ePlan 101 for Program Directors

Melissa Brown
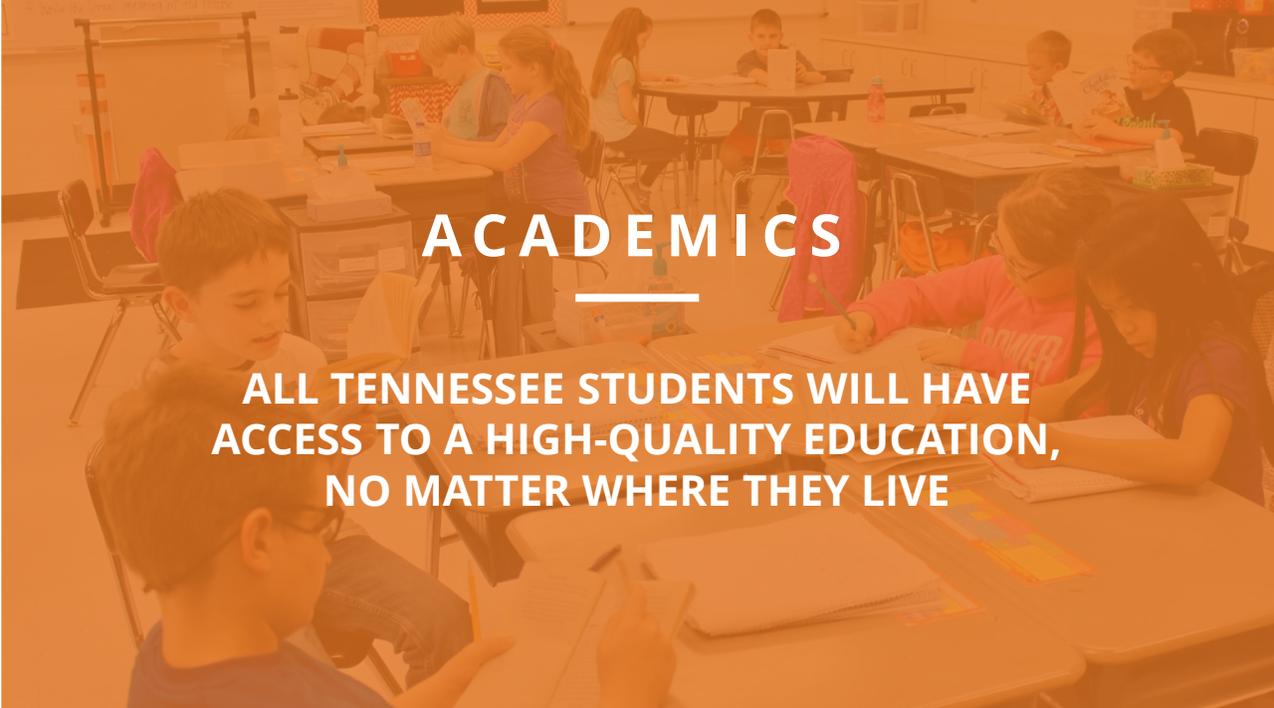
Director of Operations and ePlan

Division of Federal Programs and Oversight
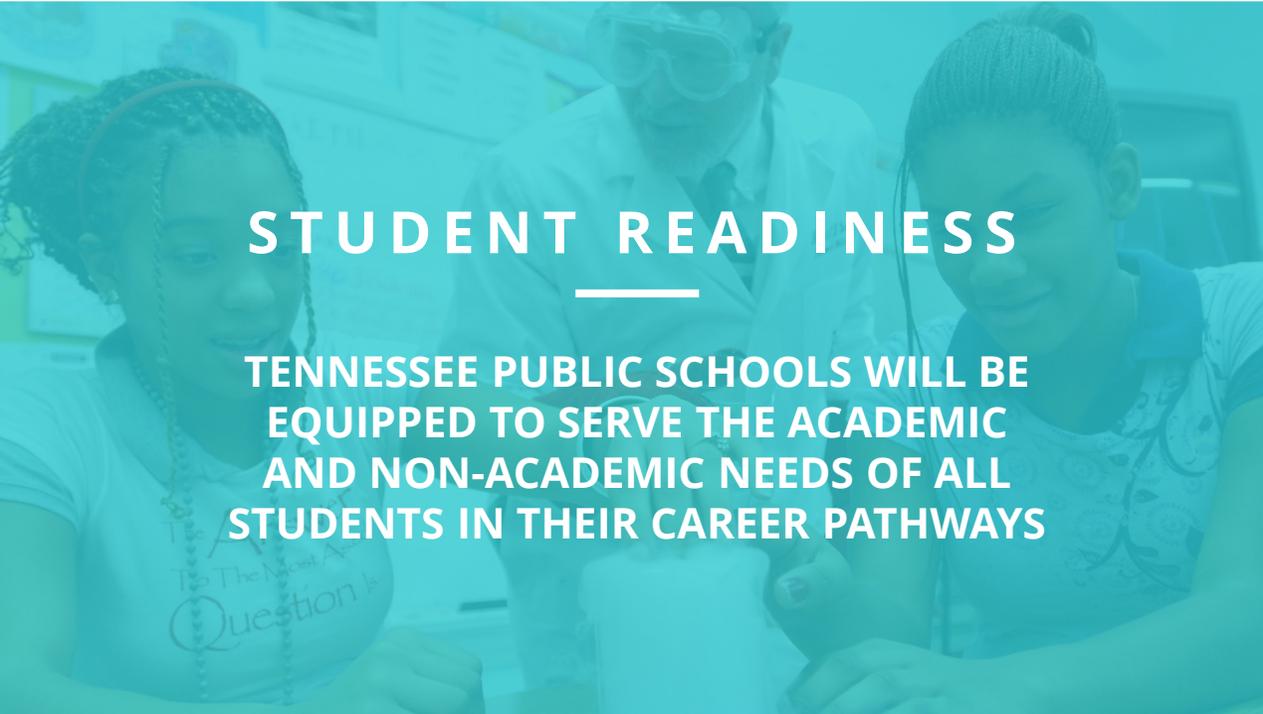
© Tennessee Department of Education

BEST FOR ALL
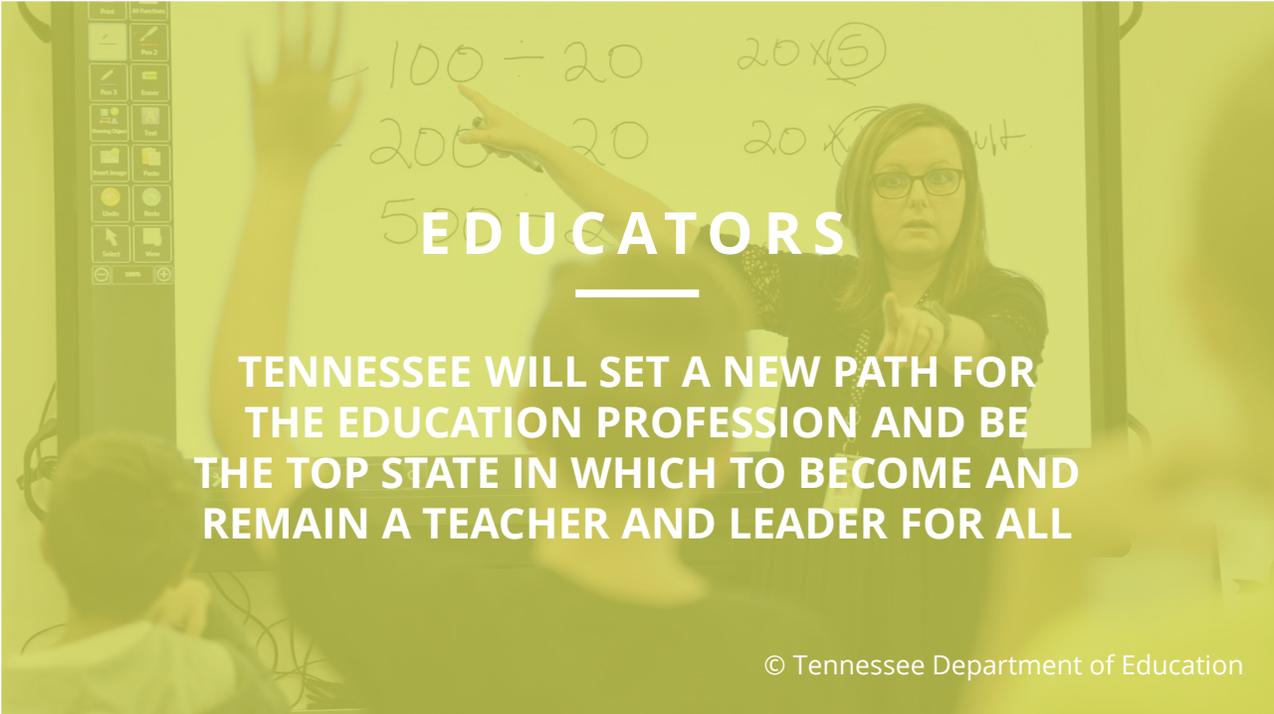We will set all students on a path to success.

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

EDUCATORS

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
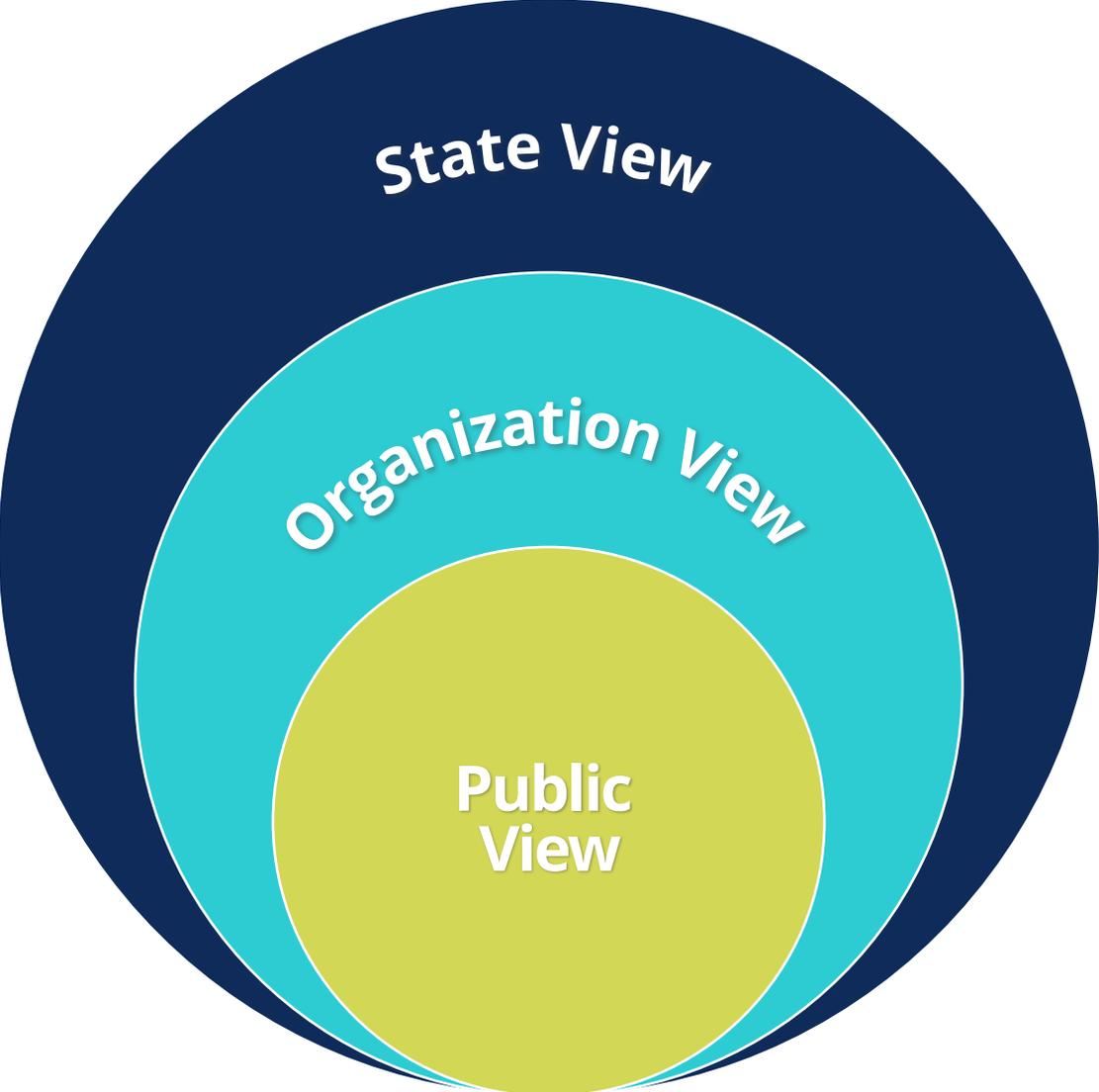
Agenda

- Public Access
  - User Access
  - Technical Resources
  - Public Home Page
- Organization Access
  - How to Find Components & Revision Details
  - Workflow
  - Print PDFs
  - Inbox
  - Reports
  - Address Book
  - Reimbursement Requests
- Closing

Public Access

Who knew the public can access ePlan?

Different ePlan for Different Purposes

State View

Organization View

Public View

User Access Basics

1. Users need the correct **Role** to add information to ePlan or access information in the Organization or State Views.

2. Users submit a **User Access Form** to request a user account and specific roles.

3. New roles are added through the User Access Form or the by the department grandfathering new roles to existing users.

4. Yearly **ePlan User Access Audit** cleans up unneeded user roles.

User Access Form

- Select listed roles, or insert specific role names
- Click the **blue links** for more information including a list of all available roles.
- Consider **Grouping Roles** – e.g., All IDEA Director or ESEA Director roles
- Copy roles from or Replace existing users
- Digital signatures acceptable

Technical Resources

- Available in **Public View**

- ePlan's TDOE Resources

Public ePlan Home Layout

ePlan Home

A.

Announcements

FY24 Funding Application Open (7/26/2023)
The FY24 Funding Application is open in ePlan. Applications must be completed by **Aug. 31, 2023.**

Data and Information Tool due Sept. 1 (7/26/2023)
The FY23 Data and Information tool is due **Sept. 1, 2023.**

Reminders

1. **Welcome to ePlan** (12/1/2022)

ePlan is Tennessee's online platform that allows schools and districts the ability to access district and school plans, funding applications, and monitoring instruments.

ePlan user access forms can be found in the User Access folder on the TDOE Resources page or select one of the following forms:

- LEA (Public Districts, State Special Schools, and State Agencies)
- Charter Schools
- Community Based Organizations
- Non-Public Schools
- User Access Administrators

Click here to access the ePlan User Manual.

2. **Dates to Remember** (9/20/2022)

* Dates are subject to change.

August 21-25: Federal Programs Institute
August 31: T-Mobile Tech for TN Students Application Deadline

See the latest Federal Programs Updates newsletter.
See the latest edition of the Commissioner's Update for Directors.

3. **TDOE Directory** (9/19/2022)
Click here to open the TDOE Directory.

4. **InformTN Assistance** (9/30/2020)

Here are some ways to get technical help for InformTN.

1. The Technical User Guide contains information including how to access InformTN on page 5.
2. Click the question mark in the upper right corner to open the Help section which contains the Technical User Guide.
3. Email inform-tn-help@sip.eldarion.com for other technical support questions.

5. **Single Sign On (SSO) Account Set-up and Password Assistance** (9/29/2020)

Individuals that have a locked SSO account should send an email to DT.Support@tn.gov requesting a new Welcome email.

- Click here for instructions to reset your SSO password.

To obtain an SSO account, please contact your local District EIS Supervisor for assistance.

- Click here for the list of EIS Supervisors.

For further assistance with your SSO account, including requests to have the ePlan tile added, please contact our **District Technology team** at DT.Support@tn.gov or (800) 495-4154.

6. **Office Hours** (12/28/2019)

ePlan Office Hours for LEA Users
Tuesdays at 11 a.m. CT | 12 p.m. ET.
Dates and login information for FPO office hours can be found here.

Organization Access

Where the real fun happens!

Signing in to ePlan
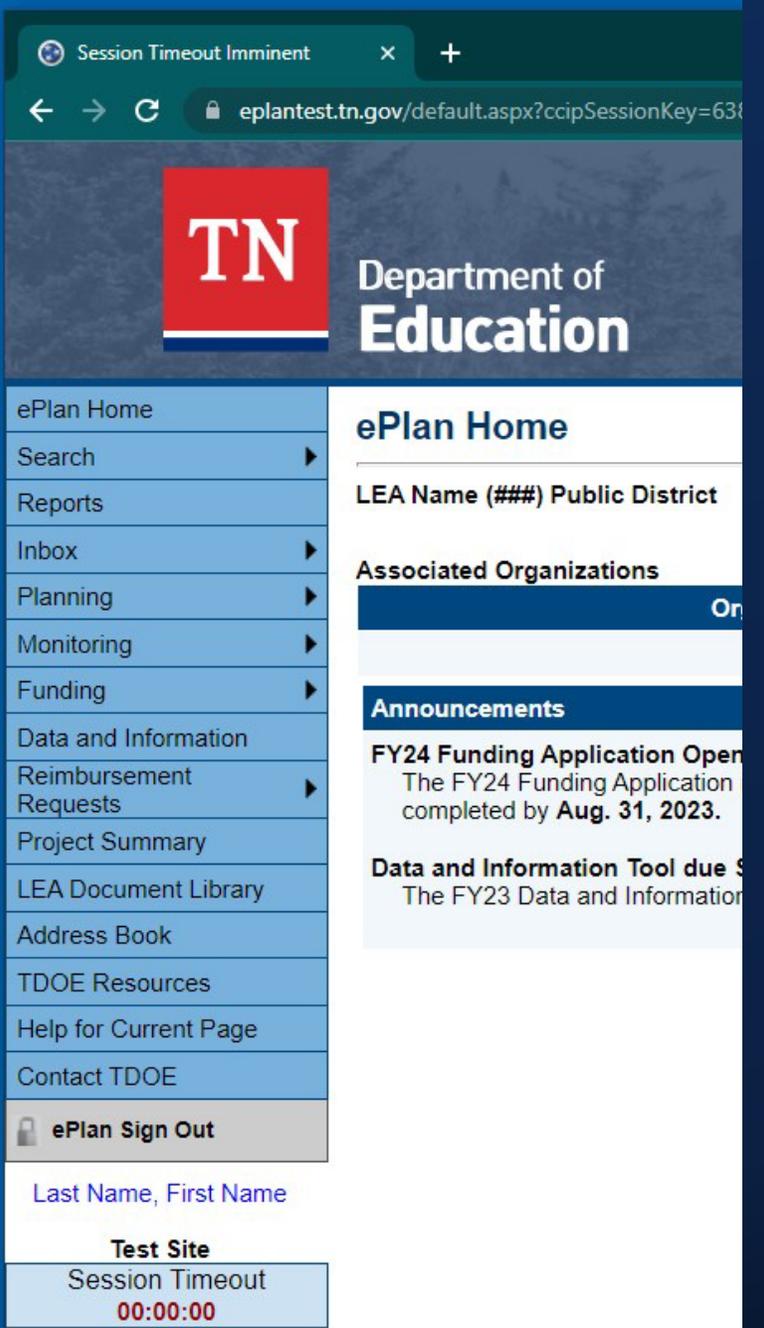
How to Find Components

- After Signing in to ePlan, use the **Left Navigation Menu** to navigate to your organization's ePlan components.
- View
  - Planning
  - Monitoring
  - Funding
  - Data and Information
  - Reimbursement Requests

Component Details

Funding Applications

LEA Name (###) Public District - FY 2024

[2024 ▾] [All Active Applications ▾]

Entitlement Funding Application	Due Date	Revision	Status	Status Date
Consolidated	5/12/2023 11:59:00 PM	0	LEA Authorized Representative Approved	7/17/2023
CTE Perkins Basic		0	TDOE CTE Perkins Basic Reviewer Approved	7/18/2023
Public School Security Grant		0	Not Started	7/10/2023
State Funds		0	Draft Started	6/13/2023
TN ALL Corps		0	Not Started	7/21/2023

Competitive Funding Application	Revision	Status	Status Date
Access for All Learning Network (AALN K-8)	0	Not Started	4/18/2023
ARP Homeless System Navigator	0	Not Started	7/21/2023
CTE Perkins Reserve	0	Not Started	4/5/2023
IDEA Partnership for Systemic Change (K-12)	0	Not Started	4/18/2023
Lottery for Education: Afterschool Programs (LEAPS)	0	Not Started	3/2/2023
Model Preschool Districts	1	Revision Started	6/6/2023
Voluntary Pre-K	0	TDOE Voluntary Pre-K Director Returned Not Approved	5/30/2023

Change Component Year or Type

- View by **Fiscal Year**
- View by **Application Type**

Track Changes – Change Log & Revision Details

View Change Log

Description (View Sections Only View All Pages)	Revision	Validation
All	Details	Messages

Revision Details

LEA Name (###) Public District - FY 2023 - Consolidated - Rev 1

Return to Sections Page

Allocations

Allocations
Review   The Title I, Part A Original amount changed from $1,759,078.65 to $1,768,418.81.

Title I, Part A

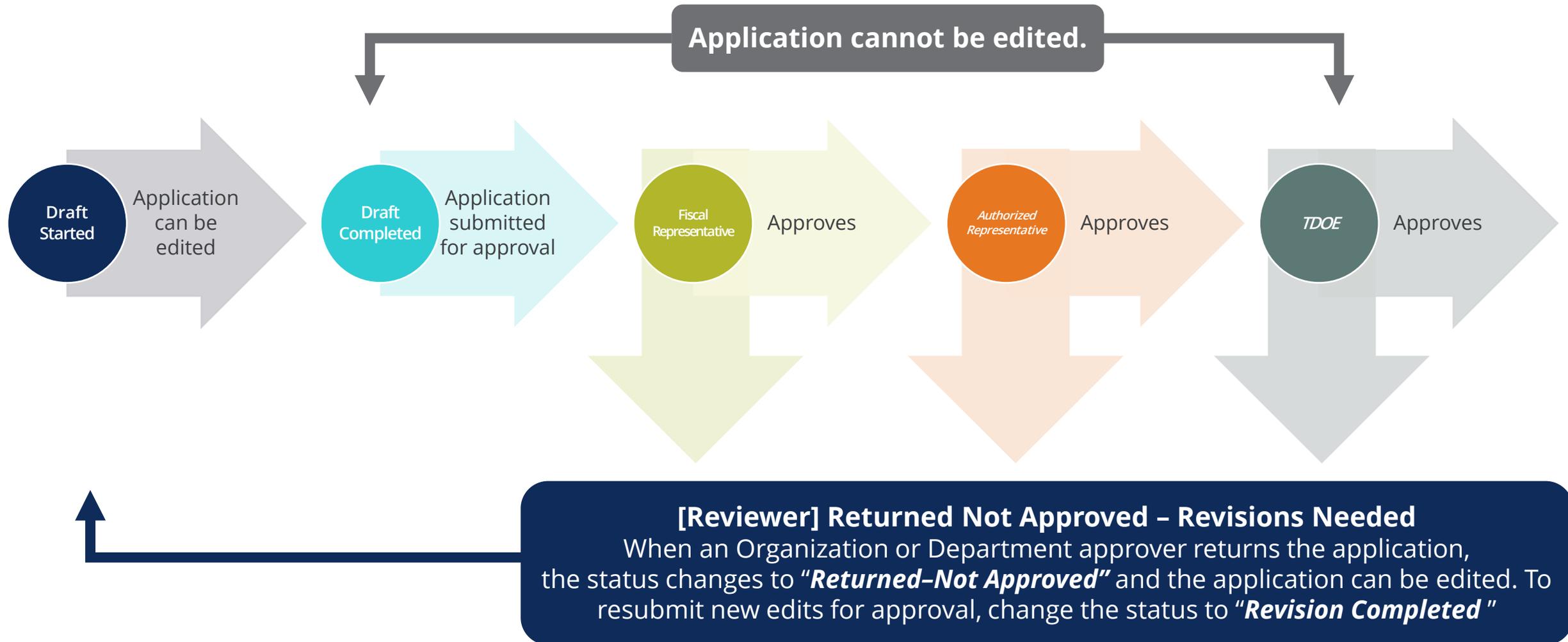| Budget |
|---|
| Review   UPDATED BUDGET DETAIL
Updated Cost from $189,342.96 to $198,683.12

Line Item Number: 599 - Other Charges
Account Number: 72130 - Other Student Support
Location: Wilson County (950)
Optional Program Code:
Quantity: 1.00
Cost: $198,683.12
Total: $198,683.12
Description: District set aside for carryover to use in case of budget cuts for the next fiscal year to assure no cuts to staff are necessary. |

Component Workflow

▪ Below are the roles and the order of the **workflow steps** for a typical application process. Similar workflows may apply to reimbursements and reports. These roles and the workflow may vary slightly for specific programs.

ePlan Role	ePlan Function
LEA Grant Director **LEA Fiscal Representative** **LEA Authorized Representative**	Click **Draft Started** (or **Revision Started** for revisions) Respond to application questions, enter budgets
LEA Grant Director	Click **Draft Completed** (or **Revision Completed** for revisions)
LEA Fiscal Representative (CFO or treasurer)	Click **LEA Fiscal Representative Approved** (or **LEA Fiscal Representative Not Approved**) (may also request funds after TDOE approves application)
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 Funding Application Workflow

Application cannot be edited.

| Draft Started | Application can be edited | Draft Completed | Application submitted for approval | Fiscal Representative | Approves | Authorized Representative | Approves | TDOE | Approves |

[Reviewer] Returned Not Approved – Revisions Needed
When an Organization or Department approver returns the application,
the status changes to *"Returned–Not Approved"* and the application can be edited. To resubmit new edits for approval, change the status to *"Revision Completed"*

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Print and TDOE Resources

- Print one or multiple component

- Print files are available in **TDOE Resources** for 5 Days

Inbox

1. All ePlan System Notifications (Received and Sent)
2. Adjust date range to show items from **last 7 days** to **older than a year**
3. Click on underlined name to display the message

Run Reports

- Click **Reports** on the Left Navigation Menu.
  - **District Funding Summary:** Shows the LEAs current Grant Awards sorted by Days to Obligation.
  - **Users:** See all LEA User Roles.
- Reports can be **downloaded in multiple file types**, including excel or PDF.
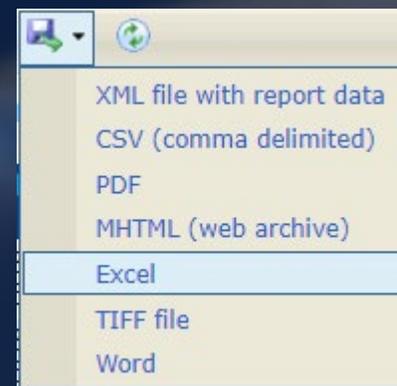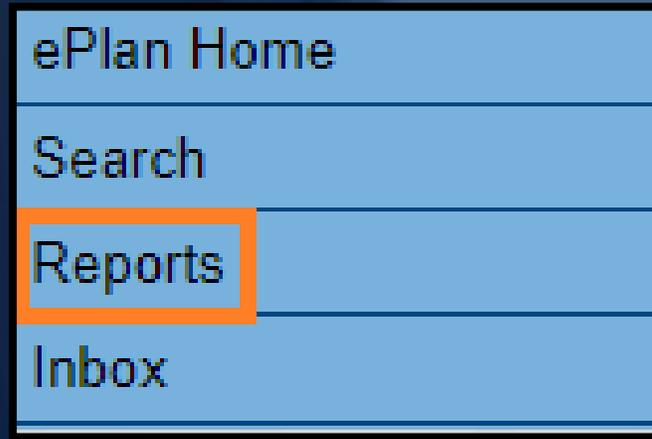
Address Book

- Access from the Left Navigation Menu
- **Contacts =/= Roles!**
  - **LEA Funding Application Contacts** are Individuals identified in the current fiscal year funding application.
    - Update in the **Funding Application.**

  - **LEA Role** lists the individuals in the LEA who are assigned specific roles.
    - Update via **User Access Form**.

Address Book

TDOE Resources

Help for Current Page

Contact TDOE

Reimbursement Requests

1. Only available after the Funding Application is **fully approved.**

2. Only **one reimbursement request at a time.**

3. Expenditures only from **approved** **budget** line items and amounts.

Reimbursement Requests Workflow

- **1. Draft Started**
  - Must be done by an ePlan user with a *Fiscal Representative* or *Update* role.
- **2. Draft Complete**
- **3. Grants Management Approved**
  - Completed by the TDOE fiscal department.
- **4. Submitted to State Accounting System**
  - Done by ePlan at night or early in the morning the day.
- **5. State Accounting System Accepted**
  - Done within a couple hours after the submission to the state accounting system.
- **6. State Accounting System Paid**
  - Final step where a voucher number is created by Edison for the payment.
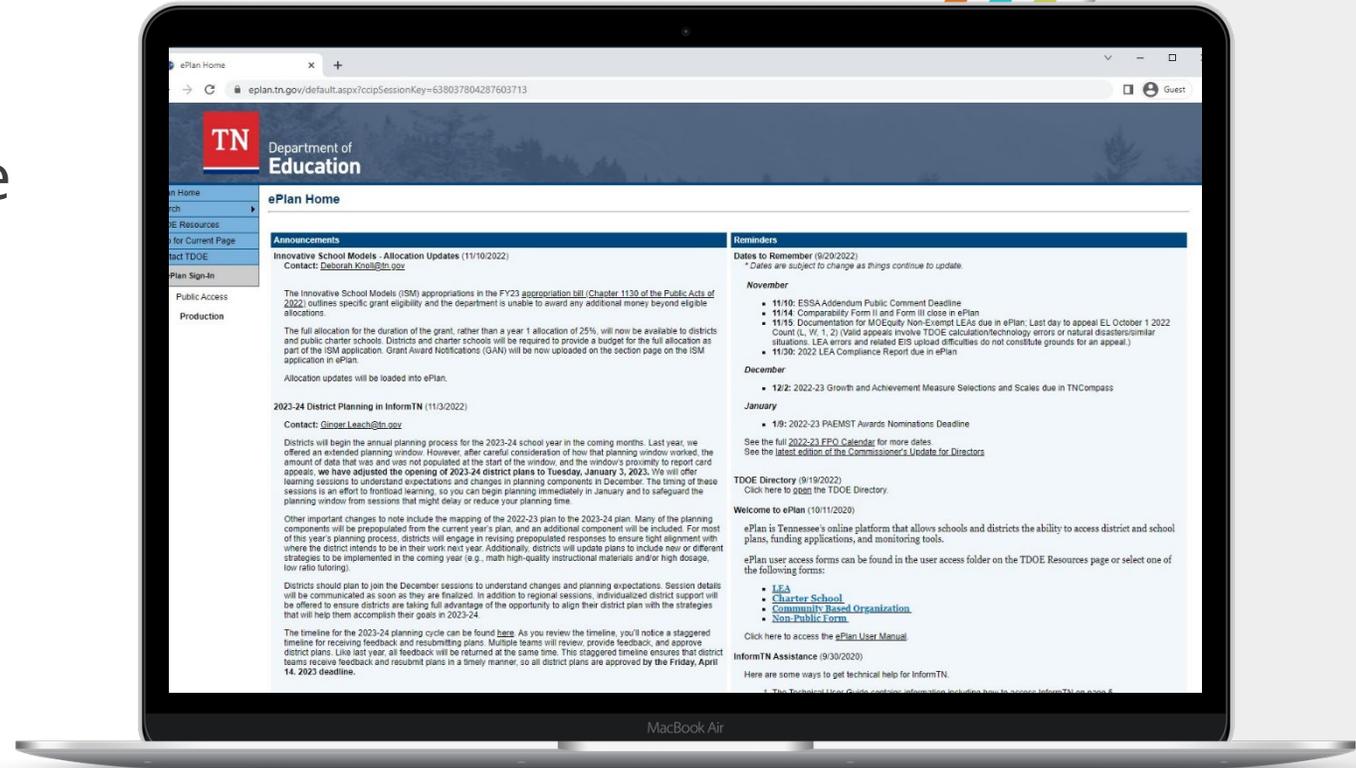 - Can take 7-9 business days

Closing

ePlan Office Hours

- Weekly on-demand ePlan support from the ePlan Help team.

- MS Teams link is available on the ePlan homepage.

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

Thank You!

Melissa Brown | Director of Operations and ePlan
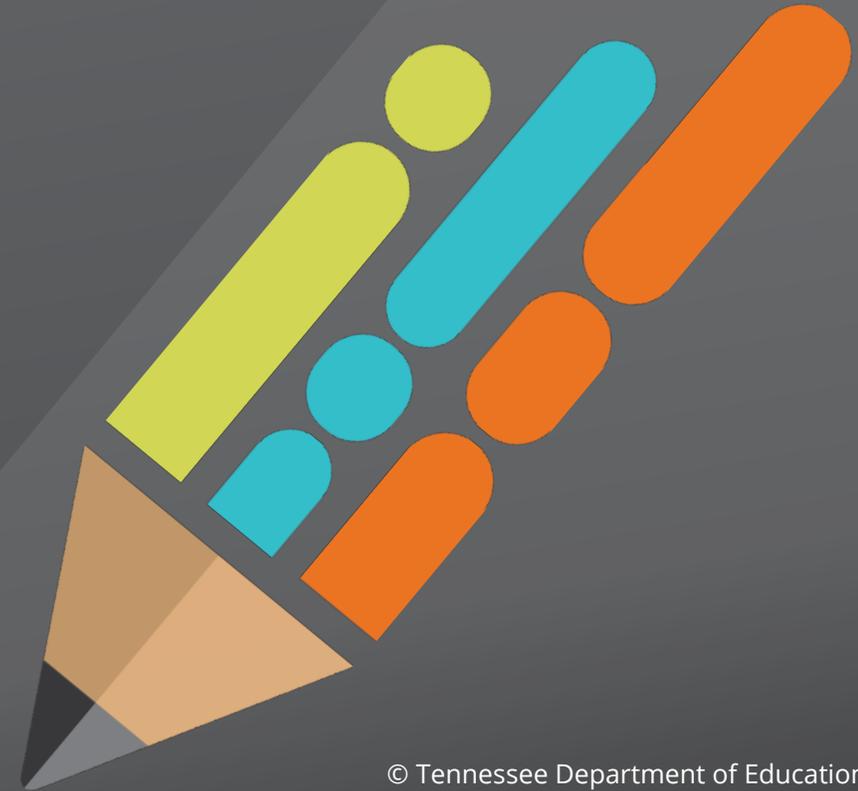Division of Federal Programs and Oversight
ePlan.Help@tn.gov

TN Department of
Education

Tuesday-Thursday
Please Share Your Feedback:

You may access the PD by navigating here:
https://stateoftennessee.formstack.com/forms/2023fpi_pd_survey

TN Department of
Education

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

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