ePlan User Audit Instructions

Charter School and Community-Based Organizations

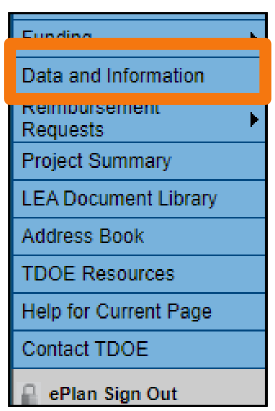
The ePlan User Audit important to ensure that user access is accurately assigned and to maintain the integrity of the funding and program information that is provided to the department through ePlan. Please see the instructions below for completing the ePlan User Audit.

Topic	Contact
ePlan technical support and user access	• ePlan.Help@tn.gov
User Access Forms	• ePlan User Access Form for Charter Schools • ePlan User Access Form for Community-Based Organizations (CBOs) • ePlan User Access Form for a Single Non-Public School • ePlan User Access Form for Multiple Non-Public Schools

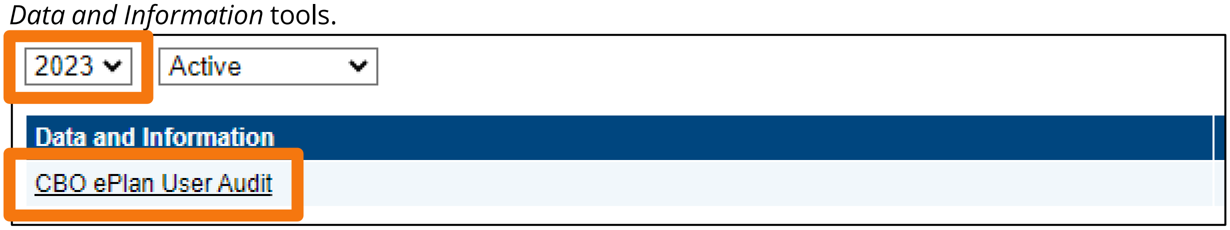
ePlan User Audit Instructions

1. The *ePlan User Audit* must be completed by the *ePlan User Audit Director.*
   Note: This role was pre-assigned to *LEA Authorized Representatives* in October 2023. This role can be added for other ePlan users in the organization by completing the appropriate ePlan User Access Form linked in the resources above.)

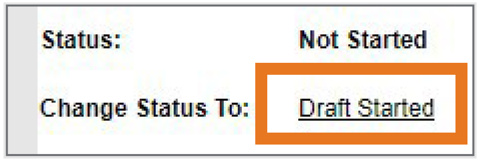
2. To navigate to the *ePlan User Audit* from the ePlan homepage, click on *Data and Information* on the ePlan main menu.



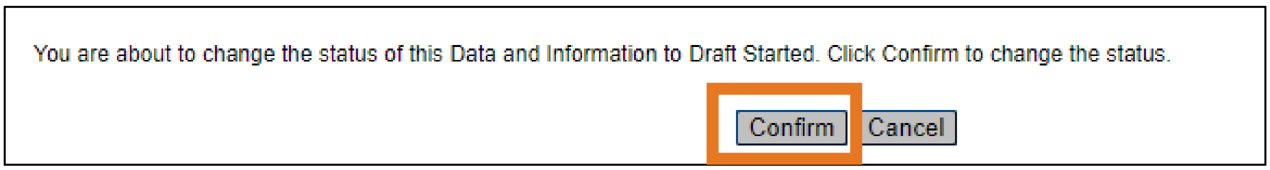
3. Select the *Fiscal Year 2023* from the drop-down box. Select the relevant *ePlan User Audit* from the list of *Data and Information* tools.



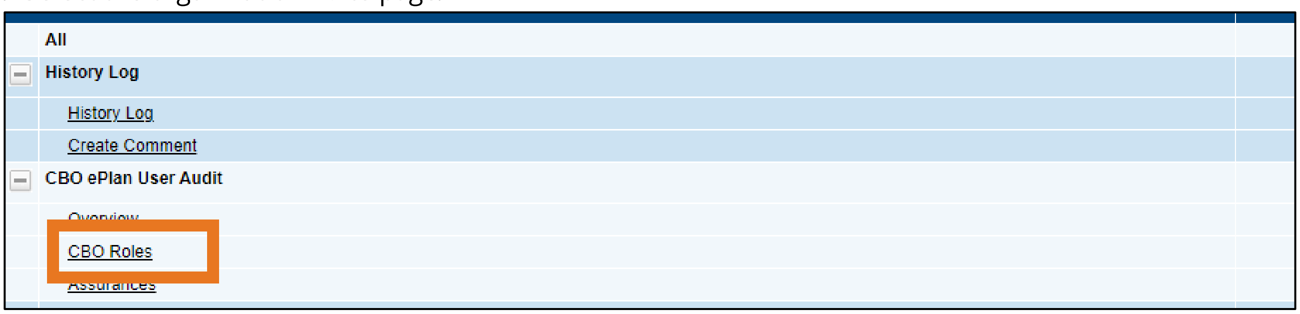
4. Click *Draft Started*. If you are unable to click *Draft Started*, hover over the *Draft Started* button to see a list of individuals who have access. **Only users with the *LEA Authorized Representative or ePlan User Audit Director* roles may click *Draft Started*.**



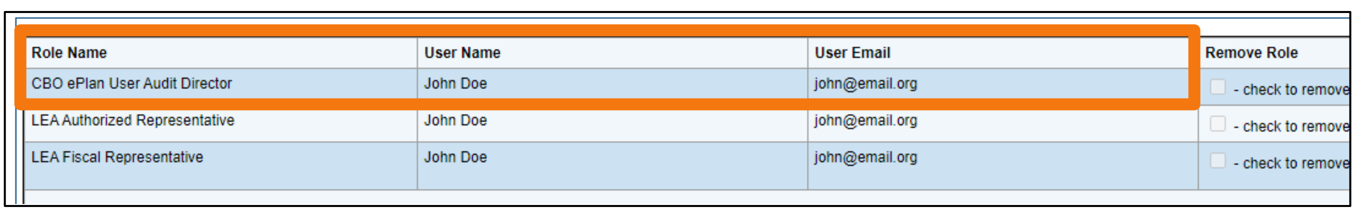
5. Click *Confirm* to change the *ePlan User Audit* status to *Draft Started.*



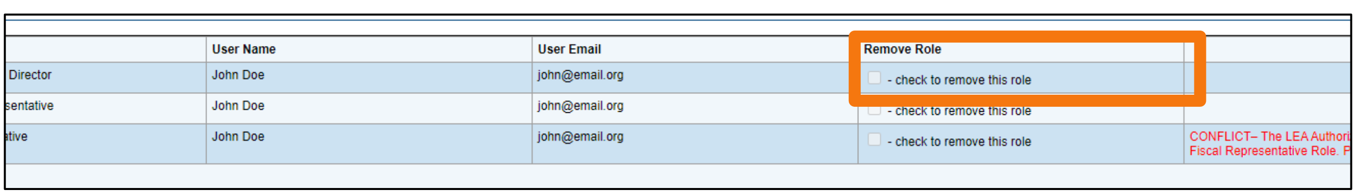
6. Select the organization *Roles* page**.**



7. Roles, Names, and Emails address of the individuals that are assigned each role are prepopulated into the data and information tool. Complete the page by reviewing each role.

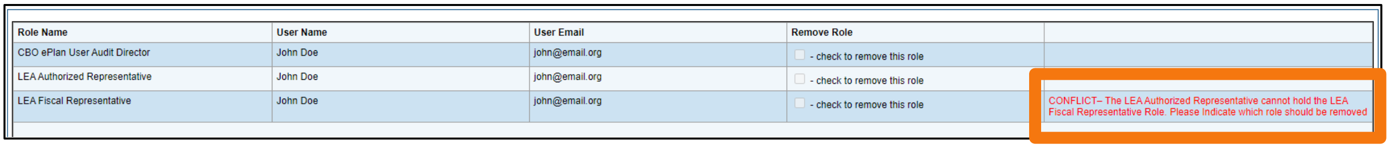


8. To request a role be removed from an individual, please click the checkbox in the *Remove Role* column.



TN Department of Education

9. Where applicable, the fifth column of the page highlights serious role conflict 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.

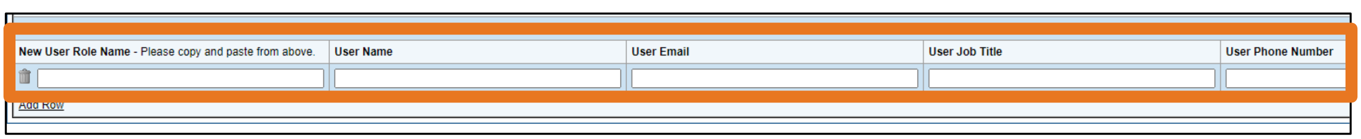


Role Name	User Name	User Email	Remove Role	
CBO ePlan User Audit Director	John Doe	john@email.org	- check to remove this role	
LEA Authorized Representative	John Doe	john@email.org	- check to remove this role	
LEA Fiscal Representative	John Doe	john@email.org	- check to remove this role	CONFLICT– The LEA Authorized Representative cannot hold the LEA Fiscal Representative Role. Please Indicate which role should be removed

See the table below for possible conflict resolution actions.

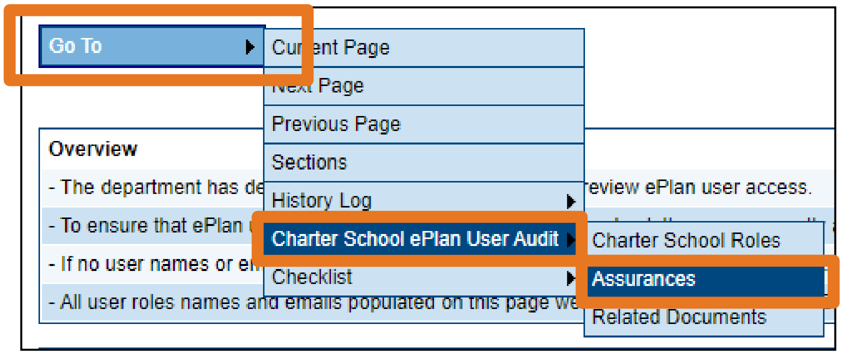
Conflict Message	Possible Resolutions
CONFLICT— LEA Authorized Representative Role may only be assigned to one user account.	• Check the box to remove the *LEA Authorized Representative* role for all individuals *except* for the individual who is employed as the principal or organization director. The 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.

10. Existing ePlan users are those individuals listed on the page. To request a new role for an existing user, provide the new role by copying and pasting it from the table, then provide the users name, email address, job title and phone number. Click "Add Row" to add more than one role. New roles for existing users can also be added via the ePlan User Access form.

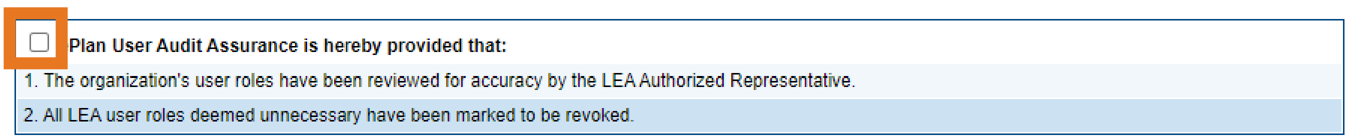


11. To request roles for a new user, please navigate to the appropriate User Access Form, and follow the instructions on the form. User Access Form links are provided on the page, or at the top of this document.

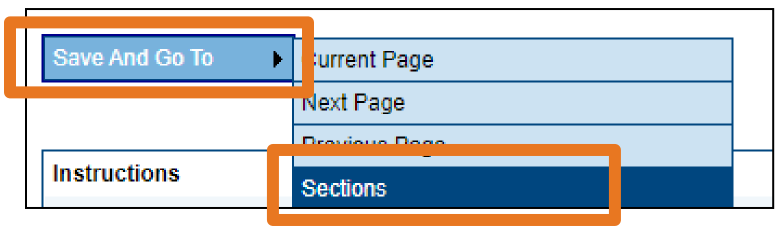
12. Navigate to the *Assurances* page, by clicking *Save and Go To*, then *[Organization Type] ePlan User Audit*, and then *Assurances*.



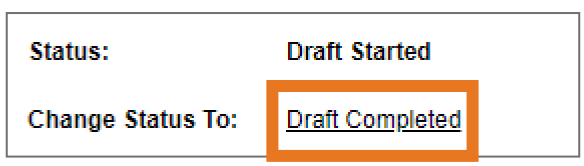
13. On the *Assurances* page, read the assurances and check the box to indicate that the conditions have been met for the ePlan User Audit.



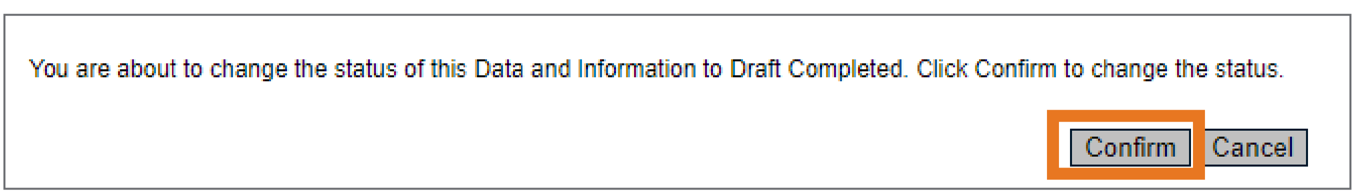
14. Return to the *Sections* page by clicking *Save and Go To*, then *Sections.*



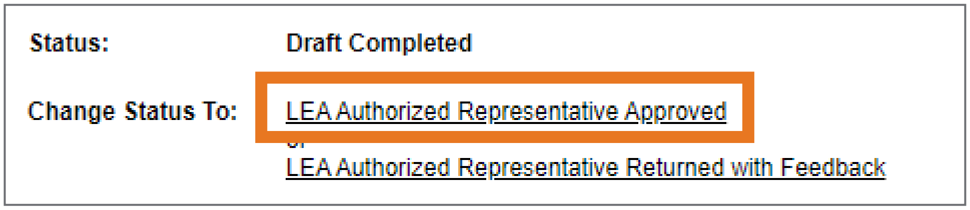
15. On the *Sections* page, the person assigned the *LEA ePlan User Audit Director* role must change the *ePlan User Audit* status to *Draft Completed*.



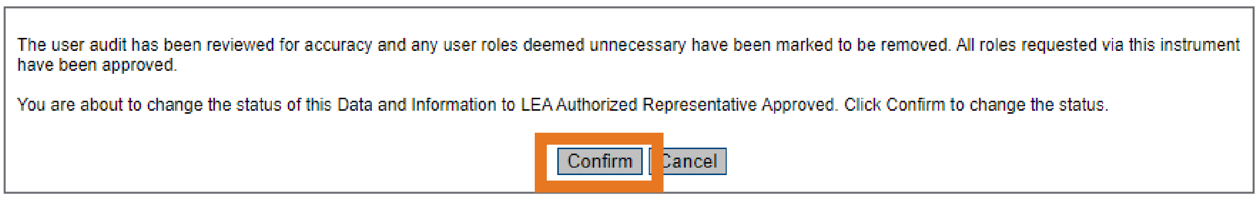
Click *Confirm* to submit the *ePlan User Audit.*



16. 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 alone without input from other staff members, the LEA Authorized Representative must complete both status changes.)*



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



18. After the ePlan User Audit is submitted, the ePlan team will make the requested role changes. 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.