

Instructions: Fill out user information, check role(s), obtain required signatures, and email to: ePlan.Help@tn.gov.

Copy all users who sign the form when submitting. Be clear on your form for which Charter Schools the role(s) are requested. If there is more than one charter, include the name and ID for each one.

User's Name: _____

ePlan User ID Email: _____ **Phone:** _____

Charter Name: Example Charter Academy **ID:** * _____

Charter Name: _____ **ID:** *

*** Please include the three-digit District ID Number in front of the Charter School ID Number**

Charter ID numbers can be found at <https://tnschooldirectory.tnedu.gov/>

Funding Application (App) and/or Grant Director Roles		Fiscal, View, & Approve Roles
	Academic Special Courses Director	Data View Only: view all ePlan components, but not edit
	Charter Schools Facilities Cohort (24, 25, 26): edit & submit app	Fiscal Update* (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
	Charter Schools Grant Cohort Director (24, 25, 26): edit & submit app	Fiscal Representative/Parental Leave Director (CFO/Finance Director): fiscal approve funding app.; submit
	CTE Special Course and Special Program	Authorized Representative/ePlan Audit Director: final approval of any funding app. & monitoring document (Only Director of Schools, Executive Director, or Founder may
	Innovative School Model Grant Director	
	Parental Leave Director	
	Physical Activity Compliance Director	
	Public School Security Grant Director	
	Safe Schools Director	
	Restore all roles	
	Other:	

If replacing another user, provide name(s) of previous user(s).

Remove all access Remove access selected above *only*.

New User Signature

Supervisor's Signature

New User Title

Supervisor's Title

Date

Date

CFO Signature *Required for Fiscal Update users

Director of Schools, Executive Director, or Founder Signature

Note: To complete a funding application, each charter must have users with the respective Application Director role, Fiscal Representative role, and Authorized Representative role.

January 2026