

ePlan User Audit Instructions

Charter Schools, Non-Public Schools, and Community-Based Organizations

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.

Торіс	Contact
ePlan technical support and user access	<u>ePlan.Help@tn.gov</u>
	ePlan User Access Form for Charter Schools
	ePlan User Access Form for Community-Based
User Access Forms	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:

- The *ePlan User Audit* **must** be completed by the *ePlan User Audit Director*.
 Note: This role was pre-assigned to *LEA Authorized Representatives*. 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.

Funding	Þ
Data and Information	
Reimpursement Requests	۲
Project Summary	
LEA Document Library	
Address Book	
TDOE Resources	
Help for Current Page	
Contact TDOE	
🔒 ePlan Sign Out	



3. Select the *Fiscal Year 2024* from the drop-down box. Select the relevant *ePlan User Audit* from the list of *Data and Information* tools.

ata and Information	
BO/Charter School/Non-Public (123) Non-LEA - FY 2024	
2024 V Active V	
Data and Information	
2BO/Charter/Non-Public ePlan User Audit	

 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 D	raft Started. Cli	ick Confirm to change the status.
	Confirm	Cancel

6. Select the organization *Roles* page.

All	
History Log	
History Log	
Create Comment	
CBO ePlan User Audit	
Overview	
CBO Roles	



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

Role Name	User Name	User Email	Remove Role
CBO ePlan User Audit Director	John Doe	john@email.org	- check to remove
LEA Authorized Representative	John Doe	john@email.org	- check to remove
LEA Fiscal Representative	John Doe	john@email.org	- check to remove

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

	User Name	User Email		
Director	John Doe	john@email.org	- check to remove this role	
sentative	John Doe	john@email.org	· · · · ·	
tive	John Doe	john@email.org	- check to remove this role	CONFLICT- The LEA Authori Fiscal Representative Role. P

- **9.** 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.
- **10.** Navigate to the Assurances page, by clicking Save and Go To, then [Organization Type] ePlan User Audit, and then Assurances.

Go To 🕨	Cur <mark>ent Page</mark>	
	Next Page	
	Previous Page	
Overview	Sections	
- The department has de	History Log	eview ePlan user access.
- To ensure that ePlan	Charter School ePlan User Audit	Charter School Roles
- If no user names or en	Checklist	Assurances
- All user roles names ar	o emails populated on this page we	Related Documents
		Neialeu Documents

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

Plan User Audit Assurance is hereby provided that:
1. The organization's user roles have been reviewed for accuracy by the LEA Authorized Representative.
2. All LEA user roles deemed unnecessary have been marked to be revoked.



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

Save And Go To	urrent Page	
	Next Page	
	Provinue Page	
Instructions	Sections	

13. 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	

14. 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.

Please note this is the last step for <u>Non-Public</u> schools. Non-Public Schools do not need to complete the LEA Authorized Representative Approved step.

15. 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.)



16. Click Confirm to submit the ePlan User Audit.

The user audit has been reviewed for accuracy and any user roles de have been approved.	eemed unnecessary have been marked to be removed. All roles requested via this instrument	
You are about to change the status of this Data and Information to LEA Authorized Representative Approved. Click Confirm to change the status.		
	Confirm	

17. After the ePlan User Audit is submitted, the ePlan team will make the requested role changes. The timeline for removal may be up to one month. *LEA ePlan User Audit Directors* will receive an email when User Access removals are complete.