


2023 LEA Compliance Report ePlan Submission Instructions

The LEA compliance report is due in ePlan by **November 30, 2023**. Prior to uploading the report, please confirm all required fields (e.g., **LEA name, date of local school board approval**) have been filled in. The department will consider the report incomplete if a required field is blank. Step-by-step report submission (ePlan upload) instructions are below.

1. Any ePlan user with an LEA role can upload to the LEA Document Library.
 - a. The [LEA User Access Form](#) features roles that permit users to access the **LEA Document Library**.
 - b. Below is a screenshot of the form that shows the common **LEA Data View** role, which allows users to upload to the ePlan **LEA Document Library**.
 - c. School planning roles do not permit users to access the **LEA Document Library**.



ePlan User Access Form for LEAs

Tennessee's Electronic Planning and Grants Management System

Instructions:

1. Fill out **LEA-user** information. If the user needs role(s) for a charter school or community based organization, see [ePlan.tn.gov > TDOE Resources > User Access Forms](#) for the correct forms.
2. Write and/or select **new user access role(s)**; do not include existing role(s). See [ePlan User Access Roles for LEAs](#) for a complete list.
3. To remove and/or copy access from previous users, check the appropriate options and write in previous user(s)'s full names.
4. Obtain required signatures. *Adobe Certificated Signatures* are acceptable.
5. Email the completed form to ePlan.Help@tn.gov. **Copy all users who sign the form when submitting.**

User's Name:

LEA Name:

LEA ID #:

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

Phone:

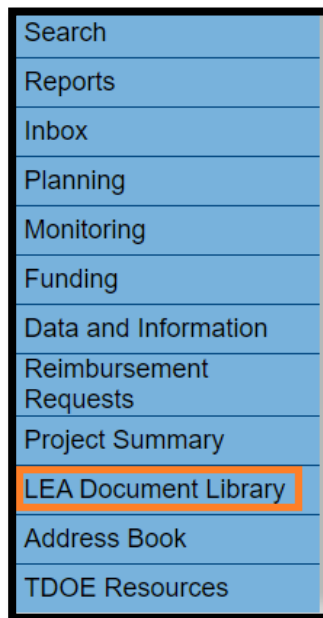
Funding Application/Grant Director Roles		Data View
1		<div style="background-color: yellow; padding: 2px;">LEA Data View Only: view all ePlan components, upload to</div> <input type="checkbox"/> LEA Document Library but can't edit other ePlan components. (Allows user to be selected as a contact in the CFA)
2		
3		
4		
5		
6		
7		
Monitoring Roles		Fiscal & Approve Roles
1		<input type="checkbox"/> LEA Fiscal Update* (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
2		<input type="checkbox"/> LEA Fiscal Representative (CFO/Finance Director): fiscal approve funding app.; complete FER; submit state funds app.
3		<input type="checkbox"/> Board Chair: approve state funds app.
4		<input type="checkbox"/> County/City Clerk or SSD Recorder: approve state funds app.
5		<input type="checkbox"/> LEA Authorized Representative: final approve any funding app. & monitoring document (Only Director of Schools may have this role)
Other Roles		LEA-Level Planning Roles
1		<input type="checkbox"/> LEA Plan Data Entry: edit LEA Plan. (This role is not for editing individual school plans.)
2		<input type="checkbox"/> LEA School Plan Reviewer: edit, school- & LEA-approve school plan. (For LEA-level staff to review school plans)
3		<input type="checkbox"/> LEA User Access Admin.: add users to edit school plan(s)

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

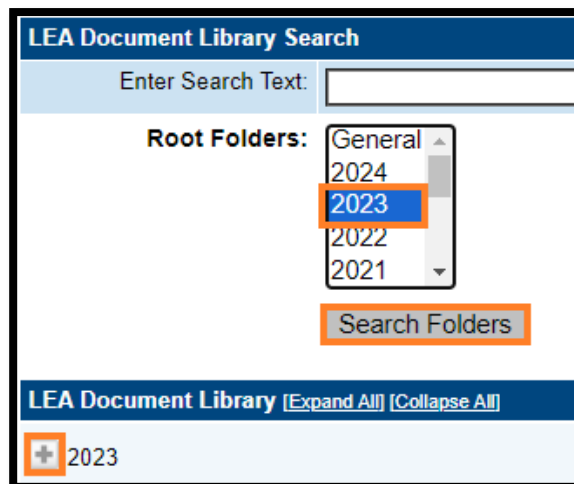
☐ Copy all access
 ☐ Remove all access
 ☐ Remove access indicated above only

Previous User(s):

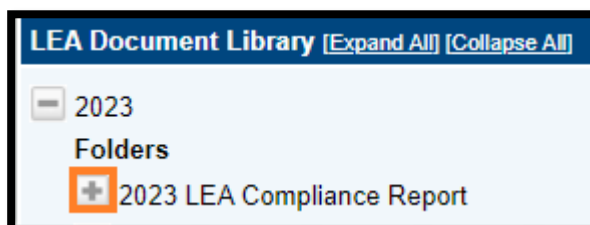
2. Select the **LEA Document Library** from the main menu.



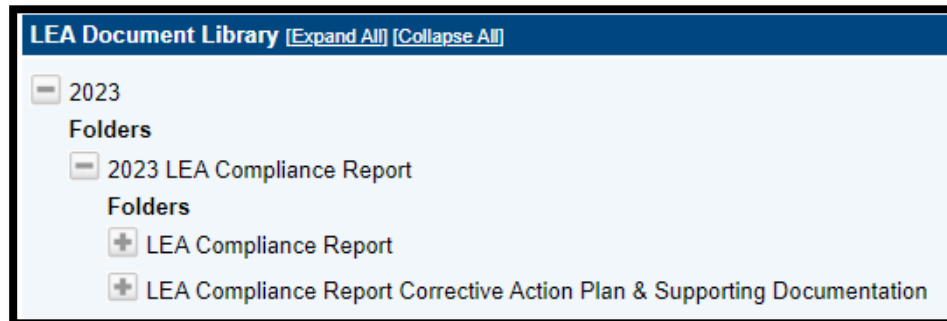
3. To open the **2023 LEA Document Library**, click **2023** and then click **Search Folders**. Next, click the **+** icon in front of **2023** as shown below.



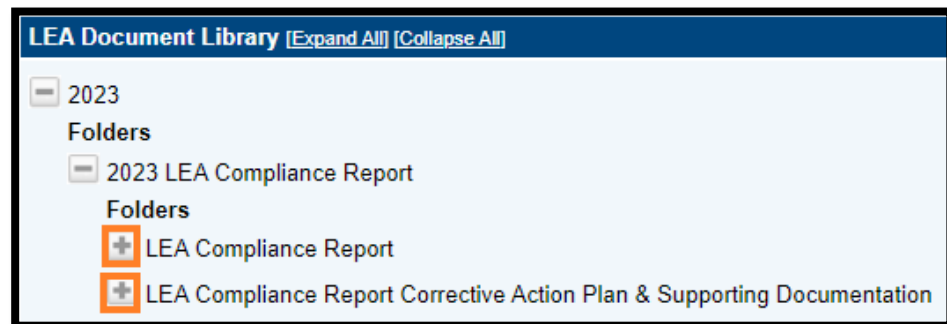
4. Click the **+** icon to open the 2023 LEA Compliance Report folder.



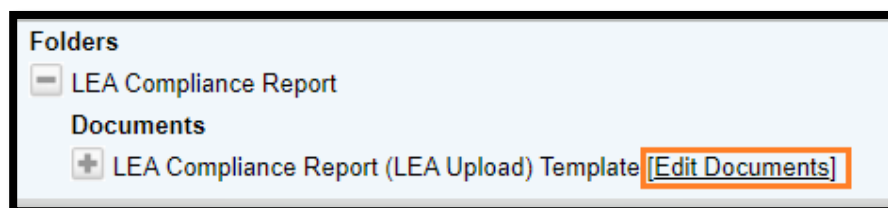
5. There are two (2) subfolders here:
 - a. LEA Compliance Report
 - i. **Submission of a completed compliance report is required.**
 - b. Corrective Action Plan & Supporting Documentation
 - i. **Submission of a completed corrective action plan is required only if noncompliance is indicated in the compliance report.** Including supporting documentation with a corrective action plan is optional.



6. Click the + icon to open the LEA Compliance Report or Corrective Action Plan & Supporting Documentation folder.



7. If needed, the report template can be downloaded after clicking **Edit Documents**. The corrective action plan template is embedded within the compliance template.



8. To download the report template, click on the template.

Document Information	
Document Name	LEA Compliance Report (LEA Upload) Template
Folder Hierarchy	2023 2023 LEA Compliance Report LEA Compliance Report
Upload Begin Date ⓘ	9/28/2023
Upload End Date ⓘ	
Minimum Required Count	1
Maximum Allowed Count	
Document Template	LEA Compliance Report (LEA Upload) Template

9. Click **Upload Document** to upload a completed 2023 report.

Document Information	
Document Name	LEA Compliance Report (LEA Upload) Template
Folder Hierarchy	2023 2023 LEA Compliance Report LEA Compliance Report
Upload Begin Date ⓘ	9/13/2023
Upload End Date ⓘ	
Minimum Required Count	1
Maximum Allowed Count	
Document Template	LEA Compliance Report (LEA Upload) Template
Upload Document	

10. If applicable, to upload a 2023 corrective action plan and supporting documentation, click **Edit Documents**.

LEA Document Library [Expand All] [Collapse All]	
2023	
Folders	
2023 LEA Compliance Report	
Folders	
LEA Compliance Report	
Documents	
+ LEA Compliance Report (LEA Upload) Template [Edit Documents]	
LEA Compliance Report Corrective Action Plan & Supporting Documentation	
Documents	
+ LEA Compliance Report Corrective Action Plan & Supporting Documentation [Edit Documents]	

11. Next, click **Upload Document** to upload a 2023 corrective action plan and supporting documentation.

Document Information	
Document Name	LEA Compliance Report Corrective Action Plan & Supporting Documentation
Folder Hierarchy	2023 2023 LEA Compliance Report LEA Compliance Report Corrective Action Plan & Supporting Documentation
Upload Begin Date ⓘ	9/13/2023
Upload End Date ⓘ	
Minimum Required Count	0
Maximum Allowed Count	
Upload Document	