



U.S. DEPARTMENT OF EDUCATION

**Education Stabilization Fund-
Higher Education Emergency Relief Fund
(HEERF) Data Collection Tool User Guide**

Release 1.1

March 2021

This technical guide was produced under U.S. Department of Education Contract No. 91990019A0008/91990020F0358 with Applied Engineering Management Corporation. Brian Fu served as the contracting officer's representative. No official endorsement by the U.S. Department of Education of any product, commodity, service or enterprise mentioned in this publication is intended or should be inferred.

March 2021

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On request, this publication is available in alternate formats, such as Braille, large print, or CD Rom. For more information, please contact the Department's Alternate Format Center at (202) 260-0852 or (202) 260-0818.

DOCUMENT CONTROL

DOCUMENT INFORMATION

Title:	Education Stabilization Fund - Higher Education Emergency Relief Fund (HEERF) Data Collection Tool User Guide
Issue Date:	March 2021
Security Level:	Unclassified – For Official Use Only

DOCUMENT HISTORY

Version Number	Date	Summary of Change
1.0	January 2021	This is a new technical User Guide for the HEERF Data Collection Tool
1.1	March 2021	<ul style="list-style-type: none">• Updated the Limited Reopen period dates• Updated login screenshots• Changed references of “Annual Report” to “Annual Performance Report”

PREFACE

This User Guide is intended to assist users of the HEERF Data Collection Tool. This guide addresses the basic mechanics of the Data Collection Tool system access and navigation for this process as well as the specific steps required to complete the Higher Education Emergency Relief Fund (HEERF) Annual Performance Report.

This guide will be updated if major system modifications affect user procedures.

Data entered into the Data Collection Tool are authorized by a Higher Education Emergency Relief Fund (HEERF) Data Collection Form (OMB Control Number 1840-0850, expires 12/31/2023).

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 ATTN: Brian Fu or e-mail ICDocketMgr@ed.gov.

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1.0 Introduction

The Higher Education Emergency Relief Fund (HEERF) Annual Performance Report is collected using the Education Stabilization Fund (ESF) Data Collection Tool. The Data Collection Tool is a web-based application that allows Institutions of Higher Education (IHEs) to report information that constitutes the Annual Performance Report for HEERF grantees.

This document is intended to guide users in submitting the HEERF Annual Performance Report.

1.1 Technical Requirements

The system login screen is located on the [Education Stabilization Fund Public Transparency Portal](#) as illustrated below.

Recommended Web Browser: The Data Collection Tool will work in all browsers, but Google Chrome is recommended for the best performance.

1.2 Overview

The Department of Education awarded HEERF grant funds to Institutions of Higher Education (IHEs) through several different programs, including Student Portion, Institutional Portion, Historically Black Colleges and Universities (HBCUs), Tribally Controlled Colleges and Universities (TCCUs), Minority Serving Institutions (MSIs), Strengthening Institutions Program (SIP) and Fund for the Improvement of Postsecondary Education (FIPSE) Formula Grant.

1.2.1 HEERF Annual Performance Report Important Dates

For the reporting period of March 13, 2020 through December 31, 2020, the Data Collection Tool will open on January 5, 2021 at 8:00 a.m. ET and close February 1, 2021 at 11:59 p.m. ET.

The limited reopen period for the HEERF Annual Performance Report is March 17, 2021, 8:00 a.m. ET through March 31, 2021, 11:59 p.m. ET.

IMPORTANT! To be included in the data quality review and the limited reopen period, a submission of the HEERF Annual Performance Report is *required* by February 1, 2021. Late submissions will not be accepted and deadline extensions will not be granted.

2.0 Data Collection Tool User Roles

2.1 Types of Users

The HEERF Annual Performance Report collection through the Data Collection Tool supports the following user roles. These roles were obtained via email responses from the institution.

Editor Role: allows IHE user to view, enter, and update their own IHE's data via the Data Collection Tool.. They can view and print the Annual Performance Report.They cannot submit the Annual Performance Report

Submitter Role: allows IHE user to view, enter, update, and submit their own IHE's Annual Performance Report. They can view and print the Annual Performance Report. **This person is authorized to submit the report on behalf of the institution.**

NOTE! Your IHE's primary point of contact should contact the Help Desk to obtain user names and passwords for additional users or to adjust access levels, when needed. The Help Desk's contact information is:

Phone: 1-888-OPEPD-10 (888-673-7310)
Email: CARESActReportingHelpDesk@ed.gov

The Help Desk is open from 8 a.m. to 6 p.m. ET, Monday through Friday, excluding Federal holidays.

2.2 Concurrent Users

Multiple users may have access to the Data Collection Tool. If multiple users are entering data on the same page of the Annual Performance Report at the same time, only the most recent data entry updates will be captured by the system. However, if multiple users are working on different pages within the Data Collection Tool at the same time, one user's save will not overwrite the other's. Users should work internally to ensure multiple users are not saving updates to the Annual Performance Report concurrently.

3.0 Logging In and Out of the Data Collection Tool

3.1 Logging into the Data Collection Tool

To access the Data Collection Tool login screen, go to the [Education Stabilization Fund Public Transparency Portal](#).

Recommended Web Browser: The Data Collection Tool will work in all browsers, but Google Chrome is recommended for the best performance.

1. Click the login icon button in the top right of the page (see fig. 3.1).

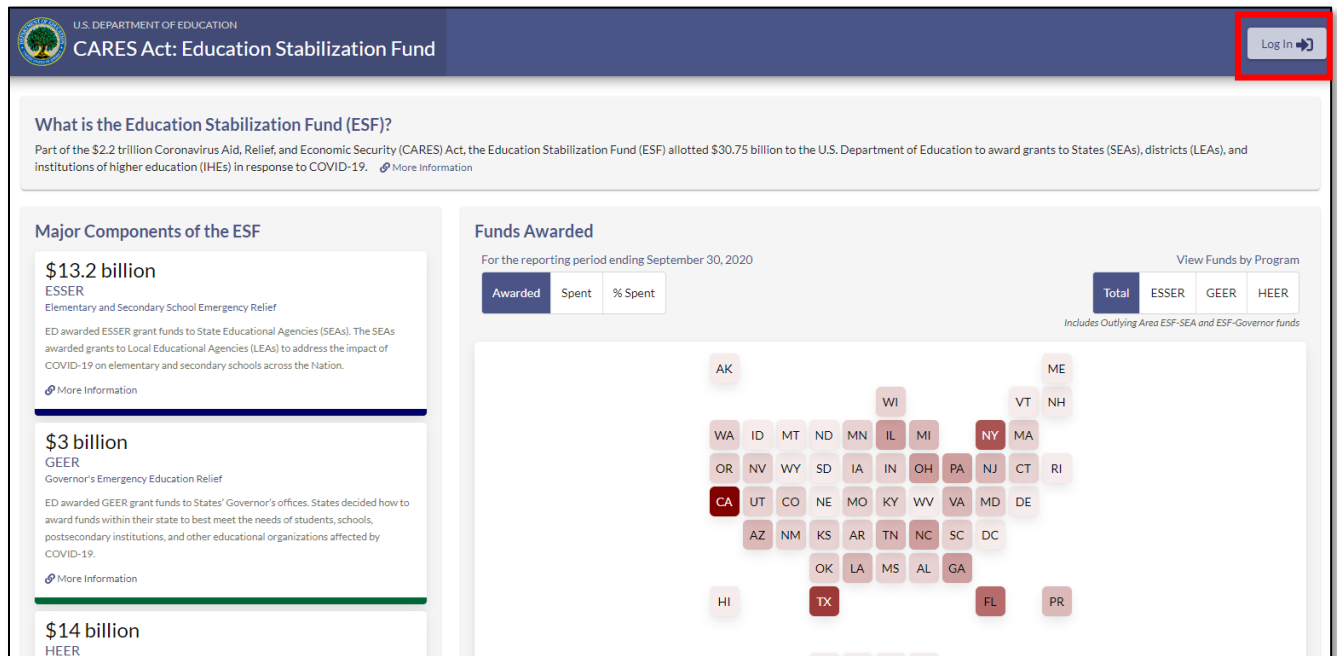


Figure 3.1 – Login Button on Education Stabilization Fund Public Transparency Portal

2. Enter the assigned Data Collection Tool user name and password into the appropriate fields and click **Login** (see fig. 3.2). See Section 3.1 if you need to reset your password. If you experience issues logging into the Data Collection Tool, please contact the Help Desk.

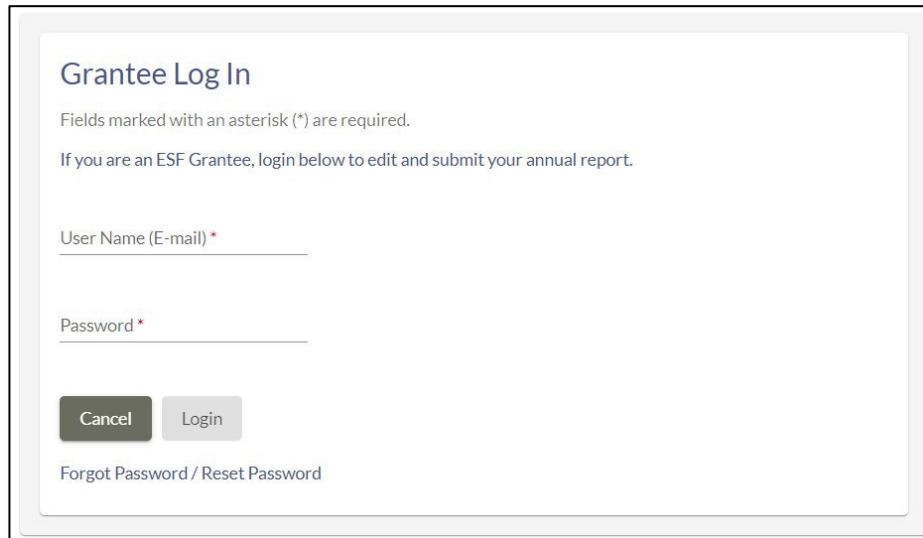


Figure 3.2 – Data Collection Tool Login Screen

NOTE! The Data Collection Tool password is case sensitive.

3. A Department of Education approved warning banner will appear. Accept the terms of the consent to monitoring before accessing the application (see fig. 3.3) by clicking the ***I Accept the Terms*** button.

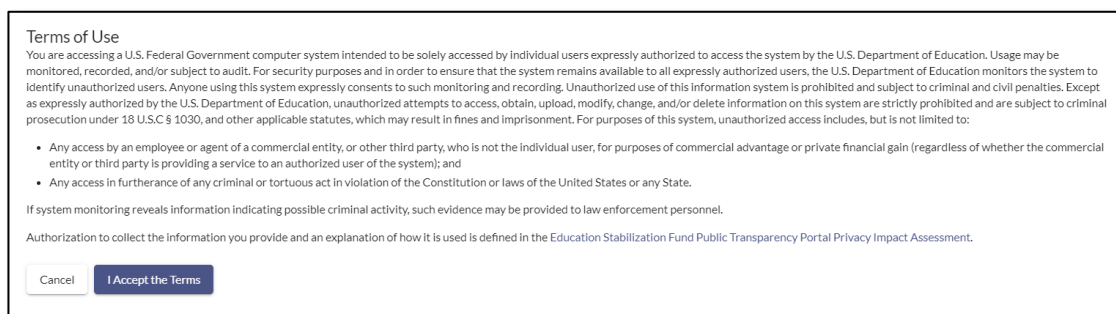
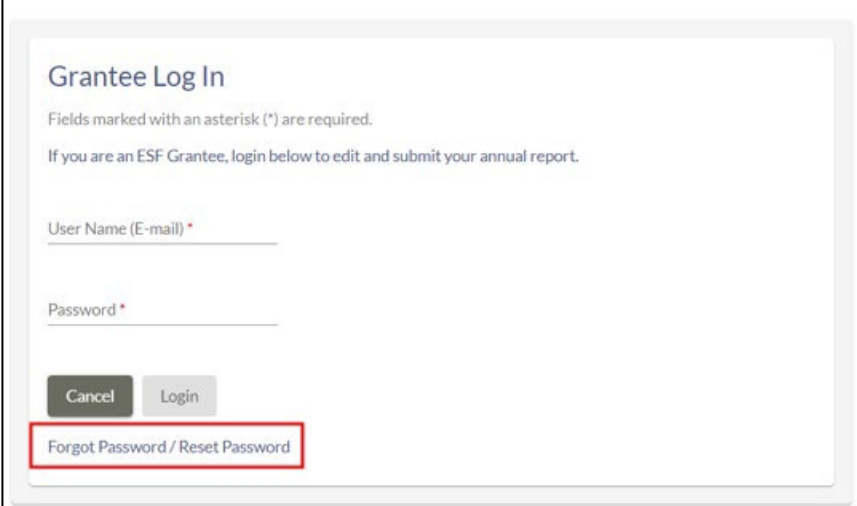


Figure 3.3 – Terms of Use Screen

3.2 Data Collection Tool Password

3.2.1 Resetting Account Password – Forgot Password

If unable to log into your account, reset your Data Collection Tool password by clicking the ***Forgot Password*** link on the login screen (see fig. 3.4).



Grantee Log In

Fields marked with an asterisk (*) are required.

If you are an ESF Grantee, login below to edit and submit your annual report.

User Name (E-mail) *

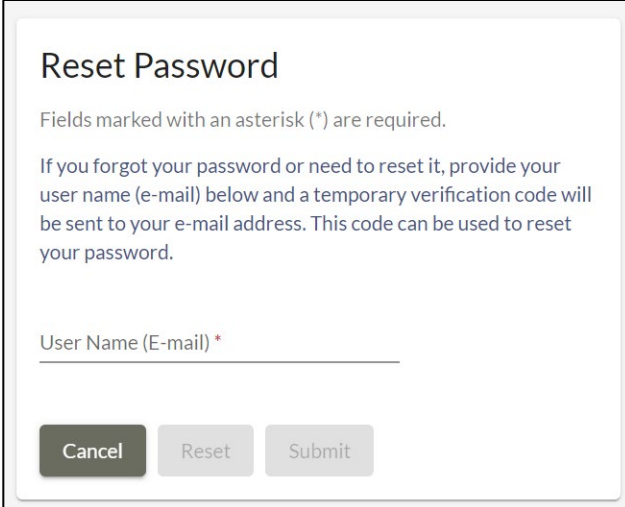
Password *

Cancel Login

Forgot Password / Reset Password

Figure 3.4 – Data Collection Tool Login Screen - Forgot Password Link

Upon clicking the link, enter the user name and click **Submit** (see fig. 3.5).



Reset Password

Fields marked with an asterisk (*) are required.

If you forgot your password or need to reset it, provide your user name (e-mail) below and a temporary verification code will be sent to your e-mail address. This code can be used to reset your password.

User Name (E-mail) *

Cancel Reset Submit

Figure 3.5 – Password Reset E-mail Initiation

An automated e-mail will be sent to the user's e-mail address associated with the Data Collection Tool account and will include a verification code. Return back to the login screen and enter the verification code which will then allow the user to enter a new password.

NOTE! Passwords may not be previous passwords and require the following elements: at least 12 characters, one uppercase letter, one lowercase letter, a number, and a special character.

3.2.2 Resetting Account Password When Logged In

Select **Change Password** from the navigation dropdown menu to reset the account password after successfully logging into the Data Collection Tool.

Follow the prompts to create a new password by entering the old password (the same one used to log in initially), and create a new password by entering it twice. Click **SAVE** (see fig. 3.6).

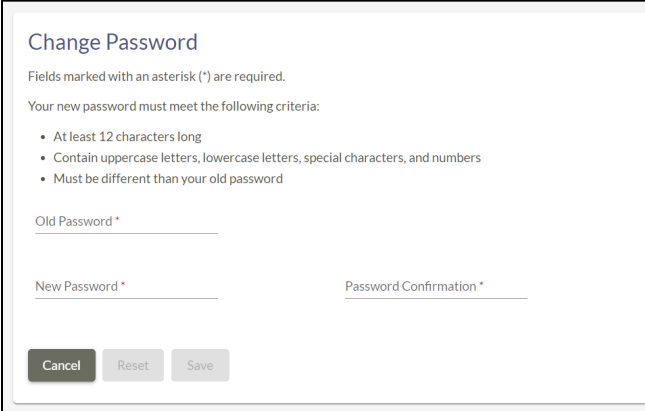


Figure 3.6 – Resetting Data Collection Tool Password

3.3 Viewing Account Information

Once logged into your account, click the navigation dropdown menu to access your Data Collection Tool account information (see fig. 3.7).

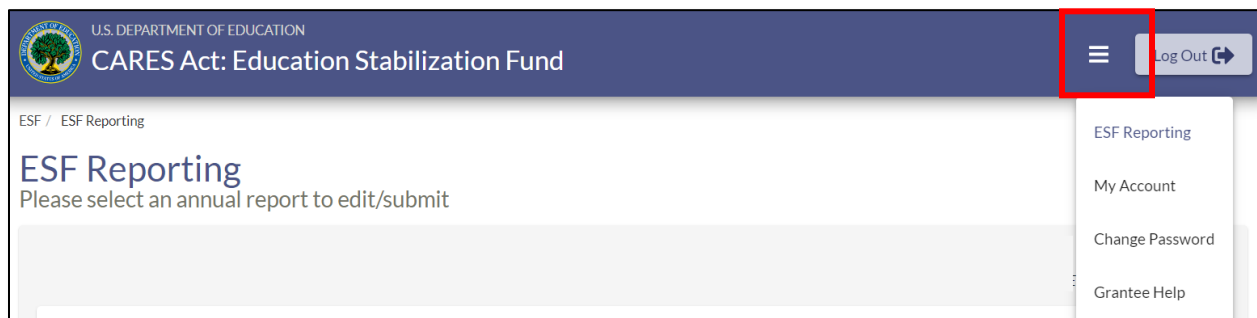


Figure 3.7 – Data Collection Tool Dropdown Menu

Select **My Account** to view your user name, role, and institution DUNS number(s) you are responding for (see fig. 3.8). Additionally, the Help Desk's contact information is located on the screen at the bottom.

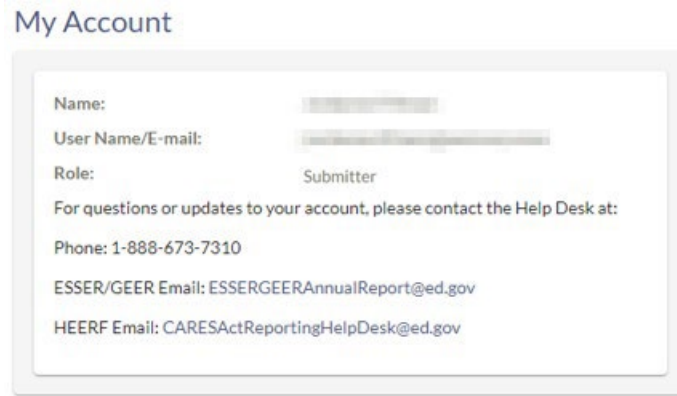


Figure 3.8 – Data Collection Tool - My Account

NOTE! If the information displayed in the *My Account* section is inaccurate, contact the Help Desk for assistance.

3.4 Logging Out of the Data Collection Tool

Log out of the Data Collection Tool when edits within the Annual Performance Report are completed to minimize security risks. Before signing out, be sure to save any changes to avoid losing work. To sign out, click the Log Out icon on the top right-hand corner of the screen. (see fig. 3.9).



Figure 3.9 – Log Out Link

4.0 Accessing the HEERF Annual Performance Report

After logging into the Data Collection Tool, the ESF Reporting landing page will be displayed (see fig. 4.1).

To navigate to the Annual Performance Report, click **Enter**.

If you are associated with multiple institutions, you will have access to the Annual Performance Report for all of them on the landing page. You are required to complete a report for *each* institution.

IHE Name	IHE Duns#	Annual Report	Due Date	Current Reporting Period	Status	Access Form
SOUTHWESTERN CHRISTIAN COLLEGE	075105775	First Annual Report	February 1, 2021	March 13, 2020 - December 31, 2020	In Progress	Enter
THE UNIVERSITY OF TEXAS PERMIAN BASIN	800188807	First Annual Report	February 1, 2021	March 13, 2020 - December 31, 2020	In Progress	Enter

Figure 4.1 – ESF Reporting Landing Page

NOTE! A warning is generated by the system after 30 minutes of inactivity. To avoid losing data, click within the Annual Performance Report form, or select **Continue** when the inactivity warning message is displayed.

4.1 Data Collection Tool Features

Each page within the Data Collection Tool contains the following features (see fig. 4.2):

- A. **Instructions:** Provides general information regarding HEERF reporting, including due dates and applicable reporting periods
 - To open and close the instructions, click on the Instructions bar
- B. **Burden Statement:** Full text of the Burden Statement
 - To open and close the burden statement, click on the *Burden Statement* bar
- C. **Section Numbers:** A list of sections within the report
 - To navigate between sections, click the desired number
- D. **Status Indicator:** Shows the current status of the Annual Performance Report
 - Not Started: Annual Performance Report has not been started
 - In Progress: Annual Performance Report has been saved at least once
 - Submitted: Annual Performance Report has been submitted

- i. Only a user with Submitter privileges can submit the Annual Performance Report
- E. **Last Modified:** Shows who last modified the report including the date and time it was modified
- F. **Section Navigation Menu:** A blue highlight indicates what section the user is on
- G. **Additional Guidance:** Users can hover over the blue “i” icon to view additional guidance (see fig. 4.3)

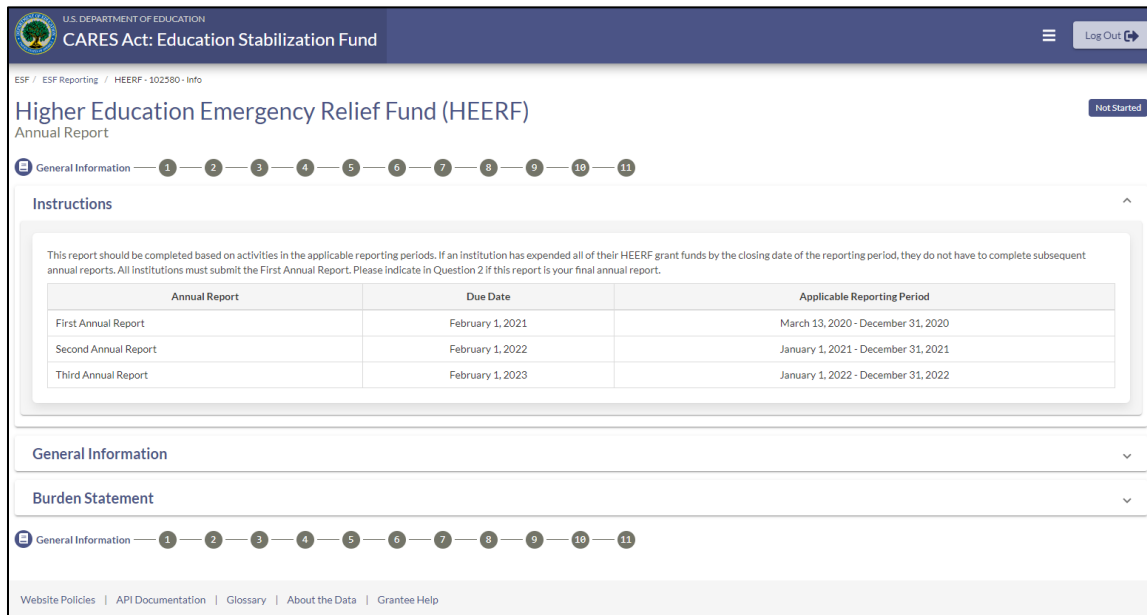


Figure 4.2 – Data Collection Tools Features

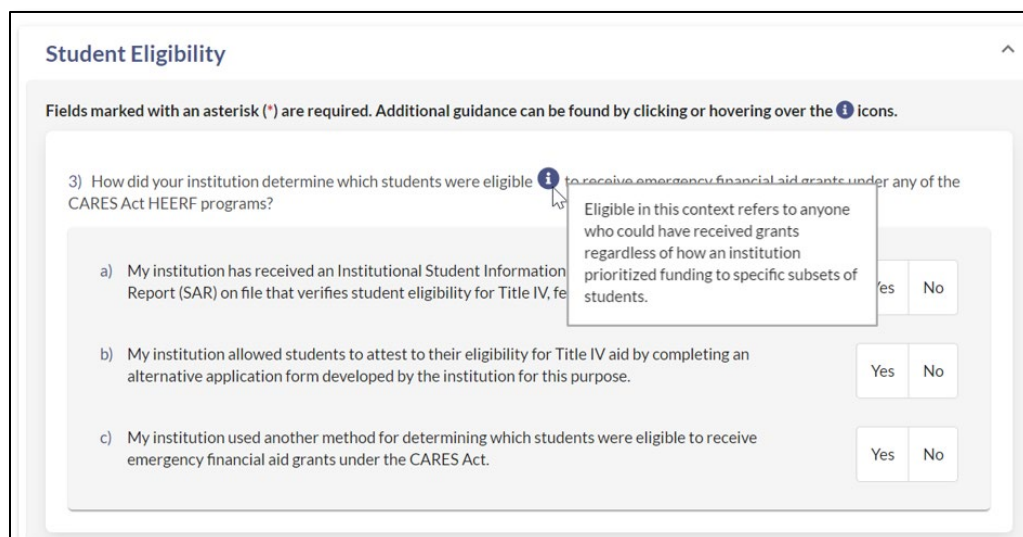


Figure 4.3 – Additional Guidance

5.0 Navigation and Data Entry Tips

The Annual Performance Report consists of a General Information and eleven (11) numbered sections, one of which is the Review and Submit page.

5.1 Navigating Pages

To navigate to a list of Annual Performance Report sections, click the **Enter** button under *Access Form* on the ESF Reporting landing page. (see fig. 5.1).



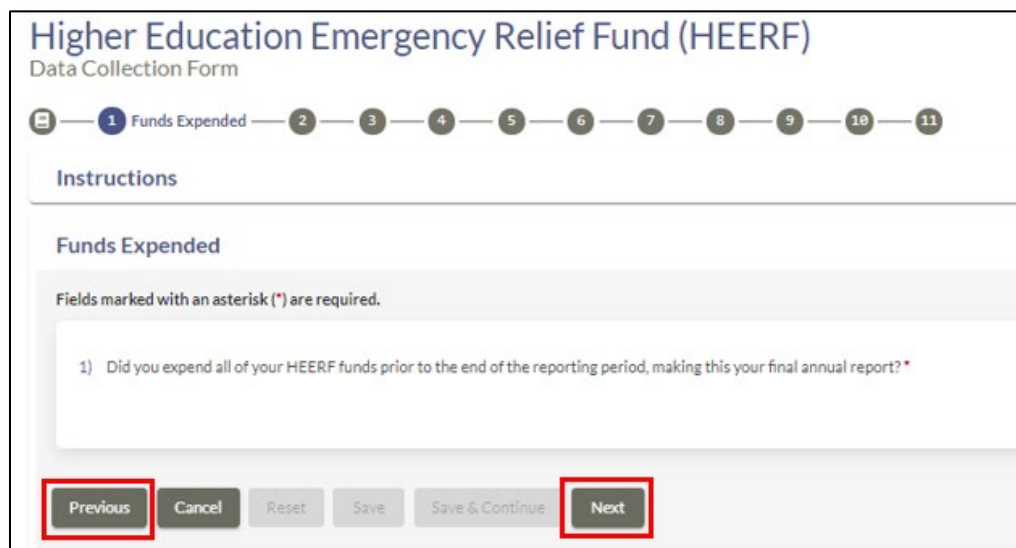
ESF Reporting
Please select an annual report to edit/submit

Higher Education Emergency Relief Fund (HEERF)

IHE Name	IHE Duns #	Annual Report	Due Date	Current Reporting Period	Status	Access Form
SOUTHWESTERN CHRISTIAN COLLEGE	075105775	First Annual Report	February 1, 2021	March 13, 2020 - December 31, 2020	In Progress	Enter
THE UNIVERSITY OF TEXAS PERMIAN BASIN	800188807	First Annual Report	February 1, 2021	March 13, 2020 - December 31, 2020	In Progress	Enter

Figure 5.1 – Navigating to Sections

Users can navigate to previous and subsequent pages sections while completing the HEERF Annual Performance Report by selecting the **Next** and **Previous** buttons at the bottom of each page (see fig. 5.2).



Higher Education Emergency Relief Fund (HEERF)
Data Collection Form

1 Funds Expended — 2 — 3 — 4 — 5 — 6 — 7 — 8 — 9 — 10 — 11

Instructions

Funds Expended

Fields marked with an asterisk (*) are required.

1) Did you expend all of your HEERF funds prior to the end of the reporting period, making this your final annual report? *

Previous Cancel Reset Save Save & Continue Next

Figure 5.2 – General Information Page

5.2 Saving and Resetting Data Entry Responses

Users can save the HEERF Annual Performance Report data entry responses by selecting **Save & Continue** at the bottom of the page. Users can exit and log back in at a later time to return to the Annual Performance Report and submit (all previously entered and saved responses will appear).

Once the changes have been made, the **Reset**, **Save** and **Save & Continue** buttons will become enabled (see fig. 5.3).

The **Reset** button will revert any changes made to the current page only.

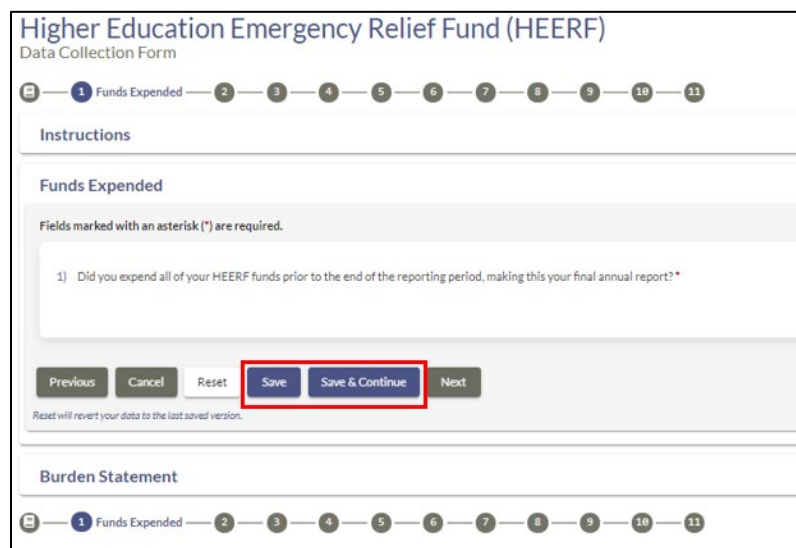
The screenshot shows the 'Higher Education Emergency Relief Fund (HEERF) Data Collection Form'. At the top, there is a progress bar with 11 steps, with step 1 'Funds Expended' selected. Below the progress bar is an 'Instructions' section, followed by the 'Funds Expended' section. A note states 'Fields marked with an asterisk (*) are required.' Below this is a question: '1) Did you expend all of your HEERF funds prior to the end of the reporting period, making this your final annual report? *'. At the bottom of the form, there are several buttons: 'Previous', 'Cancel', 'Reset', 'Save', 'Save & Continue', and 'Next'. The 'Save' and 'Save & Continue' buttons are highlighted with a red rectangular box. Below the buttons, there is a small note: 'Reset will revert your data to the last saved version.' At the bottom of the form, there is a 'Burden Statement' section with another progress bar.

Figure 5.3 – Click Save or Save & Continue

NOTE! If the **Previous**, **Cancel**, **Reset** or **Next** button is clicked prior to clicking the **Save** or **Save & Continue** button, a pop-up message will display to warn the user they are navigating away from the page without saving (see fig. 5.4).

If the **Leave without saving** button is clicked, changes made since clicking **Save** or **Save & Continue** will be undone. If the **Stay** button is clicked, the changes are still present but have not been saved. Be sure to click the **Save** or **Save & Continue** button.

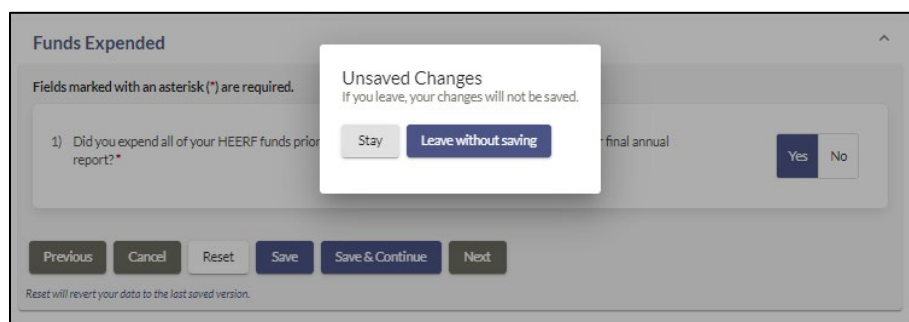
The screenshot shows the same 'Funds Expended' section as in Figure 5.3, but with a modal dialog box overlaid. The dialog box is titled 'Unsaved Changes' and contains the text 'If you leave, your changes will not be saved.' Below this text are two buttons: 'Stay' and 'Leave without saving'. The 'Stay' button is light gray, and the 'Leave without saving' button is dark blue. In the background, the form is dimmed, and the 'Save' and 'Save & Continue' buttons are still visible.

Figure 5.4 – Unsaved Changes Warning Message

5.3 Data Entry Response Types

Data is entered into the Annual Performance Report in the following ways:

- **Manual Data Entry:** Data should be entered using the options available in the Data Collection Tool.
- **Toggle Buttons:** Questions responded to by selecting the **Yes** or **No** buttons.
- **Prefilled Data:** The system will prefill data for the reporting period of March 13, 2020 through December 31, 2020 from the U.S. Department of Education's G5 System.
- **Auto-Calculated:** The system will calculate the value for the data element.
- **Cascading Questions:** Sets of questions that result in additional questions depending on the response to the previous question.
- **File Upload:** Questions may ask for supporting documentation to be added. These must be PDF or Microsoft Word files and cannot exceed 2 MB per file.
- **URL Fields:** These fields will only accept valid website URLs (an error will display if an invalid URL is entered).

5.3.1 Manual Data Entry

For sections within the Annual Performance Report that require text responses, the character limit for most text fields is 300 characters and will be displayed under the text field. Please review the text field for accuracy after pasting, as the text will be truncated after 300 characters.

NOTE! Text responses will be saved as plain text, with no formatting, so do not devote time to formatting the text sections in Word.

If a field collects a percentage, please enter only the numerical value. The Data Collection Tool will prevent text being entered in a numerical field. If data type formats are not entered correctly, a validation error will appear. Data on the page may not be saved if this occurs. Correct these before navigating away from the page to avoid a loss of work.

5.3.2 Toggle Buttons

The first question in the Annual Performance Report requires a *Yes or No* response using toggle buttons. The **Yes** or **No** buttons will default as white and will turn dark blue when selected. To respond:

1. Click the **Yes** or **No** button to respond (see fig. 5.5).

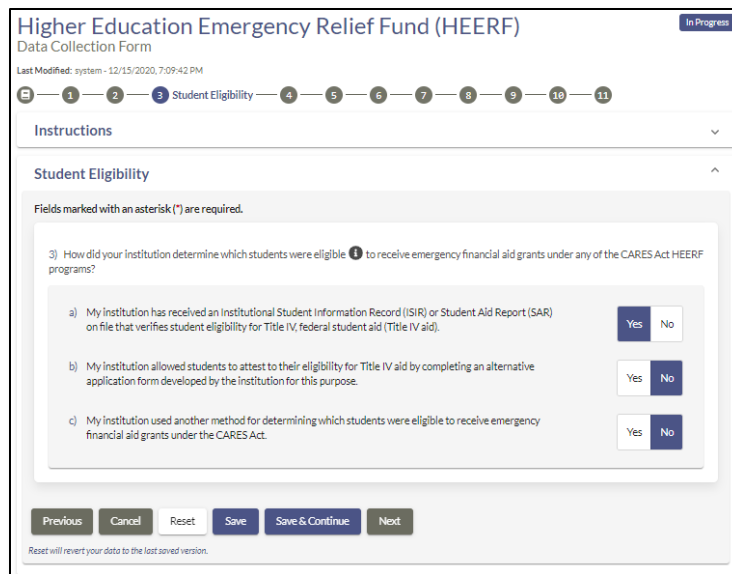


Figure 5.3 – Yes or No Toggle Buttons

5.3.3 Prefilled Data

Data is prefilled into the following pages as noted below. Unless an exception is noted, data will not be refreshed in the system after being prefilled.

- **General Information:** Contact information and amount awarded are prefilled from G5.
 - The total grant amount allocated to the IHE is prefilled from G5 and non-editable.
 - The lead contact's phone number can be manually updated. If this individual has changed, please contact the Help Desk.

5.3.4 Auto-Calculated

The system will calculate the value for the data element including percentages and totals.

- **Section 7:** The amounts displayed under the Summary section are auto-calculated based on the number of students entered in the Number of HEERF Student Recipients questions and the amounts disbursed directly to students as entered in the HEERF Amount Disbursed related questions.
 - **NOTE!** In order to complete this section be sure to reference the *Appendix* which is located at the bottom of the page below the *Previous* and *Next* buttons (see fig 5.6)

Graduates

Full-time students: \$0.00

Part-time students: \$0.00

Previous Cancel Reset Save Save & Continue Next

Appendix I

For your institution, provide the following:

- 1) Count of students that were eligible to receive emergency financial grants under the HEERF.
- 2) Unduplicated count of unique student recipients who received grants from any part of the HEERF.
- 3) The total amount disbursed from each of the following fund types for all students who received grants and grant recipient subgroups listed in the table below:

Figure 5.6 – Appendix in Section 7

- **Section 8:** Questions 8.17 and 8.18 are auto-calculated from data entered in previous rows.
- **Section 9:** Question 9a is auto-calculated from previous questions and Section 9e is auto-calculated from students who dropped out divided by total number of students who received funds.

5.3.5 Cascading Questions

Cascading questions are sets of questions that result in additional questions depending on the response to the previous question (see fig. 5.7).

NOTE! For all cascading questions, the first question is required (indicated so by an asterisk).

Higher Education Emergency Relief Fund (HEERF) Data Collection Form

Last Modified: system - 12/15/2020, 7:09:42 PM

1 2 3 4 Aid Determination 5 6 7 8 9 10 11

Instructions

Aid Determination

Fields marked with an asterisk (*) are required.

4) How did your institution determine which students received emergency financial aid grants to students and how much each student would receive? Please indicate if any of the following strategies were used.

4.1) Did you distribute the same amount to all eligible students regardless of different circumstances?* Yes No

4.1.1) Did you ask students to apply for funds? Yes No

4.1.1.1) Did you use that application to determine the amount of a student's emergency financial aid grant? Yes No

4.1.2) Did you use any institutional administrative data (pre-existing data that did not come from a HEERF-specific application form) in determining the amount of funds awarded to students? Yes No

Previous Cancel Reset Save Save & Continue Next

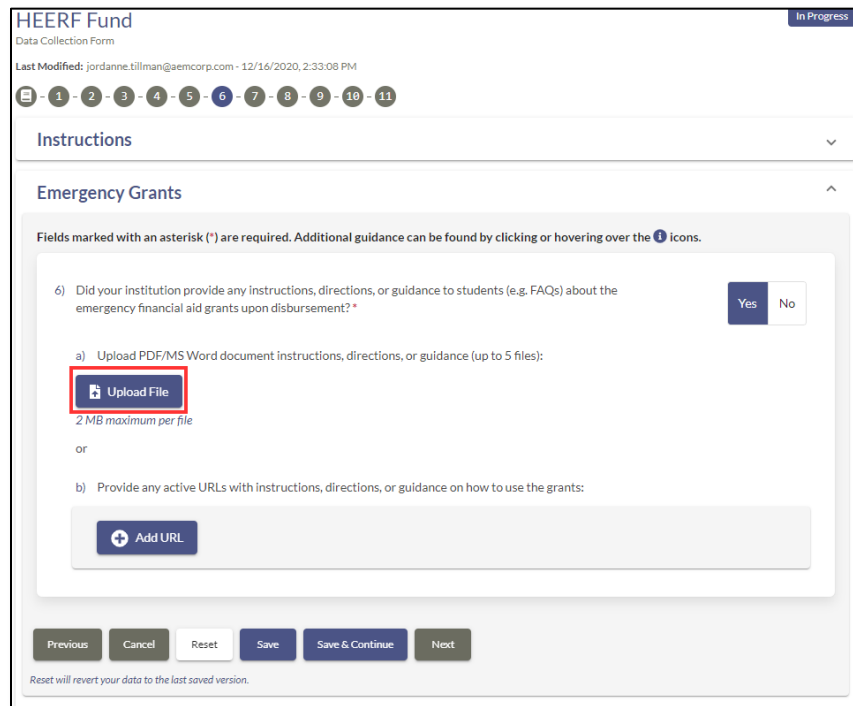
Reset will revert your data to the last saved version.

Figure 5.7 – Cascading Questions

5.3.6 Uploading Supporting Documentation (PDF or Word)

Some questions may ask for supporting documentation to be added. Documents must be in PDF or Microsoft Word format and cannot exceed 2 MB per file. Each specific question will indicate the maximum number of uploads allowed.

To upload a file, click **Upload File** (see fig. 5.8). This will open your local computer's file explorer.



The screenshot shows the HEERF Fund Data Collection Form. At the top, it says "HEERF Fund Data Collection Form" and "Last Modified: jordanne.tillman@aemcorp.com - 12/16/2020, 2:33:08 PM". Below this is a progress indicator with steps 1 through 11, where step 6 is selected. The "Emergency Grants" section is expanded, showing a question: "6) Did your institution provide any instructions, directions, or guidance to students (e.g. FAQs) about the emergency financial aid grants upon disbursement?*" with "Yes" and "No" buttons. Below the question, there is a sub-question: "a) Upload PDF/MS Word document instructions, directions, or guidance (up to 5 files):". The "Upload File" button is highlighted with a red box. Below this, it says "2 MB maximum per file" and "or". There is also a sub-question: "b) Provide any active URLs with instructions, directions, or guidance on how to use the grants:" with an "Add URL" button. At the bottom of the form, there are buttons for "Previous", "Cancel", "Reset", "Save", "Save & Continue", and "Next". A note at the bottom says "Reset will revert your data to the last saved version."

Figure 5.8 File Upload Button

Select the correct file and click **Open** to upload the selected file to the specific question of the Annual Performance Report (see fig. 5.9).

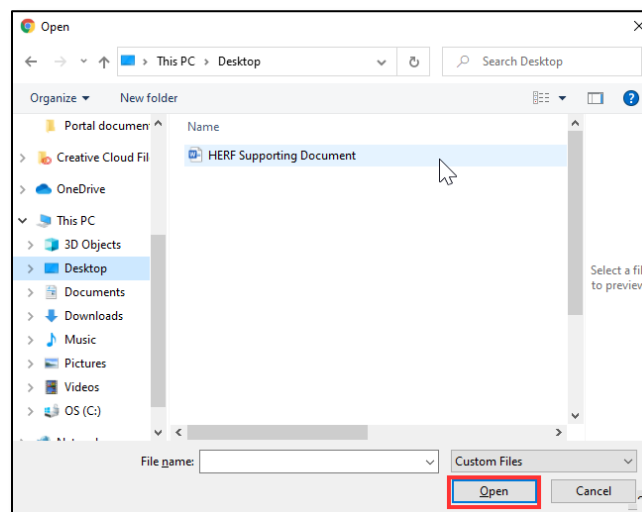
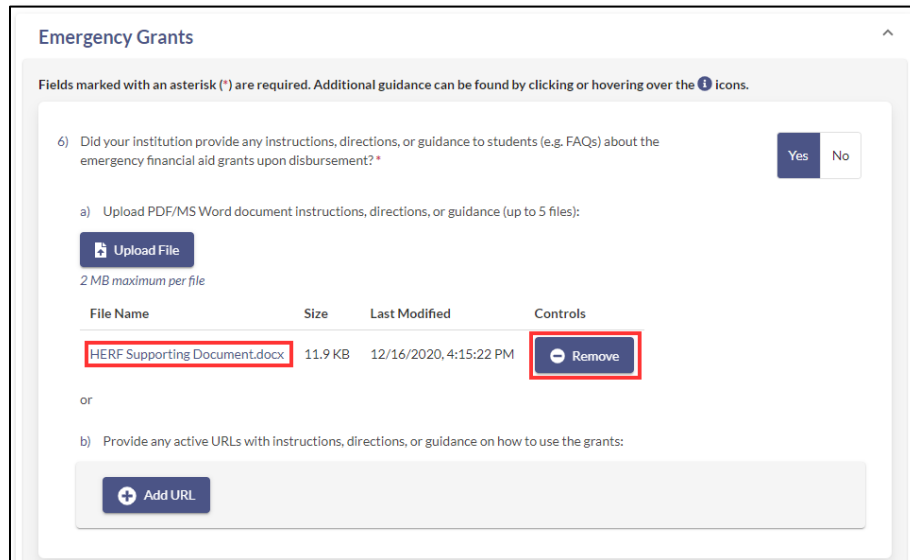


Figure 5.9 – File Explorer to Upload Selected File to Annual Performance Report

Once the file upload processes successfully, it will appear in the Annual Performance Report within the question it was uploaded to. Users can open the document by clicking the document file name. The document can be deleted by clicking **Remove** (see fig. 5.10).



The screenshot shows a form titled "Emergency Grants" with a sub-header "Fields marked with an asterisk (*) are required. Additional guidance can be found by clicking or hovering over the **i** icons." Below this, question 6) asks: "Did your institution provide any instructions, directions, or guidance to students (e.g. FAQs) about the emergency financial aid grants upon disbursement?*" with "Yes" and "No" radio buttons. Question 6a) asks: "Upload PDF/MS Word document instructions, directions, or guidance (up to 5 files):" with an "Upload File" button and a note "2 MB maximum per file". A table lists the uploaded file:

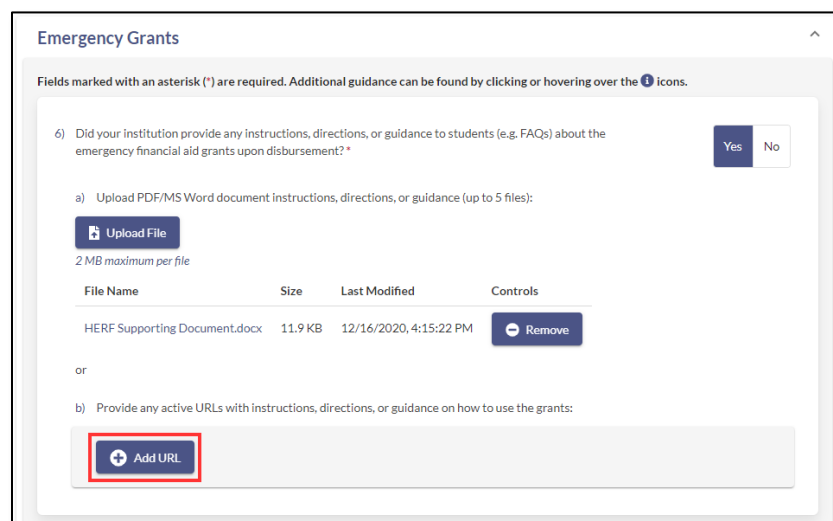
File Name	Size	Last Modified	Controls
HERF Supporting Document.docx	11.9 KB	12/16/2020, 4:15:22 PM	Remove

Below the table is an "or" separator and question 6b) asks: "Provide any active URLs with instructions, directions, or guidance on how to use the grants:" with an "Add URL" button.

Figure 5.10 – Uploaded File

5.3.7 URL Fields

Some questions ask for a direct website URL. To add a URL to a specific question, click **Add URL** (see fig.5.11).



This screenshot is identical to Figure 5.10, showing the "Emergency Grants" form. In this version, the "Add URL" button under question 6b) is highlighted with a red box, indicating the action to be taken to add a URL.

Figure 5.11 – Add URL Button

A data entry field will appear allowing users to either manually type in or copy and paste the website URL into the field (see fig. 5.12). Users can add as many website URLs as needed by clicking **Add URL** each time.

The screenshot shows a web form titled "Emergency Grants". At the top, it states: "Fields marked with an asterisk (*) are required. Additional guidance can be found by clicking or hovering over the ? icons." Below this, question 6 asks: "Did your institution provide any instructions, directions, or guidance to students (e.g. FAQs) about the emergency financial aid grants upon disbursement?*" with "Yes" and "No" radio buttons. Question 7a asks to "Upload PDF/MS Word document instructions, directions, or guidance (up to 5 files):" and includes an "Upload File" button and a note "2 MB maximum per file". A table lists an uploaded file: "HERF Supporting Document.docx" (11.9 KB, 12/16/2020, 4:15:22 PM) with a "Remove" button. Below this is an "or" separator. Question 7b asks to "Provide any active URLs with instructions, directions, or guidance on how to use the grants:". A text input field contains "https://www2.ed.gov/about/o" with a "Remove URL" button. An "Add URL" button is at the bottom of the input area.

Figure 5.12 – Completed URL Field

NOTE! The error message **Value is Invalid** will display if an invalid website URL is entered (see fig. 5.13). A valid website URL must be provided in order to add the URL and to save the section and continue. Most web browsers display the **URL** of a web page above the page in an address bar. A typical **URL** could have the form <http://www.example.com/index.html>, which indicates a protocol (http), a hostname (www.example.com), and a file name (index.html).

This screenshot is identical to Figure 5.12, but the URL input field now contains "https://www2.ed.g" (truncated). A red error message "Value is Invalid" is displayed below the input field. At the bottom of the form, there are navigation buttons: "Previous", "Cancel", "Reset", "Save", "Save & Continue", and "Next". A small note at the very bottom reads: "Reset will revert your data to the last saved version."

Figure 5.13 – Value is Invalid Error Message

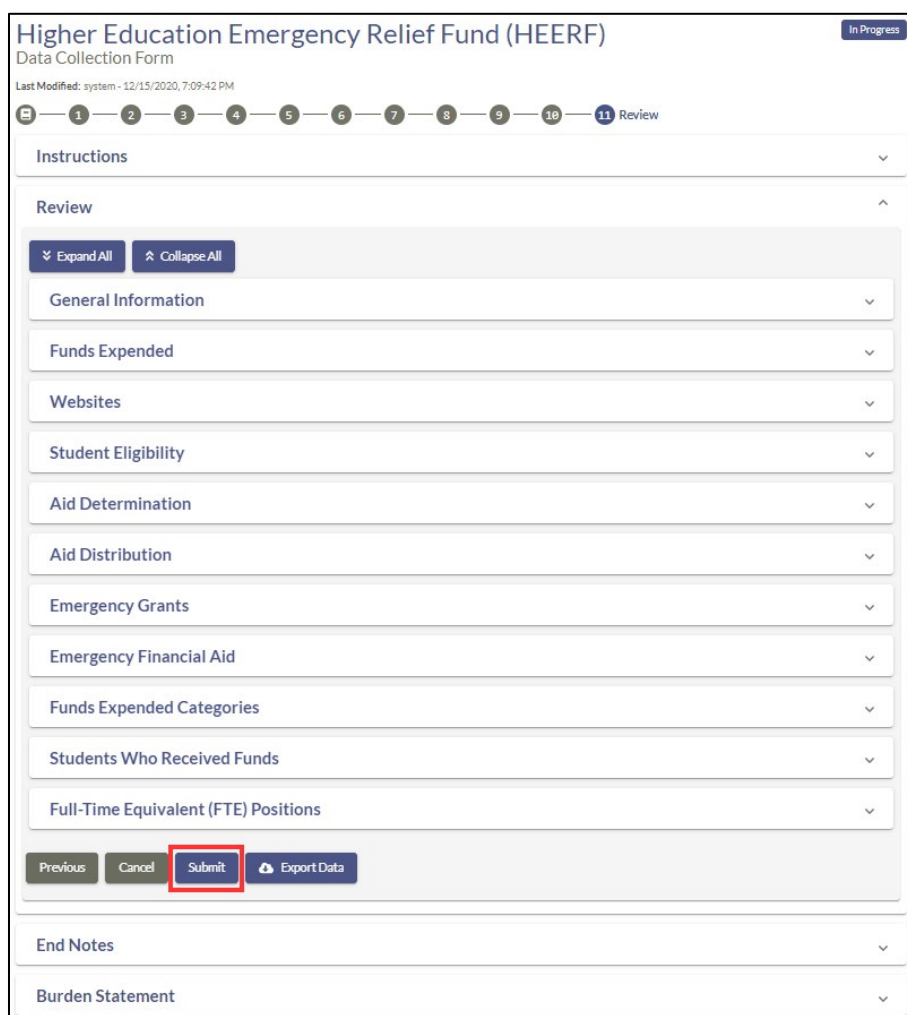
6.0 Submitting the HEERF Annual Performance Report

After all sections are completed, navigate to Section 11 to review all data entered. If data is incorrect, navigate back to the section and update accordingly.

Once all data is confirmed, the user assigned the Submitter role will have the ability to select **Submit** to officially submit the HEERF Annual Performance Report (see fig 6.1).

Prior to submitting, review the **End Notes** section located below the **Submit** button. Here you can find:

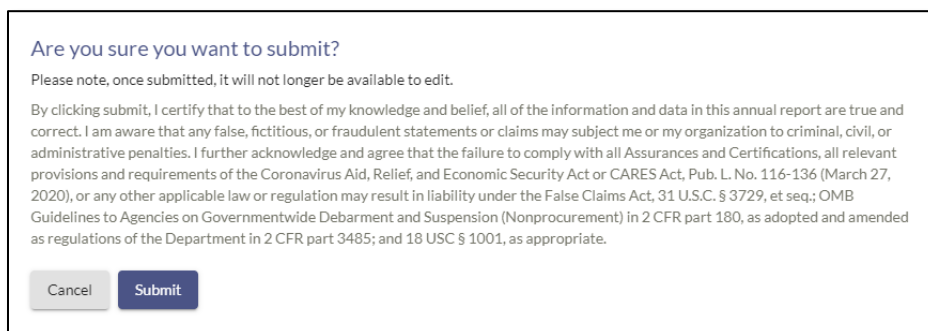
- Quick links to important federal documentation
- Guidelines and reminders on reporting specific information from the program office



The screenshot displays the 'Higher Education Emergency Relief Fund (HEERF) Data Collection Form' interface. At the top, it shows the title 'Higher Education Emergency Relief Fund (HEERF) Data Collection Form' and a status indicator 'In Progress'. Below the title is a progress bar with 11 numbered steps, where step 11 is labeled 'Review' and is currently active. The main content area is divided into several sections: 'Instructions', 'Review', and 'End Notes'. The 'Review' section is expanded, showing a list of data entry categories: General Information, Funds Expended, Websites, Student Eligibility, Aid Determination, Aid Distribution, Emergency Grants, Emergency Financial Aid, Funds Expended Categories, Students Who Received Funds, and Full-Time Equivalent (FTE) Positions. At the bottom of the 'Review' section, there are four buttons: 'Previous', 'Cancel', 'Submit', and 'Export Data'. The 'Submit' button is highlighted with a red rectangular box. Below the 'Review' section are the 'End Notes' and 'Burden Statement' sections, both of which are currently collapsed.

Figure 6.1 – Submit Button to Submit Annual Performance Report

After the **Submit** button is clicked, the user will be presented with a confirmation email, advising that once submitted, the form will no longer be available to edit. To fully submit, users will need to click **Submit** on this window (see fig. 6.2).



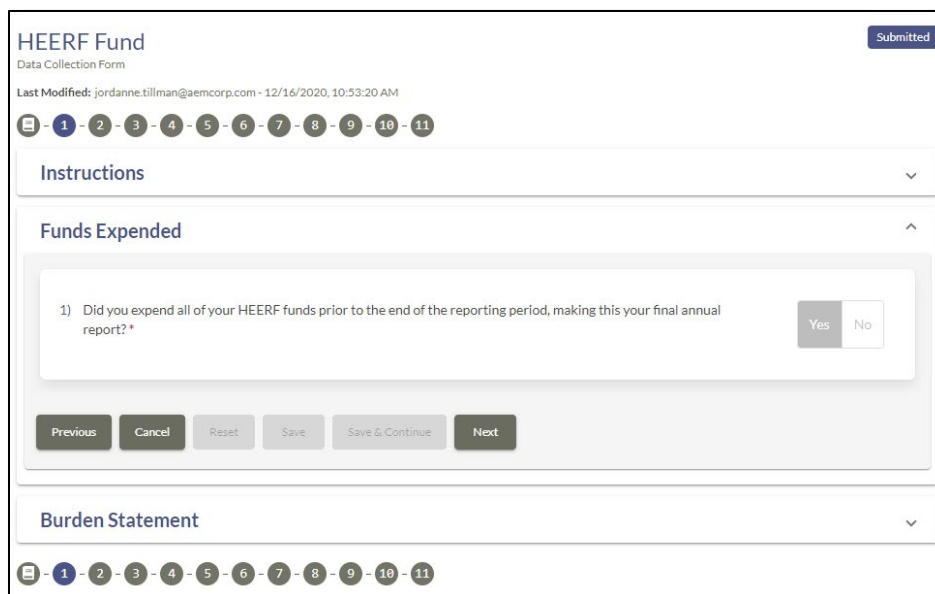
Are you sure you want to submit?

Please note, once submitted, it will not longer be available to edit.

By clicking submit, I certify that to the best of my knowledge and belief, all of the information and data in this annual report are true and correct. I am aware that any false, fictitious, or fraudulent statements or claims may subject me or my organization to criminal, civil, or administrative penalties. I further acknowledge and agree that the failure to comply with all Assurances and Certifications, all relevant provisions and requirements of the Coronavirus Aid, Relief, and Economic Security Act or CARES Act, Pub. L. No. 116-136 (March 27, 2020), or any other applicable law or regulation may result in liability under the False Claims Act, 31 U.S.C. § 3729, et seq.; OMB Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement) in 2 CFR part 180, as adopted and amended as regulations of the Department in 2 CFR part 3485; and 18 USC § 1001, as appropriate.

Figure 6.2 – Submit Confirmation Window

Once the form is submitted, users can view responses, but cannot make any changes. The **Reset**, **Save**, and **Save & Continue** buttons become disabled. (see fig. 6.3).



HEERF Fund Submitted

Data Collection Form

Last Modified: jordanne.tillman@aemcorp.com - 12/16/2020, 10:53:20 AM

1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 - 11

Instructions

Funds Expended

1) Did you expend all of your HEERF funds prior to the end of the reporting period, making this your final annual report? *

Burden Statement

1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 - 11

Figure 6.3 – Form After Submission

IMPORTANT! The HEERF Annual Performance Report may not be resubmitted. Once a submission is made within the Data Collection Tool, that submission will be marked as final. Please ensure data is accurate and complete before submission.

7.0 Exporting Submitted Data

To generate a .csv file/data extract of the Annual Performance Report responses at any point during data entry, navigate to the Review section (see fig. 7.1).

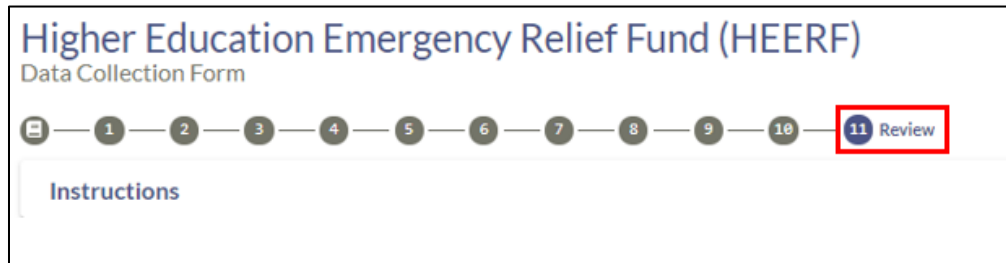


Figure 7.1 – Review Section

Select the **Export Data** button at the bottom of the screen (see fig. 7.2) and follow the browser's prompts to download and save a copy locally.

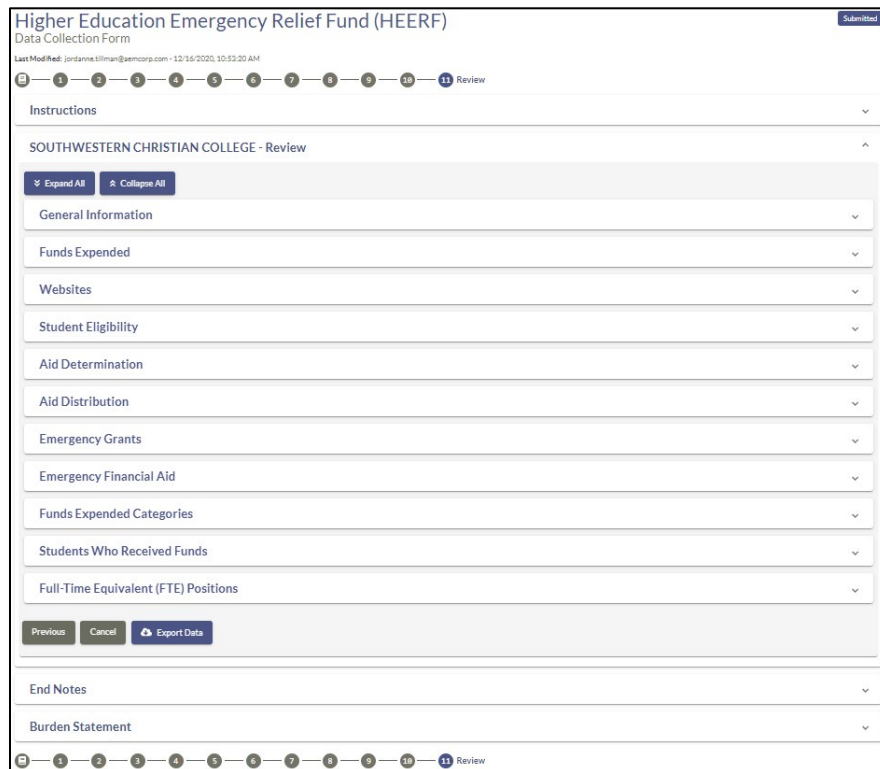


Figure 7.2 – Export Data Button

NOTE! An extract of responses is available for download at any point during data entry from the Review section.



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