



Department of  
**Education**

# ePlan General Technical Application Guide

Tennessee Department of Education | April 2022



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## Introduction

LEAs may apply for grant money for both the Early Reading Training (PK-5) and Secondary Literacy Training (5-12) grants through the ePlan **FY22 Literacy Training Teacher Stipend Grant** funding application.

## ePlan User Access

All users must have the correct ePlan user access role to access and complete the application. Users with existing ePlan access can verify current user access roles in the Address Book. To view existing access, visit [ePlan.tn.gov](http://ePlan.tn.gov), navigate to the **Address Book** and **LEA Role**.

New ePlan users and existing ePlan users who need to request a User Access role must request the additional role using the appropriate **ePlan User Access Form**. Access the form by navigating to [eplan.tn.gov](http://eplan.tn.gov) > TDOE Resources > 1. User Access Forms and select the correct form according to organization type, or click on this link: [ePlan User Access Form for LEAs](#)

Users do not need to log in to ePlan to access *TDOE Resources* in ePlan. Follow the instructions on the *User Access Form*, then email the completed form to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov) to request additional access roles. User access requests may take up to two business days to process. Users will receive an email reply when access has been granted.

## Application Workflow

Below are the roles and the order of the workflow steps for a typical application process. These roles and the workflow may vary slightly for specific programs.

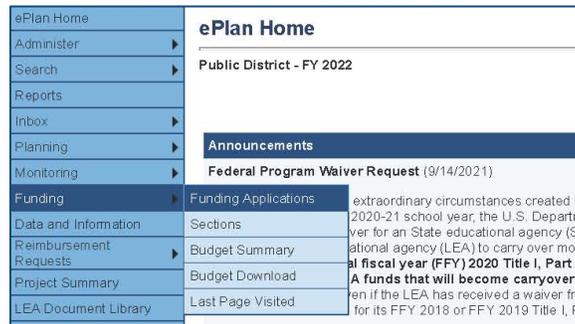
ePlan Role	ePlan Function
<b>LEA FY22 Literacy Training Teacher Stipend Grant Director</b> <b>LEA Fiscal Representative</b> <b>LEA Authorized Representative</b>	Click <b>Draft Started</b> (or <b>Revision Started</b> for revisions) Respond to application questions, enter budgets
<b>LEA Grant Director</b>	Click <b>Draft Completed</b> (or <b>Revision Completed</b> for revisions)
<b>LEA Fiscal Representative</b> (CFO or treasurer)	Click <b>LEA Fiscal Representative Approved</b> (or <b>LEA Fiscal Representative Not Approved</b> ) (may also request funds after application is approved)
<b>LEA Authorized Representative</b> (Director of Schools)	Click <b>LEA Authorized Representative Approved</b> (or <b>LEA Authorized Representative Not Approved</b> )
<b>TDOE FY22 Literacy Training Teacher Stipend Grant Director</b> (Department project directors)	Click <b>TDOE FY22 Literacy Training Teacher Stipend Grant Director Approved</b> (or <b>TDOE FY22 Literacy Training Teacher Stipend Grant Director Returned Not Approved</b> )

After each status change, ePlan automatically sends a notification email to all users in the LEA who have the ePlan role of the next step in the process. Reimbursements cannot be submitted until approval is received from the *TDOE FY22 Literacy Training Teacher Stipend Grant Director*.

# ePlan Application

## Accessing the Application

To navigate to applications from the ePlan homepage, hover over the **Funding** tab on the left menu bar, then select **Funding Applications**.



Select the desired fiscal year (2022) from the dropdown in the upper left corner of the screen. Funding applications are stored in ePlan according to the state fiscal year (i.e., 2022 indicates the 2021–22 school year). Click on **FY22 Literacy Training Teacher Stipend Grant** to access the application.



To begin the application, users with the role of *LEA FY22 Literacy Training Teacher Stipend Grant Director*, *LEA Fiscal Representative*, or *LEA Authorized Representative* may click **Draft Started**.



## Application Sections and Pages

The **Sections** page lists all the available sections and pages within an application such as: **History Log**, **Create Comment**, **Cover Page**, **Budget**, **Program Details**, **Assurance**, **Related Documents**, and **Checklist**. The **Sections** page is helpful in navigating to the specific sections and pages to be completed.

### History Log and Create Comment

The application History Log contains a record of status changes and comments made on the application. ePlan users may want or need to create a comment in an ePlan funding application for one of the following reasons:

- To provide an explanation as a part of the application’s history.
- To provide information that a user cannot add into the main application due to the application’s current status (users can only edit applications that are in a *Draft Started* or *Revision Started* status.)

ePlan creates a running record of all comments. Any comment created and saved in an ePlan funding application will always be available as a part of the funding application’s history log. For details instructions on adding a comment in a funding application, see the [Creating a Comment](#) resource.

## Allocations

The **Allocations** page indicates the total amount awarded by the grant program to the grantee. For the *FY22 Literacy Training Teacher Stipend Grant* preliminary allocations of one penny (\$0.01) will be loaded for each LEA to allow LEAs to complete the applications program details pages prior to the events. After the training has been completed and rosters have been confirmed, the department will load the appropriate allocations. LEAs must then complete a revision to update the application budget for the final allocation. (See [Revisions](#) for more information on creating an application revision).

Final rosters will be available for LEAs to view in ePlan. Navigate to: *LEA Document Library > 2022 > Literacy Training Teacher Stipend Grant*.

## Cover Page

LEAs must complete the LEA ID Number, LEA Name, Official Address, Director of Schools contact information, Literacy Training Teacher Stipend points of contact information, shipping information, and fiscal representative points of contact. LEAs must indicate which grants the LEA is applying for.

Since these grants are provided for from federal funding applications, this page also requires the LEA to provide the LEA's DUNS Number and Unique Entity Identifier (UEI) set up at SAM.gov.

Once all fields are complete, hover over the **Save And Go To** button and click on **Sections** to return to the *Sections* page.

## Budget

### Allowable Use of Funds

For the *FY22 Literacy Training Teacher Stipend Grant*, all funds must be budgeted in 71100-189 and ensure the budget narrative includes that it is for "Pretax Teacher Stipends".

### Entering the Budget

To manually enter the budget line item:

- For each budget line that the organization plans to use, click **Modify** located to the left of the account number to open the Budget Detail page for that line item.
- On the Budget Detail page for the line item, click **Add Budget Detail**.

Delete	Edit	Budget Detail	Narrative Description
			Total for filtered Budget Details: \$0.00
			Total for all other Budget Details: \$0.00

- For each Budget Detail:
  - The Account Number and line-item number is auto-populated.
  - Add a narrative description for each entry.
  - Enter the Quantity and Cost for the Budget detail. The quantity is most commonly 1.00.
  - ePlan auto-calculates the Line-Item total as Quantity multiplied by Cost.
- Continue to add additional Budget Details as needed for the budget line item.
- To **edit** existing Budget details, click the pencil icon. To delete an existing Budget Detail, click the trash can icon.
- Click **Return** to navigate back to the Budget page.

- Once complete, confirm that the total amount is accurate or that the *Remaining* area at the bottom of the *Budget* page is \$0.00.

### **Budget Totals**

ePlan auto-calculates the budget totals as budget details are entered and deducts the budgeted amounts from the awarded allocation. Users can see the total calculations at the bottom right-hand corner of the *Update Budget Detail* page

- Once all budget details are complete, confirm that the amount in the *Remaining* area is \$0.00.

### **Program Details**

For both grants, the *Program Details* page include application questions specific to the funding program. Complete the Program question to indicate if participants will require accommodations for each applicable grant.

### **Program Assurances**

Users must review all program assurances thoroughly. All items specified are requirements of the grants. Two types of program assurances are required for the FY22 Literacy Training Teacher Stipend Grant.

1. Embedded Program Assurances
2. Assurance files

#### **Embedded Program Assurances:**

By checking the assurance check box, the user affirms that they have read and understand all requirements and that the user assures the state education agency that the user meets each of the conditions detailed on the Assurances page.

#### **Assurance Files**

LEAs must provide the Tennessee Central Procurement Office Audit team with an additional set of assurances. This is a file provided as a link at the bottom of the *Program Assurances* page. Scroll to the bottom of the page to download the file. After following the instructions for the file, **check** the second box. Hover over the **Save And Go To** button and click on **Sections**.

### **Checklist**

The department uses the **Checklist** section functionality to provide feedback to users and communicate corrections that must be made to the application before it can be approved. *(Note: This page won't contain any information until after the application is in the LEA Authorized Representative approved status and submitted to the department for review)*

Each **Checklist** section is designated with one of these statuses:

- **Not Reviewed:** No review occurred.
- **OK:** The section has no corrections and is approvable.
- **Coordinator Reviewed:** The section has been reviewed by the coordinator.
- **Attention Needed:** The section has items that need to have corrections completed.

Users should review the **Checklist** for comments from each application reviewer, if applicable, and for the program section.

After submission, the department reviews the application and marks each section as **OK**, **Not Applicable**, or **Attention Needed**. If the application contains no items that are marked as **Attention Needed**, the application is approvable.

If the application contains items that are marked as **Attention Needed**, the application will be returned to the user with a status of **Not Approved**. The user must review the checklist for items that are marked **Attention Needed** and make the necessary changes to those items. Only the checked items in the areas marked **Attention Needed** need correction. Each section marked **Attention Needed** includes notes to explain items needing attention. The user should check for notes and additional comments.

Once the user has made the necessary adjustments, the user resubmits the application for approval. If the department determines that the area is corrected, **Attention Needed** will be changed to **OK** by department leadership. If the items needing attention still have not been corrected, the application will be returned again with a status of **Not Approved**.

Applications that contain no items that are marked **Attention Needed** can be approved.

## **Validations**

ePlan runs funding application validations as checks to help users complete the funding application correctly. Users can view validation messages from the Sections page, by clicking “Messages” in the Validation column. Users can view all validation messages in the application, or validation messages for the individual section or page.

On the Validation Messages page, Items marked **Warning** are validations that users are not required to address prior to submitting the application. Examples of warnings are not uploading an optional related document or budgeting an entire allocation.

Items marked **Error** are incorrect, and users must address each one before submitting the application. Examples of errors are (1) budgeting for more than the allocation, (2) budgeting more indirect cost than is allowable, (3) not budgeting in a section where there is an allocation, (4) not uploading a required related document, and (5) not responding to a required question. If the user does not address all **Error** validations, ePlan will not allow a user to submit the application. Click on the *Review* link to go to the identified page to make corrections.

## **Submission**

When all application sections and pages are complete and any validation errors are cleared, the application is ready for submission and the approval process. Refer to the [ePlan User Access](#) section of this guide for the approval workflow.

To submit the application for review, the user changes the application status on the **Sections** page to **Draft Complete**. This generates an email to the next user in the approval workflow who must review the draft and click **Approved** (or **Not Approved**) at the top of the **Sections** page.

## **Printing in ePlan**

Users may print or download a PDF from the [Sections](#) page.

- To print the entire application, click the **Print** link across from the word “All” at the top of the [Sections](#) page.
  - To print a single page, click on the **Print** link across from the name of the page.
  - To print an entire section, click on the **Print** link to the far right of the section name. In the example shown, the user is printing the entire **ESEA Requirements** section.
  - To choose multiple pages, check the **Print Select Items** box at the top of the print column to select more than one page. The **Print** links appear as checkboxes. Select all text boxes for the desired print request.

- Select the checkboxes and click **Print** at the top of the column.
  - The **Print Request** screen pops up. Users may rename their print job here.
  - Click **Print**.
  - The **Generating Document** screen appears. The system takes 20–30 seconds to generate small print documents. For larger files, expect an email from the ePlan system when the file is ready to download.
  - After ePlan generates the print file, click **Return to Funding Applications**.

The PDF generated by ePlan appears at the top of the page from the **TDOE Resources** menu item. The PDF link remains in **TDOE Resources** for five (5) days. Users may use the **“Delete”** links to remove any print jobs.

## Revisions

When final allocations are loaded LEAs must budget the amount of the allocation in the **FY22 Literacy Training Teacher Stipend Grant** by initiating a revision. To begin a revision, users with the role of *LEA FY22 Literacy Training Teacher Stipend Grant Director, LEA Fiscal Representative, or LEA Authorized Representative* may click **Revision Started** at the top of the **Sections** page. If the status is already in **Revision Started**, move to the next step.

Application Status:	LEA Authorized Representative Approved
Change Status To:	<input type="button" value="Revision Started"/> or <input type="button" value="FER Draft Started"/>

When the application is in **Revision Started** status, users may edit sections in the application as needed.

The application process flows in the same manner as the original submission. Until full approval, budget changes are not reflected on reimbursement pages.

Users may view any changes made to the application as part of a revision on the generated **Details** link in the **Revision** column on the **Sections** page.

Description ( View Sections Only View All Pages )	Revision
All	Details
– Cover Page	
Cover Page	
– History Log	
History Log	
Create Comment	
– Allocations	Details
Allocations	Details
Remaining \$827,000.00	

To view the original application or a prior revision, from the dropdown menu on the Funding Application screen, choose the menu item for *All Approved Applications*. The page displays all former revisions (approved only).

Funding Applications		
Alamo (171) Public District - FY 2017		
2017	All Approved Applications	
	All Active Applications	
Entitlement	All Approved Applications	
Consolidated	Last Approved Applications	4
Consolidated		3

## Literacy Training Teacher Stipend Grant

### General Questions and Answers

**1. What if the LEA does not have enough money allocated in ePlan for the number of stipend eligible teachers completing training?**

Department staff members will cross-reference the training sign-in sheets from the vendor for accuracy based on projected enrollments and original allocations. If additional funding is needed for stipends, the department staff will adjust the allocation amount in ePlan. The LEA will be notified via email when the updated allocation is made. The LEA will then revise the funding application to budget additional funds as referenced in the “Completing the Funding Application” section of this document.

**2. What if the LEA has too much money allocated in ePlan for the number of stipend eligible teachers completing training?**

Any funds that were budgeted and not needed for stipend payment will be reverted to the Federal grant. No action will be needed from the LEA for the reverting of funds.

**3. State guidance for teacher pay for the FY22 Literacy Training Teacher Stipend Grant is \$1,000 per stipend eligible teachers that complete Course 1 and Course 2 of training. Does this stipend include benefits, or are benefits above and beyond the \$1,000 stipend?**

How benefits are paid is ultimately a local decision; a LEA may absorb the cost of taxes and benefits or pass the cost to the employee. The benefits lines in the grant will not be available in the budget section.

**4. Will LEAs be able to complete multiple reimbursement requests in ePlan?**

This grant is FY22 only even though some training may occur in July. TDOE will upload the attendance rosters supplied by the vendor into the LEA Document Library. LEAs must verify to TDOE that the attendance roster(s) match the LEAs attendance records. LEAs may complete multiple reimbursement requests in ePlan.

**5. When will LEAs need to close their books and complete their Final Expenditure Reports (FER)?**

The funding application will span two fiscal years, but LEAs will only complete one FER. LEAs must complete a FER by **August 31, 2022**. The date of the FER must be June 30 or before since this is a FY22 grant. The FER follows the same process as other grants in ePlan. To access FER guidance, visit *ePlan* > *TDOE Resources* > *Cross-Cutting Fiscal Materials* > *Final Expenditure Report*.

**6. Who can request reimbursement in ePlan for the Literacy Training Teacher Stipend Grant?**

The *Fiscal Representative* user role must submit and approve the reimbursement requests. After this user logs into ePlan, select **Reimbursement Requests** from the navigation menu on the left side of the ePlan home page.

**7. When will funds be released to LEAs?**

All documentation of attendance will be uploaded by a member of the Early Reading Training team. LEAs will be notified when the documentation is uploaded. When the rosters are confirmed, the LEA can submit the reimbursement request in ePlan. It is a LEA decision as to the timing of stipend payment.