



ePlan User Access Form for Charter Schools

Tennessee's Electronic Planning and Grants Management System

Instructions: Fill out user information, check role(s), obtain required signatures, and email to: ePlan.Help@tn.gov.
Copy all users who sign the form when submitting. Be clear on your form for which Charter Schools the role(s) are requested. If there is more than one charter, include the name and ID for each one.

User's Name: _____

ePlan User ID Email: _____ **Phone:** _____

Charter Name: Example Charter Academy **ID: *** ____123-1234____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

Charter Name: _____ **ID: *** ____

*** Please include the three-digit District ID Number in front of the Charter School ID Number**
Charter ID numbers can be found at <https://tnschooldirectory.tnedu.gov/>

Funding Application (App) and/or Grant Director Roles	
☐	Academic Special Courses Director
☐	Charter Schools Facilities Cohort (24, 25, 26, 27): edit & submit app
☐	Charter Schools Grant Cohort Director (24, 25, 26, 27): edit & submit app
☐	CTE Special Course and Special Program
☐	Innovative School Model Grant Director
☐	Parental Leave Director
☐	Physical Activity Compliance Director
☐	Public School Security Grant Director
☐	Safe Schools Director
☐	Preschool Development Grant (Voluntary Pre-K Director)
☐	Restore all roles

Fiscal, View, & Approve Roles	
☐	Data View Only: view all ePlan components, but not edit
☐	Fiscal Update* (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
☐	Fiscal Representative/Parental Leave Director (CFO/Finance Director): fiscal approve funding app.; submit
☐	Authorized Representative/ePlan Audit Director: final approval of any funding app. & monitoring document (Only Director of Schools, Executive Director, or Founder may
☐	
☐	
☐	

If replacing another user, provide name(s) of previous user(s). _____
☐ Remove all access ☐ Remove access selected above *only*.

New User Signature

Supervisor's Signature

New User Title

Supervisor's Title

Date

Date

CFO Signature **Required for Fiscal Update users*

Director of Schools, Executive Director, or Founder Signature

Note: To complete a funding application, each charter must have users with the respective Application Director role, Fiscal Representative role, and Authorized Representative role.