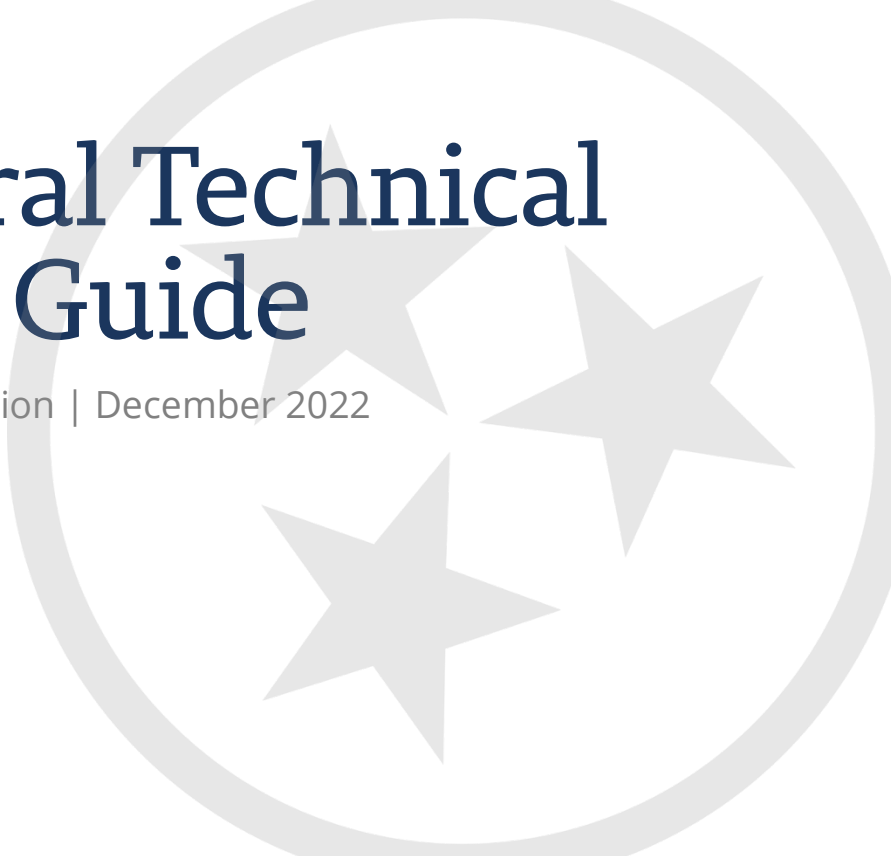




Department of  
**Education**

# ePlan General Technical Application Guide

Tennessee Department of Education | December 2022



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# Introduction

Organizations apply for grants through ePlan funding applications. Funding applications are created for one or more grants for a fiscal year. This guide gives an overview of general application features.

Guidance for individual funding applications is typically provided in a specific funding application's Technical Application Guide. These guides include an introduction section describing the purpose and intent of the program, relevant background information about the funding source such as funding legislation, information about application timeframes and deadlines, budget information, and required information for the application. Additional information regarding periods of performance, carryover of funds, state allocations, and matching fund requirements is included as applicable.

## ePlan User Access

All users must have the correct ePlan user access role to access and complete applications. 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 the links below:

- [ePlan User Access Form for a Single Non-Public School](#)
- [ePlan User Access Form for Multiple Non-Public Schools](#)
- [ePlan User Access Form for LEAs](#)
- [ePlan User Access Form for Charter Schools](#)
- [ePlan User Access Form for Community-Based Organizations \(CBOs\)](#)

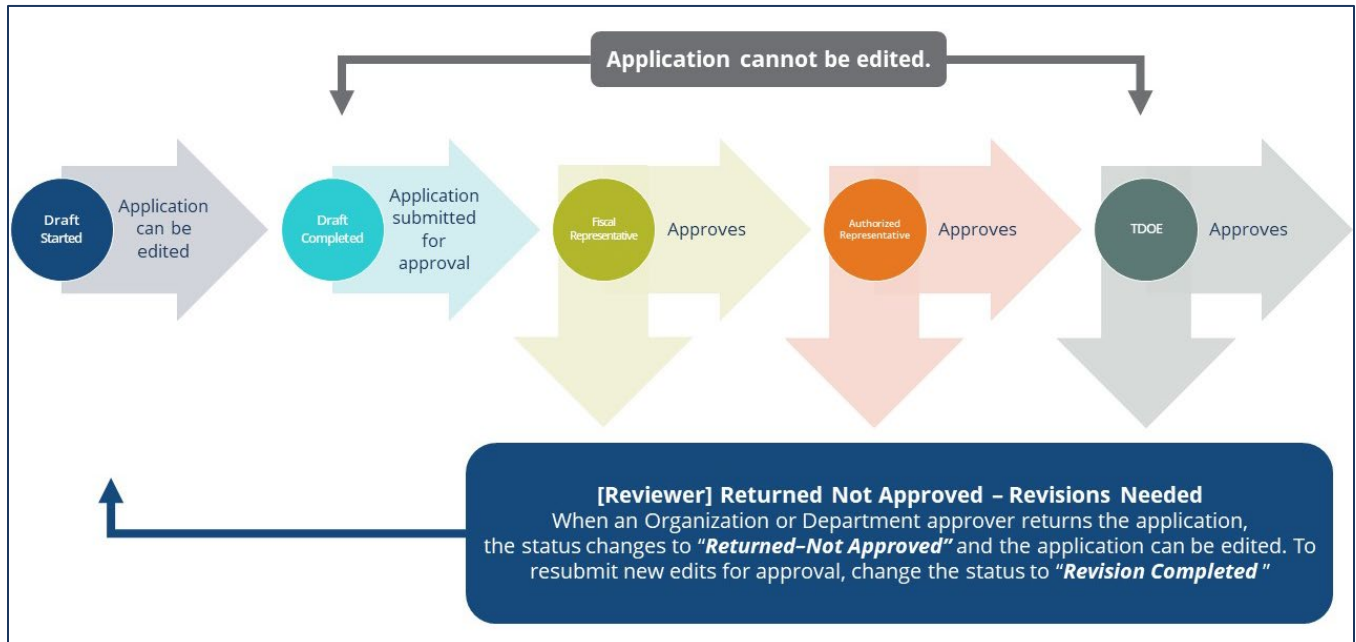
Users do not need to log in to ePlan to access *TDOE Resources* in ePlan. Follow the instructions on the *User Access Form*, then email the completed form to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov) to request additional access roles. User access requests may take up to two business days to process.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

## Workflows

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 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 TDOE approves application)
<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 Program Director</b> (Department project directors)	Click <b>TDOE Program Director Approved</b> (or <b>TDOE Program 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 Program 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**. **NOTE:** For users with ePlan roles for multiple organizations, return to ePlan home to select the correct organization before proceeding to Funding Applications.

ePlan Home	<b>ePlan Home</b>	
Administer	Public District - FY 2022	
Search		
Reports		
Inbox		
Planning	<b>Announcements</b>	
Monitoring	Federal Program Waiver Request (9/14/2021)	
<b>Funding</b>	<b>Funding Applications</b>	extraordinary circumstances created by the COVID-19 pandemic for the 2020-21 school year, the U.S. Department of Education has authorized the use of Title I, Part A funds that will become carryover funds for the 2021-22 school year if the LEA has received a waiver from the U.S. Department of Education for its FFY 2018 or FFY 2019 Title I, Part A funds.
Data and Information	Sections	
Reimbursement Requests	Budget Summary	
Project Summary	Budget Download	
LEA Document Library	Last Page Visited	

Select the desired fiscal year 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 **the application name** to access the application.

<b>Funding Applications</b>	
Public District - FY 2022	
2022	All Active Applications
Entitlement Funding Application	Revision
<a href="#">ARP Homeless 2.0</a>	0
<a href="#">ARP IDEA</a>	0

To begin the application, next to **Change Status To:** click on **Draft Started**.

Application Status: Not Started

Change Status To: **Draft Started**

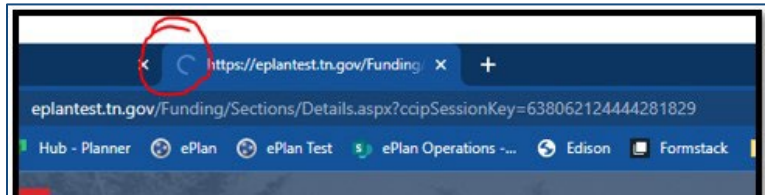
**NOTE:** Once a draft has been started, users may wish to access previous applications. To access previous applications, return to **Funding Applications** and select the appropriate prior year.



## Saving Funding Application Pages

After working in a funding application, users must click the **Save and Go To** button, then ensure that the page has finished saving before closing ePlan or leaving the page.

Users can tell that the page has not saved when the browser's spinning wheel or loading icon is still occurring. The screenshot below shows an example of a page that has not finished saving. Please make sure that the browser's loading icon is no longer spinning before closing the page.



The best way to see if a change to the application was saved after leaving the page is to review the **Change Log**. The **Change Log** for the application can be accessed from the **Sections** page.



## Application Sections and Pages

The **Sections** page lists all the available sections and pages within an application such as: **Change Log, History Log, Create Comment, Cover Page, Budget, Program Details, Assurance, Related Documents, and Checklist**. Individual funding application guides indicates which pages are applicable to each specific program application. The **Sections** page is helpful in navigating to the specific sections and pages which must be completed.

Sections		
Public District - FY 2022 - TN ALL Corps - Rev 0		
Application Status: Not Started		
Change Status To: <a href="#">Draft Started</a>		
<a href="#">View TDOE History Log</a> <a href="#">View Change Log</a>		
Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation	Print <input type="checkbox"/> Select Items
All	<a href="#">Messages</a>	<a href="#">Print</a>
<input type="checkbox"/> History Log		<a href="#">Print</a>
<a href="#">History Log</a>		<a href="#">Print</a>
<a href="#">Create Comment</a>		
<input type="checkbox"/> Allocations	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Allocations</a>	<a href="#">Messages</a>	<a href="#">Print</a>
<input type="checkbox"/> TN ALL Corps	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Cover Page</a>		<a href="#">Print</a>
<a href="#">Budget</a>	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Budget Overview</a>		<a href="#">Print</a>
<a href="#">Program Details</a>		<a href="#">Print</a>
<a href="#">Assurance</a>		<a href="#">Print</a>
<a href="#">Related Documents</a>		<a href="#">Print</a>
<input type="checkbox"/> Contacts		<a href="#">Print</a>
<a href="#">Contacts</a>		<a href="#">Print</a>
<input type="checkbox"/> TN ALL Corps Checklist		<a href="#">Print</a>
<a href="#">TN ALL Corps Checklist</a>		<a href="#">Print</a>
All	<a href="#">Messages</a>	<a href="#">Print</a>

## Change Log

The **Change Log** may be accessed on the main sections page for every funding application. It lists every change or update since the previous status. This helps users identify changes that have been made to the application since they last viewed it. More information about the **Change Log** is available in the ePlan User Manual.

Sections	
Public District - FY - Program - Rev 0	
Application Status: Not Started	
Change Status To: <a href="#">Draft Started</a>	
<a href="#">View TDOE History Log</a> <a href="#">View Change Log</a>	
Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	

## History Log and Create Comment

The **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.

### To Add a Comment in a Funding Application:

1. Navigate to the funding application’s main **Sections** page.
  - To navigate to the main funding application page from other pages in the application, click **Go To** and **Sections** as shown and highlighted below.
2. Select **Create Comment** from under the *History Log* on the main section page as highlighted in the screenshot below to navigate to the *Create Comment* page.
3. On the **Create Comment** page, type your comment in the box.
4. If desired, a hyperlink can be inserted in a comment by clicking the hyperlink icon.
5. To send an email notification of this comment to recipients check the box next to **Send Email to ePlan Contacts** below the main comment box.
  - Sending an email notification is not required to create the comment.
  - If no email notification is needed, click **Save and Go To** to exit the page. The comment is now a part of the Funding Application **History Log** for everyone to view.
6. **To send an email notification:** Select the recipients to receive notification of the comment from the lists provided and then click **Add**.

### Available Contact Groups

<b>LEA Contacts by Funding Application</b>	Available if a contact is selected on the applications contact page. Not all funding applications have contacts on the contact page.
<b>LEA Contacts by Role</b>	Current users with the applicable role
<b>Other LEA Contacts</b>	Additional contacts for an LEA
<b>TDOE Contacts</b>	State users that can complete various ePlan functions.
<b>TDOE Miscellaneous Contacts</b>	Lists every State ePlan User by name
<b>Additional Recipients</b>	Allows you to type in any additional email addresses manually

- It is a good practice to send a copy of your comment to yourself to let you know when the message has been delivered.
7. The **Recipient Summary** shows who will receive the email.
  8. Clicking **Save And Go To** will send the comment notification.
  9. Comments with email notifications can be accessed from the **Inbox** on your ePlan tab in addition to the history log of the funding application. Additional information about Inbox functionality in ePlan is available in Troubleshooting, [Inbox](#).



## Allocations

The **Allocations** page in ePlan indicates the total amount awarded by the grant program to the grantee. For entitlement grant programs, the **Allocations** page will be populated with a total budget amount at the time of application and the subsequent **Budget** pages will typically need to be completed to indicate how the total allocation will be allocated across specific budget accounts and line items. For competitive grants, the **Allocations** page will not typically be populated until grant awards are made and a proposed budget will be entered by the user on the **Budget** pages. Grantees will receive a notification of award and specific instructions for formulating a budget revision to reconcile the proposed budget to the total allocation which is entered on the **Allocations** page at the time of award.

## Cover Page

The *Cover Page* typically requires entry of general organization information: the ID Number, Organization Name, Official Address, and name and email and phone contact information for organization and program points of contact. For federal funding applications, this page also requires the LEA to provide the 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.

LEA ID#		LEA Name	
LEA Official Address			
Street	City	Zip Code	
Phone	LEA Website		
Director of Schools			
Name	Email	Phone	
TN ALL Corps Point of Contact			
Name	Email	Phone	
Save And Go To ▶			

## Budget

### Allowable Use of Funds

Individual funding application guides include a brief explanation of allowable and unallowable costs. All expenses must be necessary and reasonable for performing grant activities. A full list of account numbers and line items that are eligible to be budgeted may be included in an appendix for further guidance.

### Transfers Out and Indirect Cost

Indirect cost represents the expenses of doing business that cannot clearly link to a specific grant, contract, project function, or activity, but are necessary for the general operation of the organization and the activities it performs. These costs cannot attribute directly to any grant because the time and effort spent are not measurable. Users may choose to budget for indirect cost for some funding programs. Indirect cost is available on each **Budget** page in account number **99100 – Transfers Out**.

	Account Number	Total
Modify	71100 - Regular Instruction Program	\$100,000.00
Modify	71150 - Alternative Instruction Program	\$0.00
Modify	72120 - Health Services	\$0.00
Modify	72130 - Other Student Support	\$0.00
Modify	72210 - Support Services/Regular Instruction Program	\$70,000.00
Modify	72250 - Education Technology	\$0.00
Modify	73100 - Food Service	\$0.00
Modify	99100 - Transfers Out	\$0.00
<b>Total</b>		\$170,000.00
<b>Adjusted Allocation</b>		\$997,000.00
<b>Remaining</b>		\$827,000.00

ePlan provides automated information regarding the maximum amount permitted for indirect cost within each grant.

- Eligible funds budgeted in all accounts are totaled at the top of the **Budget** page on the **Total Contributing to Indirect Cost** line.
- Organizations have an individualized, agreed-upon indirect cost rate that is preloaded into ePlan each year or a standard rate for the funding program will be applied.
- Organizations cannot exceed the **Maximum Allowed for Indirect Cost**. If the total amount budgeted in account number 99100 is more than the maximum allowed for indirect cost, the user receives a validation error and cannot submit the application.

### Entering the Budget

Depending on the funding application, Users can make changes to grant budgets using the following methods:

1. Adding Budget Details Manually,
2. The Copy Last Year's Budget Detail Function, and
3. The *Upload Budget Data/Download Budget Data* Function

### Adding Budget Details Manually

To manually enter each 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**.

Download Budget Data

Add Budget Detail
<< First
< Previous
Next >
Last >>
Items 0-0 out of 0
Items/Page: 10

Delete	Edit	Budget Detail	Narrative Description
			Total for filtered Budget Details: <input type="text" value="\$0.00"/>
			Total for all other Budget Details: <input type="text" value="\$0.00"/>

### Create Budget Detail

Public District - FY 2022 - TN ALL Corps - Rev 0 - TN ALL Corps

Budget Detail	Narrative Description								
Account Number: <input type="text"/> Line Item Number: <input type="text"/> Focus Area: <input type="text"/> <small>(Select at least 1, and up to 1 tag(s))</small> School Type: <input type="text"/> <small>(Select at least 1, and up to 1 tag(s))</small> Optional Program Code: <input type="text"/> Location Code: <input type="text"/> Quantity: <input type="text" value="1.00"/> Cost: <input type="text" value="\$0.00"/> Budget Detail Total: <input type="text" value="\$0.00"/>	<div style="border: 1px solid #ccc; height: 150px;"></div>								
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: right;">Total for all other Budget Details:</td> <td style="text-align: right;"><input type="text" value="\$0.00"/></td> </tr> <tr> <td style="text-align: right;">Total for all Budget Details:</td> <td style="text-align: right;"><input type="text" value="\$0.00"/></td> </tr> <tr> <td style="text-align: right;">Adjusted Allocation:</td> <td style="text-align: right;"><input type="text" value="\$0.00"/></td> </tr> <tr> <td style="text-align: right;">Remaining:</td> <td style="text-align: right;"><input type="text" value="\$0.00"/></td> </tr> </table>		Total for all other Budget Details:	<input type="text" value="\$0.00"/>	Total for all Budget Details:	<input type="text" value="\$0.00"/>	Adjusted Allocation:	<input type="text" value="\$0.00"/>	Remaining:	<input type="text" value="\$0.00"/>
Total for all other Budget Details:	<input type="text" value="\$0.00"/>								
Total for all Budget Details:	<input type="text" value="\$0.00"/>								
Adjusted Allocation:	<input type="text" value="\$0.00"/>								
Remaining:	<input type="text" value="\$0.00"/>								

- For each Budget Detail:
  - The Account Number auto-populates for the account that is being modified.
  - Select the appropriate line item number from the dropdown menu. A complete list of available line items should be included in a table or in an appendix to the program application guide.
  - Program-specific uses of budget tags, such as Focus Area or School Type, as well as Optional Program Codes and Location Codes will be included in a table or in an appendix in the individual funding application technical guide.
  - 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 and repeat this process for each budget line. ePlan auto-calculates the budget totals as budget items and details are entered. When award amounts are predetermined, ePlan deducts the budgeted amounts from the awarded allocation.
- Once complete, confirm that the total amount is accurate or that the Remaining area at the bottom of the Budget page is \$0.00.

### Copying Last Year's Budget Detail

On some funding applications, Users may choose to copy the previous year's budget line items and narrative descriptions into the current year's application. Once copied, users only need to make changes where dollar amounts and narratives have changed since the previous year.

**The decision to copy a previous year's budget must be made before entering the current year's budget information. If a user makes a single budget entry, the link to copy budget details becomes unavailable.**

To copy the previous year's budget, click **Copy [2022] Budget Detail**. Click the verification link **Copy**

<a href="#">Copy 2022 Budget Detail</a>   <a href="#">Upload Budget Data</a>   <a href="#">Download Budget Data</a>	
Action	Account Number
<a href="#">Modify</a>	71100 - Regular Instruction Program
<a href="#">Modify</a>	71150 - Alternative Instruction Program
<a href="#">Modify</a>	72120 - Health Services
<a href="#">Modify</a>	72130 - Other Student Support
<a href="#">Modify</a>	72210 - Support Services/Regular Instruction Program
<a href="#">Modify</a>	72250 - Education Technology

### Upload Budget Data and Download Budget Data

The *Budget Upload/Download* function on the budget page allows users to download budget files as spreadsheets and then create, edit, or delete the contained budget detail data in the spreadsheet file before uploading it back into ePlan. This allows users to do the following:

- Complete data entry faster,
- See large numbers of budget details at one time,
- Create custom reports from budget details using the Excel functions,
- Ask individuals to contribute to application budgets without ePlan access, which the user can upload directly into the Application, and
- Print the budget as an Excel file, including the ability to print filtered data, such as budget details for a specific school.

Any user who can view the budget page of the application can use the download budget function, including the public in the case of approved applications. Only users with the user role access that allows changes to the budget page may upload a file into the application. Uploads, like other budget changes, can only occur when the funding application is in an editable status (Such as *Draft Started* or *Revision Started*, or *Returned Not Approved*). The *Upload Budget Data* link is unavailable when the application is in a non-editable status. Detailed instructions for uploading and downloading budget data are available [here](#).

### 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

Total for all other Budget Details:	\$90,000.00
Total for all Budget Details:	\$100,000.00
Adjusted Allocation:	\$100,000.00
Remaining:	\$0.00

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

## Budget Overview

Every funding application will have a standard *Budget Overview* page that shows a summary of how the grantee has proposed allocating the grant funds by line item number.

The [Show Unbudgeted Categories](#) link will show every line item that is available to be budgeted.

Account Number	71100 - Regular Instruction Program	71200 - Special Education Program	71300 - Vocational Education Program	72110 - Attendance	72120 - Health Services
Line Item Number					

## Program Details

As applicable, *Program Details* pages include application questions specific to the funding program. Application questions may require numeric or narrative responses or require selection from drop down or checkbox options. Each funding program application guide lists the questions specific to the program included in the *Program Details* page as well as any limitations on responses such as word or character count limits.

Due to system timeouts and the need to frequently save information entered in ePlan, users can review application questions included on the *Program Details* page and formulate responses in a word processing or spreadsheet document. By copying and pasting responses from a word processing or spreadsheet document into the application, users can avoid losing unsaved responses when timeouts occur.

Occasionally, program questions are provided to users prior to the application opening, and/or prior to final grant allocations being loaded into ePlan. When this occurs, users can begin answering program details questions before entering the budget into ePlan.

## Program Assurances

Users must review all program assurances thoroughly. All items specified are requirements of the program, legislation, or regulation. Two types of program assurances can be used in ePlan funding applications.

1. Embedded Program Assurances
2. Assurance files

### Embedded Program Assurances:

Embedded program Assurances are built into the ePlan funding application on Program Details pages, or on individual Program Assurances pages. 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 in the Assurances.



**Assurance**

Public District - FY 2022 - TN ALL Corps - Rev 0 - TN ALL Corps

Save And Go To ▶

\* The undersigned authorized representative hereby applies for the program funds requested in the application on behalf of the Identified LEA (Grantee). These Assurances, together with all application information submitted by the LEA, constitute the "Grant Contract."

The Grantee hereby agrees to the following Assurances:

1.	Administration of the program, activities, and services covered by this Grant Contract shall be in accordance with all applicable state and federal statutes, regulations, and the approved application.
2.	The Grantee shall make a good faith effort (as demonstrated by communication, recruitment, and retention plans) to serve at least 15% of students in

## Assurance Files

For some grants, Organizations 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**.

	any program or activity receiving Federal financial assistance.
14.	Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. 1681 et seq., which prohibits discrimination on the basis of sex in any education program or activity receiving federal financial assistance, and Tennessee Department of Education   Technical Application Guide: ESSER Fund 3.0.22   May 2021
15.	All regulations, guidelines, and standards issued by the TDOE and U.S. Department of Education.

**State of Tennessee Assurances**

\* The LEA agrees to the State of Tennessee Assurances and has sent **Attachment A** to [cpo.auditnotice@tn.gov](mailto:cpo.auditnotice@tn.gov).

[Click here to download the State of Tennessee Assurances.](#)

Save And Go To ▶

## Related Documents

The **Related Documents** page allows users to upload external related documents. Each funding program application guide lists any required and optional related documents. Headers in the Related Documents section indicate if the document is required or optional. If a document is required, ePlan prevents submission of the application without an upload.

The **Document Template** column provides links to download templates or forms for application items, if applicable. If **N/A** appears in this column, there is no required template for that specific item. Upload content in any format.

- Download the document template (if applicable), complete the document, and click the **Upload New** link to begin the upload.
- Click the **Choose File** button to browse for the document.
- **Upload** the document and enter a specific name for the document.
- Click **Create** to upload the document.

## Checklist

Some funding applications may include a **Checklist** section purely for informational purposes. Other applications may use the **Checklist** section functionality to provide feedback to users and communicate corrections that must be made to the application before it can be approved. Individual funding application guide indicate whether a **Checklist** is included for informational purposes or as a part of the review process.

When the **Checklist** is part of the review process, each 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.

Application Status:	TDOE FPO Divisional Coordinator Returned – Revisions Needed
Change Status To:	<a href="#">Revision Completed</a>

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.

Sections		
Sample (###) Public District - FY 2023 - Consolidated - Rev 0		
Application Status: <b>Draft Started</b>		
Change Status To: <a href="#">Draft Completed</a>		
<a href="#">View TDOE History Log</a>		
<a href="#">View Change Log</a>		
Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation	Print ■ Select Items
All	<a href="#">Messages</a>	<a href="#">Print</a>
<input type="checkbox"/> Consolidated Checklist		<a href="#">Print</a>
<a href="#">Consolidated Checklist</a>		<a href="#">Print</a>
<input type="checkbox"/> Cover Page	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Cover Page</a>	<a href="#">Messages</a>	<a href="#">Print</a>
<input type="checkbox"/> History Log		<a href="#">Print</a>
<a href="#">History Log</a>		<a href="#">Print</a>
<a href="#">Create Comment</a>		
<input type="checkbox"/> Allocations		<a href="#">Print</a>
<a href="#">Allocations</a>		<a href="#">Print</a>

Validation Messages		
Sample (###) Public District - FY 2023 - Consolidated - Rev 0		
<a href="#">Return To Sections Page</a>		
Cover Page		
<input type="checkbox"/> Cover Page		
<a href="#">Review</a> Questions marked with an asterisk (*) require a response.		<b>Error</b>
Title I, Part A		
<input type="checkbox"/> Budget		
<a href="#">Review</a> The Title I, Part A budget of \$0.00 is less than the Adjusted Allocation amount of \$0.01.		<b>Warning</b>

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.

**Validation Messages**

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[Return To Sections Page](#)

Cover Page

Cover Page	Review Questions marked with an asterisk (*) require a response. <span style="float: right; color: red;">Error</span>
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Title I, Part A

Budget	Review The Title I, Part A budget of \$0.00 is less than the Adjusted Allocation amount of \$0.01. <span style="float: right;">Warning</span>
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## 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 or the individual funding application 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.

Once the application receives approval from the TDOE Program Director, users may begin [submitting reimbursements](#)

## 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. Print requests do not include any uploaded related documents.

Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation	Print <input type="checkbox"/> Select Items
All		<a href="#">Print</a>
<input type="checkbox"/> History Log		<a href="#">Print</a>
<a href="#">History Log</a>		<a href="#">Print</a>
<a href="#">Create Comment</a>		
<input type="checkbox"/> Allocations		<a href="#">Print</a>

- 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.
- 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.

Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation	Print <input checked="" type="checkbox"/> Select Items
All		<input type="checkbox"/>
<input type="checkbox"/> History Log		<input type="checkbox"/>
<a href="#">History Log</a>		<input type="checkbox"/>
<a href="#">Create Comment</a>		
<input type="checkbox"/> Allocations		<input type="checkbox"/>

- Select the checkboxes and click **Print** at the top of the column.
- The **Print Request** screen pops up. If necessary, Users may rename their print job here.
- Click **Print**. The **Generating Document** screen appears. The system takes 20–30 seconds to generate the print job. 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**.
- ePlan generates a PDF which appears at the top of the page from the **TDOE Resources** menu item in ePlan. The PDF link remains in **TDOE Resources** for five (5) days. Users may use the **Delete** links to remove any print jobs if desired.

TDOE Resources			
Below is your list of Print Requests.			
Print Request Name	Request Date	Expiration Date	
<a href="#">My LEA Contacts Page</a>	4/23/2020 2:28:48 PM	4/28/2020 2:28:48 PM	<a href="#">Delete</a>



# Troubleshooting

The following are answers to common questions about ePlan application functionality.

## User Access

If an ePlan user is not able to work in an application, it is usually due to one of these three reasons:

- The user is not using the Google Chrome browser. For best results: always use Google Chrome to access ePlan. ePlan does not have the same functionality in other browsers.
- The application is not in the right work step or status. Users can only edit an application when it is in **Draft Started** or **Revision Started** status.
- The user does not have the right role to work on the application. When hovering the cursor over **Change Status To** options, a tooltip appears that indicates the roles with access to make the status change. This tooltip will list the names of individual users associated with each permitted role. Users can also access the address book to see which roles an ePlan user has.

ePlan's address book for each organization contains a list of every user that has an ePlan role.

- The LEA Role Contacts list all the roles. If the role is not listed in the address book, no one has been assigned to that role.
- The LEA Funding Application contacts are contacts selected for a funding application.
  - A contact is not the same as a role. A role assigns access to complete a task in ePlan.
- User Access forms are in ePlan's TDOE Resources in the User Access Form folder.
  - Users do not need an ePlan role to access TDOE Resources.

See [ePlan User Access](#) for more information about the ePlan status workflow and user roles.

## Validation Messages

- This feature shows any errors that will prevent an application from moving forward.
- Click the messages under Validation on the Sections page to see any errors or warnings.

### Validation Messages

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[Return To Sections Page](#)

Cover Page

Cover Page
<b>Review</b> Questions marked with an asterisk (*) require a response. <b>Error</b>

Title I, Part A

Budget
<b>Review</b> The Title I, Part A budget of \$0.00 is less than the Adjusted Allocation amount of \$0.01. <b>Warning</b>

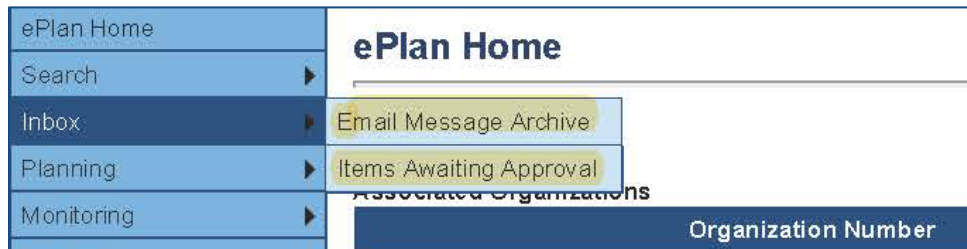
## Post-Submission

When users need to revise an application after changing the status to **Draft Completed** prior to the submission deadline, contact the next approver in the workflow and ask that they change the status to **Not Approved** to return the application access to the previous user in the workflow. If the application has proceeded through the workflow to the TDOE Program Director, users can contact the program director or ePlan Help to request that the application be returned to the previous step in the workflow.

A complete list of ePlan program contacts is available [here](#).

## Inbox

Several ePlan functions automatically generate emails which the system sends to users. The [Create Comment](#) function prompts ePlan to send an email message to the selected recipients. And, **System Notifications** are sent to users because of a **Status Change** to support [Workflows](#).



All email messages sent or received by a user through ePlan can be accessed from the **Inbox**. The **Inbox** section of ePlan contains the **Email Message Archive** and **Items Awaiting Approval**. The **Email Message Archive** will contain all emails sent to or received from another ePlan user through the system. Users may select the time period to display. Messages received by the user will appear first; scroll down to the lower half of the page to view sent messages. Comments with email notifications can be accessed from the **Inbox** in addition to the **History Log** section of the funding application.

When a **System Notification** is generated related to a **Status Change** that requires the user to complete an approval step, users will find these in **Items Awaiting Approval**.

## Reimbursement Requests

- Reimbursement Requests can only be submitted one at a time by a user with the Fiscal Update Role.
- Reimbursement Requests cannot be submitted until the application is approved by the department.
  - Only budget items that have been approved can be requested for reimbursement.

# Appendix A: Available Account and Line Numbers

Account Number	Common Expenses Type and Line Items*
<p><b>Regular Instructional Program (71100)</b>            The Regular Education Program includes activities that provide students in grades K through 12 with learning experiences to prepare them to become productive citizens, family members, and members of the work force. <i>Expenditures for instructing students should be recorded in this program.</i></p>	<p>71100-116 Teachers* (e.g. interventionists, CSR teachers, etc.)            71100-163 Educational Assistants*            71100-189 Other Salaries &amp; Wages (e.g. bonuses, stipend, interventionists, instructional facilitators, instructional coaches that serve at one school, etc.)            71100-195 Certified Substitutes*            71100-198 Non-certified substitutes*            71100-312 Contracts with Private Agencies (e.g. virtual/on-line/remote learning subscriptions)            71100-429 Instructional Supplies &amp; Materials (e.g. IXL, CASE assessments, paper, workbooks, calculators, etc.)            71100-499 Other Supplies &amp; Materials: (e.g. staplers, pointers, markers, pencils, etc.)            71100-722 Regular Instructional Equipment (e.g. tables, desks, chairs, computers, iPads, printers, items that cost \$100 or more and have a life span of one year or more, and delicate and fragile items such as: Apple TV, Kindles, etc.)            71100-471 Software (e.g. Edgenuity, Ed Galaxy, Achieve 3000, etc.)</p>
<p><b>Alternative Instruction Program (71150)</b>            Alternative Schools Program is an instructional program designated for students who consistently exhibit behavior that is disruptive to the learning process or violent in nature. This program may also serve at-risk youth with special needs. This program includes activities that deal directly with the interaction between teachers and students in an alternative learning environment. Expenditures placed under this series are similar to the 71100 account number, except expenditures for 71150 are earmarked specifically for alternative educational settings.</p>	<p>71150-128 Homebound teachers            71150-311 Contracts with Other School Systems            71150-399 Other Contracted Services (e.g. payments to businesses or other school systems for services related to the instructional program)            71150-429 Instructional Supplies and Materials            71140-430 Textbooks - Electronic            71150-449 Textbooks - Bound            71150-471 Software            71150-499 Other Supplies &amp; Materials (e.g. includes purchases for support of classroom instruction.            71150-790 Regular Instruction Equipment (e.g. computers, desks, chairs, machinery, items that cost \$100 or more and have a life span of one year or more, etc.)  <i><b>NOTE:</b> Since students often attend an alternative program from a number of campuses, much of the cost of their materials such as textbooks should be budgeted to the instructional programs from the school of origin. Therefore, all costs associated with alternative programs may not be recorded in this category. Organizations are expected to track direct costs associated with the program.</i></p>

Account Number	Common Expenses Type and Line Items*
<p><b>Special Education Program (71200)</b>  The Special Education Program includes activities that provide learning experiences for students having special needs. This includes PreK as well as elementary and secondary students. Services include activities for varying needs, including educating the gifted and those with learning, emotional and physical disabilities. A student is educated based on an Individual Education Plan (IEP) developed by a team who addresses the particular needs of the student.</p>	71200-171 Speech Pathologists 71200-310 Contracts with Other Public Agencies 71200-399 Other Contracted Services (e.g. services the LEA may not be able to perform as part of being required by the student IEP) 71200-429 Instructional Supplies and Materials 71200-471 Software 71200-499 Other Supplies and Materials (e.g. may include consumables, replacement of worn-out or deteriorated items that address the unique needs of students to meet IEP requirements, etc.) 71200-725 Special Education Equipment (e.g. specialized desks and chairs, computers and machinery, etc., equipment/materials should have a life span of one year or more)
<p><b>Vocational Education Program (71300)</b>  The Career and Technical Education (CTE) Program includes instructional activities that provide students with the opportunity to develop knowledge, skills, and attitudes needed for employment in an occupational area. Activities include training both in the classroom and in a supervised work environment. Expenditures placed under this series are similar to the 71100 account number, except expenditures for 71300 are earmarked specifically for vocational education programs.</p>	71300-189 Other Salaries and Wages (e.g. CTE teachers to provide students with remote learning) 71300-311 Contracts with Other School Systems 71300-399 Other Contracted Services (e.g. CTE payments to businesses directly related to services for the instructional program) 71300-429 Instructional Supplies & Materials (e.g. repair manuals, tools, wrenches, sockets, drills, etc., materials cost under \$100) 71300-471 Software 71300-730 Vocational Instruction Equipment (e.g. tools and shop resources that cost \$100 or more, socket sets, drills, welders, TIG and aluminum set-ups, air compressors, etc.)
<p><b>Attendance (72110)</b>  Attendance services are activities designed to improve student attendance at school and which attempt to prevent or to solve student problems involving the home, the school, and the community. Attendance also records and reports student information to the state for funding and other statistical needs. Major categories include personnel, benefits, supplies and materials, and other charges</p>	72110-105 Supervisor/Director* 72110-130 Social Workers* 72110-162 Clerical Personnel* 72110-189 Other Salaries & Wages*
<p><b>Health Services (72120)</b>  Health Support Services are activities that provide physical and mental health services that are not direct instruction. Services are also provided for appropriate medical and nursing services as required by individual program needs that include medical supplies, materials, and equipment.</p>	72120-105 Supervisor/Director* 72120-131 Medical Personnel* (e.g. nurses, nurse consultants, etc.) 72120-189 Other Salaries & Wages* 72120-499 Other Supplies & Materials (e.g. first aid kits, band-aids, creams, ice packs, gloves, <b>hand sanitizer, disinfecting wipes, other personal protective equipment [PPE]</b> . etc.) 72120-599 Other Charges (e.g. qualified disaster relief payments expenses, reimbursement for food delivery, and home office supplies, etc.)

Account Number	Common Expenses Type and Line Items*
<p><b>Other Student Support (72130)</b> Other Student Support includes services to students in addition to attendance and health services. These include guidance services, and evaluation and testing services for Regular Education students, Special Education students, and Vocational Education students.</p>	<p>72130-123 Guidance Personnel (i.e. counselors) 72130-170 School Resource Officer (e.g. SRO for summer programming) 72130-307 Communication (e.g. online platform for two-way communication between teachers and parents) 72130-499 Other Supplies and Materials (e.g. social-emotional learning materials, student books, and journals, teacher books, and materials to support students, etc.) 72130-790 Other Equipment (e.g. interactive panel technology, assistive technology for students, etc.)</p>
<p><b>Support Services/Regular Instruction Program (72210)</b> Regular Education Program includes activities primarily for assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for students. These activities include curriculum development, techniques of instruction, child development and understanding, and staff training.</p>	<p>72210-105 Supervisor/Director* 72210-132 Material Supervisor(s)* 72210-136 Audiovisual Personnel* 72210-137 Education Media Personnel* 72210-189 Other Salaries &amp; Wages* 72210-399 Other Contracted Services 72210-524 In-Service (e.g. professional development) 72210-790 Other Equipment (e.g. tables for social distancing)</p>
<p><b>Support Services/Alternative Instruction Program (72215)</b> Alternative School Instructional Support includes activities primarily for assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for students in alternative learning environments. Activities include curriculum development, techniques of instruction, student development and understanding, and staff training.</p>	<p>72215-123 Guidance Personnel 72215-138 Instructional Computer Personnel 72215-399 Other Contracted Services (e.g. payments to outside consultants for services to the alternative instructional staff support function) 72215-499 Other Supplies and Materials (e.g. supplies for the alternative education instructional support staff)</p>
<p><b>Support Services/Special Education Program (72220)</b> Special Education Instruction Support includes activities primarily for assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for students with special needs. These activities include curriculum development, techniques of instruction, child development and understanding, and staff training.</p>	<p>72220-124 Psychological Personnel 72220-135 Assessment Personnel 72220-171 Speech Pathologists 72220-196 In-Service Training (intended to pay employees for providing professional development for others) 72220-308 Consultants (e.g. such as behavior consultants, etc.) 72220-499 Other Supplies and Materials (e.g. additional learning platforms to support progress and mastery of IEP goals; support materials to therapy and intervention, etc.) 72250-524 In-Service/ Staff Development (e.g. all costs related to staff development or training for the support of the special education instructional program)</p>



Account Number	Common Expenses Type and Line Items*
<p><b>Support Services/Vocational Education Program (72230)</b>            Career and Technical Education Instructional Staff Support includes activities primarily for assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences that give students the opportunity to develop the knowledge, skills, and attitudes needed for employment in an occupational area. These activities include curriculum development, techniques of instruction, child development and understanding, and staff training.</p>	<p>72230-336 Maintenance &amp; Repair Services (e.g. equipment essential to the program)            72230-399 Other Contracted Services (e.g. payments to outside consultants for services to the career and technical instructional staff support function)            72230-499 Other Supplies and Materials (e.g. materials for CTE instructional support staff)            72230-790 Other Equipment (e.g. expenses for initial, additional, and replacement of equipment such as computers, desks, chairs, etc., lifespan of items should exceed one year)</p>
<p><b>Education Technology (72250)</b>            Technology services are designed to provide internet and other technical services to support instruction, attendance, health, administration, testing, and other areas as needed. Major categories include personnel, benefits, supplies, materials, and other expenses such as internet connectivity. <i>72550 should only be used for LEA connectivity/technology infrastructure.</i></p>	<p>72250-138 Instructional Computer Personnel            72250-330 Operating Lease Payments            72250-350 Internet Connectivity            72250-470 Cabling            72250-471 Software (e.g., Microsoft Teams, WebEx, Zoom, security software, etc.)            72250-499 Other Supplies and Materials (e.g. replacement of items consumed, worn out, or deteriorated through the use in providing tech service)            72250-524 In-Service Staff Development            72250-790 Other Equipment (e.g., LEA infrastructure for connectivity/technology)</p>
<p><b>Office of the Principal (72410)</b>            Office of the Principal includes activities concerned with directing and managing the operation of a particular school. Such activities include those performed by the principal, assistant principals, and other assistants while they supervise all operations of the school, evaluate staff, assign duties to staff, supervise and maintain the records of the school, and coordinate school instructional activities with those of the total school system. These activities also include the work of secretarial and clerical staff in support of the teaching and administrative duties.</p>	<p>72410-189: Other Salaries and Wages (e.g. stipends for additional duties, added summer school responsibilities)            72410-201 Social Security            72410-204 State Retirement            72410-212 Employer Medicare            72410-499 Other Supplies and Materials (e.g. expenditures related to the operation of the office of the principal)</p>
<p><b>Operation of Plant (72610)</b>            Operation of Plant includes activities concerned with keeping the physical plant clean and ready for daily use. <i>These activities include the operation of the heating, lighting, and ventilating systems, and the repair and replacement of operational equipment.</i></p>	<p>72610-328 Janitorial Services (e.g. contracted)            72610-410 Custodial Supplies (e.g., regular cleaning supplies, hand soap, paper towels, etc.)            72610-499 Other Supplies and Materials (e.g. supplies and materials services purchased to keep the physical plant open and safe for use)            72610-720 Plant Operation Equipment (e.g. cameras, vacuums, buffers, floor strippers, HVACs, humidifiers, air quality system, boilers, water heaters, etc.)</p>

Account Number	Common Expenses Type and Line Items*
<p><b>Maintenance of Plant (72620)</b>  Maintenance of Plant includes activities concerned with keeping the physical plant open, comfortable, and safe for use, and keeping the grounds, buildings, and equipment in effective working condition and state of repair. <i>It includes maintenance and repair of existing buildings and equipment.</i></p>	72620-335 Maintenance & Repair Services – Building (e.g. removal of pipes and drains, roof repair, carpet removal) 72620-336 Maintenance & Repair Services - Equipment (e.g. repair of maintenance equipment) 72620-338 Maintenance & Repair Services – Vehicles (e.g. repair and maintenance of vehicles) 72620-399 Other Contracted Services (e.g. maintenance fleet, reserved for items of an ongoing nature such as alarm monitoring and elevator inspections, etc.) 72620-499 Other Supplies & Materials (e.g. tools, tool housing, storage bins/chests, specialized service equipment, etc.) 72620-599 Other Charges (e.g. expenses related to maintenance function that cannot properly fit into 72620 categories) 72620-717 Maintenance Equipment (e.g. high priced maintenance equipment)
<p><b>Transportation (72710)</b>  Transportation includes activities concerned with conveying students for Regular, Vocational, and Special Educational instruction, as provided by State and Federal law. This includes trips between home and school, and trips to school activities.  Transportation includes operation expenses for system-owned vehicles involved in the transportation function. Vehicle servicing, maintenance, and contracts for transporting services should also be recorded in this category.</p>	72710-105 Supervisor* 72710-142 Mechanics* 72710-146 Bus Drivers* 72710-189 Other Salaries & Wages* 72710-729 Vans and Vehicles
<p><b>Food Service (73100)</b>  School Nutrition includes activities concerned with providing meals to students and staff in a school or school system. This service area includes the supervision of a staff whose responsibility is to prepare and serve regular and incidental meals, lunches, or snacks in connection with school activities and food delivery.</p>	73100-105 Cafeteria Supervisor/Director* 73100-119 Cafeteria Bookkeeper* 73100-162 Clerical Personnel* 73100-165 Cafeteria Personnel* 73100-189 Other Salaries & Wages 73100-422 Food Cost 73100-499 Other Supplies and Materials (e.g., silverware packs, disposal containers, portal coolers, etc.) 73100-710 Food Service Equipment (e.g., kiosks, scanners, pin pads, streamers, coolers, etc.)
<p><b>Community Services (73300)</b>  Community Services includes activities concerned with providing community services to students, staff, or community participants. This includes expenditures for system staff participating in community organizations such as leadership, family resource centers, Families First, extended school programs, and community-sponsored activities.</p>	73300-189 Other Salaries & Wages (e.g. supervisor/director, other contracted services) 73300-201 Social Security 73300-204 State Retirement 73300-207 Medical Insurance 73300-212 Employee Medicare 73300-355 Travel 73300-399 Other Contracted Services 73300-499 Other Supplies & Materials (e.g. supplies and materials for the community services program)

Account Number	Common Expenses Type and Line Items*
<p><b>Early Childhood Education (73400)</b>            The Early Childhood Education Program includes activities that address the educational, health, and social service needs of preschoolers who are three and four years of age to prepare them for kindergarten. The Early Childhood Instructional Support includes teachers, assistants, and others assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for the preschools.</p>	<p>73400-310 Contracts with Other Public Agencies (e.g. contracted student support for early childhood)            73400-399 Other Contracted Services (e.g. services unique to a particular student; amounts paid for services for IDEA early childhood, etc.)            73400-499 Other Supplies &amp; Materials (e.g. support for the early childhood education program for IDEA early childhood.)            73400-790 Other Equipment (e.g. computers, desks, chairs, etc., useful life of items should exceed one year.)</p>
<p><b>Regular Capital Outlay (76100)</b>            Regular Capital Outlay includes activities such as site acquisition services, site improvement services, architecture and engineering services, building acquisition and construction services, and building improvement services. <i>Expenditures under this series include new upgrades to current facilities and plants.</i></p>	<p>76100-706 Building Construction            76100-707 Building Improvements (e.g., upgrades and improvements - window replacement, ionization, roofs, HVAC improvements, asbestos removal, tile installation, etc.)            76100-720 Plant Operation Equipment (e.g. equipment needed to operate facilities, new HVAC, etc.)            76100-790 Other Equipment (e.g. Ion Air Purifiers)</p>
<p><b>Transfer Out (99100)</b>            This represents monies transferred from one fund to another. It should be utilized for normal interfund transfers (i.e. Indirect cost payments, transfers to Debt Service Fund, transfer of supplemental type payments from one fund to another.)</p>	<p>99100-504 Indirect cost</p>