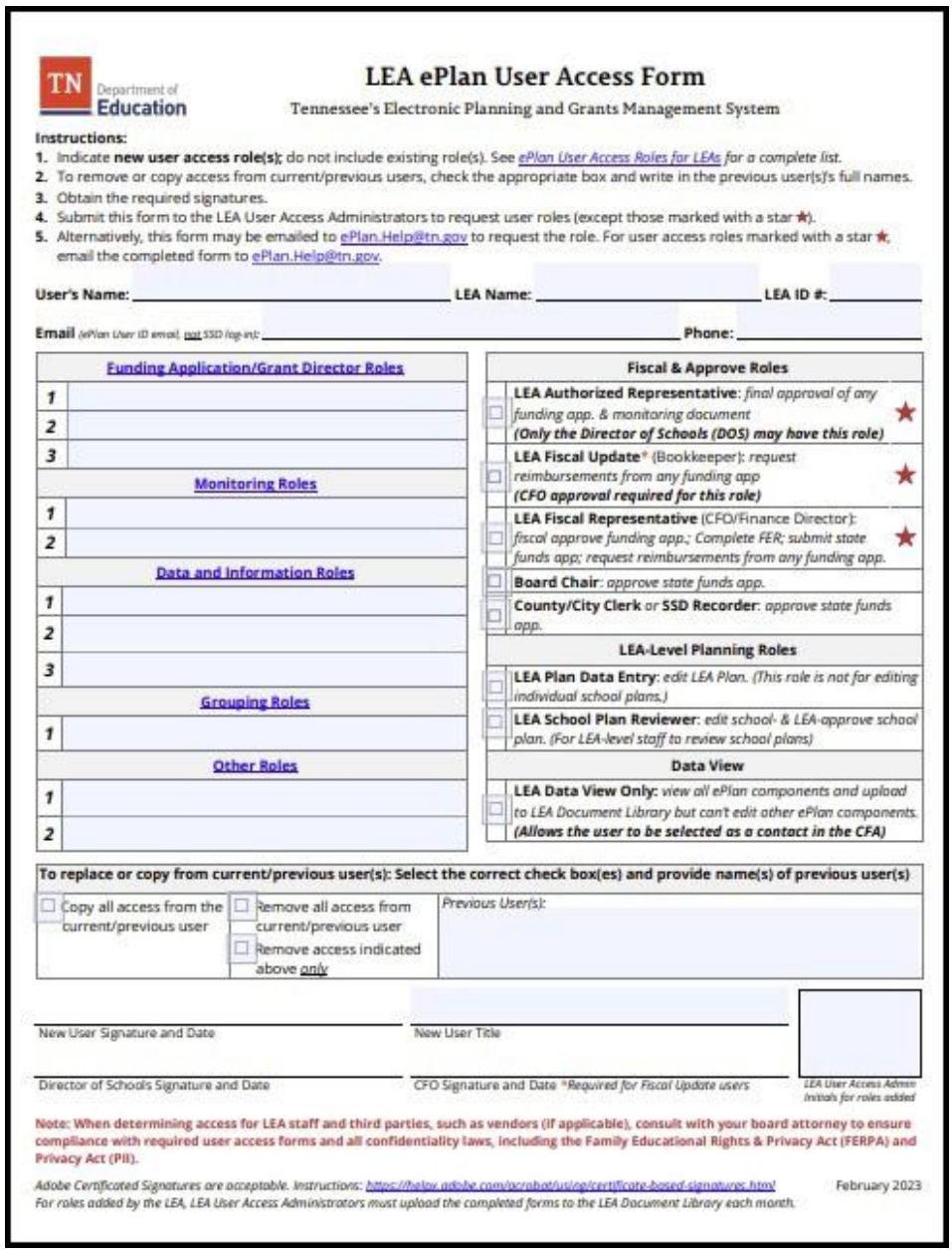
2026 LEA Compliance Report
ePlan Submission Instructions

The 2026 LEA compliance report is due in ePlan by **November 30, 2026**. Included are instructions for uploading the report and, if applicable, the corresponding corrective action plan to ePlan. Before proceeding, please ensure the report does not reflect omissions (e.g., LEA name, signature, approval date).

1. Any district user with an LEA role can upload or download 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 and download via the ePlan LEA Document Library.
    c. School planning roles do not permit users to access the LEA Document Library.



TN Department of Education

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 to request the role. For user access roles marked with a star ★, email the completed form to ePlan.Help@tn.gov.

User's Name: _____ **LEA Name:** _____ **LEA ID #:** _____

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

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

Fiscal & Approve Roles	
☐	**LEA Authorized Representative**: *final approval of any funding app. & monitoring document* ***(Only the Director of Schools (DOS) may have this role)*** ★
☐	**LEA Fiscal Update*** (Bookkeeper): *request reimbursements from any funding app* ***(CFO approval required for this role)*** ★
☐	**LEA Fiscal Representative** (CFO/Finance Director): *fiscal approve funding app.; Complete FER; submit state funds app; request reimbursements from any funding app.* ★
☐	**Board Chair**: *approve state funds app.*
☐	**County/City Clerk** or **SSD Recorder**: *approve state funds app.*
LEA-Level Planning Roles	
☐	**LEA Plan Data Entry**: *edit LEA Plan. (This role is not for editing individual school plans.)*
☐	**LEA School Plan Reviewer**: *edit school- & LEA-approve school plan. (For LEA-level staff to review school plans)*
Data View	
☐	**LEA Data View Only:** *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)***

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

☐ Copy all access from the current/previous user
☐ Remove all access from current/previous user
☐ Remove access indicated above only

Previous User(s):

New User Signature and Date _____ New User Title _____

Director of Schools Signature and Date _____ CFO Signature and Date **Required for Fiscal Update users* _____ *LEA User Access Admin Initials for roles added*

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).

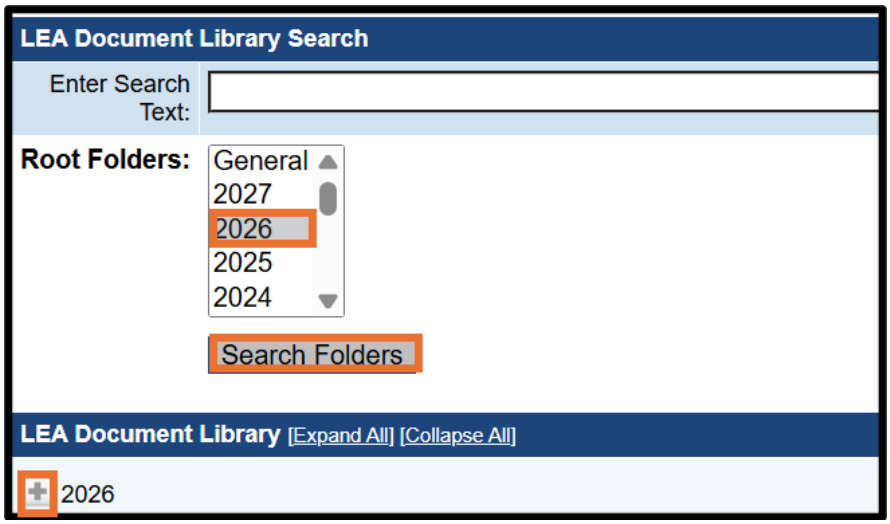
Adobe Certificated Signatures are acceptable. Instructions: https://helpx.adobe.com/acrobat/using/certificate-based-signatures.html
For roles added by the LEA, LEA User Access Administrators must upload the completed forms to the LEA Document Library each month.

February 2023

2. After signing in, select the **LEA Document Library** from the ePlan main menu.



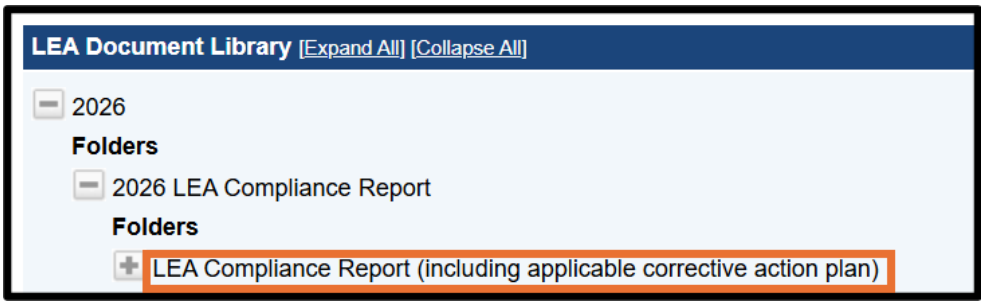
3. To open the 2026 LEA Document Library, click **2026** and then click **Search Folders**. Next, click the **+ icon** in front of **2026**.



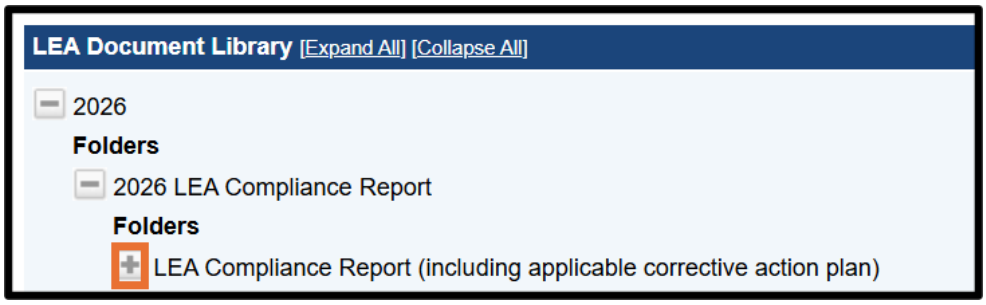
4. Click the **+ icon** to open the 2026 LEA Compliance Report folder.



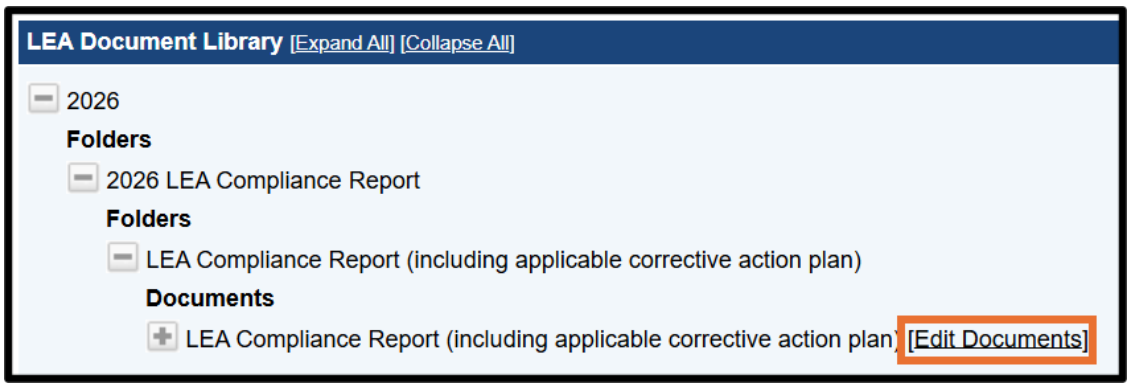
5. There is one (1) subfolder: LEA Compliance Report.



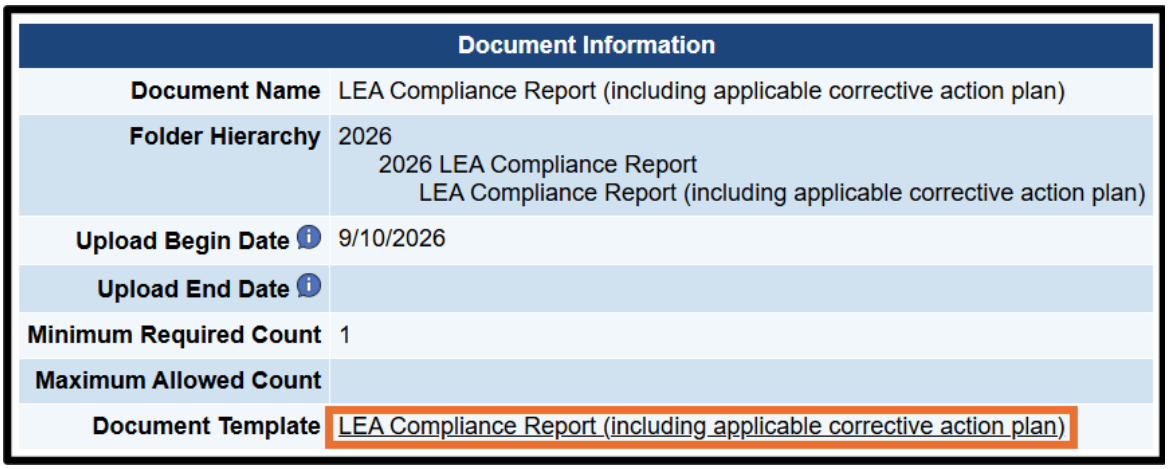
6. Click the **+ icon** to open the folder.



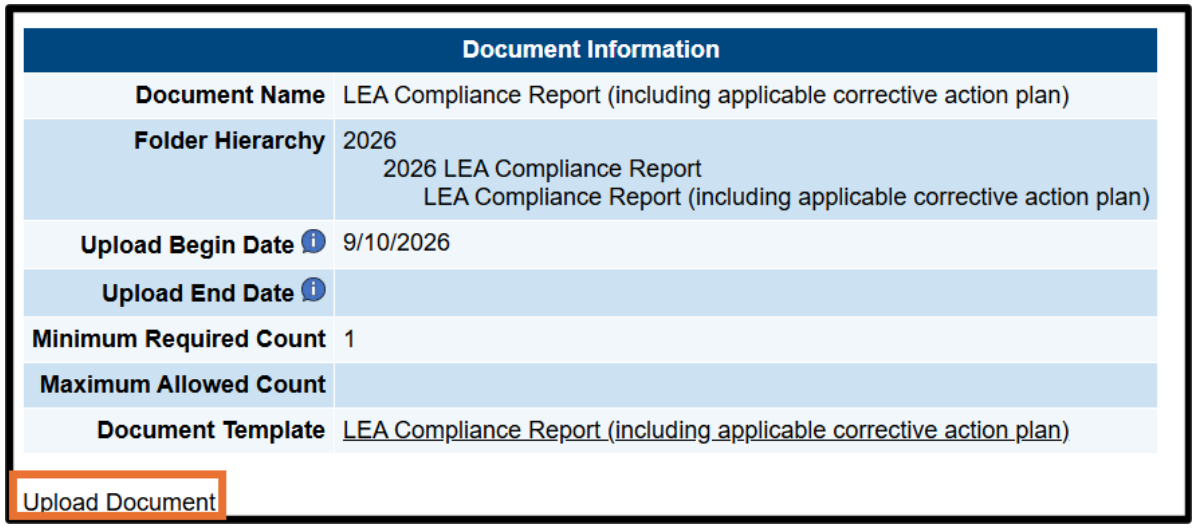
7. Click **Edit Documents.**



8. If needed, download the report template by clicking on the **Document Template** link. Otherwise, proceed to the next step.



9. Before completing this step, please ensure the LEA compliance report does not reflect an omission in a required field (e.g., LEA name, signature, approval date). Click **Upload Document.**



10. Next, fill in each field and click **Save**. If the report reflects an indication of noncompliance and the corresponding corrective action plan is a standalone document instead of the final page of the report, repeat this and the previous step to submit the corrective action plan.

