ePlan User Audit Instructions
Local Educational Agencies (LEAs)

The ePlan User Audit is important to ensure that user access is accurately assigned and to maintain the integrity of the funding and program information that is provided to the department through ePlan. Please see the instructions below for completing the ePlan User Audit

Topic	Contact
ePlan technical support and user access	ePlan.Help@tn.gov
User Access Forms	ePlan User Access Form for LEAs

Workflow

ePlan Role	ePlan Function
LEA ePlan User Audit Director	Click ***Draft Started*** Respond to questions
LEA ePlan User Audit Director	Click ***Draft Completed***
LEA Authorized Representative (Director of Schools)	Click ***LEA Authorized Representative Approved*** (or ***LEA Authorized Representative Not Approved***)
TDOE LEA ePlan User Audit Director Reviewed or Returned (Department project directors)	Click ***TDOE LEA ePlan User Audit Director Approved*** (or ***TDOE LEA ePlan User Audit Director Returned***)

What's New:

1. The LEA Details page has been removed. We do not need this information**.**

2. The Application, Data and Information, Monitoring, Other, and Planning roles are not individual pages. These roles can be reviewed in the ePlan Address Book and by running an LEA User Report to check who has these roles.

3. Assurances include a new assurance to review the roles in the ePlan address book.

ePlan User Audit Instructions:

1. The ePlan User Audit must be completed by the **LEA ePlan User Audit Director**.
   Note: This role was pre-assigned to LEA Authorized Representatives and User Access Administrators. Other ePlan users may request the role by completing the ePlan User Access Form for LEAs.

2. To navigate to the *ePlan User Audit* from the ePlan homepage, click on *Data and Information* on the ePlan main menu.

Division of Federal Programs and Oversight   1 | September 2024
Andrew Johnson Tower • 710 James Robertson Parkway • Nashville, TN 37243
tn.gov/education
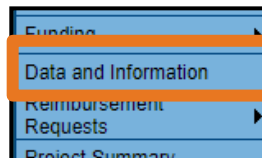
3. Select the *Fiscal Year 2024* from the drop-down box. Select the *LEA ePlan User Audit* from the list of *Data and Information* tools.

Data and Information

Public District - FY 2025

2024 ⌄   Active   ⌄

Data and Information	Revision
Acknowledgement of Allocation Adjustment	0
Alternative Education Survey	0
Civil Rights and Bullying Compliance Report	0
Comparability	0
Coordinated School Health Action Plan	0
CTE Special Programs of Study	0
Data Report for Students with Disabilities	1
Education Stabilization Fund - ESSERF Data Collection	0
Excess Cost	0
Excess Cost Data Collection Tool	0
Extended Learning End-of-Year Report	0
Extended Learning Mid-Year Report	0
Federal Program Waiver Request	0
Grant Award Notifications	0
Homeless Immunization Report	0
IDEA High Cost	0
IDEA State Special School Transportation Reimbursement	0
LEA ePlan User Audit	0

4. Data and Information tools open to the Sections Page. From here click *Draft Started*. If you are unable to click *Draft Started*, hover over the *Draft Started* button to see a list of individuals who have access. **Only users with the *ePlan User Audit Director* roles may click *Draft Started.***

Status:	Not Started
Change Status To:	Draft Started

5. Click *Confirm* to change the *ePlan User Audit* status to *Draft Started.*

You are about to change the status of this Data and Information to Draft Started. Click Confirm to change the status.

Confirm   Cancel

Division of Federal Programs and Oversight   2| September 2024
Andrew Johnson Tower • 710 James Robertson Parkway • Nashville, TN 37243
tn.gov/education

6. Each page in the *LEA ePlan User Audit* section must be completed.

The table below describes each page:

Roles Page Title	Roles Description
Overview	Instructions for completing the User Access Audit.
LEA Authorized Representative, User Access Administrator, and Fiscal Roles	The *LEA Authorized Representative* role is reserved for the *Director of Schools*. LEA *User Access Administrators* can add LEA and School Roles in ePlan, except for the roles listed on this page. Fiscal roles are assigned as needed to allow users to provide fiscal approval or complete *Reimbursement Requests* and *Final Expenditure Reports*.
Assurances	The assurances must be reviewed and completed.
School Planning Roles	Instructions and Assurance for completing the *School Planning Roles* audit: these roles are only assigned to school-level staff.

7. Select the ***Overview*** *page*. Review the Audit instructions.

8. Click *Save and Go To* then select *Next Page* to navigate to the **LEA Authorized Representative, User Access Administrator, and Fiscal Roles** page.

9. Roles, Names, and Email addresses of the individuals who are assigned each role are prepopulated into the data and information tool. Complete the page by reviewing each role.

10. To request a role be removed from an individual, please click the checkbox in the *Remove Role* column.

11. Where applicable, the last column highlights role conflicts between *LEA Authorized Representative* roles and *LEA Fiscal Representative* roles. If this column contains a red "*Conflict*" message, the organization **must** specify which role should be removed to resolve the conflict. This action will be completed after the completion of the audit period. ***Note:*** The message will not disappear when the action is selected.

Division of Federal Programs and Oversight
Andrew Johnson Tower • 710 James Robertson Parkway • Nashville, TN 37243
tn.gov/education

3| September 2024

See the table below for possible conflict resolution actions.

Conflict Message	Possible Resolutions
CONFLICT— LEA Authorized Representative Role may only be assigned to one user account.	• Check the box to remove the *LEA Authorized Representative* role for all individuals _except_ for the individual who is employed as the Director of Schools. The individual assigned the *LEA Authorized Representative* role **must** have final legal authority for the organization.
CONFLICT— The LEA Authorized Representative cannot hold the LEA Fiscal Representative Role. Please indicate which role should be removed	• Check the box to remove the *LEA Authorized Representative* role for this individual. *or* • Check the box to remove the *LEA Fiscal Representative* role for this individual. *or* • Check both boxes to remove both roles from this individual.

12. To request a new user be assigned a user role, please navigate to the [ePlan User Access Form for LEAs](#) and follow the instructions on the form.

13. Navigate to the *Assurances* page, by clicking *Save and Go To*, then *LEA ePlan User Audit*, and then *Assurances*. On the *Assurances* page, read the assurances and check the box to indicate that the conditions have been met for the ePlan User Audit.

14. the page, then return to the Sections Page, by clicking *Save and Go To*, then *Sections*.

15. Complete the School Planning Roles user audit, by clicking *Address Book* on the ePlan left Navigation menu, then the **View All District Contacts** link. Scroll to view School Contacts.

16. Ensure that all listed School Contacts are correctly assigned user roles.

17. Remove any school users that no longer need school roles by **Sept. 30, 2024**. See [instructions on how to remove and add school plan users and roles](#).

18. Navigate back to the Data and Information tool by clicking *Data and Information* on the left navigation menu, selecting the 2024 Fiscal Year, and the LEA ePlan User Audit from the *Sections* page. Select *School Planning Roles.*

Division of Federal Programs and Oversight
Andrew Johnson Tower • 710 James Robertson Parkway • Nashville, TN 37243
tn.gov/education

4| September 2024

19. Check the assurance that All School User roles are correctly assigned. Any outdated roles have been removed.

Instructions

1. Please review Users currently assigned School-level ePlan user roles by navigating to the **Address Book**, clicking the **"View All District Contacts"** link, and scrolling to view **School Contacts**.

Click this link to read how to change the ePlan address book view.

2. Ensure that all listed users are correctly assigned user roles

3. Remove any school users that no longer need school roles by **Sept. 30, 2024**. Click here for instructions on how to remove and add school plan users and roles.

Confirm that School User Roles are correct

☐ * All School User roles are correctly assigned. Any outdated roles have been removed.

20. Return to the *Sections* page by clicking *Save and Go To*, then *Sections.*

21. On the *Sections* page, the person assigned the *LEA ePlan User Audit Director* role **must** change the *ePlan User Audit* status to *Draft Completed*.

Status:	Draft Started
Change Status To:	Draft Completed

22. Click *Confirm* to submit the *ePlan User Audit.*

You are about to change the status of this Data and Information to Draft Completed. Click Confirm to change the status.

Confirm   Cancel

23. On the *Sections* page, the *LEA Authorized Representative* **must** change the *ePlan User Audit* status to *LEA Authorized Representative Approved*. (If the *LEA Authorized Representative* is completing the audit without input from other staff members, the *LEA Authorized Representative* must complete both status changes.)

Status:	Draft Completed
Change Status To:	LEA Authorized Representative Approved
	LEA Authorized Representative Returned with Feedback

24. Click *Confirm* to submit the *ePlan User Audit.*

The LEA-Level/School-Level user audit has been reviewed for accuracy and any user roles deemed unnecessary have been marked to be removed.

You are about to change the status of this Data and Information to LEA Authorized Representative Approved. Click Confirm to change the status.

Confirm   Cancel

25. After the ePlan User Audit is submitted, the ePlan team will remove the requested roles. The timeline for removal may be up to a month. LEA ePlan User Audit Directors will receive an email when User Access removals are complete.

Division of Federal Programs and Oversight
Andrew Johnson Tower • 710 James Robertson Parkway • Nashville, TN 37243
tn.gov/education

5| September 2024