

# LEA ePlan User Access Form

Tennessee's Electronic Planning and Grants Management System

**Instructions:**

1. Indicate **new user access role(s)**; do not include existing role(s). See [ePlan User Access Roles for LEAs](#) for a complete list.
2. To remove or copy access from current/previous users, check the appropriate box and write in the previous user(s)'s full names.
3. Obtain the required signatures.
4. Submit this form to the LEA User Access Administrators to request user roles (except those marked with a star ★).
5. Alternatively, this form may be emailed to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov) to request the role. For user access roles marked with a star ★, email the completed form to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov).

User's Name: \_\_\_\_\_ LEA Name: \_\_\_\_\_ LEA ID #: \_\_\_\_\_

Email (ePlan User ID email, not SSO log-in): \_\_\_\_\_ Phone: \_\_\_\_\_

<u>Funding Application/Grant Director Roles</u>	
1	
2	
3	
<u>Monitoring Roles</u>	
1	
2	
<u>Data and Information Roles</u>	
1	
2	
3	
<u>Grouping Roles</u>	
1	
<u>Other Roles</u>	
1	
2	

<u>Fiscal &amp; Approve Roles</u>	
<input type="checkbox"/>	<b>LEA Authorized Representative:</b> <i>final approval of any funding app. &amp; monitoring document</i> ★ <b>(Only the Director of Schools (DOS) may have this role)</b>
<input type="checkbox"/>	<b>LEA Fiscal Update*</b> (Bookkeeper): <i>request reimbursements from any funding app</i> ★ <b>(CFO approval required for this role)</b>
<input type="checkbox"/>	<b>LEA Fiscal Representative</b> (CFO/Finance Director): <i>fiscal approve funding app.; Complete FER; submit state funds app; request reimbursements from any funding app.</i> ★
<input type="checkbox"/>	<b>Board Chair:</b> <i>approve state funds app.</i>
<input type="checkbox"/>	<b>County/City Clerk or SSD Recorder:</b> <i>approve state funds app.</i>
<u>LEA-Level Planning Roles</u>	
<input type="checkbox"/>	<b>LEA Plan Data Entry:</b> <i>edit LEA Plan. (This role is not for editing individual school plans.)</i>
<input type="checkbox"/>	<b>LEA School Plan Reviewer:</b> <i>edit school- &amp; LEA-approve school plan. (For LEA-level staff to review school plans)</i>
<u>Data View</u>	
<input type="checkbox"/>	<b>LEA Data View Only:</b> <i>view all ePlan components and upload to LEA Document Library but can't edit other ePlan components. (Allows the user to be selected as a contact in the CFA)</i>

**To replace or copy from current/previous user(s): Select the correct check box(es) and provide name(s) of previous user(s)**

<input type="checkbox"/> Copy all access from the current/previous user	<input type="checkbox"/> Remove all access from current/previous user	Previous User(s):
	<input type="checkbox"/> Remove access indicated above <u>only</u>	

_____ New User Signature and Date	_____ New User Title	<div style="border: 1px solid black; width: 100px; height: 100px; margin: 0 auto;"></div> LEA User Access Admin Initials for roles added
_____ Director of Schools Signature and Date	_____ CFO Signature and Date *Required for Fiscal Update users	

**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).**