

Adding or Removing School Level Users

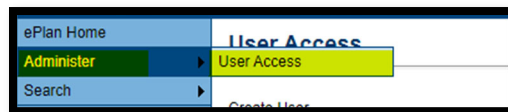
Adding or Removing School Level Users

LEA user access administrators can assign or delete school-level roles.

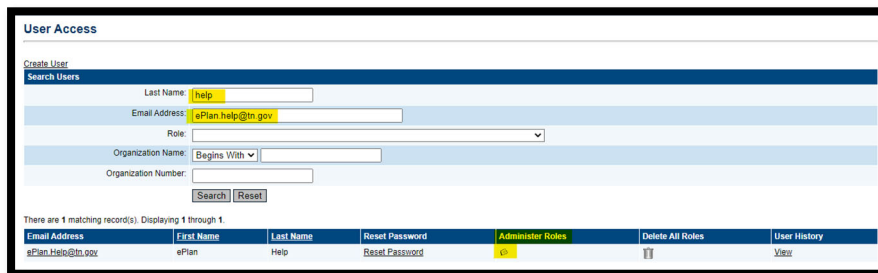
- **School Plan Data Entry** – These users edit and submit school plans. These users are usually assistant principals or other school personnel.
- **School Plan Reviewer** – These users review and approve or not approve school plans. These are usually principals.

Steps to add or remove roles for a school-level user:

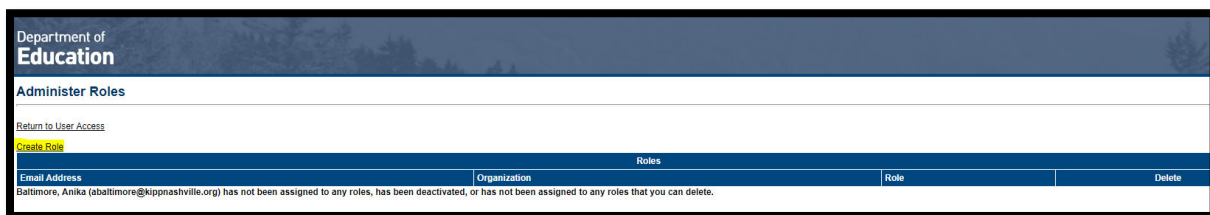
1. Hover over Administer and select “User Access.”



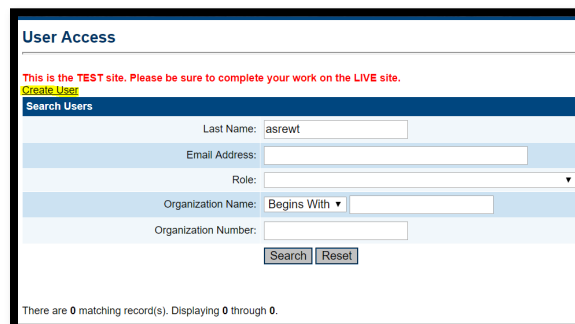
2. Type in the user’s last name or email address and select search.
 - a. Select the note for Administer Roles as highlighted below.



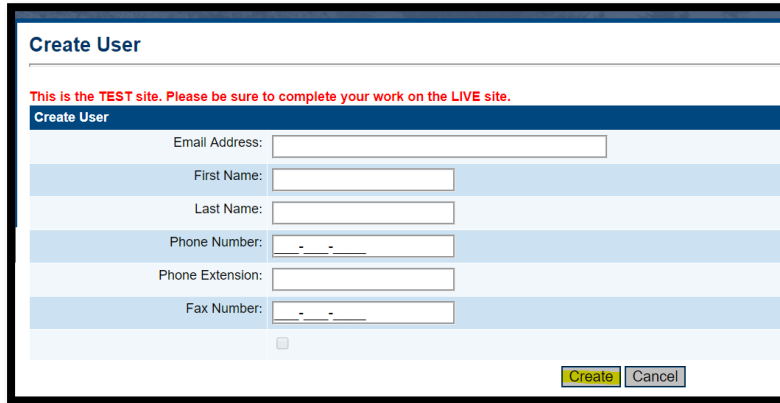
3. The next screen **Administer Roles** allows users to create roles.



4. If an individual is not registered in ePlan, select “**Create User**” to add them as a new user.

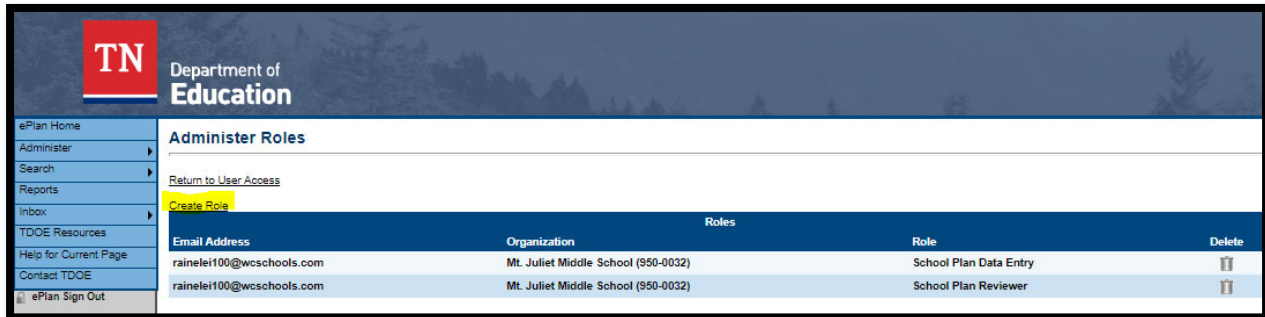


5. Enter their contact information and then select “Create.”



6. Click the administer roles as shown in step two to add the roles.

7. The next screen will show any current roles for the user. Select “Create Role” as highlighted below to go to the next screen and assign the user a new role.

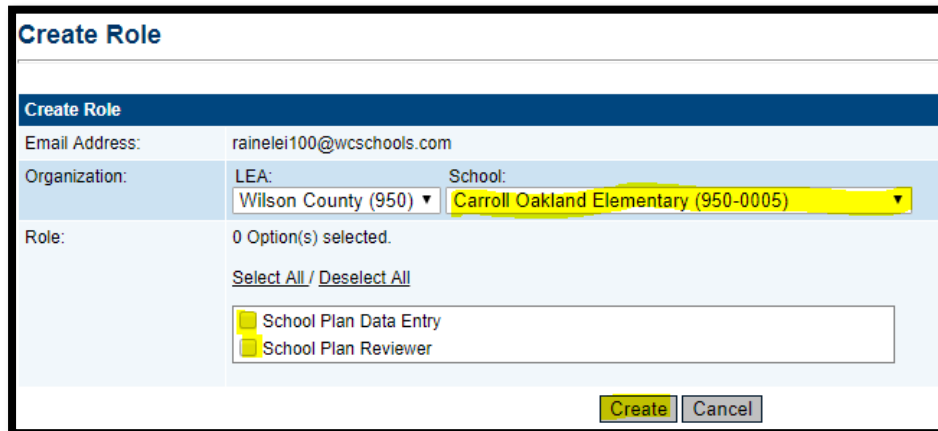


Email Address	Organization	Roles	Role	Delete
rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)		School Plan Data Entry	
rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)		School Plan Reviewer	

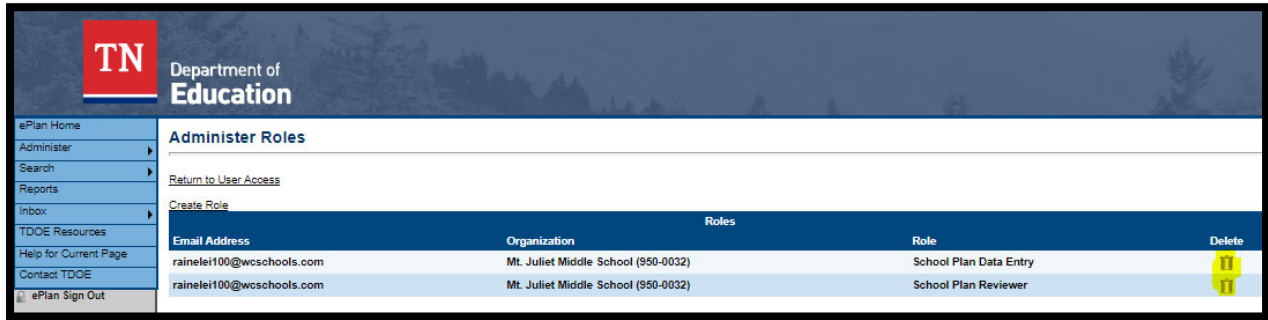
8. After the “Create Role” screen loads, select the following:

- a. The school for which this person should be assigned the roles.
- b. The roles for the individual; the School Plan Data Entry and/or School Plan Reviewer.

9. Click the box to the left of the role names to select a role. Then select “Create.”



10. To remove a role from an individual, select the trashcan icon next to the role that needs removed.



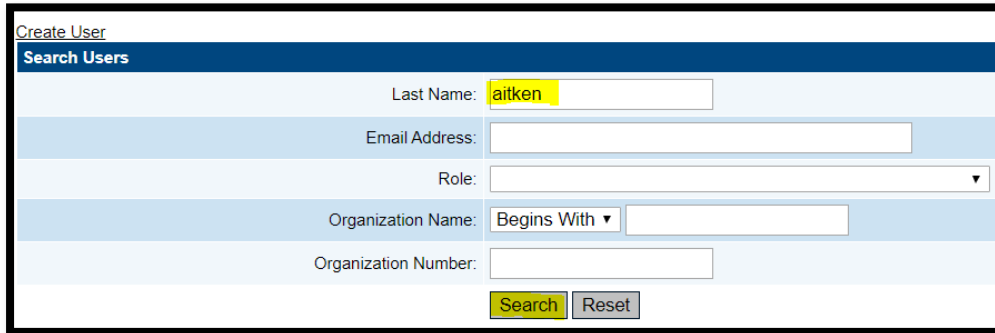
11. Review the user’s roles and see the new roles that were added or removed.

Contact Information

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

Steps to update contact information:

1. Search for the user first.

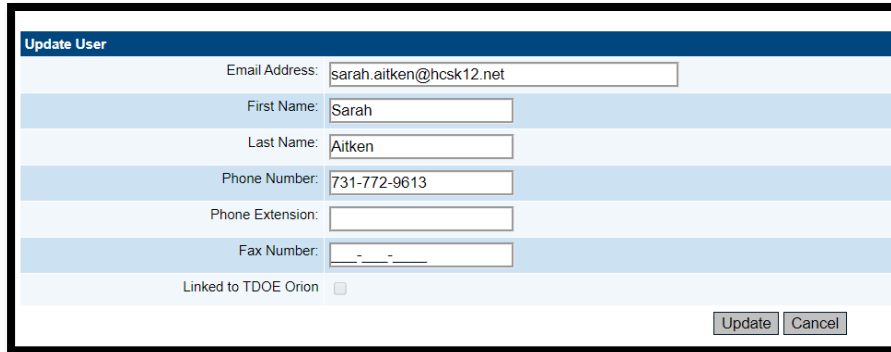


2. Click on the underlined name. If the reset password column shows “Password Set in TDOE Orion,” the user’s information cannot be updated using this method. From the example below, Alexander Aitken and John Aitken could not have their information updated.

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 contains the contact information for this user.

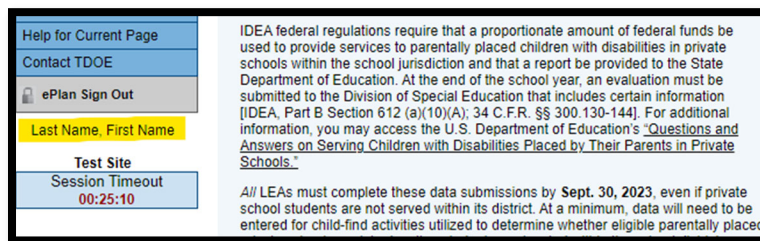
- Any of the contact information with editable fields can be changed.
- Please note that if the *Linked to TDOE Orion* line contains a checkmark, the user’s name and email address cannot be updated by the District User Access Administrator. The contact information must be updated by the District Technology Support Team. Please contact DT.Support@tn.gov for help.



c. Even if the account is linked to TDOE Orion, the phone number and other editable fields can be updated by the district user access administrator.

4. Click **Update** to save the changes.

5. Note: Users can access and update their own contact information by clicking the user name underneath the left navigation menu.



Resetting a password.

Users that do not use Orion SSO can have a password reset link sent to their email to reset their ePlan password. There are two ways a user can have this link sent to their email address.

1. A user access administrator can click the **Reset Password** after searching for the user.

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

2. Users can also send this same link to their email address by clicking the **Forgot your password?** link on the sign-in page.

