

ePlan User Access Form for Charter Schools

Tennessee's Electronic Planning and Grants Management System

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: * 123-1234*

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **ID: *** _____

Charter Name: _____ **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	
<input type="checkbox"/>	Academic Special Courses Director
<input type="checkbox"/>	Charter Schools Facilities Cohort (24, 25): edit & submit app
<input type="checkbox"/>	Charter Schools Grant Cohort Director (24, 25, 26): edit & submit app
<input type="checkbox"/>	CTE Special Course and Special Program
<input type="checkbox"/>	Innovative School Model Grant Director
<input type="checkbox"/>	Parental Leave Director
<input type="checkbox"/>	Physical Activity Compliance Director
<input type="checkbox"/>	Public School Security Grant Director
<input type="checkbox"/>	Safe Schools Director
<input type="checkbox"/>	Restore all roles
<input type="checkbox"/>	Other: _____

Fiscal, View, & Approve Roles	
<input type="checkbox"/>	Data View Only: view all ePlan components, but not edit
<input type="checkbox"/>	Fiscal Update* (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
<input type="checkbox"/>	Fiscal Representative/Parental Leave Director (CFO/Finance Director): fiscal approve funding app.; submit
<input type="checkbox"/>	Authorized Representative/ePlan Audit Director: final approval of any funding app. & monitoring document (Only Director of Schools, Executive Director, or Founder may
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

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 <i>*Required for Fiscal Update users</i>	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.