



Department of
Education

End of Year Data Reports for Students with Disabilities

Data and Information Tool Technical Application Guide

Tennessee Department of Education | October 2023



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Introduction

The **End of Year Data Reports for Students with Disabilities** must be submitted annually for both federal and state reporting and compliance. Districts run, review, and verify that the data contained in EDPlan/EasyIEP reports are accurate and final and use the **Data Reports for Students with Disabilities Data and Information Tool** to submit and certify these data.

The **Data Reports for Students with Disabilities Data and Information Tool** can be accessed through the Tennessee Department of Education’s eGrants platform, ePlan.tn.gov, under the Data and Information tools section.

ePlan User Access

All users must have the correct ePlan user access role to access and complete the data and information tool. Users with existing ePlan access can verify current user access roles in the Address Book. To view existing access, visit 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 > TDOE Resources > 1. User Access Forms and select the correct form according to organization type, or click on the link below:

- [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 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.

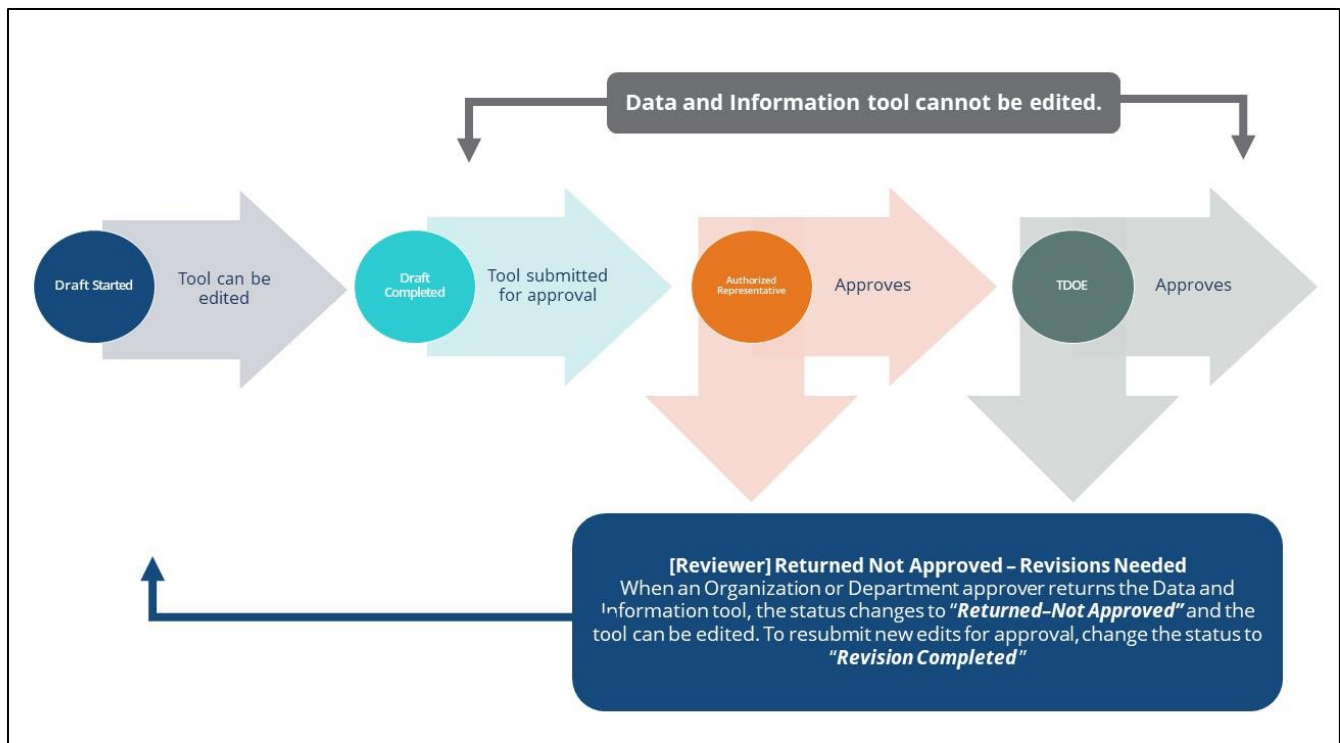
For FY22, ePlan users who were previously assigned the IDEA Director roles were grandfathered into the **LEA End of Year Data Reports for Students with Disabilities Director** role.

Workflows

Below are the roles and the order of the workflow steps for the data and information process.

ePlan Role	ePlan Function
LEA Data Reports for Students with Disabilities Director	Click Draft Started (or Revision Started for revisions) Respond to questions, upload files, etc.
LEA Data Reports for Students with Disabilities Director	Click Draft Completed (or Revision Completed for revisions)
LEA Authorized Representative (Director of Schools)	Click LEA Authorized Representative Approved (or LEA Authorized Representative Not Approved)
TDOE Program Director (Department project directors)	Click TDOE Program Director Approved (or TDOE Program Director Returned Not Approved)

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 Data and Information Tool

Accessing the Data and Information Tool

To navigate to applications from the ePlan homepage, click the **Data and Information** tab on the left menu bar. **NOTE:** For users with ePlan roles for multiple organizations, return to ePlan home to select the correct organization before proceeding to Data and Information.



Select the desired fiscal year from the dropdown in the upper left corner of the screen. Data and information tools are stored in ePlan according to the state fiscal year (i.e., 2023 indicates the 2022–23 school year). Click on the **Data Reports for Students with Disabilities Data and Information Tool** to access the tool.

2023 ▾	Active ▾		
Data and Information	Revision	Status	Status Date
Civil Rights and Bullying Compliance Report	0	TDOE Civil Rights and Bullying Compliance Report Director Reviewed	7/27/2023
Comparability	0	TDOE FPO Divisional Coordinator Reviewed	12/19/2022
Coordinated School Health Action Plan	2	TDOE Coordinated School Health Action Plan Director Approved	6/9/2023
Data Reports for Students with Disabilities	0	TDOE Data Reports for Students with Disabilities Director Approved	11/30/2022
EasyIEP LEA User Access Agreement	0	TDOE EasyIEP LEA User Access Agreement Director Reviewed	1/3/2023

The data and information tool loads to the Sections page. To begin the tool, next to **Change Status To:** click on **Revision Started**.

Status:	TDOE Data Reports for Students with Disabilities Director Approved
Change Status To:	Revision Started

NOTE: Once a revision has been started, users may wish to access previous versions. To access previous versions, return to **Data and Information** and select the appropriate prior year.

Data and Information Tool Sections and Pages

The **Sections** page lists all the available sections and pages within a data and information tool such as: **Change Log, History Log, Create Comment, Cover Page, End of Year Data Reports for Students with Disabilities, and Related Documents**. The **Sections** page is helpful in navigating to the specific sections and pages which must be completed.

Status:	Revision Started		
Change Status To:	Revision Completed		
View Change Log			
Description (View Sections Only View All Pages)	Revision	Validation	Print <input type="checkbox"/> Select Items
All		Messages	Print
<input type="checkbox"/> History Log			Print
History Log			Print
Create Comment			
<input type="checkbox"/> Data Reports for Students with Disabilities		Messages	Print
Cover Page			Print
Mid-Year Data Reports for Students with Disabilities			Print
End of Year Data Reports for Students with Disabilities		Messages	Print
Related Documents		Messages	Print
All		Messages	Print

Change Log

The **Change Log** may be accessed on the main sections page for every data and information tool. It lists every change or update since the previous status. This helps users identify changes that have been made to the data and information tool since they last viewed it.

Status:	TDOE Data Reports for Students with Disabilities Director Approved
Change Status To:	<u>Revision Started</u>
View Change Log	

History Log and Create Comment

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

- To provide an explanation as a part of the data and information tool's history.
- To provide information that a user cannot add into the main data and information tool due to the data and information tool's current status (users can only edit data and information tools 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 data and information tool will always be available as a part of the data and information tool's history log.

To Add a Comment in a Data and Information Tool:

1. Navigate to the data and information tool's main **Sections** page.
 - To navigate to the main data and information tool page from other pages in the data and information tool, 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 data and information tool **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

LEA Contacts by Funding Application	Available if a contact is selected on the applications contact page. Not all funding applications have contacts on the contact page.
LEA Contacts by Role	Current users with the applicable role
Other LEA Contacts	Additional contacts for an LEA

TDOE Contacts	State users that can complete various ePlan functions.
TDOE Miscellaneous Contacts	Lists every State ePlan User by name
Additional Recipients	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 data and information tool. Additional information about Inbox functionality in ePlan is available in Troubleshooting, [Inbox](#).

Cover Page

The *Cover Page* for the **End of Year Data Reports for Students with Disabilities Data and Information Tool** requires the following information: LEA Number, LEA Name, LEA Official Address, LEA Phone Number, Director of Schools Name, Director of Schools Email Address, and Director of Schools Phone Number. Once all fields are complete, hover over the **Save And Go To** button and click on **Sections** to return to the *Sections* page.

Cover Page

* LEA Number

* LEA Name

* LEA Official Address

* LEA Phone Number

* Director of Schools Name

* Director of Schools Email Address

* Director of Schools Phone Number

Save And Go To ▶

End of Year Data Reports for Students with Disabilities

The *End of Year Data Reports for Students with Disabilities* page requires selections of checkbox options related to the required reports. Selecting the checkboxes indicates that users have run, reviewed, and verified that the data contained in the required reports are accurate and final.

Instructions for ePlan:

All data must be up to date in TN PULSE prior to running the End of Year Data Reports for Students with Disabilities.

Please refer to the [TN PULSE Instructions](#) for step-by-step instructions for completing reports.

Once you have run, reviewed, and verified that the data contained in the reports are accurate and final, please check the boxes below and upload a copy of each report that was reviewed to the Related Documents page.

When you have completed this process for all required reports, submit the End of Year Data Reports for Students with Disabilities for Director of Schools review by returning to the Sections page and changing the status to "Revision Complete".

Your district's Director of Schools will be notified to review and approve the End of Year Data Reports for Students with Disabilities for the final confirmation and submission to the department.

Required Reports

* Exit Student Report

* Initial Eligibility 60 Day Report

* TN-End of Year Frequency Report (XLS)

* Restraint and Isolation Report

Related Documents

The **Related Documents** page allows users to upload the require reports for the **End of Year Data Reports for Students with Disabilities**. Headers in the Related Documents section indicate if the document is required or optional. If a document is required, ePlan prevents submission of the data and information tool without an upload.

The **Document Template** column provides links to download templates or forms for data and information tool 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 **Select** button to browse for the document.
- Choose a file and click **Open**. The file will appear in the **Upload Data File** row.
- Leave the **Document Name** blank. The system will assign a name.
- Click **Create** to upload the document.

Required Documents		
Type	Document Template	Document/Link
Combined Table 1&3 Dec1 Rpt Details (XLS) [Upload at least 1 document(s)]	N/A	Upload New [Update] [Delete] 📁 Combined Table 1&3
DRAFT Combo Table 1 & 3 Dec1 Report (PDF) [Upload at least 1 document(s)]	N/A	Upload New [Update] [Delete] 📁 DRAFT Combo Table 1&3
(EOY) Exit Report [Upload at least 1 document(s)]	N/A	Upload New
(EOY) Initial Eligibility 60 Day Report [Upload at least 1 document(s)]	N/A	Upload New
(EOY) TN-End of Year Frequency Report (XLS) [Upload at least 1 document(s)]	N/A	Upload New
(EOY) Restraint and Isolation Report [Upload at least 1 document(s)]	N/A	Upload New

Validations

ePlan runs data and information tool validations as checks to help users complete the data and information tool 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 data and information tool, or validation messages for the individual section or page.

Status:	Revision Started		
Change Status To:	Revision Completed		
View Change Log			
Description (View Sections Only View All Pages)	Revision	Validation	Print <input type="checkbox"/> Select Items
All		Messages	Print
<input type="checkbox"/> History Log			Print
History Log			Print
Create Comment			
<input type="checkbox"/> Data Reports for Students with Disabilities		Messages	Print
Cover Page			Print
Mid-Year Data Reports for Students with Disabilities			Print
End of Year Data Reports for Students with Disabilities		Messages	Print
Related Documents		Messages	Print
All		Messages	Print

Return To Sections Page		
Data Reports for Students with Disabilities		
End of Year Data Reports for Students with Disabilities		
Review	Questions marked with an asterisk (*) require a response.	Error
Related Documents		
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Exit Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Initial Eligibility 60 Day Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) TN-End of Year Frequency Report (XLS)'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Restraint and Isolation Report'.	Error
Return To Sections Page		

On the Validation Messages page, items marked **Warning** are validations that users are not required to address prior to submitting the data and information tool. 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 data and information tool. 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 data and information tool. Click on the *Review* link to go to the identified page to make corrections.

[Return To Sections Page](#)

Data Reports for Students with Disabilities

End of Year Data Reports for Students with Disabilities		
Review	Questions marked with an asterisk (*) require a response.	Error
Related Documents		
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Exit Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Initial Eligibility 60 Day Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) TN-End of Year Frequency Report (XLS)'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Restraint and Isolation Report'.	Error

[Return To Sections Page](#)

Submission

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

To submit the data and information tool for review, the user changes the data and information tool status on the **Sections** page to **Revision Completed**. 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.

How to Print in ePlan

Description (View Sections Only View All Pages)	Revision	Validation	Print <input checked="" type="checkbox"/> Select Items
All		Messages	<input type="checkbox"/>
<input type="checkbox"/> History Log			<input type="checkbox"/>
History Log			<input type="checkbox"/>
Create Comment			
<input type="checkbox"/> Data Reports for Students with Disabilities		Messages	<input checked="" type="checkbox"/>
Cover Page			<input checked="" type="checkbox"/>
Mid-Year Data Reports for Students with Disabilities			<input checked="" type="checkbox"/>
End of Year Data Reports for Students with Disabilities		Messages	<input checked="" type="checkbox"/>
Related Documents		Messages	<input checked="" type="checkbox"/>
All		Messages	<input type="checkbox"/>

- Users may print or download a PDF from the [Sections](#) page.
- To print the entire data and information tool, click the **Print** link across from the word "All" at the top of the [Sections](#) page. **NOTE:** Print requests do not include any uploaded related documents.
- 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 **End of Year Data Reports for Students with Disabilities** 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 Planning**.
- 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.

Below is your list of Print Requests.

Print Request Name	Request Date	Expiration Date	
End of Year Data Reports Record	10/13/2023 6:33:37 PM	10/18/2023 6:33:37 PM	Delete

Troubleshooting

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

User Access

If an ePlan user is not able to work in a data and information tool, 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 tool is not in the right work step or status. Users can only edit a data and information tool when it is in **Draft Started** or **Revision Started** status.
- The user does not have the right role to work on the data and information tool. 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.

Return To Sections Page		
Data Reports for Students with Disabilities		
End of Year Data Reports for Students with Disabilities		
Review	Questions marked with an asterisk (*) require a response.	Error
Related Documents		
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Exit Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Initial Eligibility 60 Day Report'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) TN-End of Year Frequency Report (XLS)'.	Error
Review	At least 1 document(s) must be uploaded for the required Related Document '(EOY) Restraint and Isolation Report'.	Error
Return To Sections Page		

Post-Submission

When users need to revise a data and information tool after changing the status to **Revision 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 tool has proceeded through the workflow to the TDOE Program Director, users can contact the program director or ePlan Help to request that the tool 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

[Change Log](#)

The **Change Log** may be accessed on the main sections page for every data and information tool. It lists every change or update since the previous status. This helps users identify changes that have been made to the data and information tool since they last viewed it.

Status:	TDOE Data Reports for Students with Disabilities Director Approved
Change Status To:	Revision Started
View Change Log	

History Log and 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](#).

ePlan Home	ePlan Home
Search	
Inbox	Email Message Archive
Planning	Items Awaiting Approval
Monitoring	Associated Organizations
	Organization Number

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 data and information tool.

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**.