TN Department of Education

ePlan User Manual

A Guide for General Use

Tennessee Department of Education | Updated May 2025

Note: Sections of the Contents page are hyperlinks. Click on any section to go directly to that page. Features exclusive to local educational agency (LEA) users will be marked with the symbol.

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Introduction

ePlan is Tennessee's online platform that allows schools, local education agencies (LEAs), and community-based organizations (CBOs) the ability to access district and school plans, funding applications, reporting functions, and monitoring tools. ePlan has a dedicated TDOE Resources page available to help ePlan users ensure that Tennessee succeeds in educating students.

This desk reference provides a general guide for users of the ePlan system. More detailed instructions for common ePlan functions are housed on the TDOE Resources page.

***Note**:* Users who represent community-based organizations (CBOs), charter schools, and non-public schools may not see full functionality of the features discussed in this guide. Features that are exclusive to LEA users will be marked with the symbol. Any questions about access to ePlan features should be emailed to ePlan.Help@tn.gov.

Support Teams

If you need support with:	Contact Name	Contact Information
School Planning Roles	District User Access Administrator	District Personnel
LEA/Charter School/Non-Public School/CBO Roles	ePlan Help	ePlan.Help@tn.gov Office Hours Tues. 11 a.m. CT
InformTN (District and School Plans Platform)	InformTN Team	inform-tn-help@sip.eldarion.com
Reimbursement Requests or Final Expenditure Reports (FER)	Regional Fiscal Consultants	Fiscal Consultant Map
Consolidated Funding Application (CFA)	FPO Coordinator	FPO Oversight Coordinator Map
Orion Single Sign-On (SSO)	DT Support	DT.Support@tn.gov or 1-800-495-4154
Education Information System (EIS)	DT Support	DT.Support@tn.gov or 1-800-495-4154
TN Compass	TN Compass Support	support@tncompass.org
Edison	Supplier Maintenance	Supplier.Maintenance@tn.gov or 615-741-9745
TN PULSE	TN PULSE Support	TN PULSE Support

Accessing ePlan and User Roles

Many areas of the ePlan system are publicly accessible. However, most functionality is secured by user login and password protection. In addition to a username and password, ePlan users are assigned specific roles within the system, which allow users to initiate and/or approve actions within ePlan.

Homepage

The homepage has important messages on upcoming events and resources. Announcements are in the left column. The right column is Reminders, including Dates to Remember; a Welcome to ePlan message, which includes links to User Access Forms; SSO Account Set-up; and Password Assistance.

Navigation

Users navigate ePlan through two primary modes: the ***Main Menu,*** located on the left side of all ePlan pages, and the ***Save and Go To*** button located on most pages. Hovering over the Save and Go To button

provides a menu of options including the *Current Page*, *Next Page*, *Previous Page*, *Sections*, and *History Log*. Additional options may be available specific to the function accessed.

Main Menu

ePlan's main menu is found on the far left of the screen. The main menu has the following functions:

- **ePlan Home** returns users to the ePlan homepage.
- **Search** allows users to look up an organization (not a general site search).
- **Reports** allow users to access a report of allocated funds, with the remaining amounts and expiration dates.
- **Inbox** contains the email message archives and items awaiting approval.
- **Planning** contains district and school plans.
- **Monitoring** houses monitoring instruments.
- **Funding** contains the organization's current and past funding applications.
- **Data and Information**
- **Reimbursement Requests** contain current and past requests.
- **Project Summary** contains a summary of the funding applications for the organization. This summary will include the amount of money in the budget and any remaining funds not spent.
- **LEA Document Library**
- **Address Book** contains the organization's users and their roles and contact information.
- **TDOE Resources** is a document library of user guides to ePlan functions. Sign-in is not required.
- **Help for Current Page** displays any available Help items for specific pages in ePlan.
- **Contact TDOE** to provide guidance and contact information for ePlan Help.
- **ePlan Sign Out** signs a user out.

ePlan User Access

New ePlan users and existing ePlan users who need to request a User Access role must request the additional role using the appropriate **ePlan User Access Form**. Access the form by navigating to eplan.tn.gov > TDOE Resources > 1. User Access Forms and select the correct form according to organization type, or click on the links below:

- ePlan User Access Form for a Single Non-Public School
- ePlan User Access Form for Multiple Non-Public Schools
- ePlan User Access Form for LEAs
- ePlan LEA User Access Administrator Form
- ePlan User Access Form for Charter Schools
- ePlan User Access Form for Community-Based Organizations (CBOs)

All users must have the correct ePlan user access role assigned. Users with existing ePlan access can verify current user access roles in the Address Book. To request additional access roles, follow the User Access Form instructions, then email the completed form to ePlan.Help@tn.gov. Users do not need to log in to ePlan to access *TDOE Resources*.

***Note**:* For LEA users, please see the section below titled "ePlan LEA User Access Administrator." User access requests may take up to two business days to process. Users will receive an email reply when access has been granted.

ePlan LEA User Access Administrator

LEA User Access Administrators can add and delete most LEA-level roles for LEA ePlan users. LEA User Access Administrators cannot add roles that finalize and approve funding applications or monitoring instruments, additional LEA User Access Administrators, or State-level roles.

See the ePlan User Access Roles for LEAs document for each ePlan role name.

For more information about this change, please see the ePlan LEA User Access Administrator Manual.

ePlan Account Information

There are two types of ePlan accounts: one is linked to Orion SSO, and one is not linked to SSO. There are four fields tied to each ePlan account. The following two charts represent how an individual can update any or all four fields for each account type. When an individual clicks on their name as found above the session timeout box, they can make updates to their fields.

SSO Account

Field	Who Can Update	How to Update
Email Address	DT Support	Email DT.Support@tn.gov
First Name	DT Support	Email DT.Support@tn.gov
Last Name	DT Support	Email DT.Support@tn.gov
Phone Number	Each individual	Click on your name as shown in the screenshot below.

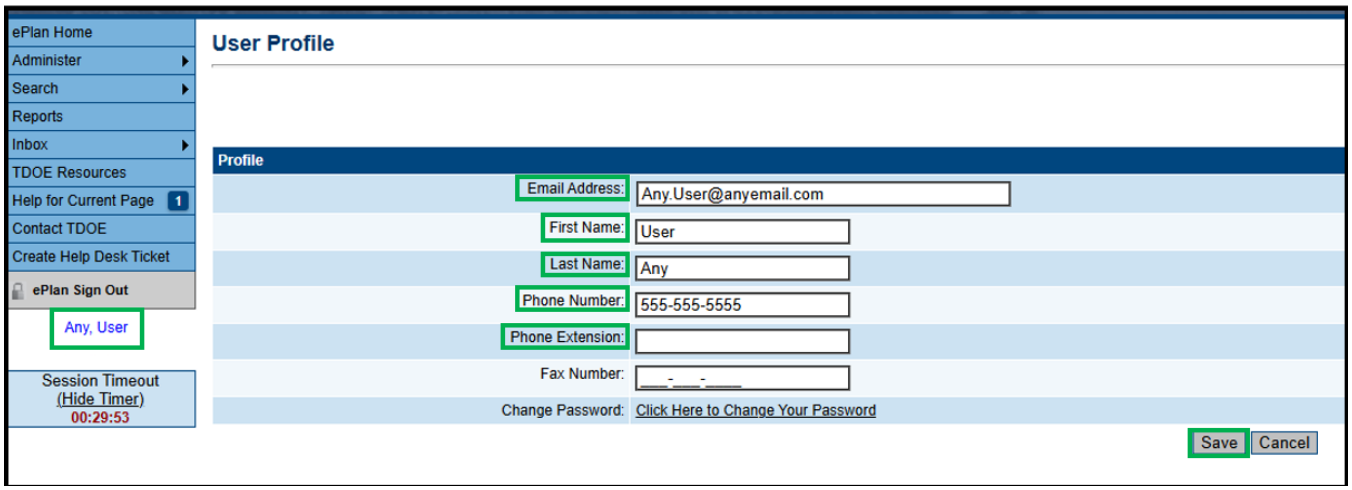
Non-SSO Account

Field	Who Can Update	How to Update
Email Address	Each individual	Click on your name as shown in the screenshot below.
First Name	Each individual	Click on your name as shown in the screenshot below.
Last Name	Each individual	Click on your name as shown in the screenshot below.
Phone Number	Each individual	Click on your name as shown in the screenshot below.

Phone Number

Every ePlan user can update their phone number by clicking their blue name after signing into ePlan.

- If the ePlan user does not have an Orion SSO account, they can also update their name and email address. SSO users should contact DT.Support@tn.gov if they need their name or email address changed.
- SSO Users will see greyed out boxes for all but their Phone Number, Phone Extension, and Fax Number.



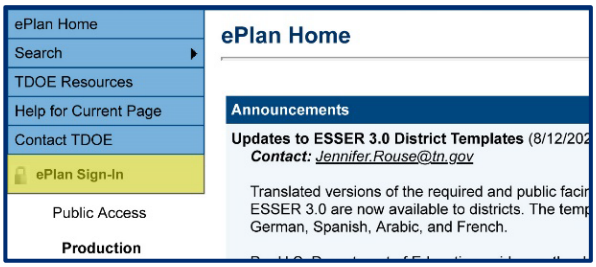
ePlan Annual Audit

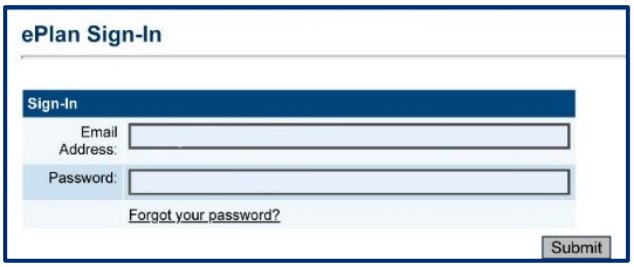
The department conducts an audit once a year to ensure that everyone who has ePlan roles has access. Each fall, the ePlan Help opens the annual ePlan audit for each organization that has ePlan roles. The individual who has the LEA Authorized Representative role will receive emails with information to complete the audit, including a technical guide and office hours links. This audit will open in September.

- If the organization does not complete its audit, that organization will have its ePlan roles removed.
- A new user access form will need to be completed for each person who needs their roles restored.

Log in to ePlan

To access ePlan, visit ePlan.tn.gov. The sign-in link is located at the bottom of the left-side navigation menu.



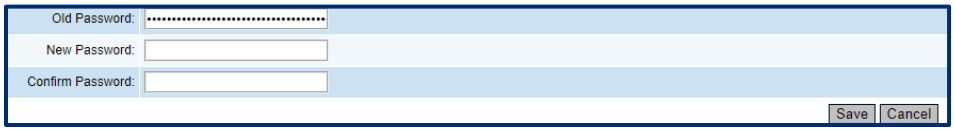


Passwords

Logins for ePlan are obtained in one of two ways: via ePlan or Orion SSO.

1) Passwords for ePlan expire every 90 days. To reset the password, users input their username, click on "Forgot your password?" and click submit. The system will send an email to the user with instructions for resetting the password. The email is time-sensitive and will indicate the date and time it will expire.

   A link is sent from ePlanTN.NoReply@eGrantsManagement.com. When users click on this link, the reset password page will appear. The old password field will auto-populate with a long series of "***" as shown below. Users ***should not*** fill in their old passwords. Users only need to fill in their new password twice and hit submit to update the password.



   ePlan passwords should be eight characters long and contain one uppercase character, one lowercase character, one number, and one special character. ePlan users are locked out after five failed login attempts. After the user is locked out, an email will be sent to the user's email address with a link to reset the password.

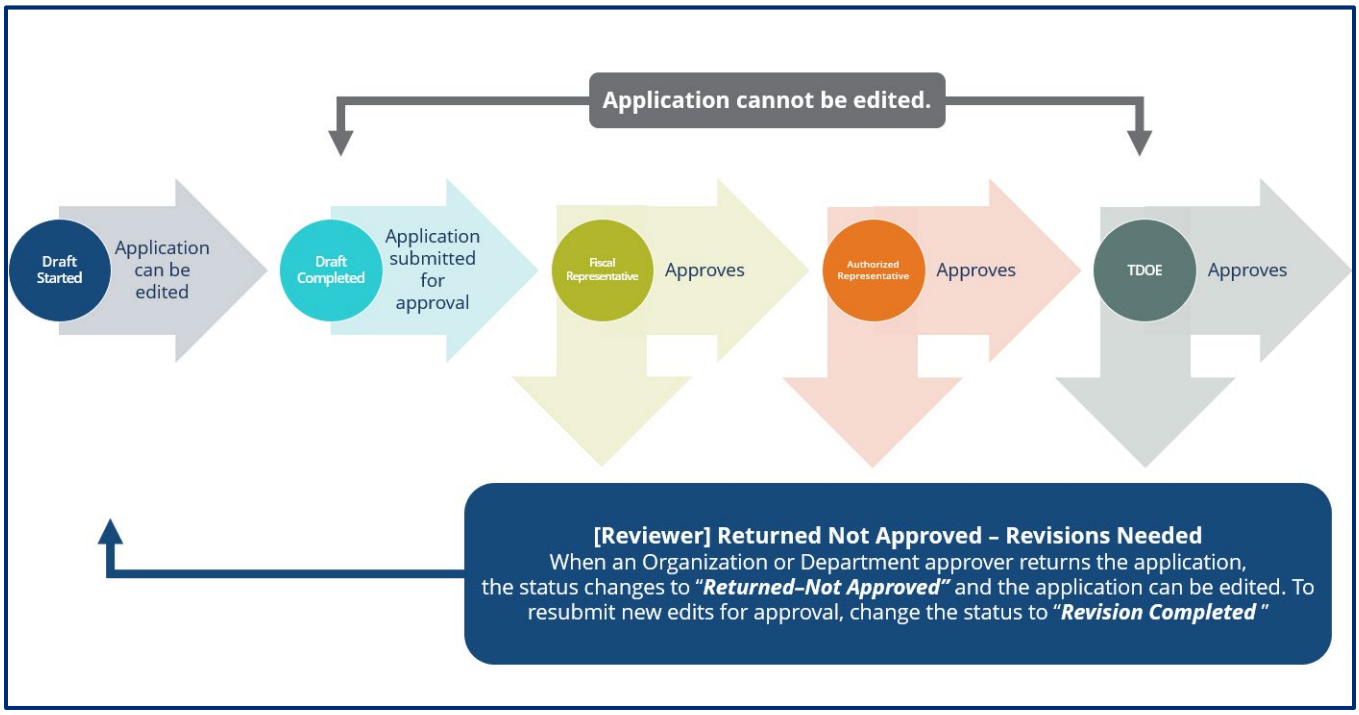
2) Orion SSO users can also click on their Forgot Your Password links or contact DT.Support@tn.gov with Orion SSO login issues. TDOE Resources includes detailed information to support SSO users. To access these resources, go to TDOE Resources > 2. User Resources ePlan Help, and click on the + icon next to SSO Resources. Resources are available for SSO Account Set-up, SSO Slowdown or Timeout Recommendations, Clearing Cache Instructions, and an SSO FAQ.

Workflows

Below are the roles and the order of the workflow steps for a typical application process. Similar workflows may apply to reimbursements and data and information collection. These roles and the workflow may vary slightly for specific programs.

ePlan Role	ePlan Function
LEA Grant Director ***LEA Fiscal Representative*** ***LEA Authorized Representative***	Click ***Draft Started*** (or ***Revision Started*** for revisions) Respond to application questions, enter budgets
LEA Grant Director	Click ***Draft Completed*** (or ***Revision Completed*** for revisions)
LEA Fiscal Representative (CFO or treasurer)	Click ***LEA Fiscal Representative Approved*** (or ***LEA Fiscal Representative Not Approved***) (may also request funds after TDOE approves the application)
LEA Authorized Representative (Director of Schools)	Click ***LEA Authorized Representative Approved*** (or ***LEA Authorized Representative Not Approved***)
TDOE Program Director (Department project directors)	Click ***TDOE Program Director Approved*** (or ***TDOE Program Director Returned Not Approved***)

After each status change, ePlan automatically sends a notification email to all users in the LEA who have the ePlan role in the next step in the process. Reimbursements cannot be submitted until approval is received from the TDOE Program Director.



Timeout Policy

Users are logged out after 30 minutes of inactivity on a page. A countdown timer is displayed below the left-side navigation menu. ePlan users receive a notification when the last five minutes have been reached, warning that they will be logged out in five minutes. **Any information that is not saved before being logged out will not be saved**. Users should be in the habit of routinely saving information as they progress in ePlan.

Due to system timeouts and the need to frequently save the information entered in ePlan, users are strongly encouraged to formulate narrative responses and budget information in a word processing or spreadsheet document. By copying and pasting responses from a word processing or spreadsheet document into the application, users can avoid losing unsaved responses when timeouts occur.

Orion Single Sign-On

Individuals who have an Orion Single Sign-On account can access ePlan via the SSO platform. Individuals with a locked SSO account should send an email to DT.Support@tn.gov requesting a new Welcome email.

InformTN

The district and school plans for 2014 – 2019 are available in ePlan. School plans from 2019 – the present are found on a new platform called InformTN, available at https://edplan.tn.gov/.

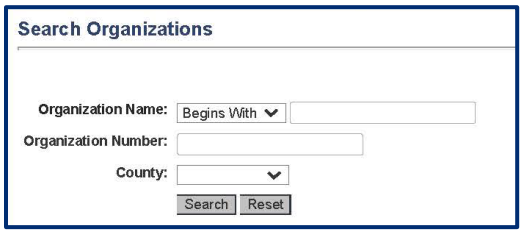
Here are ways to get technical help for InformTN:

1. The Technical User Guide contains information, including how to access InformTN on page 4.
2. Click the question mark in the upper right corner to open the Help section which contains the Technical User Guide.
3. Email inform-tn-help@sip.eldarion.com for other technical support questions.

ePlan Main Menu Functions

Search

Search allows users to look up an organization. It is not a general site search. This function is useful for users with access to multiple organizations and users accessing publicly available information.



Reports

Reports are a quick way to look at certain data from ePlan. Reports can be downloaded as Microsoft Excel spreadsheets and other file types to work with outside of ePlan.

District Funding Summary Report

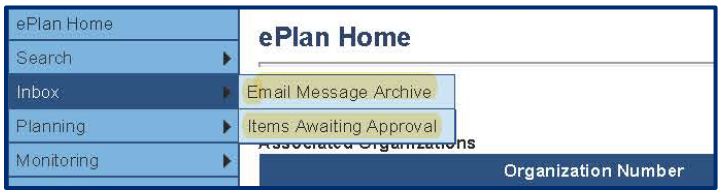
The **District Funding Summary Report** provides an overview of expiring funds. LEA users can access LEA Reports from the Reports tab on the left navigation menu. The feature was introduced to allow LEAs to access a new report displaying the LEA's allocated funds with the remaining amounts and expiration dates. This report is titled District Funding Summary and detailed instructions are available for accessing the report.

LEA Users Report

The LEA Users Report allows users to view the user account information for all users in the LEA. It displays the name, email, phone number, organization information, role, and role creation information for each user in the LEA. For more information, see the ePlan LEA User Access Administrator Manual.

Inbox

The inbox contains the email message archives and items awaiting approval. Several ePlan functions automatically generate emails to users. The History Log and Create Comment function prompts ePlan to send an email message to the selected recipients. **System Notifications** are sent to users because of a **Status Change** to support Workflows.



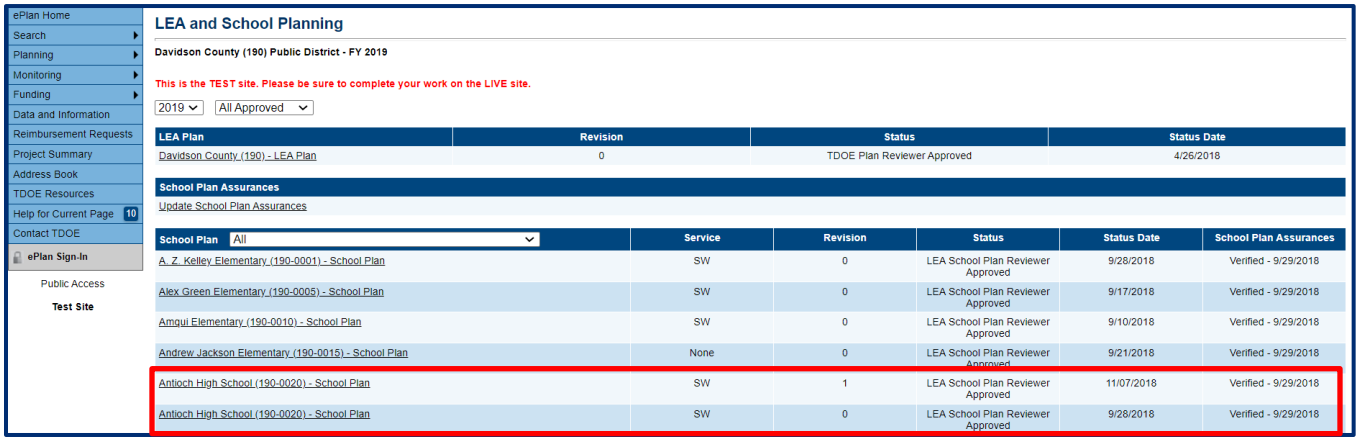
All email messages sent or received by a user through ePlan can be accessed from the **Inbox**. The **Inbox** section of ePlan contains the **Email Message Archive** and **Items Awaiting Approval**. The **Email Message Archive** will contain all emails sent to or received from another ePlan user through the system. Users may select the time period to display. Messages received by the user will appear first; scroll down to the lower half of the page to view sent messages. Comments with email notifications can be accessed from the **Inbox** in addition to the **History Log** section of the funding application.

When a **System Notification** is generated related to a **Status Change** that requires the user to complete an approval step, users will find these in **Items Awaiting Approval**.

Planning

Planning contains district and school plans; this function does not apply to community-based organizations (CBOs). Annual LEA and school plans can be found in ePlan through the 2018-19 school year; all plans from 2019 – present are available in InformTN.

To view plans before 2020, click on *Planning* > *Planning Tool*. *All Approved* includes all plans that have been approved, including those that have had a revision (see screenshot below showing two approved plans for Antioch High School: the approved original plan and the approved revised plan). *Last Approved* includes only the most recently approved version of the LEA and/or school plan.



Monitoring

The *Monitoring Instruments* section houses instruments that the department uses to monitor how various funding sources are utilized by awarded grantees. Monitoring instruments are program-specific, and instructions are provided to grantees on how to complete monitoring.

Funding

Funding contains the organization's current and past funding applications as well as budget information.

Funding Applications

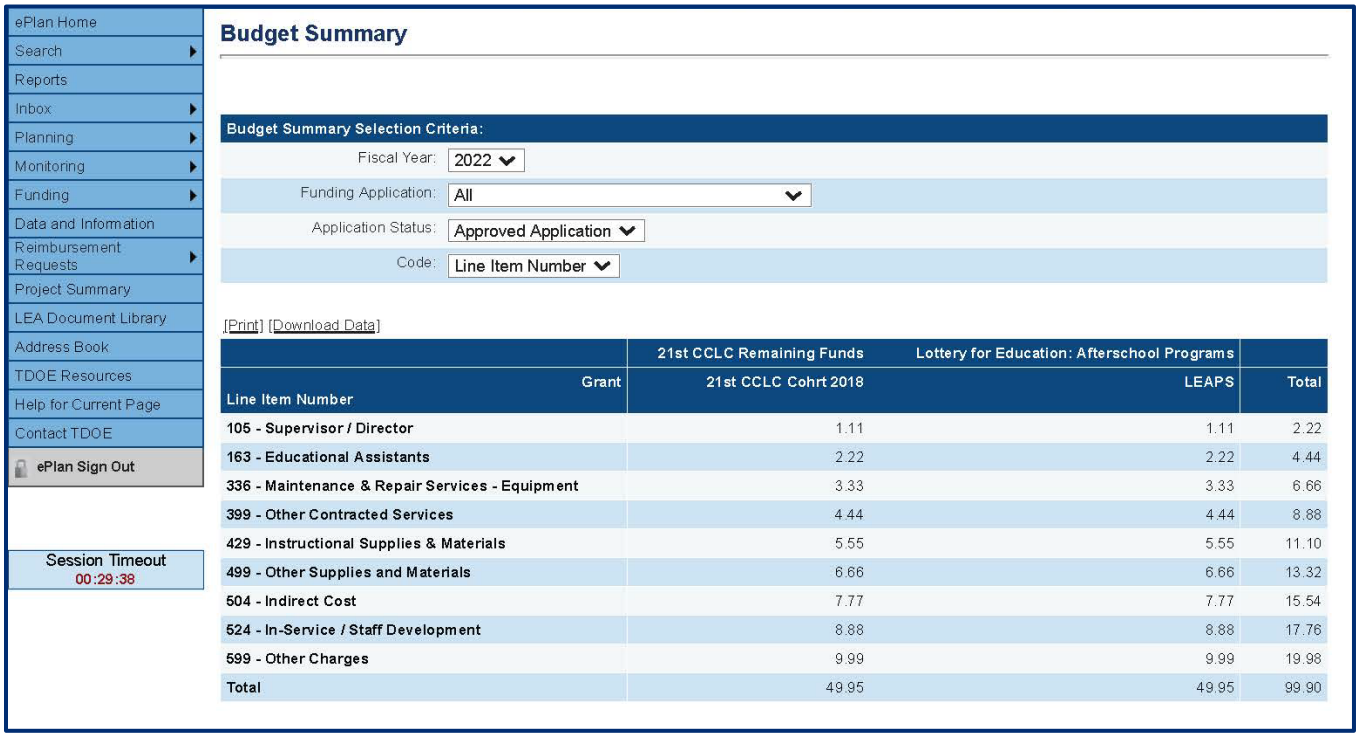
When ePlan users click on Funding Applications from the ePlan menu, the default screen will include all active applications for the current fiscal year.

Users can select alternate years, all approved applications, or the last approved applications from the drop-down at the top of the page.

Funding applications have natural Workflows that are followed to complete an application. Detailed instructions are provided by each funding program, and any specific questions on the funding applications should be directed to the TDOE grant directors. A General Technical Application Guide is available in TDOE Resources.

Budget Summary

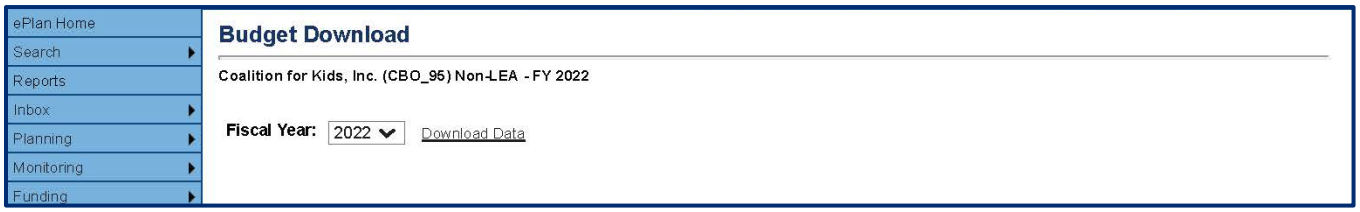
The Budget Summary page allows users to view the budget status of all of an organization's grants and can be filtered using selection criteria, including fiscal year, funding application, application status, and code (line item number or account number).



	21st CCLC Remaining Funds	Lottery for Education: Afterschool Programs	
Grant / Line Item Number	21st CCLC Cohrt 2018	LEAPS	Total
105 - Supervisor / Director	1.11	1.11	2.22
163 - Educational Assistants	2.22	2.22	4.44
336 - Maintenance & Repair Services - Equipment	3.33	3.33	6.66
399 - Other Contracted Services	4.44	4.44	8.88
429 - Instructional Supplies & Materials	5.55	5.55	11.10
499 - Other Supplies and Materials	6.66	6.66	13.32
504 - Indirect Cost	7.77	7.77	15.54
524 - In-Service / Staff Development	8.88	8.88	17.76
599 - Other Charges	9.99	9.99	19.98
Total	49.95	49.95	99.90

Budget Download

From the **Budget Download** page, users can select the fiscal year and click on *Download Data* to download a .csv format spreadsheet which will list all revenues allocated in ePlan by Reporting Year, Account, Expenditure Object (line item), Fund, and Sub Fund.



A document that reviews how to use a feature that allows an individual to download a complete budget and upload a completed budget is available here.

Allocations

The **Allocations** page in ePlan indicates the total amount awarded by the grant program to the grantee. For entitlement grant programs, the **Allocations** page will be populated with a total budget amount at the time of application and the subsequent **Budget** pages will typically need to be completed to indicate how the total allocation will be allocated across specific budget accounts and line items. For competitive grants, the **Allocations** page will not typically be populated until grant awards are made, and a proposed budget will be entered by the user on the **Budget** pages. Grantees will receive a notification of the award and specific instructions for formulating a budget revision to reconcile the proposed budget to the total allocation which is entered on the **Allocations** page at the time of the award.

Final Expenditure Reports

Final Expenditure Reports are a fiscal year-end closing report for each program. The FER cannot be initiated if a budget revision or reimbursement request is incomplete. Users must wait for the in-process reimbursement to be complete or delete any draft reimbursements before beginning the FER. The final reimbursement can be included in the FER. Detailed instructions for completing Final Expenditure Reports are available in TDOE Resources.

Grant Award Notifications

Grant Award Notifications (GANs) before FY23 are available for grantees in the LEA Document Library.

From FY23 forward, GANs are available for LEAs in the *Grant Award Notification* **Data and Information** tool for that fiscal year. GANs provide funding information, terms and conditions, and contact information for each grant in addition to specifying the LEA's allocation and indirect cost rate.

If the GAN for a particular grant is not available yet, organizations can find much of the same funding information through the grant funding application, the Project Summary function, or from paid Reimbursement Requests. See the LEA Grant Award Notifications Overview in TDOE Resources for more information.

Data and Information

Data and Information tools allow organization users to provide time-stamped data and information in a single location for department staff to review. Only users with the correct User Access Role assigned to them can view and work in this component. Programs provide specific instructions for data and information collection.

Reimbursement Requests

Reimbursement Requests contain current and past requests. Reimbursement requests can only be entered in ePlan after the department has approved the application.

The process is linear. Only one reimbursement can be processed at a time for each application. Once a reimbursement enters the approval process, the entire process must be completed through fiscal distribution before another reimbursement can be entered. Detailed instructions for the Reimbursement Requests function are available in TDOE Resources.

Project Summary

Project Summary contains a summary of the funding applications for the organization. The **Project Summary** function is available from the ePlan main menu for both LEA and CBO users and provides users with critical overview information about current grant budgets and amounts remaining to be spent. It is strongly advised that organizations use this feature to monitor grant expenditures. Detailed instructions for using the Project Summary function are available in TDOE Resources.

LEA Document Library

When ePlan users click on the LEA Document Library from the ePlan menu, the default screen will include the folder for the current fiscal year.

The **LEA Document Library** stores organization-specific documents from the department and provides a location for organizations to upload documents to share with the department. Each organization has a Document Library that is unique by year. When ePlan users click on the LEA Document Library from the ePlan menu, the default screen will include the folder for the current fiscal year. Only ePlan users with an organization role can access the LEA Document Library. This information is not available to the public.

Each organization has a Document Library that is unique by year.

Address Book

The **Address Book** contains the organization's users and their roles and contact information. There are two sections of contacts in the Address Book:

- **LEA Funding Application Contacts :** This lists every individual with a contact on each funding application for the district. For some bigger applications, like the Consolidated Application, there will be multiple contact types and contacts listed. One person can hold multiple contact types within a funding application. This is updated by district personnel. These contacts will only be updated after the department approves an application. Therefore, outdated names may appear in this section.
- **LEA Role Contacts:** This is updated by the ePlan administrator when users send in their user access forms. This will contain every individual who has an active role in ePlan.These roles are current and include every individual's role.

TDOE Resources

TDOE Resources is a document library including various user guides to ePlan functions and other ePlan resources. TDOE Resources is available from the main menu and is publicly accessible; users do not have to be signed in to access TDOE Resources.

TDOE Resources are organized into the following categories:

Category	Description
1. User Access Forms	ePlan access forms for each type of user role and entity (CBO, LEA, Charter School, State Users, etc.) and user role descriptions for each entity
2. User Resources ePlan Help	Documents assisting with SSO issues, general ePlan troubleshooting, tips for using ePlan, step-by-step directions for specific tasks in ePlan, system acronyms, and contact information for grants in ePlan
3. TDOE Support Teams (Consultants Maps)	Resources for LEAs related to Support Consultants – these include maps of consultant areas
4. Department Communications (Calendar, Newsletters, Homepage messages)	Federal programs calendar, homepage announcements, and Commissioner's updates
5. Funding Applications and Grants	Application guides and resources for grant programs
6. Relief Funding	Information regarding Coronavirus-related relief programs
7. Data and Information Tools	Documents related to data collection and reporting submitted through the Data and Information functionality of ePlan
Alternative Education (Alt Ed)	Surveys and annual reports related to Alternative Education
CFA Reference Documents (ESSA/IDEA Consolidated Funding Application)	LEA resources related to the Consolidated Funding Application for ESSA and IDEA
Charter Schools	Application and resources related to Charter School operation
District & School Planning	Resources related to Planning functionality in ePlan for LEAs
Equitable Services to Non-Public / Private Schools Information & Documents (ESSA/IDEA/CTE)	Documentation and resources for the equitable service of Non-Public/Private Schools
ESSA Information, Guidance, PPTs, & Webinars	Resources for LEAs related to ESSA

Category	Description
Federal Programs Data	Lists of Title I schools by year, FPO Data Manual, webinar presentations and recordings, definitions, and sources related to Federal Programs Data
Federal Programs and Oversight (FPO)	Updates, professional development, operating and complaint procedures, Committee of Practitioners meeting information, and FPO Office Hours schedules
Fiscal - District Technical Assistance	Technical assistance resources for LEAs related to Fiscal reporting
IDEA Information, Guidance, PPTs, & Webinars	Resources for LEAs related to IDEA
Miscellaneous	Documentation related to Community Eligibility Provision, National Blue Ribbon Schools, National ESEA Distinguished Schools, and ASD School Transition
Monitoring - ESSA/IDEA/Fiscal/Perkins	Documentation related to the Monitoring functionality in ePlan for LEAs
Non-Public Schools and Accrediting Agencies	Resources related to Non-Public Schools and Accrediting Agencies
Non-Traditional Educational Programs (NEP)	Resources related to Non-Traditional Educational Programs

Users with specific questions or issues not addressed in these resources may email ePlan.Help@tn.gov or contact the relevant program director.

Help for Current Page

The Help for Current Page link in the main menu displays the number of available help items for that page. Where these items are available, users can access them by clicking on the **Help for Current Page** link. Users leave the current page to access these items.

Contact TDOE

Contact TDOE provides guidance and contact information for ePlan Help. Information is provided for General Support Questions, InformTN, SSO, Technical Questions, and contacting ePlan Support.

General Support Questions

If you have a program-related question or issue with ePlan and cannot resolve it by reviewing the information found on each page's "Help" link or by reviewing the TDOE Resources, please contact the department by clicking on the "Feedback Form" link. Complete the information on the screen and click the "Send" button.

Please note that sending your question to the support team mailbox will help ensure that it will be handled as soon as possible by the best available team member for the specific issue.

ePlan Support Contacts

- **ePlan Help Team:** ePlan.Help@tn.gov or (629) 395-4684
- **Specific ePlan Contacts:** ePlan Help Contact Information

ePlan Sign Out

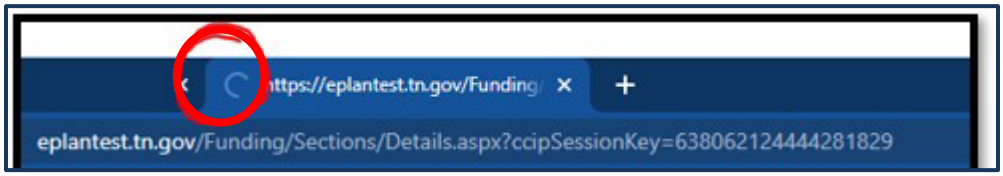
To manually sign out of the ePlan system, click on the **ePlan Sign Out** link in the main menu.

Additional ePlan Functions

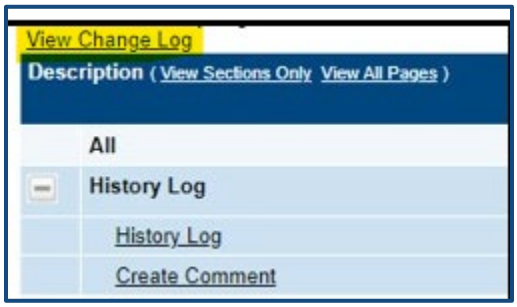
Saving Pages in ePlan Components

After working in an ePlan component, users must click the **Save and Go To** button, then ensure that the page has finished saving before closing ePlan or leaving the page.

Users can tell that the page has not saved when the browser's spinning wheel or loading icon is still spinning. The screenshot below shows an example of a page that has not finished saving. Please ensure the browser's loading icon is no longer spinning before closing the page.



The best way to see if a change to the component was saved after leaving the page is to review the **Change Log**. The **Change Log** for a component can be accessed from the component's **Sections** page.



Change Log

The **Change Log** may be accessed on the main sections page for every funding application. It lists every change or update since the previous status. This helps users identify changes that have been made to the application since they last viewed it.

History Log and Create Comment

The **History Log** contains a record of status changes and comments made on the application. ePlan users may want or need to create a comment in an ePlan funding application for one of the following reasons:

- To explain a part of the application's history
- To provide information that a user cannot add to the main application due to the application's current status (users can only edit applications that are in a *Draft Started* or *Revision Started* status).

ePlan creates a running record of all comments. Any comment created and saved in an ePlan funding application will always be available as a part of the funding application's history log.

To Add a Comment in a Funding Application:

1. Navigate to the funding application's main **Sections** page.
    - To navigate to the main funding application page from other pages in the application, click **Go To** and **Sections**.
2. Select **Create Comment** from under the *History Log* on the main section page to navigate to the *Create Comment* page.
3. On the **Create Comment** page, type your comment in the box.
4. If desired, a hyperlink can be inserted in a comment by clicking the hyperlink icon.

5. To send an email notification of this comment to recipients, check the box next to **Send Email to ePlan Contacts** below the main comment box.
    - Sending an email notification is not required to create the comment.
    - If no email notification is needed, click **Save and Go To** to exit the page. The comment is now a part of the Funding Application **History Log** for everyone to view.
6. **To send an email notification:** Select the recipients to receive notification of the comment from the lists provided and then click **Add**.

Available Contact Groups

LEA Contacts by Funding Application	Available when a contact is selected on the application's contact page. Not all funding applications feature contacts on that page.
LEA Contacts by Role	Current users with the applicable role
Other LEA Contacts	Additional contacts for an LEA
TDOE Contacts	State users who can complete various ePlan functions
TDOE Miscellaneous Contacts	Lists every State ePlan User by name
Additional Recipients	Allows you to type in any additional email addresses manually

    - It is a good practice to send a copy of your comment to yourself to let you know when the message has been delivered.

7. The **Recipient Summary** shows who will receive the email.
8. Click **Save and Go To** will send the comment notification.
9. Comments with email notifications can be accessed from the **Inbox** on your ePlan tab in addition to the history log of the funding application. Additional information about Inbox functionality in ePlan is available in Reports.

Reports are a quick way to look at certain data from ePlan. Reports can be downloaded as Microsoft Excel spreadsheets and other file types to work with outside of ePlan.

District Funding Summary Report

The **District Funding Summary Report** provides an overview of expiring funds. LEA users can access LEA Reports from the Reports tab on the left navigation menu. The feature was introduced to allow LEAs to access a new report displaying the LEA's allocated funds, with the remaining amounts and expiration dates. This report is titled District Funding Summary and detailed instructions are available for accessing the report.

LEA Users Report

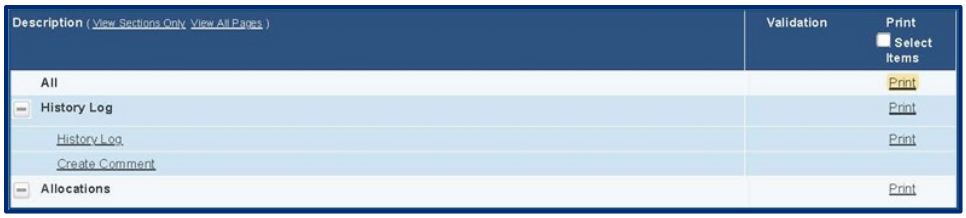
The LEA Users report allows users to view the user account information for all users in the LEA. It displays the name, email, phone number, organization information, role, and role creation information for each user in the LEA. For more information, see the ePlan LEA User Access Administrator Manual.

10. Inbox.

Printing in ePlan

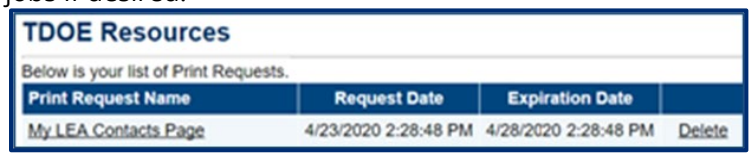
Users may print or download a PDF from the **Sections** page of applications.

- To print the entire application, click the **Print** link across from the word **All** at the top of the **Sections** page. Print requests do not include any uploaded related documents.



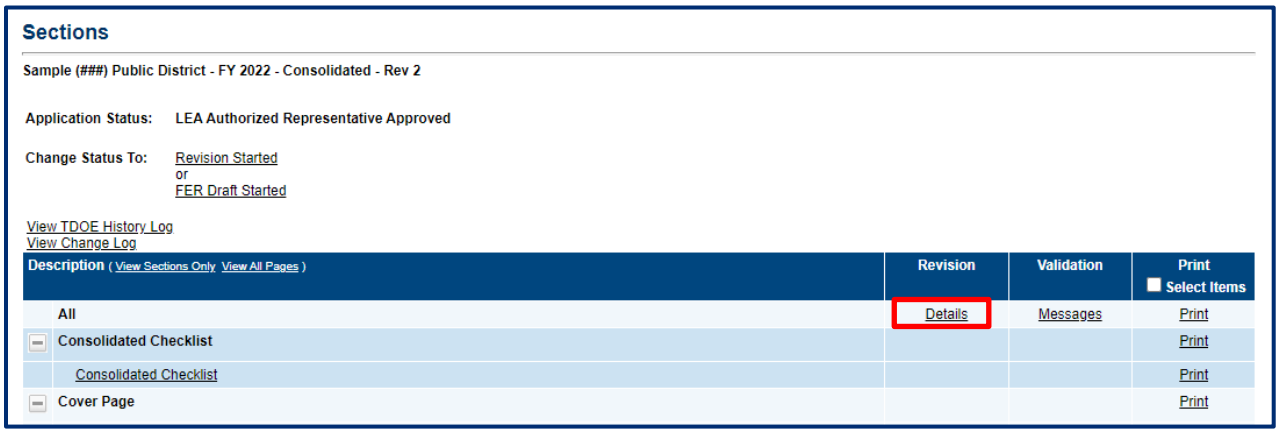
- To print a single page, click on the **Print** link across from the name of the page.
- To print an entire section, click on the **Print** link to the far right of the section name.
- To choose multiple pages, check the **Print Select Items** box at the top of the print column to select more than one page. The Print links appear as checkboxes. Select all text boxes for the desired print request.

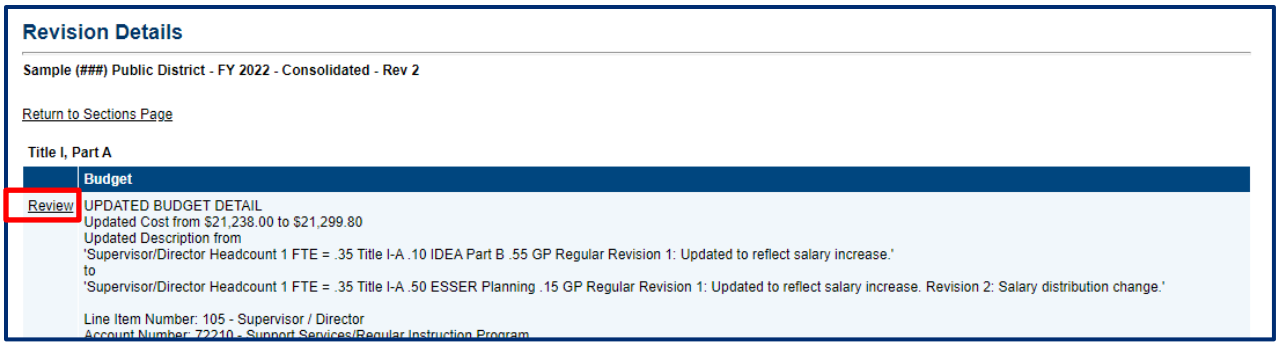
- Select the checkboxes and click **Print** at the top of the column.
- The **Print Request** screen pops up. If necessary, Users may rename their print job here.
- Click **Print**. The **Generating Document** screen appears. The system takes 20–30 seconds to generate the print job. For larger files, expect an email from the ePlan system when the file is ready to download.
- After ePlan generates the print file, click **Return to Funding Applications**.
- ePlan generates a PDF that appears at the top of the page from the **TDOE Resources** menu item in ePlan. The PDF link remains in **TDOE Resources** for five (5) days. Users may use the **Delete** links to remove any print jobs if desired.



Reviewing Application Revisions

On the **Sections** page of a revised application (i.e., an application that has been moved into a "Revision Started" workflow status), click "Details" in the Revision column to see a summary of changes made in the current revision. On the **Revision Details** page, click "Review" on any revision item to navigate to the funding application page where the change was made.



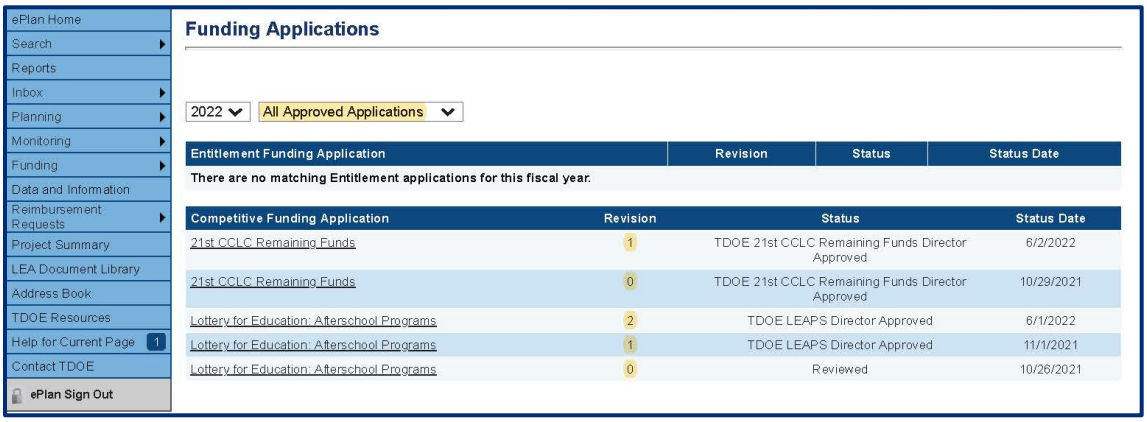


Viewing Approved Application Revisions

In addition to reviewing the details of revisions that have been made while an application is in *Revision Started* status, users can view previously approved versions of applications. For example, after a revision to the budget has been made and approved, a user may want to refer to the original approved budget. To view previous versions, begin at the **Funding Applications** page.

On the **Funding Applications** page, select the correct fiscal year from the drop-down. The second drop-down menu will default to *All Active Applications,* and the Revision column of the table will display the number of revisions for each funding application.

Change the selection in the second drop-down menu to *All Approved Applications*. The table will expand to display a list of all approved versions of each application, with the revision number displayed in the *Revision* column. Original applications are revision zero (0). Click on the hyperlinked name of the funding application to view it.



Troubleshooting

Top Three Issues

If an ePlan user is not able to work in an application, it is usually due to one of these three reasons:

1. The user is not using the **Google Chrome** browser. (For best results, always use Google Chrome to access ePlan. ePlan does not have the same functionality in other browsers.)
2. The application is not in the correct **work step or status**. Only a Draft Started or Revision Started status will allow LEAs to edit.
3. The user does not have the **appropriate role** to work on the application. Access the address book to see which roles an ePlan user has.

Contacts

For additional assistance, refer to the Support Team Chart to locate the appropriate contact information for the issue.

Updating Contact information

Please refer to ePlan Account Information for directions on updating user contact information.