TN Department of Education

ePlan 101: Top 10 tips for using ePlan

Welcome to ePlan! ePlan is Tennessee's online platform to allow schools and districts access to district and school plans, funding applications, Data and Information tools, and monitoring instruments. Below are some important tips to help ePlan users navigate and use ePlan:

Timeout Policy

Users are logged out after 30 minutes of inactivity on a page. ePlan generates a notification when the last five minutes have been reached warning the user that they will be logged out in five minutes. Any information that is not saved prior to being logged out will be lost. Users must regularly save their work while working in ePlan.

Main Navigation Menu

ePlan's navigation menu is found on the far left of the screen. Below is what each item on the main menu means:

ePlan Home – Click here to return to the ePlan Home Page	
Search – Allows a user to look up a district.	
Inbox – Contains the email message archives and items awaiting approval.	
Planning – Connect to district and school plans in InformTN or view pre-2019 plans.	
Monitoring – Click here to access monitoring instruments.	
Funding – Click here to access current and past funding applications.	
Reimbursement Requests – Click here to access current and past Reimbursement Requests.	
Project Summary – Allows a user to see a summary of the funding applications for the LEA including the amount of money in the budget and any remaining funds not spent.	
Address Book – Contains the LEA's users and their contact information.	
TDOE Resources – Department resources shared with LEAs. Also available on the public view.	
Help for Current Page – Click here to see specific help topics for the current page.	
Contact TDOE – See the various ways to contact ePlan Help.	
ePlan Sign Out – Click here to sign out of ePlan	

Homepage

See the homepage for important **Announcements** on upcoming events or links to new resources. Key resources (including User Access forms and the ePlan User Manual) are linked in the right-hand column under **Reminders**.

User Access Forms

To access specific ePlan components ePlan users must be assigned the correct roles for that component. To request a role, Users must submit an ePlan User Access form. Different Organization types have different forms. Signatures are required for every role for every user. Use the User Access Form to request roles be removed for a user also.

Forms are linked below, and on the ePlan Homepage under the Welcome to ePlan message.
- LEA and LEA User Access Administrators
- Charter School
- Community Based Organization
- Non-Public Schools

For LEAs, most roles can be assigned by the LEA User Access Administrator. District User Access Administrators are listed in the District's Address Book in ePlan.
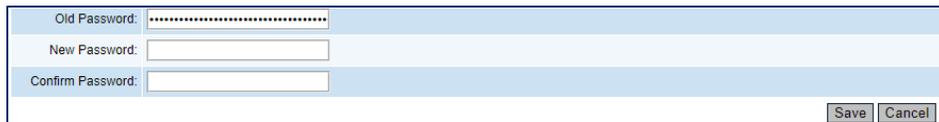
Passwords

ePlan Passwords expire every 90 days. To reset a password, input the user email address, click on "Forgot your password?" and hit submit on the ePlan Sign-In page.
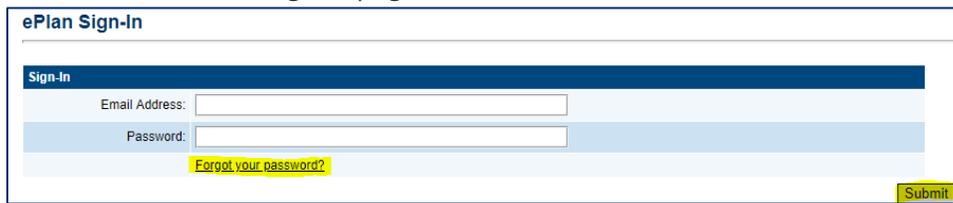
ePlan will send a password reset link to the entered email address from *ePlanTN.NoReply@eGrantsManagement.com*. When users click on this link, the reset password page will appear. The old password field will auto populate with a long series of asterisks (***) as shown below. ***Do not change the content in the old password field***. Users only need to fill in their new password twice and hit submit to update their passwords.

ePlan passwords must be at least eight characters long and contain at least one uppercase character (A-Z), one lowercase character (a-z), one number (0-9), and one special character.

ePlan users will be locked out after five subsequent wrong attempts. After the user is locked out, a reset password will be sent to the user's email address with a link to reset the password.

NOTE: Orion Single Sign-On users can also click the Forgot Your Password link or contact DT.Support@tn.gov with Orion SSO login issues.

User Contact Information

Click on the blue username link under the left navigation menu to update the User Profile. All users can update the phone number, extension, and fax number. Users not using single sign-on can also update email address and name. Orion Single-Sign on users must contact DT.Support@tn.gov to update name and email information.

LEA Document Library

The LEA Document Library is available for sharing documents between the department and the LEA. Both the department and the LEA can upload documents.

Each LEA has a Document Library that is unique by year. The default LEA Document Library screen displays the folder for the current fiscal year. Only users with a role for the LEA can access the LEA Document Library. This information is not available to the public.

State users must first search for the LEA to find this LEAs unique LEA Document Library.

Funding Applications

The default Funding Application page displays all active applications for the current fiscal year. Users can select alternate years, all approved applications, or last approved applications from the drop-downs at the top of the page. Open a specific application by clicking on the application name. Funding Applications open directly to the Funding Application Sections Page where users can see the workflow status step and the sections and pages in the application.

Funding applications follow a standard workflow:

Status	Explanation
Draft Started	The LEA Director for that respective grant clicks **Draft Started**. Until the funding application has been moved to *Draft Started*, no information can be entered into the application. E.g., the Consolidated Application needs to be started by a Consolidated Director, and the Safe Schools Application needs to be started by the Safe Schools Director.
Draft Completed	Once all funding application information and budgets have been entered, the LEA director clicks **Draft Completed**. If there are any validation errors in the application, the application cannot be changed the status to *Draft Completed*. • Review Validation errors by clicking "Messages" in the Validation column on the sections page. Users can view errors by page, or for the entire application. <table><tr><td>**Description** (View Sections Only View All Pages)</td><td>**Revision**</td><td>**Validation**</td></tr><tr><td>All</td><td>Details</td><td>Messages</td></tr></table> ***Validation messages may be errors or warnings.*** • ***Errors*** appear in Red and prevent an application from moving forward. • ***Warnings*** appear in black and exist to check that the user intends to do some action. Click on the error/warning to be taken to the page with the warning/error and resolve the issue to allow the application to be moved to Draft Completed status.
LEA Reviewed	After the draft is completed, the next steps are for the **LEA Fiscal Representative and LEA Authorized Representative to review and then approve or not approve** the application.
TDOE Reviewed	The final step of the initial application is for **TDOE personnel to review the application and approve or not approve it**. Sometimes this step may be called "Reviewed."

Direct questions about funding applications to the TDOE grant directors are listed in the ePlan Help Grant Contact Information document.

Reimbursement Requests

Reimbursement requests can only be completed after the department has approved the application. Only one reimbursement can be completed at a time for each application.

Planning Tool

ePlan connects to InformTN, the District and school plans platform. (District and School plans prior to 2019 are available to view in ePlan.)

Users must have an LEA District Planning role to work on the district plan. These roles are listed in the LEA User Role Descriptions document and can be assigned via the ePlan User Access Form for LEAs.

District Address Book

The organization address book is available from the left navigation menu. There are two sections:

LEA Funding Application Contacts: lists every individual with a contact on each funding application for the district. For some bigger applications, like the Consolidated Application, multiple contact types and contacts will be listed. One person can hold multiple contact types within a funding application. This information can be updated by district personnel by updating the funding application. These contacts will only be updated after the TDOE Approves an application. Therefore, outdated names may appear in this section.

LEA Role Contacts: lists every individual that has an active role in ePlan. These roles are current and include every individual's role. Names are updated when LEA- or State-level ePlan user access administrators add user access roles after users submit user access forms.