report Contents**.**

Step 9: Submit Report

Ensure that all relevant staff have reviewed the report prior to final submission and that you check each section thoroughly for accuracy.

1. Click the ****Submit Report**** tab.
2. Click Verify and Submit Report to review the report contents checklist and verify that all required sections are complete.
3. If everything is ready:
   - Enter your Financial Identification Number (FIN) in the space provided.
   - Click the ****Submit to THECB**** button at the bottom of the page.
4. If you are not ready to submit, click ****Cancel**** to return to the Main Menu.

Important Notes

- Contact the THECB for any questions regarding the FIN or if you need additional information.
- Remember, once the report is submitted, modifications cannot be made.
- It is advisable to review the entire report one last time before submission.

By following these instructions carefully, you will ensure that your Perkins Final Report is completed accurately and submitted by the due date. If you have any questions, please contact your grant advisor.