CEIS 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 ***CEIS 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 CEIS 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 ***CEIS-LEA.***

Sections Page and Starting the Draft

The CEIS instrument loads to the <u>Sections</u> page. From this page, users see the status of the instrument and a list of sections in the instrument. To begin working on the CEIS instrument, the CEIS 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 ***CEIS-LEA***
  Note: Districts are only required to respond to applicable years included in the 3-year monitoring cycle.
- ***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.
  - Please remember that CEIS monitoring is part of a 3-year cycle. Students served with CEIS funds must be tracked for the remaining two years of the cycle.
- ***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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Assurances

Review the assurances and agree before submitting the instrument.

Validations

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

How to Submit the Instrument

When all validation errors have been addressed, the ***CEIS Director*** must return to the *Sections* page of the instrument to change the status to ***Director Draft Completed***. Once the CEIS 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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