LEA User Access Administrator Guide for ePlan

Tennessee Department of Education | December 2022

TN Department of
Education

Contents

LEA User Access Administrators

ePlan LEA User Access Administrators are LEA ePlan users with the ability to add and remove school-level ePlan roles and certain LEA-level ePlan roles. This guide reviews the role's responsibilities and provides instructions for the processes that LEA User Access Administrators can perform.

Note: See the ePlan Address Book to see which users have the User Access Administrator role in your LEA,

ePlan User Access Roles

To view and make changes to ePlan components (i.e., Funding Applications, Data and Information Tools, and Monitoring Instruments), users must have permission via an assigned user access role. User access roles are associated with one or more specific components. All users with assigned roles for a component receive alert emails about that component's workflow status.

LEA User Access Administrators can add all school-level roles and most LEA-level roles. 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.

These additional LEA roles must be added by the Tennessee Department of Education's (department's) ePlan help team. Users can request these roles via the ePlan User Access Form for LEAs or the ePlan User Access Form for LEA User Access Administrators.

User Role Types

ePlan User Access Role	What can this role do?	Who usually has this role?	Who can add this role for a user?
LEA Authorized Representative	Submit LEA plan, Funding Applications, Monitoring Instruments	Director of Schools	ePlan help team
LEA Fiscal Representative	Edit LEA plan, Approve Funding Applications	District Financial Officer	ePlan help team
LEA Fiscal Update	Reimbursement Requests	District Fiscal Staff	ePlan help team
LEA User Access Administrator	Manage the LEA's user access roles – including adding roles	LEA users assigned the role	ePlan help team
LEA Data View	View any ePlan component or planning tool, Upload it to the LEA Document Library, Be selected as a Consolidated Funding Application (CFA) contact	District users	LEA User Access Administrator
LEA Plan Data Entry	Edit LEA plan or school plans	District administrator	LEA User Access Administrator
LEA School Plan Reviewer	Edit school or LEA plans, approve school plans	District administrator	LEA User Access Administrator
LEA Consolidated Director	Edit LEA plan and CFA	Federal Director	LEA User Access Administrator
LEA Funding Application Director Roles	Change funding application status to *Draft Started* and *Draft Completed*.	Program Directors	LEA User Access Administrator
LEA Monitoring Roles	Complete sections of Monitoring Instruments	LEA Users with the responsibility to complete monitoring sections (e.g., Program/Fiscal Directors and Coordinators)	LEA User Access Administrator
LEA Data and Information Roles	Complete sections of Data and Information Tools	LEA Users with the responsibility to provide data to the department	LEA User Access Administrator
School Plan Data Entry	Edit school plan	Assistant Principal	LEA User Access Administrator
School Plan Reviewer	Edit and approve the school plan	Principal	LEA User Access Administrator

User Access Administration in ePlan

1. From the ePlan left navigation menu, select **Administer** then **User Access**.
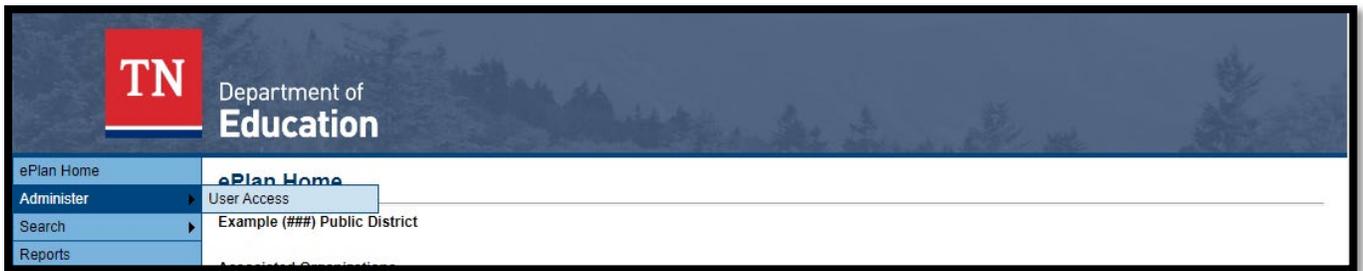
Find an Existing User

1. On the _User Access_ search screen, type in the **Last Name or Email Address** and click **Search**.
   a. In the **Administer Roles** column of the search results, click the **Note icon** to load the _Administer Roles_ page.
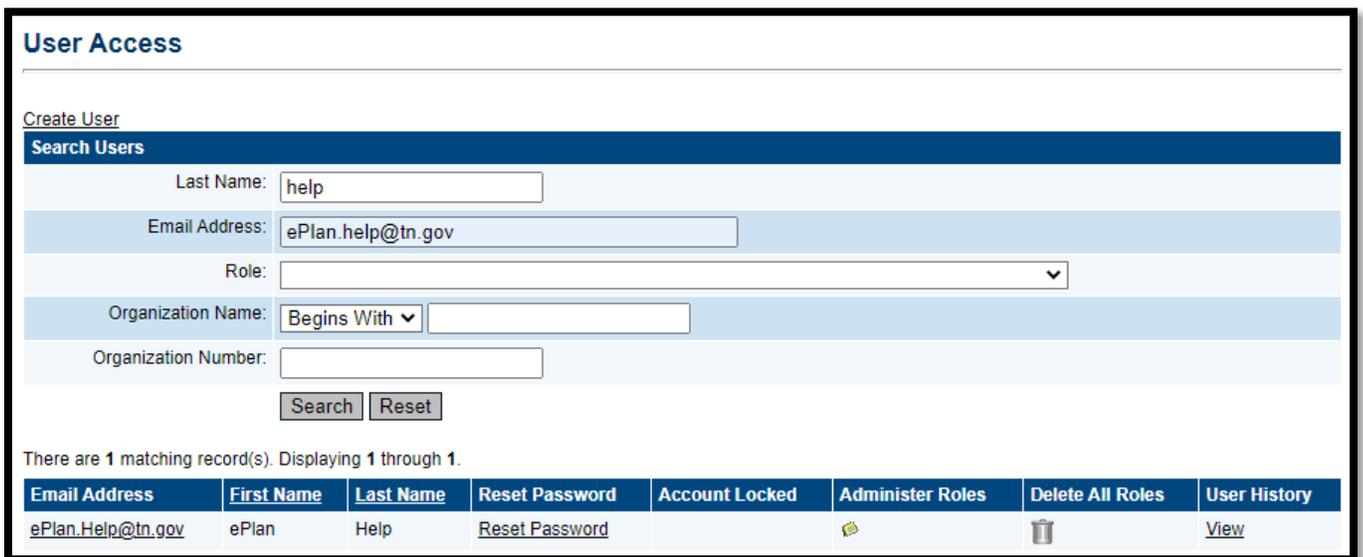
Create a New User

1. If the individual does not have an existing ePlan user account, click the ***Create User*** link at the top of the <u>User Access</u> page.
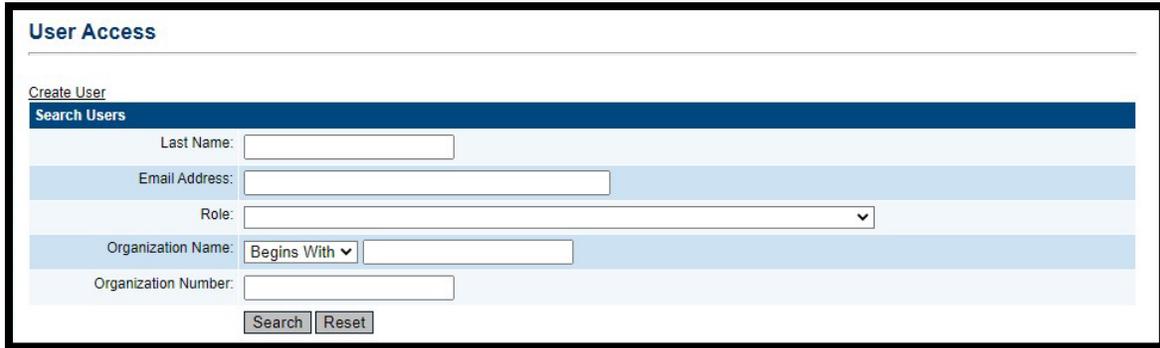
    User Access

    <u>Create User</u>

    Search Users

Last Name:	
Email Address:	
Role:	[▾]
Organization Name:	[Begins With ▾]
Organization Number:	

    [Search] [Reset]

2. Enter the new user's contact information on the <u>Create User</u> page and then click ***Create***.
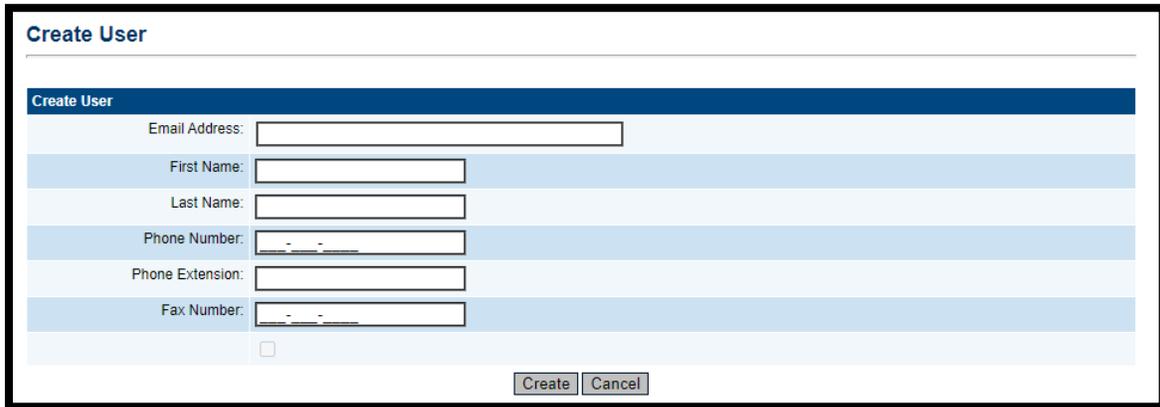
    Create User

    Create User

Email Address:	
First Name:	
Last Name:	
Phone Number:	__ - ___ - ____
Phone Extension:	
Fax Number:	__ - ___ - ____
	☐

    [Create] [Cancel]

Assign Roles

1. In the **Administer Roles** column of the user search results, click the **Note icon** to load the *Administer Roles* page.

Email Address	First Name	Last Name	Reset Password	Account Locked	Administer Roles	Delete All Roles	User History
ePlan.Help@tn.gov	ePlan	Help	Reset Password		🐀	🗑	View

2. On the *Administer Roles* page, click the **Create Role** link.

Administer Roles

Return to User Access
Create Role

Roles			
Email Address	Organization	Role	Delete
ePlan.Help@tn.gov	All	SEA Administrator	🗑
ePlan.Help@tn.gov	All	SEA Application Administrator	🗑

3. On the *Create Role* page, use the drop-down menus to select the correct LEA (and school, for school planning roles).
   a. Select the role(s) for the individual: the School Plan Data Entry and/or School Plan Reviewer.
   b. If you click in the box to the left of the role names, a checkmark will appear in that box, and you can then click **Create**.

Create Role

Create Role	
Email Address:	rainelei100@wcschools.com
Organization:	LEA: School: Wilson County (950) ▾ Carroll Oakland Elementary (950-0005) ▾
Role:	0 Option(s) selected. Select All / Deselect All ☐ School Plan Data Entry ☐ School Plan Reviewer

Create   Cancel

4. After the Organization is selected, the available roles for that user appear in the list. **Select one or more roles** to add for the user then click **Create.**

Delete A Single Role

5. To remove a role from an individual, navigate to the *Administer Roles* page for that user (see User Access Administration in ePlan and Find Existing Users), then click the **Trashcan icon** next to the role to be removed.

Delete All Roles

6. To remove all roles from an individual, navigate to the *User Access* page and search for the user's account (see User Access Administration in ePlan and Find Existing Users), then click the **Trashcan icon** in the **Delete All Roles** column.

Uploading User Access Forms

LEA User Access Administrators must not add or delete user access roles without a form with all applicable signatures. All roles must be approved by the Director of Schools before the role is assigned.

Each month, LEA User Access Administrators must upload signed forms for the roles added that month to the LEA Document Library. The department will conduct random checks to make sure the LEA Document Library contains the monthly uploads.

Note: When determining access for LEA staff and third parties, such as vendors (if applicable), consult with your board attorney to ensure compliance with required user access forms and all confidentiality laws, including the Family Educational Rights & Privacy Act (FERPA) and Privacy Act (PII).

Uploading to the LEA Document Library

1. Open the **LEA Document Library** from the left navigation menu.

2. Navigate to the correct year using the **Root Folders** search.
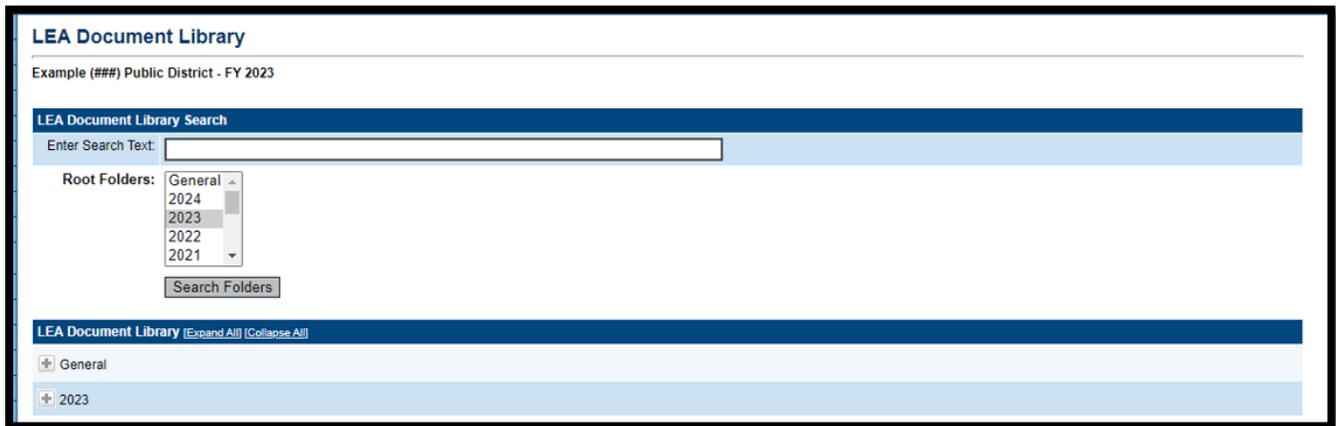
3. Scroll to the **User Access Forms** folder for that year. Expand the folder by clicking the **Plus icon**.

4. Subfolders are labeled by month and year. Expand the correct subfolder to display the document.

5. Click the **Edit Documents** link for that month's Access Forms.
6. On the *Upload Document* page, click **Upload Document**.
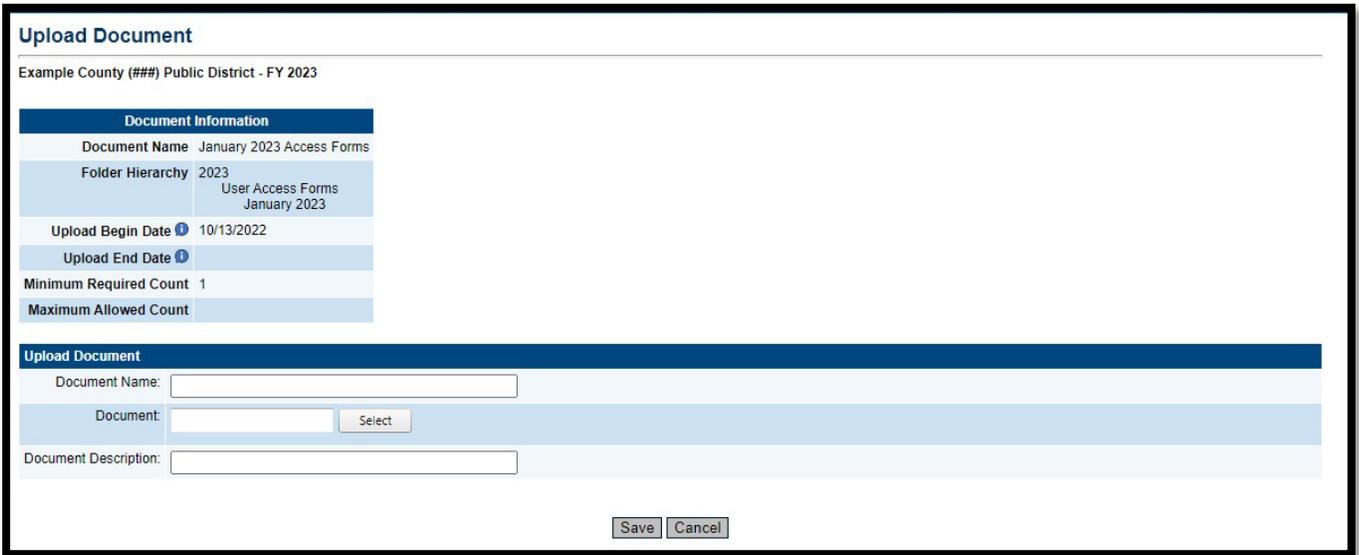
7. Enter the document name and description.
8. Click **Select**.
9. Select the correct files then click **Open**.
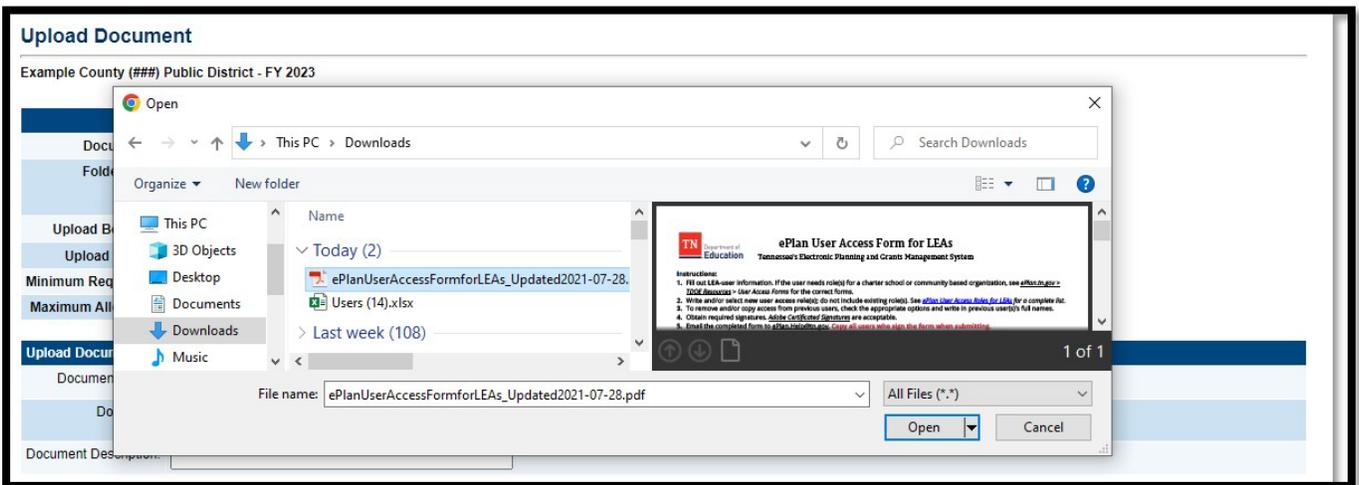
10. Click **Save** to save the file.
11. Repeat these steps to upload multiple documents as needed.

Running ePlan User Access Reports

1. Navigate to **Reports** from the left navigation menu.

2. Under <u>LEA</u>, Select the **Users** report.

3. Click the **Floppy Disk icon** to download the report. In most situations, downloading the report as an Excel file is recommended, but other file types are available.
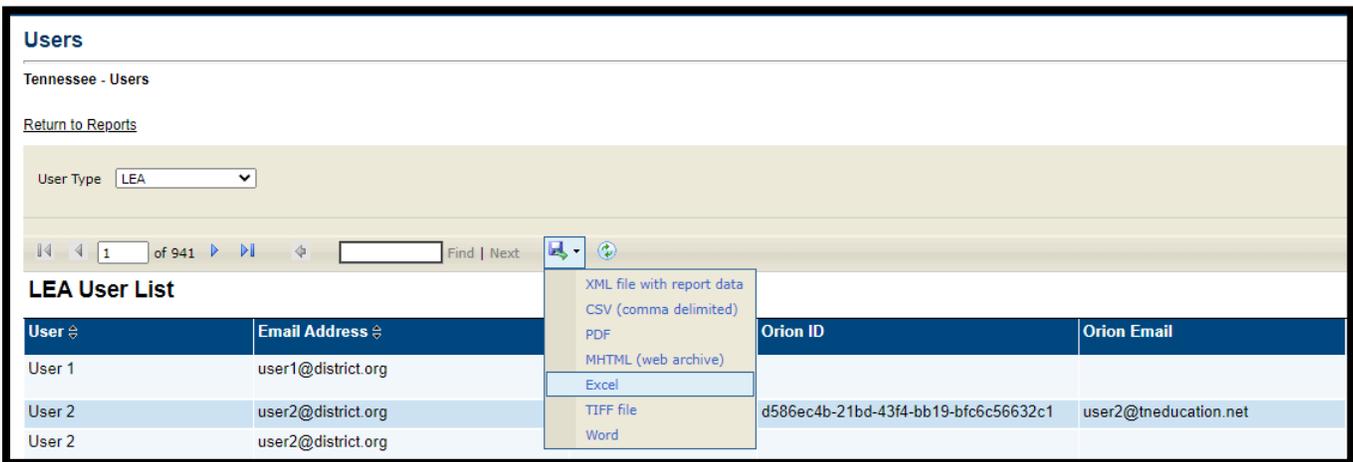
User Report Details

Report Column	Data Provided
User	User First and Last Name. Users with multiple roles will appear multiple times.
Email Address	User Email Address
Authentication Mode	Users can log in and are authenticated via ePlan or Orion Single Sign On. Individual users or the LEA User Access administrator can make updates to contact information for users authenticated in ePlan. DT Support must make changes for Orion accounts.
Phone	User Phone Number
Ext.	User Phone Extension
Org Code	LEA Number
Organization	LEA Name
Child Org Code	If applicable, school organization code
Child Organization	If applicable, school name
Org Type	LEAs are coded as Public Districts, State Agencies, or State Special Schools.
Role	The ePlan user access role assigned to the user
Date Added	When the role was added
Added By	The User Access Administrator who added the role, either at the LEA or the department.

Updating Contact Information

User access administrators can also update contact information and send password resets to users that do not use Orion Single Sign On (SSO).

1. Search for the user on the _Administer User Access_ page (see [Find Existing Users](#)).
2. Click on the underlined name. If the reset password column states, "_Password Set in TDOE Orion,_" the user's information cannot be updated by the LEA User Access Administrator. Alexander and John Aitken from the example found below could not have their information updated. To update this information, contact DT Support at DT.Support@tn.gov.

Email Address	First Name	Last Name	Reset Password
alex.aitken@hcsk12.net	Alexander	Aitken	Password Set in TDOE Orion
jaitken@bartlettschools.org	John	Aitken	Password Set in TDOE Orion
jaitken@colliervilleschools.org	John	Aitken	Reset Password
sarah.aitken@hcsk12.net	Sarah	Aitken	Reset Password

3. The **Update User** screen displays the contact information for this user.
   a. Any of the contact information can be changed.
   b. Click **Update** to save the changes.
   c. If the **Linked to TDOE Orion** box is checked, the information cannot be updated by the LEA User Access Administrator. To update this information, contact DT Support at DT.Support@tn.gov.

Update User	
Email Address:	sarah.aitken@hcsk12.net
First Name:	Sarah
Last Name:	Aitken
Phone Number:	731-772-9613
Phone Extension:	
Fax Number:	___-___-____
Linked to TDOE Orion	☐
	Update Cancel

Resetting Passwords

ePlan User Passwords

For users that do not use Orion SSO, LEA User Access Administrators can send a password reset link sent to the user's email address.

1. Search for the user (see Find Existing Users). Click the **Reset Password** link to send the user a link to change their password.

Email Address	First Name	Last Name	Reset Password
alex.aitken@hcsk12.net	Alexander	Aitken	Password Set in TDOE Orion
jaitken@bartlettschools.org	John	Aitken	Password Set in TDOE Orion
jaitken@colliervilleschools.org	John	Aitken	Reset Password
sarah.aitken@hcsk12.net	Sarah	Aitken	Reset Password

Note: Users can also send a reset password link to their email address by clicking the ***Forgot your password*** link on the sign-in page.

Sign-In	
Email Address:	ePlan.help
Password:	
	Forgot your password?

Orion Single Sign On (SSO)

Users with Single Sign On (SSO) access can follow the SSO Self-Service Password Reset Quick Step Instructions. These instructions are also linked on *ePlan Home* (homepage) under **Reminders**.

Useful Resources

ePlan Help Team

Weekly on-demand ePlan support from the ePlan Help team is available during ePlan office hours, Tuesdays at 11 a.m. CT | 12 p.m. ET. The Microsoft Teams link is posted on the ePlan homepage.

The ePlan help team is also available via email (ePlan.Help@tn.gov).

Forms (Linked on ePlan homepage)

- ePlan User Access form for LEA Users
- LEA User Access form for LEA User Access Administrators

Resources to Share with ePlan Users (Available in ePlan > TDOE Resources)

- ePlan User Manual for General Use

Technical Documents (Available in ePlan > TDOE Resources)

- Training presentation for LEA User Access Administrators