2017 User Guide
State Plan Online Submission
2017 State Plan Online Submission Information

KEY DATES

• March 1, 2017 – April 26, 2017
  State Plan Reporting Period

• March 2, 2017
  State Plan Training Session 1

• March 9, 2017
  State Plan Training Session 2

GETTING HELP

• For programmatic assistance, please contact Denise Garland, OCTAE, at: Denise.Garland@ed.gov.
• For technical assistance, please contact RTI International, at: Perkins-help@rti.org.

ACCESSING THE PERKINS WEB PORTAL

Perkins Web Portal URL: https://perkins.ed.gov/

Important Notes:
• New users must activate their account and create a password before logging in to the Perkins Web Portal.
• Returning users should log in using the username and password previously created for the Perkins Web Portal.
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NEW USERS: Activate Your Account and Create a Password

Instructions:

1. Click the link provided in the email with subject line “Perkins Web – An account was created for you”.

2. Create a password. Passwords must meet the following security requirements:
   - At least 12 characters in length
   - Contain at least one uppercase letter
   - Contain at least one lowercase letter
   - Contain at least one number
   - Contain at least one special character

For example: mustLuvD0gs!
NEW USERS: Log in to the Perkins Web Portal

Instructions:
Enter your email and the password you created and click Login.

Note
You can reset your password by clicking Forgot Password on the log in page. Passwords may be changed once every 24 hours.
RETURNING USERS: Log in to the Perkins Web Portal

Instructions:
Enter your email and password and click Login.

Note
You can reset your password by clicking Forgot Password on the log in page. After the request has been submitted, you will receive an email containing a link to reset your password. Passwords may be changed once every 24 hours.
Navigating the Perkins Web Portal

Instructions:

1. Access the main sections of the Perkins Web Portal from the home page:
   - **Submit Your Report**
     Access the submission portals. See page 7 for more information.
   - **View & Download Reports**
     See previous report submissions. Download report packages in Excel.
   - **User Help Center**
     View instructions for report submissions, and watch recorded training sessions.

2. The main sections can also be accessed using the navigation links at the top of the page.

3. Click **My Account** to view and update your account information. Click **Logout** to end your session.

4. Key dates are displayed under **Announcements**.
Submit Your Report

Instructions:

1. To access the State Plan, click Submit Your Report on the Perkins Web Portal homepage.

2. From the Submit Your Report page, click State Plan.

3. You can also access the State Plan using the navigation provided at the top of the page.

4. Click Request Access if you think you should have access to a report that is closed or not shown on the Submit Your Report page, or if you need to request accounts for other members of your team who help complete the report.

Note
Only State Directors may submit access requests.
Instructions:

1. Links to the required sections are shown to the left of the Report Workspace.

2. Click Help on this page to view instructions and tips for completing each step.

3. Enter the requested data in the web form located in the Report Workspace.

Save your progress by clicking Save Draft. Click Save & Continue to save your work and move on to the next section. Save your work often! Sessions expire after 30 minutes.

Note
Use the links on the left-hand side of the page to return to a step to make changes. Do not use the browser’s Back button.
Each eligible agency must submit a brief cover letter, indicating that it wishes to extend its Perkins IV State Plan. The request must be in writing and signed by a State official who is authorized to act on behalf of the eligible agency.

The cover letter must mention all revisions made to the FAUPL and/or matters pertaining to the administration of their CTE program (e.g., new technical skill assessments, changes to the Program of Study model, required and permissive uses of funds, etc.).

Instructions:

1. Upload the completed and signed cover letter.

2. Mail a hard copy of the letter to the following address:
   Edward R. Smith
   Chief, Program Administration Branch
   Division of Academic and Technical Education
   Office of Career, Technical, and Adult Education
   U.S. Department of Education
   550 12th Street, SW
   Potomac Center Plaza, Room 11060
   Washington, DC 20202-7241

3. Indicate whether or not the State submitted a WIOA Combined Plan.

4. If applicable, upload WIOA EDGAR Certifications.
Each eligible agency must submit any revisions to its State plan that the State determines necessary. In determining whether revisions are necessary, the State should review its activities under Title I of Perkins IV.

**Instructions:**

   a. If the State is not submitting revisions, please upload a document stating, “The State has no revisions to the State Plan.”

2. Indicate whether or not the State Plan contains revisions to the 2016-2017 FAUPL.
   a. If the 2016-2017 FAUPL contains revisions, check off which indicators the State will revise.
   b. The State must submit a FAUPL Revision Request Form for each indicator target that will be modified in PY 2016-2017.

3. Indicate whether or not the State Plan contains revisions to Student Definitions.

4. Indicate whether or not the State Plan contains revisions to any section OTHER than Accountability.
This section needs to be completed if your State Plan contains revisions to the narrative portion of the Accountability section.

**Instructions:**

Review and update your state’s definitions for “CTE participant” and “CTE concentrator” at the secondary and postsecondary level. If changes are proposed to participant and/or concentrator definitions, a FAUPL Revision Request Form will need to be submitted. More information is available on page 15.
Section 2a. Accountability - Student Definitions (Continued)

This section needs to be completed if your State Plan contains revisions to the narrative portion of the Accountability section.

Instructions:

Review and update your state’s definitions for “CTE participant” and “CTE concentrator” at the secondary and postsecondary level. If changes are proposed to participant and/or concentrator definitions, a FAUPL Revision Request Form will need to be submitted. More information is available on page 15.
Each eligible agency will need to submit proposed performance levels for each of the core indicators of performance described in section 113(b) of Perkins IV for program year nine.

Proposed performance levels must take into account the following factors described in section 113(b) (3)(A)(vi) of Perkins IV:

- how the levels of performance involved compared with the State-adjusted levels of performance established for other States, taking into account factors including the characteristics of participants when the participants entered the program and the services or instruction to be provided; and,
- the extent to which such levels of performance promote continuous improvement on the indicators of performance by such State.

Instructions:

1. Review the data shown in the “Prior Year Agreed Data” row, imported from the 2016-2017 FAUPL.
2. Click Negotiate Changes to edit information for each indicator.
Section 2a. Accountability – 2017-2018 Final Agreed Upon Performance Levels (Continued)

Instructions:

2. Edit information, as needed, for each indicator.
   a. Edit the indicator’s Numerator, Denominator, Measurement Approach, and/or Performance Target in the “State Proposed” row.
   b. A Performance Target must be proposed for each indicator.
   c. To carry over information from the “Prior Year Agreed Data” row, you may leave the Numerator, Denominator, and/or Measure Approach fields in the “State Proposed” row blank.

3. A FAUPL Revision Request form may be required depending on the proposed changes. View Frequently Asked Questions, or contact your RAS for more information.

4. Click Save Changes to save the information provided.

Note
Repeat this process for each indicator.
Section 2a. Accountability – 2016-2017 Final Agreed Upon Performance Levels

This section needs to be completed if your State Plan contains revisions to the 2016-2017 FAUPL.

The prior year indicators you selected in Section 2. State Plan Revisions will be available to negotiate. The negotiation process for 2016-2017 is similar to the negotiation process for 2017-2018.

Click 2016-2017 to expand the prior year negotiation history. Click Negotiate Changes to edit information.
Section 2a. Accountability – 2016-2017 Final Agreed Upon Performance Levels (Continued)

Instructions:

1. Edit information, as needed, for each indicator.
   a. Edit the indicator’s Numerator, Denominator, Measurement Approach, and/or Performance Target in the “State Proposed” row.
   b. A Performance Target must be proposed for each indicator.
   c. To carry over information from the “Prior Year Agreed Data” row, you may leave the Numerator, Denominator, and/or Measurement Approach fields in the “State Proposed” row blank.

2. A FAUPL Revision Request Form must be submitted for each 2016-2017 indicator that is revised.

3. Click **Save Changes** to save the information provided.
The Attestation Form certifies that the Final Agreed Upon Performance Levels (FAUPL) form, which includes revisions, if any, to the State’s measurement definitions, measurement approaches, and/or performance levels for the Perkins IV core indicators is accurate and complete.

Instructions:

1. After finalizing performance targets with DATE, download the Attestation Form.
2. Complete and sign the form.
3. Upload the completed form on this page.

Note
A separate Attestation Form for 2016-2017 must be completed ONLY if the State has indicated that they are submitting revisions to the prior year FAUPL.
Section 2b. Narrative Revisions

This section needs to be completed if your State Plan contains revisions to any section OTHER than Accountability.

Instructions:

1. Enter the name of the section in your State Plan containing revisions.
2. Provide a brief description of the change(s).
3. Click “Add Section” to insert multiple rows.
Each eligible agency will need to submit a budget for program year eleven for Title I of Perkins IV.

See page 22 for instructions on completing this form.
See page 22 for instructions on completing this form.
Section 3. Budget (Continued)

Instructions:

1. **Total Allocation to the State**— Do not enter information in row 1.
2. **Total Allocation to the State**— Do not enter information in row 2. Total Title I Allocation to the State will be pre-populated with the State’s most recent allocation.
3. **Amount of Title II Tech Prep Funds to be Consolidated with Title I Funds**— Do not enter information in row 3. Due to the Continuing Resolution, Title II funds are displayed as ZERO.
4. **Total Amount of Combined Title I and Title II Funds to be distributed under Section 112**— Do not enter information in row 4. Total Amount of Title I and Title II Funds will be automatically calculated by adding row 3 and row 4.
5. **Local Formula Distribution**— Do not enter information in row 5.
6. **Local Formula Distribution**— Enter total amount of funds for Local Formula Distribution (not less than 85% of Total Title I Funds).
7. **Reserve**— Do not enter information in row 7
8. **Funds for Secondary Programs**— Enter the total amount of Reserve funds to be allocated to Secondary Programs.
9. **Funds for Postsecondary Programs**— Enter the total amount of Reserve funds to be allocated to Postsecondary Programs.
10. **Total Reserve**— Do not enter information in row 10. Total Reserve will be automatically calculated by adding row 8 and row 9.
11. **Formula Allocations**— Do not enter information in row 11.
12. **Funds for Secondary Programs**— Enter the total amount of Formula Allocation funds for Secondary Programs.
13. **Funds for Postsecondary Programs**— Enter the total amount of Formula Allocation funds for Postsecondary Programs.
14. **Total Available for Formula Allocations**— Do not enter information in row 14. Total Available for Formula Allocations will be automatically calculated by adding row 12 and row 13.
15. **State Leadership**— Do not enter information in row 15.
16. **Non-Traditional Training and Employment**— Enter the total amount of State Leadership funds for Non-Traditional Training and Employment.
17. **Corrections or Institutions**— Enter the total amount of State Leadership funds for Corrections or Institutions.
18. **Other State Leadership**— Enter the total amount of Other State Leadership.
19. **Total State Leadership**— Do not enter information in row 19. Total State Leadership will be automatically calculated by adding row 16, row 17, and row 18. State Leadership cannot exceed 10% of Total Title I Funds.
20. **State Administration**— Do not enter information in row 20.
21. **State Administration**— Enter the total amount of State Administration funds. State Administration cannot exceed 5% of Total Title I Funds.
22. **State Administration Match**— Do not enter information in row 22.
23. **State Administration Match**— Enter the total amount of non-federal funds for the State Administration Match.
Section 4. Submit for Review

Instructions:

Once a section has been completed, it may be submitted to OCTAE for review.

1. The required sections and completion status are displayed on this page.

2. Click Submit for Review to submit completed sections to OCTAE for review. Once a section has been submitted for review, it will be locked from editing.