


## 2024 LEA Compliance Report ePlan Submission Instructions with Screenshots

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 from ePlan's 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](mailto:ePlan.Help@tn.gov). **Copy all users who sign the form when submitting.**

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

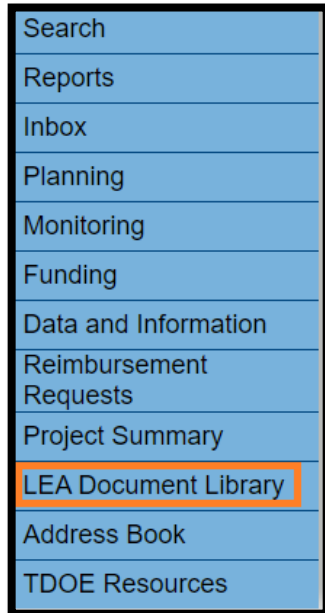
Email (ePlan User ID email, not SSO log-in): \_\_\_\_\_ Phone: \_\_\_\_\_

Funding Application/Grant Director Roles	Data View
1	<input type="checkbox"/> <b>LEA Data View Only:</b> view all ePlan components, upload to 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	
<b>Monitoring Roles</b>	<b>Fiscal &amp; Approve Roles</b>
1	<input type="checkbox"/> <b>LEA Fiscal Update*</b> (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
2	<input type="checkbox"/> <b>LEA Fiscal Representative</b> (CFO/Finance Director): fiscal approve funding app.; complete FER; submit state funds app.
3	<input type="checkbox"/> <b>Board Chair:</b> approve state funds app.
	<input type="checkbox"/> <b>County/City Clerk or SSD Recorder:</b> approve state funds app.
	<input type="checkbox"/> <b>LEA Authorized Representative:</b> final approve any funding app. & monitoring document ( <b>Only Director of Schools may have this role</b> )
<b>Other Roles</b>	<b>LEA-Level Planning Roles</b>
1	<input type="checkbox"/> <b>LEA Plan Data Entry:</b> edit LEA Plan. (This role is not for editing individual school plans.)
2	<input type="checkbox"/> <b>LEA School Plan Reviewer:</b> edit, school- & LEA-approve school plan. (For LEA-level staff to review school plans)
3	<input type="checkbox"/> <b>LEA User Access Admin.:</b> add users to edit school plan(s)

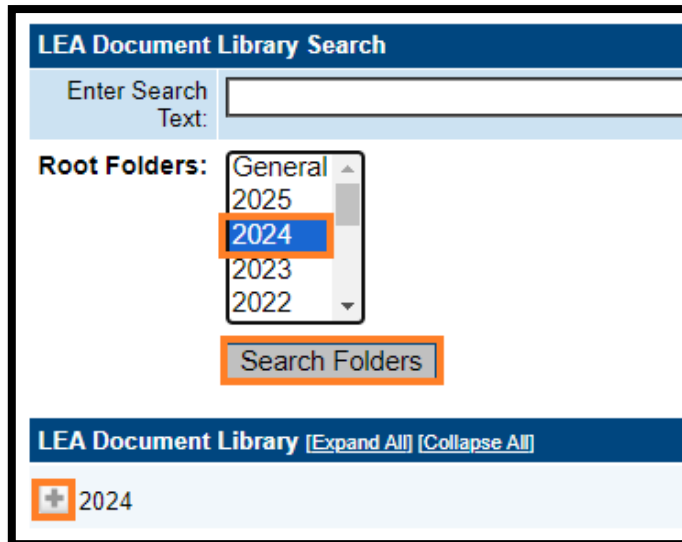
**To copy and/or replace previous user(s): Select the correct check box(es) and provide name(s) of previous user(s)**

<input type="checkbox"/> Copy all access	<input type="checkbox"/> Remove all access	Previous User(s):
	<input type="checkbox"/> Remove access indicated above <i>only</i>	

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



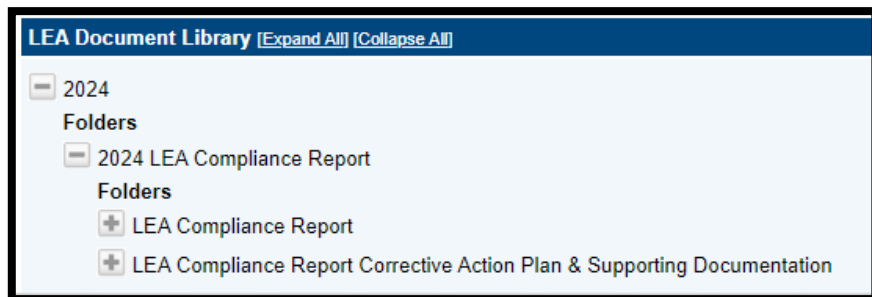
3. To open the 2024 LEA Document Library, click **2024** and then click **Search Folders**. Next, click the **+ icon** in front of **2024** as shown below.



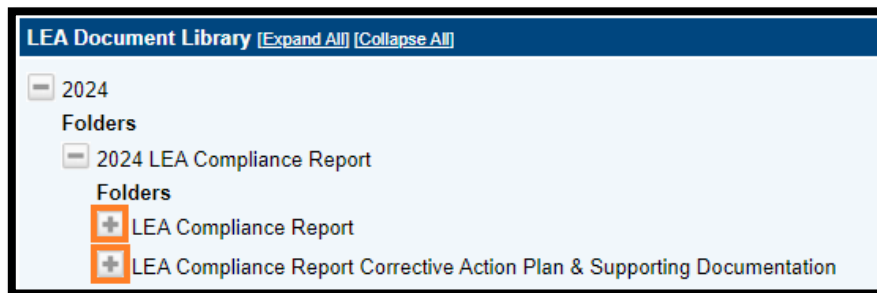
4. Click the **+ icon** to open the 2024 LEA Compliance Report folder.



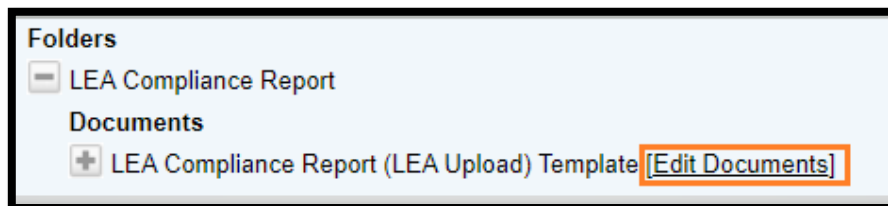
5. There are two (2) subfolders here:
  - a. LEA Compliance Report
    - i. This is required.
  - b. Corrective Action Plan and Supporting Documentation



6. Click the + icon to open these folders.



7. The LEA Compliance Report has a template that can be downloaded after clicking **Edit Documents** as shown below.



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

Document Information	
Document Name	LEA Compliance Report (LEA Upload) Template
Folder Hierarchy	2024 2024 LEA Compliance Report LEA Compliance Report
Upload Begin Date ⓘ	09/26/2024
Upload End Date ⓘ	
Minimum Required Count	1
Maximum Allowed Count	
Document Template	<a href="#">LEA Compliance Report (LEA Upload) Template</a>
<a href="#">Upload Document</a>	

9. Click **Upload Document** to upload the report.

Document Information	
Document Name	LEA Compliance Report (LEA Upload) Template
Folder Hierarchy	2024 2024 LEA Compliance Report LEA Compliance Report
Upload Begin Date ⓘ	09/26/2024
Upload End Date ⓘ	
Minimum Required Count	1
Maximum Allowed Count	
Document Template	<a href="#">LEA Compliance Report (LEA Upload) Template</a>
<a href="#">Upload Document</a>	

10. To upload the Corrective Action Plan & Supporting Documentation, first click **Edit Documents**.

The screenshot shows a hierarchical tree view of a document library. At the top is a blue header with the text "LEA Document Library" and two links: "[Expand All]" and "[Collapse All]". Below this, a tree structure is shown. The root node is "2024", which is expanded to show "Folders". Under "2024", there is a folder "2024 LEA Compliance Report", which is also expanded to show its own "Folders" and "Documents". Under "2024 LEA Compliance Report", there is a folder "LEA Compliance Report", which is expanded to show "Documents". Under "LEA Compliance Report", there are two document entries: "LEA Compliance Report (LEA Upload) Template" with an "[Edit Documents]" link, and "LEA Compliance Report Corrective Action Plan & Supporting Documentation" with an "[Edit Documents]" link. The second "[Edit Documents]" link is highlighted with an orange box.

11. Click **Upload Document** to upload the documentation.

The screenshot shows a table titled "Document Information" with a blue header. The table has two columns: "Document Name" and "Folder Hierarchy". The "Document Name" row contains the text "LEA Compliance Report Corrective Action Plan & Supporting Documentation". The "Folder Hierarchy" row contains a tree structure: "2024", "2024 LEA Compliance Report", and "LEA Compliance Report Corrective Action Plan & Supporting Documentation". Below the table, there are four rows with labels and values: "Upload Begin Date" with the value "09/26/2024" and an information icon; "Upload End Date" with an information icon; "Minimum Required Count" with the value "1"; and "Maximum Allowed Count" with an empty value field. At the bottom of the screenshot, there is a button labeled "Upload Document" with an orange border.

Document Information	
Document Name	LEA Compliance Report Corrective Action Plan & Supporting Documentation
Folder Hierarchy	2024 2024 LEA Compliance Report LEA Compliance Report Corrective Action Plan & Supporting Documentation
Upload Begin Date ⓘ	09/26/2024
Upload End Date ⓘ	
Minimum Required Count	1
Maximum Allowed Count	

[Upload Document](#)