

# OSEP Annual Performance Reporting: Guide to the APR

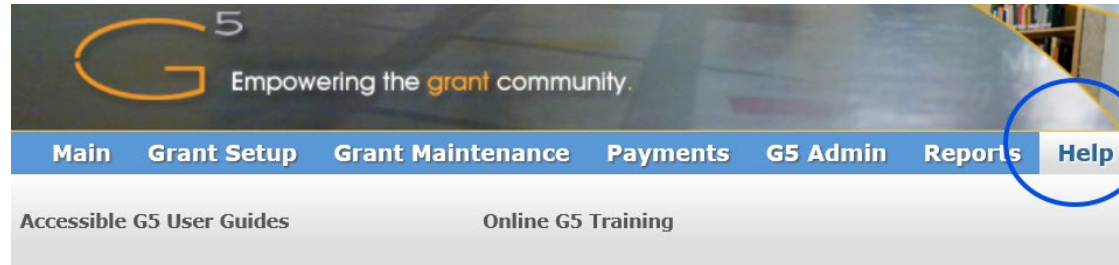
January 2026



# Objectives

- ▶ Provide step by step guidance for completing and submitting APR requirements, including
  - the ED 524B Coversheet,
  - the ED 524B Section A Status Charts for Program and Project Measures, and
  - the ED 524B Sections B and C
- ▶ Share resources for additional APR support.

# APR Resources



- ▶ Dear Colleague Letter (Word APR Package Cover Letter, sent by OSEP via email in January)
- ▶ Slide decks and other materials from OSEP Project Officers
- ▶ <https://sites.ed.gov/idea/resources-for-discretionary-grantees/>
- ▶ G5 Help
  - “Accessible G5 User Guides” – Step by step with screen shots for G5 tasks
  - “Online G5 Training” – Interactive tutorials for practicing G5 tasks

# What goes into the APR?

- ▶ ED 524-B Part 1 - Cover Sheet and Summary
  - Cover Sheet (requires signatures, budget office information)
  - Executive Summary (your year in review narrative)
- ▶ ED 524-B Part 2 - APR Status Sheet Information
  - Section A: Program and Project Measures
  - Section B: Budget
  - Section C: Additional Information
- ▶ Blank forms and general instructions can be downloaded (as PDFs) for reference from the ed.gov website (search online for “ED Grant Forms”). You don’t need to complete the PDF forms. The APR information will be entered/uploaded into form fields in G5, and your APR must be submitted in G5 (not by email).
- ▶ New G5 users may wish to review the G5 Help Resource: General G5 instructions for Completing and Submitting a Performance Report.

# Let's get started!



- We'll begin with how to get your APR started in G5.
- Then, we'll walk through:
  - ED 524B Cover Sheet
  - ED 524B Section A Status Charts
  - ED 524B Sections B and C
- Each section begins with an explanation of the information to be submitted, followed by step-by-step instructions with screen shots of what you'll need to do in G5.
- We'll finish up with the final steps for APR submission, as well as how to get help if you're stuck.

# Starting an APR in G5



- After you've logged into G5, click the **Package Submission** menu item (under the **Grant Maintenance Menu**) to begin the process of completing and submitting an electronic performance report.
- From the Award List, select your award number and click **Continue**

# Starting the APR in G5 (cont'd)

**Current Report Packages**

The listing below displays the report packages currently available. Select a record and use the Initiate button to begin a package.

Total Records: 1 Page 1 of 1 Jump to Page 1 Go

Select	Report Type	Budget Period	Due Date	Package Status
<input type="radio"/>	Annual Financial	1	10/29/2010 04:30 PM EST	Not Created

Total Records: 1 Page 1 of 1 Jump to Page 1 Go

**Initiate**

**My Performance Reports**

The table below displays all available packages for milestones that you have previously initiated which may still need to be submitted. This also includes milestones which have passed.

Total Records: 1 Page 1 of 1 Jump to Page 1 Go

Select	Report Type	PR/Award No	Budget Period	Due Date	Last Updated Date	Package Status
<input type="radio"/>	Annual Performance	P407W100001	1	07/02/2010 04:00 PM EST	07/29/2010 03:53 PM EDT	Draft

Total Records: 1 Page 1 of 1 Jump to Page 1 Go

< Previous **Edit Report** Copy Delete Unsubmit



Select*	Form Title	Form Status
<input type="radio"/>	Project Narrative - Signed Cover Sheet (Required)	Blank
<input type="radio"/>	Project Narrative - Optional attachment for additional Section A text	Blank
<input type="radio"/>	Project Narrative - Completed SF 425	Blank
<input type="radio"/>	Grant Performance Report (ED 5248) Project Status Chart - Section B & C (Required)	Blank
<input type="radio"/>	Grant Performance Report (ED 5248) Project Status Chart - Section A - 1 (Required)	Blank
<input type="radio"/>	Grant Performance Report (ED 5248) Cover Sheet - Revised 2015 (Required)	Blank

**View Form** **Edit Form**

< Previous **Continue >** User Privileges Comments View History

On the Performance Report List tab,

- ▶ If you're just getting started on this year's APR, look for an APR Package under **Current Report Packages**. Select it and click **Initiate**.
- ▶ If you've already started working on the APR and are coming back to G5 to continue editing, look for your APR Report under **My Performance Reports**. Select it and click **Edit Report**.
- ▶ On the Package Information tab, scroll down for a list of the forms that makeup your APR will be displayed for you to select and view or edit.

# General G5 Tips

The screenshot shows a web interface for managing forms. At the top, it says 'Total Records: 4' and 'Jump to Page 1'. Below this is a table with columns 'Select\*', 'Form Title', and 'Form Status'. The table contains four rows of form information. Below the table, there are navigation buttons: '< Previous', 'Cancel', 'Continue >', 'Save' (circled in blue), 'User Privileges', 'Comments', and 'View History'. There are also buttons for 'View Form', 'Edit Form', and 'Preview Package' above the 'Save' button.

Select*	Form Title	Form Status
<input checked="" type="checkbox"/>	2390_6001_Grant Performance Report Cover Sheet (ED 524B) - Revised 2008	Draft
<input type="checkbox"/>	1851_6002_Grant Performance Report (ED 524B) Project Status Chart - Section A	Draft
<input type="checkbox"/>	1852_6003_Grant Performance Report (ED 524B) Project Status Chart - Section B & C	Draft
<input type="checkbox"/>	Standard Project Narrative Form	Draft

- ▶ Save frequently. From the list of forms (the “package”) you can save a draft of your work without submitting it by clicking the **Save** button.
- ▶ If you get locked out of G5, wait 15 minutes and then try logging in again.
- ▶ Pay attention to scheduled outages posted on the G5 homepage.


## Did you know?

- ▶ Project directors can delegate user privileges to allow additional users to assist with a performance report.
  - The person to whom you want to delegate package level privileges must be a registered G5 user.
  - For instructions, refer to “Delegate User Privileges” in G5 Help

# ED 524B Cover Sheet



# Responding to the Questions on the ED 524B Cover Sheet



**U.S. Department of Education**  
**Grant Performance Report Cover Sheet (ED 524B)**  
*Check only one box per Program Office instructions.*  
 Annual Performance Report    Final Performance Report

OMB No. 1894-0003  
Exp. 07/31/2024

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**General Information**

1. PR/Award #: \_\_\_\_\_  
*(Block 5 of the Grant Award Notification - 11 characters.)*

2. Grantee NCES ID#: \_\_\_\_\_  
*(See instructions. Up to 12 characters.)*

3 Project Title: \_\_\_\_\_  
*(Enter the same title as on the approved application.)*

4. Grantee Name *(Block 1 of the Grant Award Notification.):* \_\_\_\_\_

5. Grantee Address *(See instructions.)* \_\_\_\_\_

6. Project Director *(See instructions.)* Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Ph #: (    ) \_\_\_\_\_ - \_\_\_\_\_ Ext: (    )                      Fax #: (    ) \_\_\_\_\_ - \_\_\_\_\_  
Email Address: \_\_\_\_\_

- ▶ Questions 1 through 6 are straight forward. Double-check your responses for accuracy.

# Responding to the Questions on the ED 524B Cover Sheet, cont'd

## Reporting Period Information *(See instructions.)*

7. Reporting Period: From: \_\_\_\_/\_\_\_\_/\_\_\_\_ To: \_\_\_\_/\_\_\_\_/\_\_\_\_ (mm/dd/yyyy)

## Budget Expenditures *(To be completed by your Business Office. See instructions. Also see Section B.)*

8. Budget Expenditures

	Federal Grant Funds	Non-Federal Funds <i>(Match/Cost Share)</i>
a. Previous Budget Period		
b. Current Budget Period		
c. Entire Project Period <i>(For Final Performance Reports only)</i>		

- ▶ For projects in their first year, the Reporting Period (Question 7) is your start date (probably October 1 of the prior year) through February 28 of the current year.
- ▶ For projects in year two or later, the Reporting Period (Question 7) is March 1 of the previous year to February 28 of the current year.
- ▶ When reporting budget expenditures on the Cover Sheet (Question 8) and in Section B of the Status Sheet, describe funds expended so far during the Budget Period (Budget Period start date through your most current calculations as of the time you completing the report). See your GAN for budget period dates.



# ED 524B Cover Sheet: Indirect Costs (Question 9)

- ▶ If your organization does not claim any indirect costs for your project, mark “No” for 9a, and you’re done! Move on to Question 10.
- ▶ Most projects do claim indirect costs. Please refer to your organization’s Indirect Cost Rate Agreement and any instructions or limitations from OSEP. Your business office is often able to help.

## Indirect Cost Information (To be completed by your Business Office. See instructions.)

### 9. Indirect Costs

- a. Are you claiming indirect costs under this grant?  Yes  No  
If yes, please indicate which of the following applies to your grant?
- b.  The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:  
The period covered by the Indirect Cost Rate Agreement is from: \_\_\_/\_\_\_/\_\_\_ to: \_\_\_/\_\_\_/\_\_\_ (mm/dd/yyyy)  
The approving Federal agency is:  ED  Other (Please specify): \_\_\_\_\_  
The Indirect Cost Rate is \_\_\_\_\_%  
The Type of Rate (For Final Performance Reports Only) is:  Provisional  Final  Other (Please specify): \_\_\_\_\_
- c.  The grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f).
- d.  The grantee is funded under a Restricted Rate Program and is you using a restricted indirect cost rate that either:  
 Is included in its approved Indirect Cost Rate Agreement; or  
 Complies with 34 CFR 76.564(c)(2).
- e.  The grantee is funded under a Training Rate Program and:  
 Is recovering indirect cost using 8 percent of MTDC in compliance with 34 CFR 75.562(c)(2); or  
 Is recovering indirect costs using its actual negotiated indirect cost rate reflected in 9(b).

# ED 524B Cover Sheet: Questions 10-12 & Signature

- ▶ **Questions 10 and 11:** usually N/A
- ▶ **Question 12:** Following the general instructions for ED 524B forms, indicate that complete data have not yet been included. Indicate the due date of your project's final report (90 days after grant ends) as the date when data will be available and submitted to the Department.
- ▶ Before Submitting the APR, ensure that the Cover Sheet is signed by your Authorized Representative.
  - Obtain a verifiable, digital signature on a PDF, or
  - Print a copy, have it signed, then scan and save.
  - The cover sheet signature may take several days or more to obtain, depending on your institution. Ensure that you start the process in time to meet the reporting deadline.

# ED 524B Executive Summary

- ▶ The Executive Summary for Annual Performance Reports is a one-or-two-page narrative summary of accomplishments during the current reporting period.
- ▶ Refer to the General Instructions and Dear Colleague Letter for what to include in your executive summary.
- ▶ Prepare your Executive Summary in Word, then save it as a PDF to be uploaded in G5.
- ▶ Do not submit your project abstract in this section.

## **Please include:**

- highlights of accomplishments and progress toward your project's goals and objectives that occurred during this reporting period.
- contributions the project has made to knowledge, practice, and/or local policies or systems, if applicable.
- descriptions of the populations served.

# Making a PDF from a Word Document

There are several documents you'll need to attach to your APR. G5 only accepts PDF attachments. If you have Word documents, you must convert them to PDF.

If you're using Microsoft Word on a PC, here are two options:

- Choose File → Save a Copy, and then before you click “Save,” change the file type from Word document to PDF.
- Choose File → Print, then choose a PDF “printer” like Adobe PDF or Microsoft Print to PDF.

Instructions for converting Word and other types of documents to PDF on PC and Apple devices are easy to find online.

# Completing the Cover Sheet in G5 (slide 1 of 3)

**U.S. Department of Education  
Grant Performance Report Cover Sheet (ED 524B)**

Check only one box per Program Office instructions.  
 Annual Performance Report    Final Performance Report

**General Information**

1. PR/Award #: H326T230030  
(Block 5 of the Grant Award Notification - 11 Characters.)

2. Grantee NCES ID#: [ ]  
(See instructions. Up to 12 Characters.)

\* 3. Project Title: [ ]  
(Enter the same title as on the approved application.)

4. Grantee Name: HELEN KELLER SERVICES  
(Block 1 of the Grant Award Notification.)

5. Grantee Address:  
(See instructions.)

Street: 180 LIVINGSTON ST  
FL 2  
City: BROOKLYN  
State: NY   Zip: 11201   Zip+4: 5861

6. Project Director:  
(See instructions.)

First Name: Julie   Last Name: Durando   Title: [ ]  
Phone #: 5169448900   Fax #: [ ]   Email Address: dduranco@helenkeller.org

**Reporting Period Information (See instructions.)**

\* 7. Reporting Period: From: [ ] To: [ ]  
(mm/dd/yyyy)

**Budget Expenditures (To be completed by your Business Office. See instructions. Also see Section B.)**

8. Budget Expenditures:

	Federal Grant Funds	Non-Federal Funds (Match/Cost Share)
a. Previous Budget Period	[ ]	[ ]
b. Current Budget Period	[ ]	[ ]
c. Entire Project Period (For Final Performance Reports only)	[ ]	[ ]

- ▶ Select the ED 524B Cover Sheet from the list of files and choose **Edit**
- ▶ Enter the requested information into the G5 fields.
- ▶ These fields match the PDF version of the ED 524B Cover Sheet shown on previous slides.

# Completing the Cover Sheet in G5 (slide 2 of 3)

**Indirect Cost Information (To be completed by your Business Office. See instructions.)**

\* 9. Indirect Costs  (Click button to clear and re-enter data.)

a. Are you claiming indirect costs under this grant?  
If yes, please indicate which of the following applies to your grant?  Yes  No

b. The grantee has an Indirect Cost Rate Agreement approved by the Federal Government:  Yes  No

The period covered by the Indirect Cost Rate Agreement is : From:  To:  (mm/dd/yyyy)

The approving Federal agency is :  ED  Other (Please specify):

The Indirect Cost Rate is :  %

Type of Rate (For Final Performance Reports Only) :  Provisional  Final  Other (Please specify):

c. The grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f)  Yes  No

d. The grantee is funded under a Restricted Rate Program and is you using a restricted indirect cost rate that either :  
 Is included in your approved Indirect Cost Rate Agreement  Complies with 34 CFR 76.564(c)(2)?

e. The grantee is funded under a Training Rate Program and:  
 Is recovering indirect cost using 8 percent of MTDC in compliance with 34 CFR 75.562(c)(2)  Is recovering indirect costs using its actual negotiated indirect cost rate reflected in 9(b)

**Human Subjects (Annual Institutional Review Board (IRB) Certification) (See instructions.)**

\* 10. Is the annual certification of Institutional Review Board (IRB) approval attached?  
 Yes  No  N/A

**Data Privacy and Security Measures Certification (See instructions.)**

\* 11. Is a statement affirming that you are aware of federal and state data security and student privacy regulations included, with supporting documentation attached?  
 Yes  No  N/A

**Performance Measures Status and Certification (See instructions.)**

\* 12. Performance Measures Status

a. Are complete data on performance measures for the current budget period included in the Project Status Chart?  
 Yes  No

b. If no, when will the data be available and submitted to the Department?  (mm/dd/yyyy)

13. By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate and the expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-33812). Furthermore, to the best of my knowledge and belief, all data in this performance report are true, complete, and correct and the report fully discloses all known weaknesses concerning the accuracy, reliability, and completeness of data reported.

This section should be completed on the Report Submission page by a user who is authorized to submit on behalf of an Authorized Representative.

**Grant Performance Report (ED 524B) Executive Summary Attachment:**

Title :

File :

Only Adobe Portable Document Format (.pdf) file upload is supported.

Form Complete

At the bottom of the screen, there are fields for uploading your **Executive Summary.**

- ▶ Click **Upload**
- ▶ Navigate to where you saved your Executive Summary (PDF) to choose the file to upload
- ▶ Be sure to check “Form Complete” before you click **Save and Return to Package**

# Completing the Cover Sheet in G5 (slide 3 of 3)

- ▶ Select Grant Performance Report (ED 524B) Cover Sheet
- ▶ Click **View Form** for the option to print or download a completed form for signature.
- ▶ A PDF copy (with scanned, ink signature or digital signature) should be uploaded under “Project Narrative - Signed Cover Sheet”

OSEP - Empowering the Grant Community | United States Department of Education

**G5** Empowering the grant community

Main Grant Setup Grant Maintenance **G5 Admin** Reports Help Logout

You are here: Grant Maintenance > Performance Reports > Package Submission

Submit Performance Reports

Package Information Summary Confirmation

✓ The Package has been initiated successfully. You may now continue with package submission.

The form below displays all details associated with selected package. You may navigate throughout this form to complete a Performance Report. An \* indicates a required field.

<b>Package Title</b>	OSEP FY 2023 Grant Performance Report			<b>Package Information</b>	
<b>CFDA/Subprogram</b>	04.026T - 1	<b>Fiscal Year</b>	2023	<b>Package Type</b>	Annual Performance
<b>Due Date</b>	05/03/2024 04:30 PM Washington DC Time	<b>Last Updated</b>	02/23/2024 12:41:31 PM Washington DC Time	<b>PR/Award No</b>	H326T230030

Select*	Form Title	Form Status
<input type="radio"/>	Project Narrative - Signed Cover Sheet (Required)	Blank
<input type="radio"/>	Project Narrative - Optional attachment for additional Section A text	Blank
<input type="radio"/>	Project Narrative - Completed SF 425	Blank
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section B & C (Required)	Blank
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section A - 1 (Required)	Blank
<input type="radio"/>	Grant Performance Report (ED 524B) Cover Sheet - Revised 2015 (Required)	Blank

**Package Information**

**Package Type**: Annual Performance

**Budget Period**: 1

**Contact Name**: Justin Hampton  
Justin.hampton@ed.gov  
[click to send email](#)

**Documents & Instructions**

[Instructions](#)

[SF 425](#)

**View Form** **Edit Form**

< Previous **Continue >** User Privileges Comments View History

# Uploading the Signed Cover Sheet

- ▶ Select “Project Narrative, Signed Cover Sheet (Required)” and click **Edit Form**
- ▶ Click **Upload** and navigate to where you’ve saved the PDF of the signed cover sheet on your computer.
- ▶ Check “Form Complete,” and click **Save & Return to Package**

The form below displays all details associated with selected package. You may navigate throughout this form to complete required field.

<b>Package Title</b>	OSEP FY 2020 Grant Performance Report		
<b>CFDA/Subprogram</b>	84.326T - 1	<b>Fiscal Year</b>	2020
<b>Due Date</b>	05/07/2021 04:30 PM Washington DC Time	<b>Last Updated</b>	05/03/2021 12:46:54 PM Washington DC Time

Select *	Form Title	Form Status
<input type="radio"/>	Grant Performance Report (ED 524B) Cover Sheet - Revised 2015 (Required)	Draft
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section A - 1 (Required)	Complete
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section A - 2 (Required)	Complete
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section A - 3 (Required)	Complete
<input type="radio"/>	Grant Performance Report (ED 524B) Project Status Chart - Section B & C (Required)	Draft
<input type="radio"/>	Project Narrative - Completed SF 425	Blank
<input type="radio"/>	Project Narrative - Optional attachment for additional Section A text	Draft
<input checked="" type="radio"/>	Project Narrative - Signed Cover Sheet (Required)	Draft

[View Form](#) [Edit Form](#)

[< Previous](#) [Continue >](#) [User Privileges](#) [Comments](#) [View History](#)

Project Narrative - Signed Cover Sheet

**Title :** Signed Cover Sheet

**Attachment:**  
(The file size should not exceed 9 MB)  
Type : Only PDF file upload is supported.

**File :**  
1  [upload](#)

**Form Complete**

[Cancel](#) [Save & Return to Package](#) [Save](#)

# ED 524B (Section A) Status Charts



# What goes on the Status Charts?

- ▶ Your Project Officer or others from OSEP will work with you to develop project measures and objectives. These are often taken from your original application. You can send your project officer draft measures and targets in advance to get their feedback.
- ▶ Generally, once measures are established (in Year One) they remain the same for all years of the project.
- ▶ For Program Area measures where you should not report any data, and for Project Measures when you do not yet have data, enter “999” in the Target and or Actual fields as appropriate.
- ▶ Refer to the Dear Colleague letter for additional guidance.

# Completing the Status Charts in G5

- ▶ Enter the Project Objective above the status chart.
- ▶ Use **Add Performance Measure** to add as many measures as needed for each objective. Use **Add Another Project Objective** to add more objectives.
- ▶ Be aware! There are character limits and required fields.

You are here: Grant Maintenance > Performance Reports > Package Submission

Submit Performance Reports

An \* indicates a required field.

OMB No.1894-0003 Exp.07/31/2024

U.S. Department of Education  
Grant Performance Report (ED 524B)  
Project Status Chart

PR/Award #: H326T230030

**SECTION A - Project Objectives Information and Related Performance Measures Data** (See Instructions. Use as many pages as necessary.)

1. Project Objective  Check if this is a status update for the previous budget period.

Performance Measure	Measure Type	Quantitative Data							
		Target			Actual Performance Data				
		Raw Number	Ratio	%	Raw Number	Ratio	%		
<input type="text"/>	GPR A	<input type="text"/>	<input type="text"/> / <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

**Add Performance Measure**

Explanation of Progress (include Qualitative Data and Data Collection Information)

**Add Another Project Objective** | **Delete Current Form**

Form Complete

Cancel Save & Return to Package Save



# Status Charts: Explanation of Progress

**SECTION A - Performance Objectives Information and Related Performance Measures Data** (See Instructions. Use as many pages as necessary.)

**1. Project Objective**     Check if this is a status update for the previous budget period.

1.a. Performance Measure	Measure Type	Quantitative Data					
		Target			Actual Performance Data		
		Raw Number	Ratio	%	Raw Number	Ratio	%
			/			/	

1.b. Performance Measure	Measure Type	Quantitative Data					
		Target			Actual Performance Data		
		Raw Number	Ratio	%	Raw Number	Ratio	%
			/			/	

Explanation of Progress (Include Qualitative Data and Data Collection Information)

Beneath each status chart, there is a space to provide further explanation, including qualitative data which doesn't easily fit into the chart as well as information about how your quantitative data were collected and analyzed.



# Completing the Status Charts in G5, cont'd

- ▶ **Save** frequently!
- ▶ If you are unable to save, scroll up to see error messages in red font.
- ▶ When you're done, check "Form Complete" before you click **Save & Return to Package**.

U.S. Department of Education  
Grant Performance Report (ED 524B)  
Project Status Chart

PR/Award #: H326T230030

SECTION A - Project Objectives Information and Related Performance Measures Data (See Instructions. Use as many pages as necessary.)

1. Project Objective  Check if this is a status update for the previous budget period.

Performance Measure	Measure Type	Quantitative Data						
		Target			Actual Performance Data			
		Row Number	Ratio	%	Row Number	Ratio	%	
	GPR		/			/		Delete

Add Performance Measure

Explanation of Progress (Include Qualitative Data and Data Collection Information)

# ED 524B Sections B & C



# Section B - Budget Information

- ▶ Sections B and C can be written in Microsoft Word then saved as PDFs for uploading into G5.
- ▶ Include a table in your Section B document to record expenditures during the current Budget Period. (There is an example on the next slide, but you should refer to the example provided by your project officer.) If you choose to use a different format, you must clearly include, at a minimum, the same information as in the sample table.
- ▶ If you anticipate having unexpended funds (carryover) at the end of the budget year, provide an estimate of this amount by budget category.
- ▶ Carryover does not include funds that you expect to have spent but not drawdown yet. OSEP considers those to be “expended” funds, even if not yet drawn down from G5.

# Recommended Budget Table for Section B

	<b>Amount spent so far this Budget Period</b>	<b>Additional amount estimated to be drawn down in G5 by September 30</b>	<b>Anticipated amount that will be spent but not drawn down in G5 by September 30</b>	<b>Anticipated amount to be carried over into the next budget year (carryover <u>does not</u> include funds that have been spent but not drawn down yet)</b>
Personnel				
Fringe Benefits				
Travel				
Equipment				
Supplies				
Other				
Indirect Costs				
<b>Total Costs</b>				



# Section B - Budget Information, cont'd

- **Required!** Unless your anticipated carryover is \$0.00, you must provide justification in your APR to explain (1) the reason for **any** carryover **and** (2) how you anticipate “catching up” in your spending so that you will not have unspent funds at the end of the project.
- If you anticipate having a **large carryover** (70% or more of your budget unspent 90 days or less before the end the budget period), notify your Project Officer. Grantees with large available balances (LABs) might be asked to provide additional documentation to justify why they should receive the full amount of continuation funding requested for the next budget year.

# Section C - Additional Information

- ▶ Refer to the Dear Colleague Letter for the information to be included in Section C.
- ▶ From the General Instructions:
  - If applicable, please provide a list of current partners on your grant and indicate if any partners changed during the reporting period. Please indicate if you anticipate any change in partners during the next budget period. If any of your partners changed during the reporting period, please describe whether this impacted your ability to achieve your approved project objectives and/or project activities.
  - Describe any changes that you wish to make in the grant's activities for the next budget period that are consistent with the scope and objectives of your approved application.
  - Provide any other appropriate information about the status of your project including any unanticipated outcomes or benefits from your project.

# Uploading Section B and Section C

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**G**<sup>5</sup> Empowering the grant community.

Main Grant Setup Grant Maintenance G5 Admin Reports Help Logout

You are here: Grant Maintenance > Performance Reports > Package Submission

**Submit Performance Reports**

An \* indicates a required field.

OMB No.1894-0003 Exp.07/31/2024

U.S. Department of Education  
Grant Performance Report (ED 524B)  
Project Status Chart

PR/Award #: H326T230030

**SECTION B - Budget Information** (See Instructions. Use as many pages as necessary.)

Title :

File :

Only Adobe Portable Document Format (.pdf) file upload is supported.

**SECTION C - Additional Information** (See Instructions. Use as many pages as necessary.)

Title :

File :

Only Adobe Portable Document Format (.pdf) file upload is supported.

Form Complete

[^ Back to Top](#)

To complete the package form “Project Status Charts Section B and C,” select Upload and navigate to the PDF files for Section B and Section C saved on your computer, then select Perform Upload.

When you’re done, check “Form Complete” before you click **Save & Return to Package**.

# Last Step! Submitting Your APR in G5

Welcome to G5 - Department of Education - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Welcome to G5 - Department of Edu...

<b>Due Date</b>	10/29/2010 04:30 PM EST
<b>Last Updated</b>	10/01/2010 03:14 PM EDT

Form Title	Form Status
2390_6001_Grant Performance Report Cover Sheet (ED 5248) - Revised 2008	Completed
1851_6002_Grant Performance Report (ED 5248) Project Status Chart - Section A	Completed
1852_6003_Grant Performance Report (ED 5248) Project Status Chart - Section B & C	Completed
Project Narrative	Completed

**Authorization Statement**  
To the best of my knowledge and belief, all data in this performance report is true and correct. This document has been duly authorized by the governing body of the grantee.

**Submission Alert**  
You are submitting this information on behalf of the Authorized Representative. By submitting this performance report I certify that the authorizing representative of the grantee's organization has approved this report.

**Submission Warning**  
Warning! All grantees must follow the internal administrative and clearance procedures of their organization. It is a fraud and a Federal felony to submit his report if not approved by an Authorized Representative for your institution.

**Confirmation Statement**  
A confirmation message will be sent to the authorized representative if an e-mail address is provided.

< Previous Cancel Submit

- ▶ From the list of forms (package), you can click **Preview Package** to see what your APR will look like when your Project Officer receives it.
- ▶ When everything is complete and you're ready to submit, click **Continue**
- ▶ Review the information on the Summary page, then click **Submit**.
- ▶ A confirmation message at the top of the screen will let you know that the report was submitted successfully.
- ▶ If you need to unsubmit and make changes to your APR (before the due date), return to the Package Submission screen (under Grant Maintenance) in G5.

# Stuck? What to do?

## ▶ Need technical support with G5?

G5 Help is available via the e-mail, phone numbers, and website below (even during a government shutdown)

- Hours of Operation: 8:00 AM to 5:00 PM EST, Monday - Friday, except on Federal holidays
- Toll-Free: 1-888-336-8930
- TTY: 1-800-877-8339
- Email: [OBSSHelpDesk@ed.gov](mailto:OBSSHelpDesk@ed.gov)
- [Online Help Desk](#)

# Finally

Questions about APR requirements?  
Be sure you've reviewed the APR resources.

If you're still stuck, email your project officer.



Office of Special Education Programs  
U.S. Department of Education