CCEIS Monitoring Quick Guide for ePlan
User Requirements: LEA-Level

User Access

Users must have the following roles to access the CCEIS monitoring instrument:
- Site-level users must be assigned the **CCEIS Director** role to add information to the instrument and change the status to *Director Draft Completed*.
- The Director of Schools must have the **LEA Authorized Representative** role to change the status of the instrument to *Returned* or *Approved*.

Navigating to the CCEIS Monitoring Instrument
- For best results, open ePlan.tn.gov in a Google Chrome browser window. Other browsers (e.g., Safari, Mozilla Firefox, Internet Explorer) can interfere with the ePlan platform's functionality.
- Once in ePlan, navigate to the CCEIS instrument by logging in and then select **Monitoring > Monitoring Instruments** from the left menu options.
- On the **Monitoring Instruments** page, select the current fiscal year (2023), and then **CCEIS-LEA.**

Sections Page and Starting the Draft

The CCEIS instrument loads to the _Sections_ page. From this page, users see the status of the instrument and a list of sections in the instrument. To begin working on the CCEIS instrument, the CCEIS Director must change the status from **Not Started** to **Draft Started**. To make this change, click **Draft Started** and then confirm.

Completing the Instrument

Review the **Introduction and Overview** and **Instructions and Reference** sections for information pertaining to the completion of the monitoring instrument.
- Select **CCEIS-LEA**
  Note: Identified LEAs are required to complete sections for both CCEIS and CCEIS-ARP.
- **Required Evidence** includes a statement(s) of expenditures which may vary depending on how funds were expended. This will include but is not limited to invoices, purchase orders, PARS, training agendas, and sign-in sheets.
- **The Agree/Disagree** questions require a response from the drop-down menu. Users must provide an explanation if the response is "disagree."
- **Fiscal Information** will be entered by the LEA for each applicable year and will include both the amount budgeted and carryover funds if applicable.
- **The General Information** area requires the user to either answer from the drop-down menu or provide a narrative and/or numerical response for each area.
- **Professional Development, Materials and Equipment, or Personnel** requires responses in one or more applicable areas based on the expenditure of funds and upload(s) of all required accompanying documentation (see section notes).
- **Data and Results** requires narratives and data, as appropriate, for each response.

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1 | February 2023

- *NOTE: CCEIS requires districts to report data on students served by these funds for 2 subsequent years after identification*

Assurances

Review the assurances and agree before submitting the instrument.

Validations

When the monitoring instrument is complete, click the ***Messages*** link on the <u>*Sections*</u> page in the column labeled **Validation.** Items marked **Warning** are validations that users <u>*are not required*</u> to address prior to submitting the instrument. Items marked **Error** are incorrect and <u>*must be addressed*</u> before submitting the instrument.

How to Submit the Instrument

When all validation errors have been addressed, the ***CCEIS Director*** must return to the <u>*Sections*</u> page of the instrument to change the status to ***Director Draft Completed***. Once the IDEA Director chooses the status, they must press confirm before the status updates. The ***LEA Authorized Representative*** (i.e., the Director of Schools) then finalizes and submits the instrument to the department.

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2 | February 2023