

## LEA User Access Administrator Role

#### Melissa Brown

Director of Operations | Federal Programs and Oversight

December 6, 2022







#### **ACADEMICS**

ALL TENNESSEE STUDENTS WILL HAVE ACCESS TO A HIGH-QUALITY EDUCATION, NO MATTER WHERE THEY LIVE

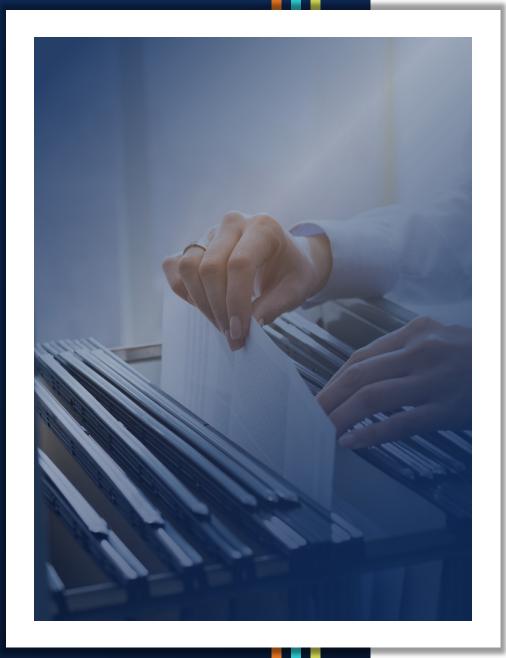
#### STUDENT READINESS

TENNESSEE PUBLIC SCHOOLS WILL BE EQUIPPED TO SERVE THE ACADEMIC AND NON-ACADEMIC NEEDS OF ALL STUDENTS IN THEIR CAREER PATHWAYS



#### **SEDUCATORS**

TENNESSEE WILL SET A NEW PATH FOR THE EDUCATION PROFESSION AND BE THE TOP STATE IN WHICH TO BECOME AND REMAIN A TEACHER AND LEADER FOR ALL



- LEA User Access Administrators
- Terms and Conditions
- Uploading to the LEA Document Library
- User Administration
- Updating Contact Information and Passwords
- User Access Roles Report
- Reminders and Resources

## LEA User Access Administrators



#### **LEA User Access Administrator Abilities**

#### **Existing**

 Add and remove school-level user access roles for school planning

#### New

- Add and remove LEA-level funding application roles, monitoring roles, and data & information collection roles
- Run user reports in ePlan to access a database list of LEA users

## **Terms and Conditions**



#### ePlan User Access Form

- 1. All roles must be approved by the Director of Schools **before the role is assigned.**
- 2. For all user access roles assigned by the district, the user access forms must be signed and uploaded to the LEA Document Library **each month.**



#### LEA ePlan User Access Form

Tennessee's Electronic Planning and Grants Management System

#### Instructions

- 1. Write and/or select new user access role(s); do not include existing role(s). See ePlan User Access Roles for LEAs for a complete list.
- To remove or copy access from current/previous users, check the appropriate option and write in the previous user(s)'s full names.
- 3. Obtain the required signatures. Adobe Certificated Signatures are acceptable.
- 4. <u>LEA User Access Administrators</u> may add user roles (except those marked with a star) and then upload the completed forms to the LEA Document Library each month. Alternatively, this form may be emailed to <u>ePlan.Help@tn.gov</u> to request the role.
- 5. For user access roles marked with a star email the completed form to ePlan.Help@tn.gov.

Phone:
Fi10 A D-1
Fiscal & Approve Roles
ed Representative: final approval of any monitoring document ctor of Schools (DOS) may have this role)
date* (Bookkeeper): request ts from any funding app    required for this role)
presentative (CFO/Finance Director): funding app.; Complete FER; submit state ** west reimbursements from any funding app.
approve state funds app.
Clerk or SSD Recorder: approve state funds
LEA-Level Planning Roles
a Entry: edit LEA Plan. (This role is not for editing
an Reviewer: edit school- & LEA-approve school level staff to review school plans)
Data View  N Only: view all ePlan components and upload int Library but can't edit other ePlan components. er to be selected as a contact in the CFA)
s) and provide name(s) of previous user(s)

## Terms and Conditions-Confidentiality

• IMPORTANT—When determining access for LEA staff and third parties, such as vendors (if applicable), consult with your board attorney to ensure compliance with required user access forms and all confidentiality laws, including the Family Educational Rights & Privacy Act (FERPA) and Privacy Act (PII).



#### Terms and Conditions-Random Checks

 The Tennessee Department of Education (department) will conduct random checks to make sure the LEA Document Library contains the monthly uploads.



# Uploading to the LEA Document Library



## **LEA Document Library**



Help for Current Page

Contact TDOE

#### ePlan Home

Example County (###) Public District

#### **Associated Organizations**

Organization Number	Organization Name
###	Example County

#### **Announcements**

2023-24 District Planning in InformTN (11/3/2022)

Contact: Ginger.Leach@tn.gov

Districts will begin the annual planning process for the 2023-24 school year in the coming months. Last year, we offered an extended planning window. However, after careful consideration of how that planning window worked, the amount of data that was and was not populated at the start of the window, and the window's proximity to report card appeals, we have adjusted the opening of 2023-24 district plans to Tuesday, January 3, 2023. We will offer learning sessions to understand expectations and changes in planning components in December. The timing of these sessions is an effort to frontload learning, so you can begin planning immediately in January and to safeguard the planning window from sessions that might delay or reduce your planning time.

#### Reminders

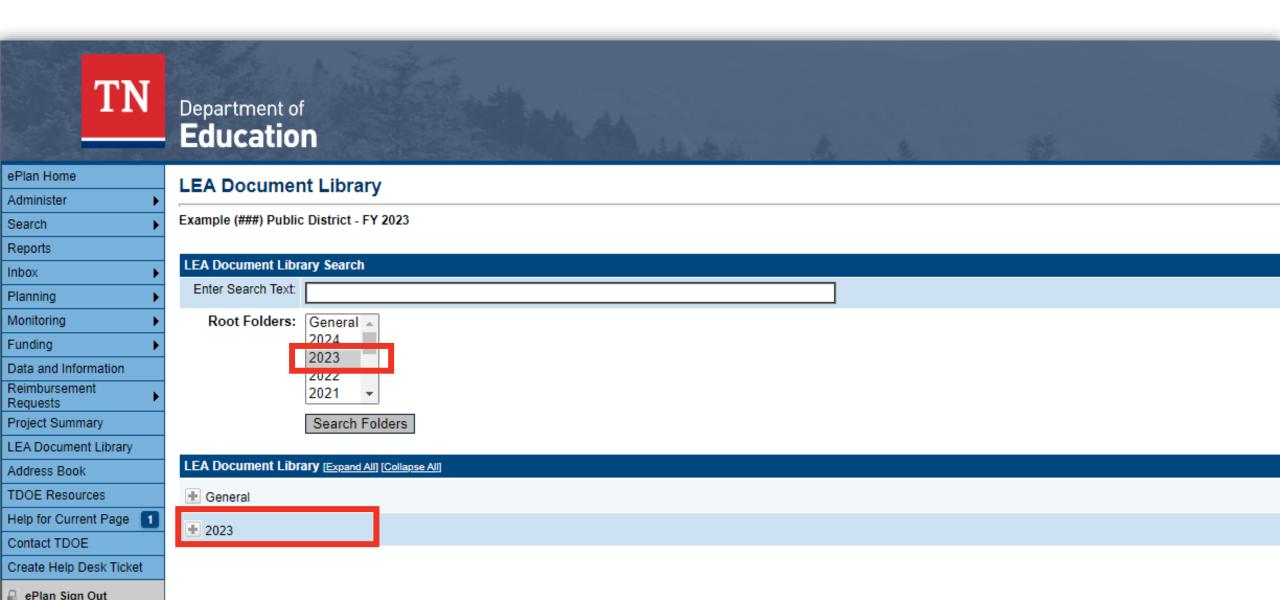
Dates to Remember (9/20/2022)

\* Dates are subject to change as things continue to update

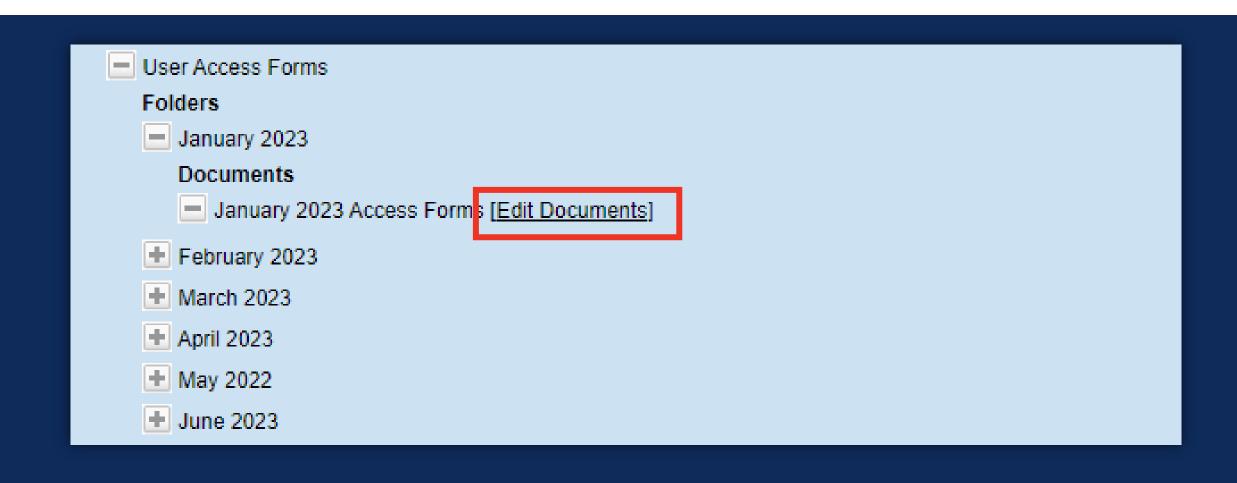
#### November

- 11/4: Educator Preparation Working Group Applica
- 11/7: ePlan User Audit due in ePlan
- 11/8: EL October 1 2022 Count (L, W, 1, 2): Final ( to LEAs same day or next day)
- 11/10: ESSA Addendum Public Comment Deadling
- 11/14: Comparability Form II and Form III close in
- 11/15: Documentation for MOEquity Non-Exempt I

## Select the Correct Year and Expand Folder



## Scroll, Expand, and Click Edit Documents



## **Click Upload Document**



ePlan Home

Administer

Search

Reports

Planning Monitoring

Funding

Requests

Data and Information

LEA Document Library

Help for Current Page

Reimbursement

**Project Summary** 

Address Book

TDOE Resources

Inbox

#### **Update Documents And Links**

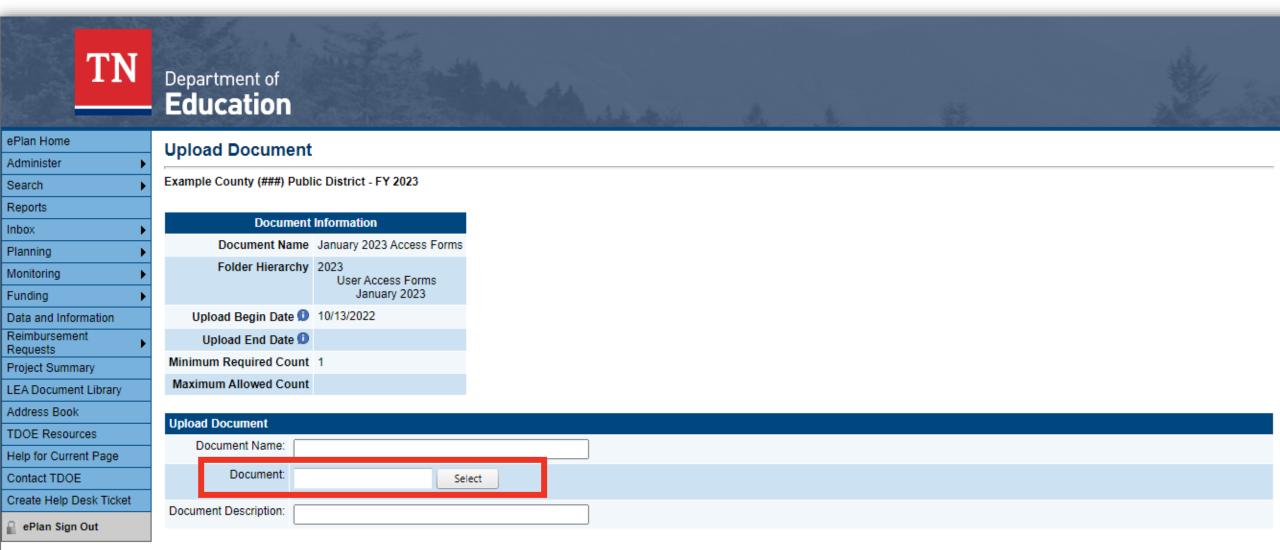
Example County (###) Public District - FY 2023

Document Information					
Document Name	January 2023 Access Forms				
Folder Hierarchy	2023 User Access Forms January 2023				
Upload Begin Date 🕕	10/13/2022				
Upload End Date 🕕					
Minimum Required Count	1				
Maximum Allowed Count					

Upload Document

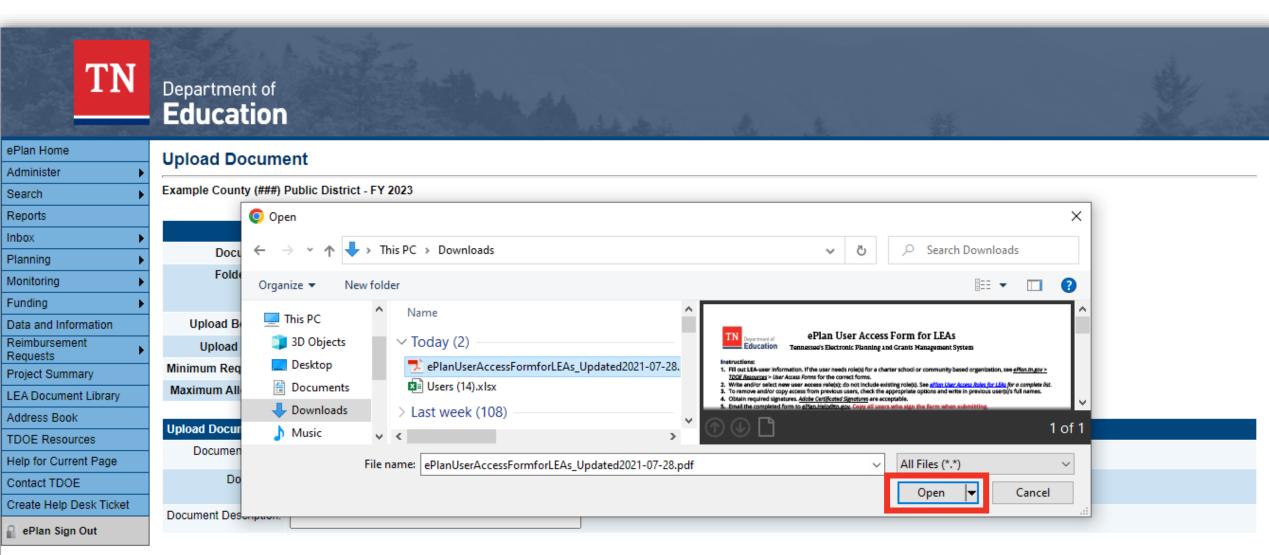
DOCUMENTS/LINKS

#### Click Select to Search for the Document



Save Cancel

## Click Open to Select the Document

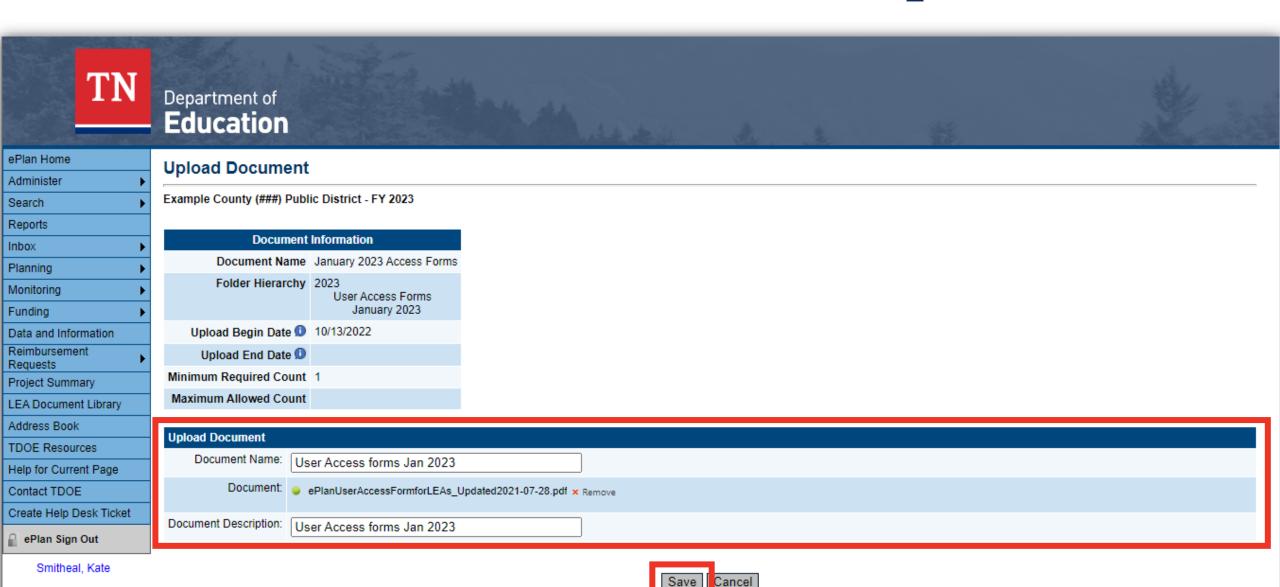


Smitheal, Kate

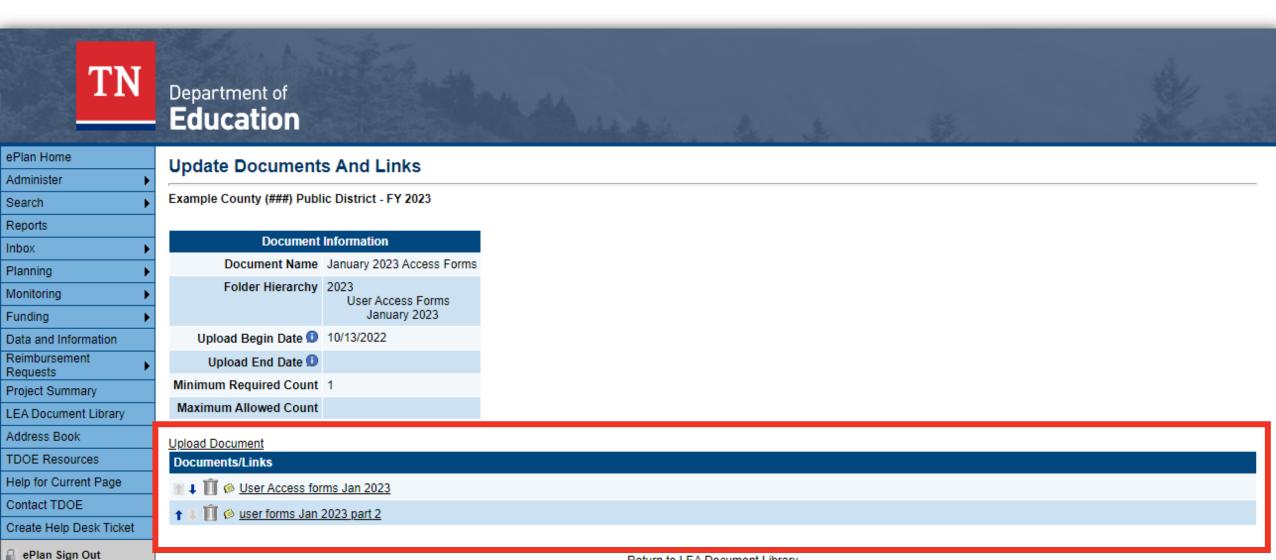
Save Cancel

## **Enter Document Name and Description**

Production



## **Upload Multiple Documents if Needed**



Return to LEA Document Library

## **User Administration**





#### **Administer > User Access**



Department of	
Education	١

Example (###) Public District

#### Associated Organizations

## **Organization Number** 2023-24 District Planning in InformTN (11/3/2022) Contact: Ginger.Leach@tn.gov

Districts will begin the annual planning process for the 2023-24 school year in the coming months. Last year, we offered an extended planning window. However, after careful consideration of how that planning window worked, the amount of data that was and was not populated at the start of the window, and the window's proximity to report card appeals, we have adjusted the opening of 2023-24 district plans to Tuesday, January 3, 2023. We will offer learning sessions to understand expectations and changes in planning components in December. The timing of these sessions is an effort to frontload learning, so you can begin planning immediately in January and to safeguard the planning window from sessions that might delay or reduce your planning time.

Other important changes to note include the manning of the 2022-22 plan to the

#### Organization Name

Example Public District

#### Reminders

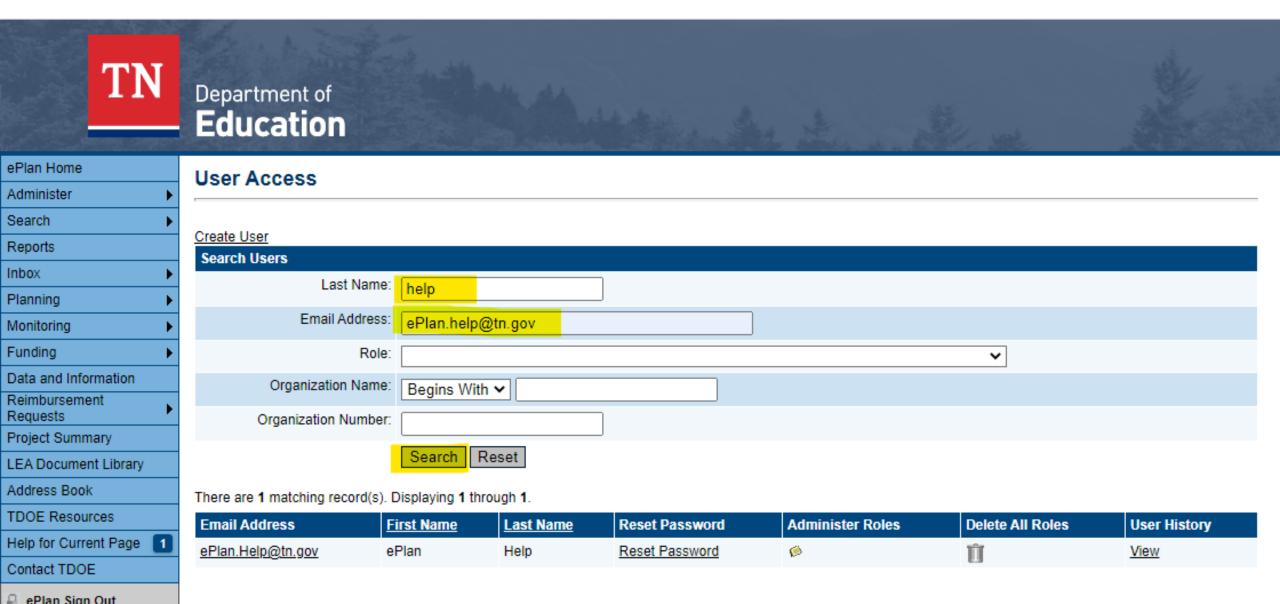
Dates to Remember (9/20/2022)

\* Dates are subject to change as things continue to update.

#### November

- 11/4: Educator Preparation Working Group Application Deadline
- 11/7: ePlan User Audit due in ePlan
- 11/8: EL October 1 2022 Count (L, W, 1, 2): Final Count (downloaded from EIS and emailed to LEAs same day or next day)
- 11/10: ESSA Addendum Public Comment Deadline
- 11/14: Comparability Form II and Form III close in ePlan
- 11/15: Documentation for MOEquity Non-Exempt LEAs due in ePlan; Last day to appeal EL October 1 2022 Count (L, W, 1, 2) (Valid appeals involve TDOE calculation/technology errors or natural disasters/similar situations. LEA errors and related EIS upload difficulties do not constitute

## Finding an Existing User



## Creating a New User

TN	Department of <b>Education</b>			
ePlan Home	Create User			
Administer <b>•</b>	Orcate Osci			
Search •				
Reports	Create User			
Inbox	Email Address:			
Planning	First Name:			
Monitoring <b>•</b>	Last Name:			
Funding				
Data and Information	Phone Number:			
Reimbursement Requests	Phone Extension:			
Project Summary	Fax Number:			
LEA Document Library				
Address Book				
TDOE Resources		Cre	ate (ancel	
Help for Current Page		·		
Contact TDOE				

## **Administering Roles**





ePlan Home Administer Search

Reports Inbox

TDOE Resources

Help for Current Page

Contact TDOE

Create Help Desk Ticket

ePlan Sign Out

Administer Roles

Return to User Access

Create Role

Roles						
Email Address	Organization	Role	Delete			
ePlan.Help@tn.gov	Example Public District (###)	LEA Plan Data Entry	Û			
ePlan.Help@tn.gov	Example Public District (###)	LEA Data View	Û			

Return to User Access

## **Administering Roles**

#### **Administer Roles**

Return to User Access

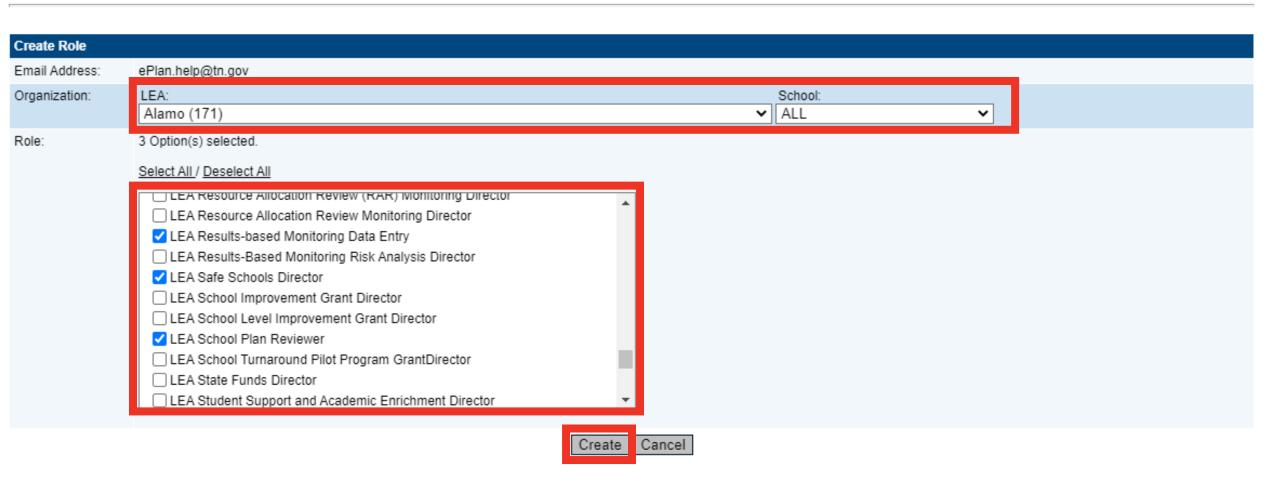
Create Role

Roles						
Email Address	Organization	Role	Delete			
ePlan.Help@tn.gov	Example Public District (###)	LEA Plan Data Entry	Û			
ePlan.Help@tn.gov	Example Public District (###)	LEA Data View	Û			

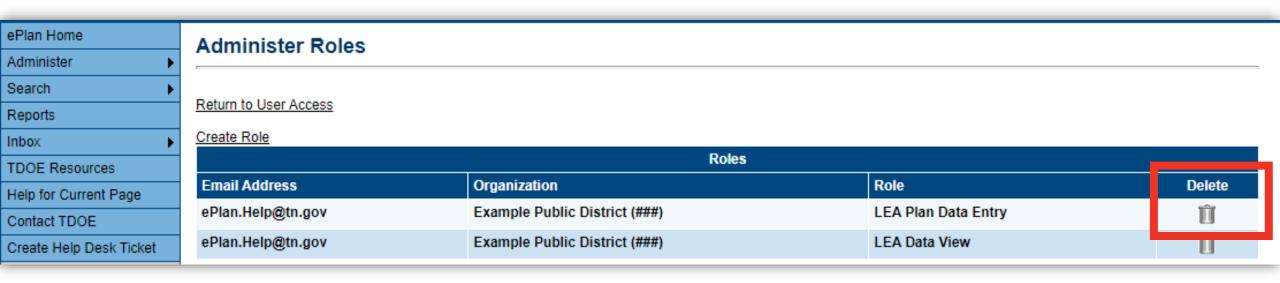
Return to User Access

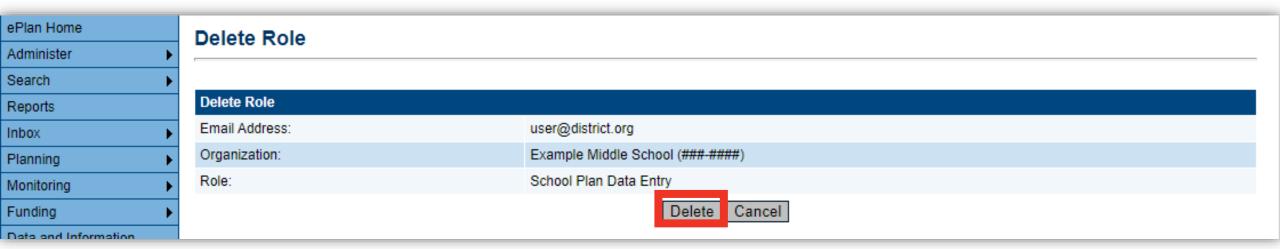
## **Creating Roles**

#### **Create Role**



## **Deleting Individual Roles**





## Roles that cannot be deleted by an LEA Admin



Administer Roles

Return to User Access

Create Role

Roles						
Email Address	Organization	Role	Delete			
any@user.com	Any LEA (Any #)	LEA Authorized Representative	0			
any@user.com	Any LEA (Any #)	LEA Fiscal Representative	Ø			
any@user.com	Any LEA (Any #)	LEA Fiscal Update	0			
any@user.com	Any LEA (Any #)	User Access Administrator	Ø			

Return to User Access

ePlan Home
Administer
Search
Inbox
Planning
Monitoring
Funding
Data and Information
Reimbursement Requests
Project Summary
Address Book
TDOE Resources
Help for Current Page

Contact TDOE

ePlan Sign Out

## **Deleting All Roles**



## TN Department of Education

#### **Delete All Roles**

The following Roles will be deleted for USER NAME (user@district.org)

Roles						
Organization Name	Organization Number	Role				
District	###	School Plan Data Entry				
District	###	School Plan Reviewer				
	Delete All Cancel					

# ePlan Home Administer Search Reports Inbox TDOE Resources Help for Current Page Contact TDOE Create Help Desk Ticket

ePlan Sign Out

Hole oBloc

# **Updating Contact Information and Passwords**



## **Updating Contact Information**

kate.smitheal@tn.gov

Kate

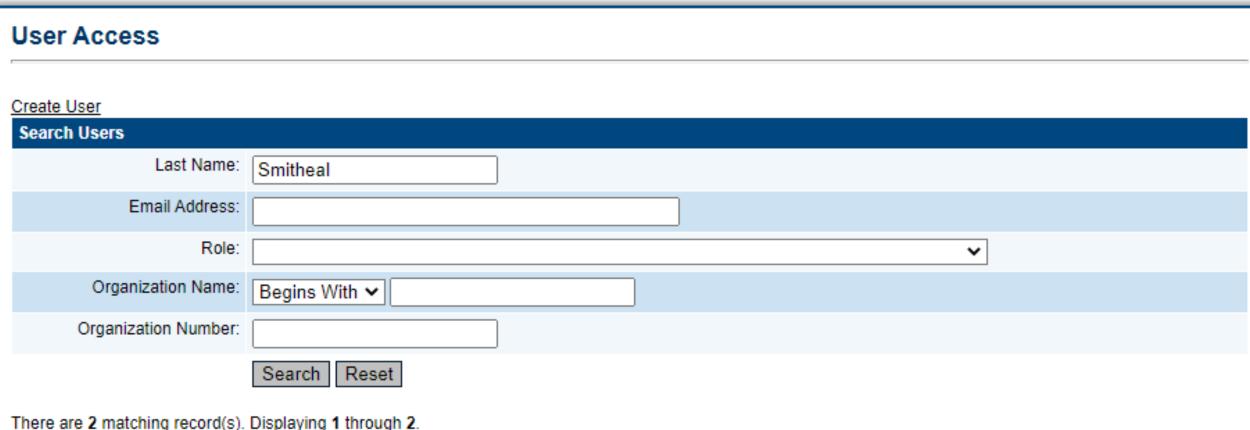
Smitheal

User Access								
Create User								
Search Users								
Last Nar	ne: Smithe	al						
Email Addre	ess:							
R	ole:				•	•		
Organization Nar	me: Begins	With 🕶						
Organization Numb	oer:							
	Search	Reset						
There are 2 matching record	d(s). Displayin	g 1 through 2.						
Email Address	First Name	<u>Last Name</u>	Reset Password	Account Locked	Administer Roles	Delete All Roles	User History	
Kate.J.Smitheal@tn.gov	Kate	Smitheal	Reset Password		Ø	Ĥ	<u>View</u>	

View

Password Set in TDOE Orion

## **Resetting Passwords**



There are 2 matching record(s). Displaying 1 through 2.

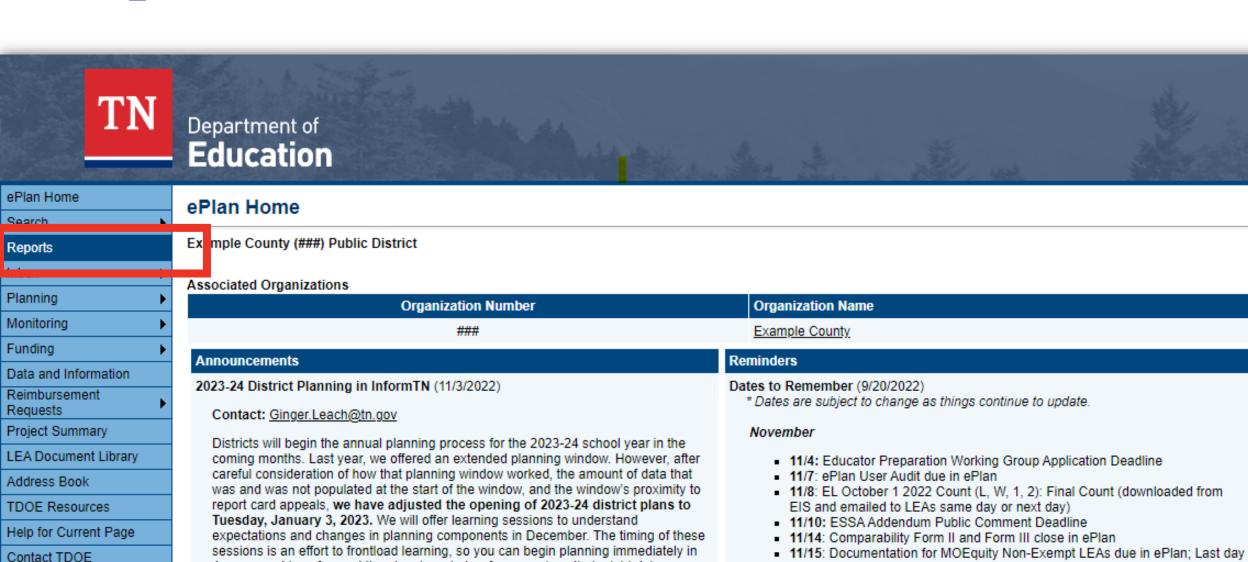
Email Address	<u>First Name</u>	<u>Last Name</u>	Reset Password	Account Locked	Administer Roles	Delete All Roles	User History
Kate.J.Smitheal@tn.gov	Kate	Smitheal	Reset Password		Ø	Û	<u>View</u>
kate.smitheal@tn.gov	Kate	Smitheal	Password Set in TDOE Orion		Ø	Û	<u>View</u>

## User Access Roles Report



#### Reports

ePlan Sign Out



to appeal EL October 1 2022 Count (L, W, 1, 2) (Valid appeals involve TDOE

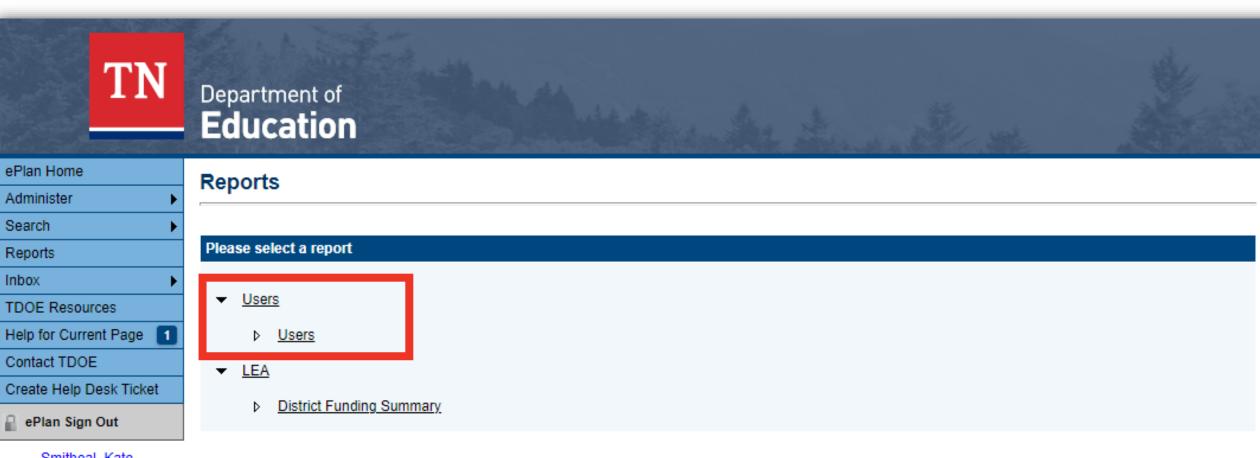
and related EIS upload difficulties do not constitute grounds for an appeal.)

calculation/technology errors or natural disasters/similar situations. LEA errors

January and to safeguard the planning window from sessions that might delay or

reduce your planning time.

#### **Users Report**

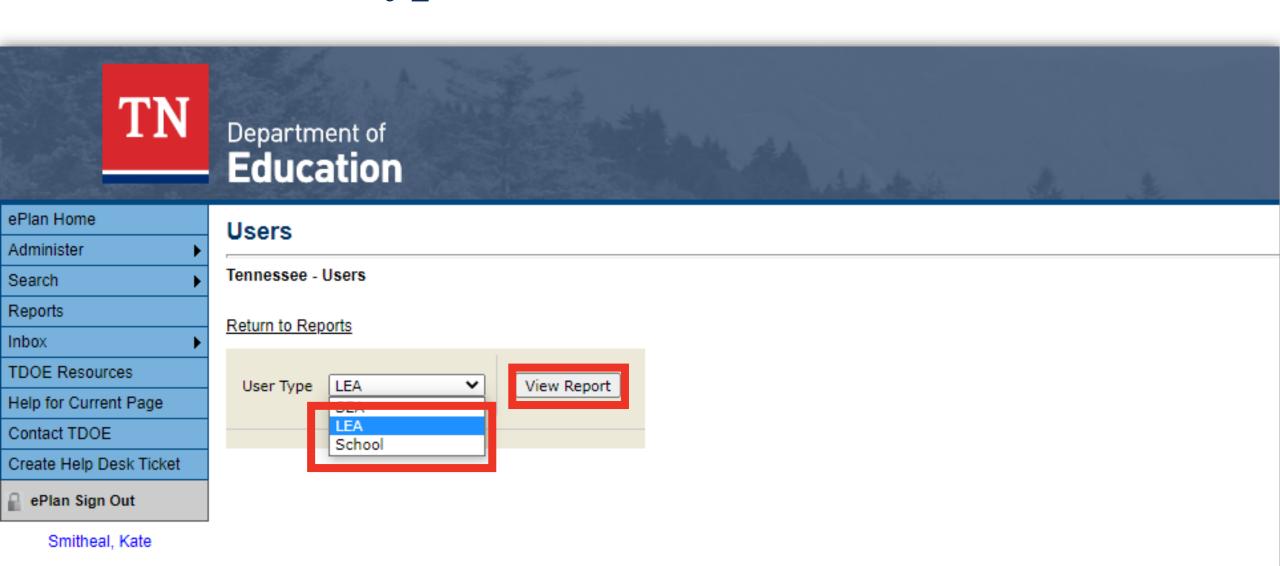


Smitheal, Kate

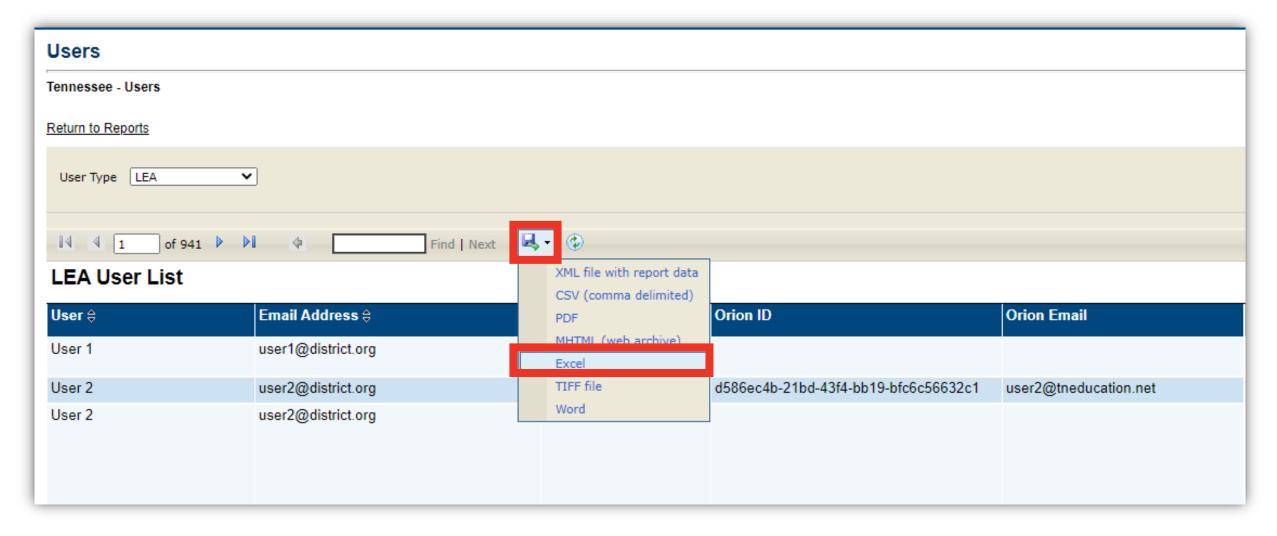
Production Session Timeout 00:28:51

## **Select User Type**

Production Session Timeout



## Download the Report as an Excel File



## **User Report Details**

User	User's first and last name: users with multiple roles will appear multiple times
Email Address	User's email address
Authentication Mode	ePlan or Orion. Individual users or the LEA User Access Administrator can make updates to contact information for users authenticated in ePlan. DT Support must make changes for Orion accounts.
Orion ID	Code that allows the system to connect with Orion Single Sign On. This can be ignored.
Orion Email	For users authenticated in Orion, this is the Single Sign On Account email address.
Phone	User's phone number
Ext.	User's phone extension
Org Code	The LEA number
Organization	The LEA name
Org Type	LEAs are coded as Public Districts, State Agencies, or State Special Schools.
Role	The user access role assigned to the user
Date Added	When the role was added
Added By	The User Access Administrator who added the role

## Reminders and Resources



#### **Useful Resources**

#### User Access Forms

linked on the ePlan Homepage and in TDOE Resources



## **Technical Guide**

and other resources are linked in TDOE Resources



#### ePlan Help Team

ePlan.Help@tn.gov



#### ePlan Office Hours

Tuesdays 11 a.m. CT | 12 p.m. ET

MS Teams link on ePlan Homepage





#### Reminders

- Ensure that <u>only authorized users</u> can access LEA information.
- Obtain forms with signatures <u>before</u> adding/deleting roles.
- At least monthly, upload user access forms to the LEA Document Library.



#### Fraud, Waste or Abuse

Citizens and agencies are encouraged to report fraud, waste, or abuse in State and Local government.

NOTICE: This agency is a recipient of taxpayer funding. If you observe an agency director or employee engaging in any activity which you consider to be illegal, improper or wasteful, please call the state Comptroller's toll-free Hotline:

1-800-232-5454

Notifications can also be submitted electronically at:

http://www.comptroller.tn.gov/hotline

