



ePlan 101 for Program Directors

Melissa Brown

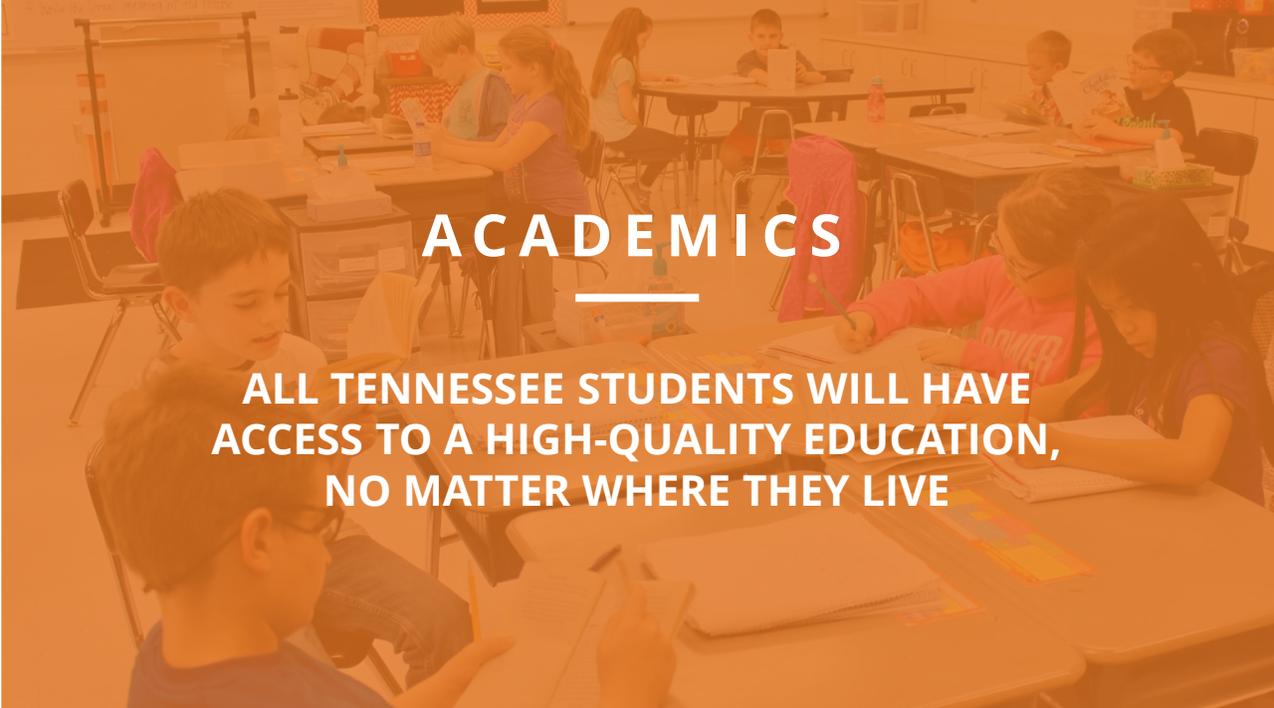
*Director of Operations and ePlan
Division of Federal Programs and Oversight*





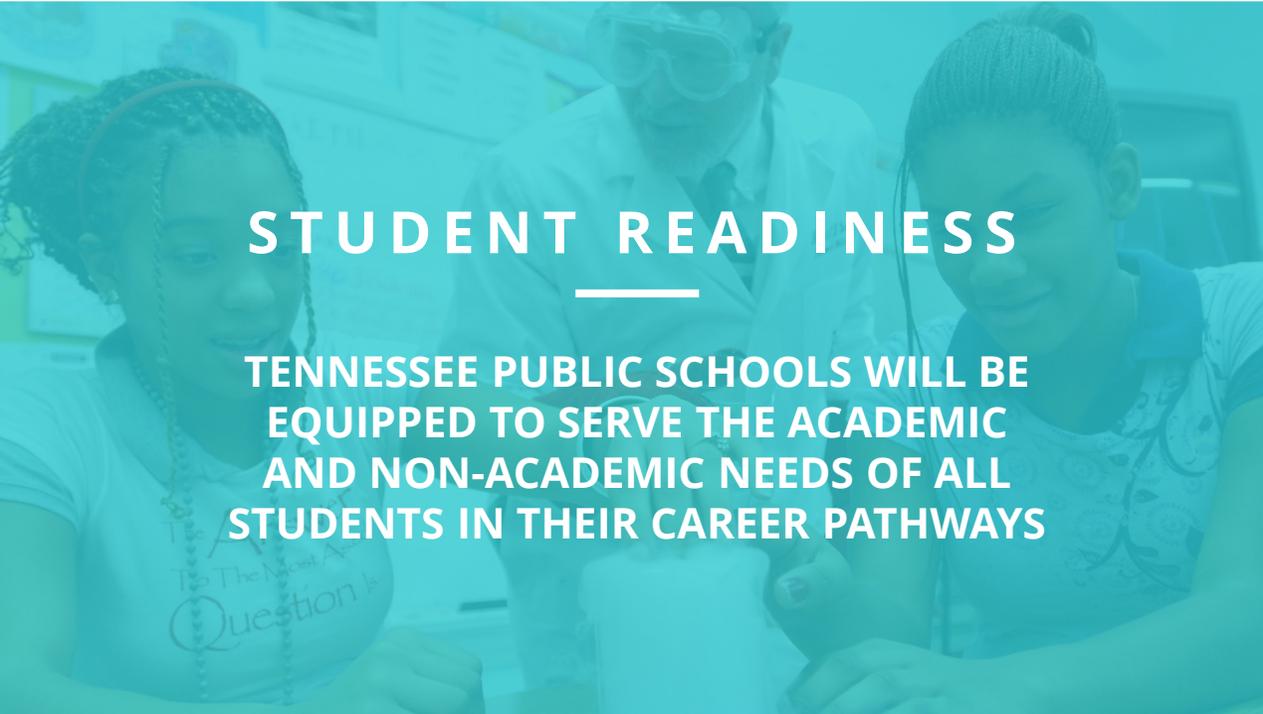
BEST FOR ALL

We will set all students on a path to success.



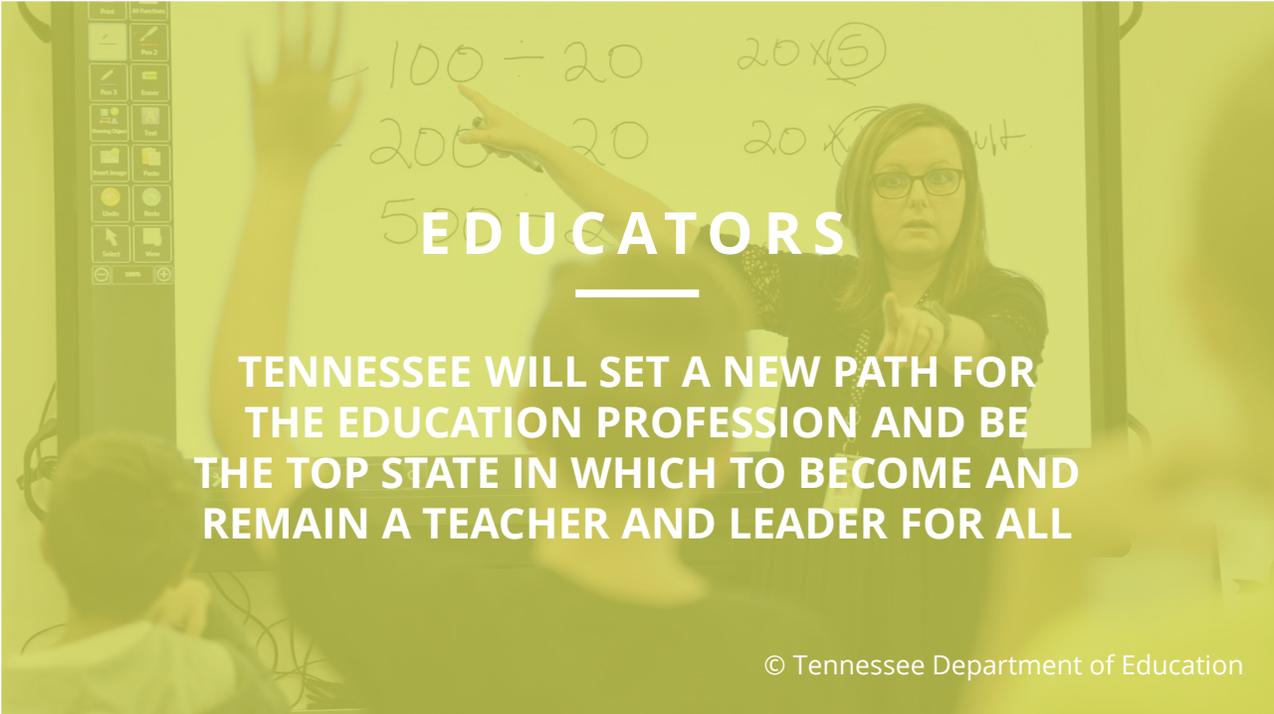
ACADEMICS

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

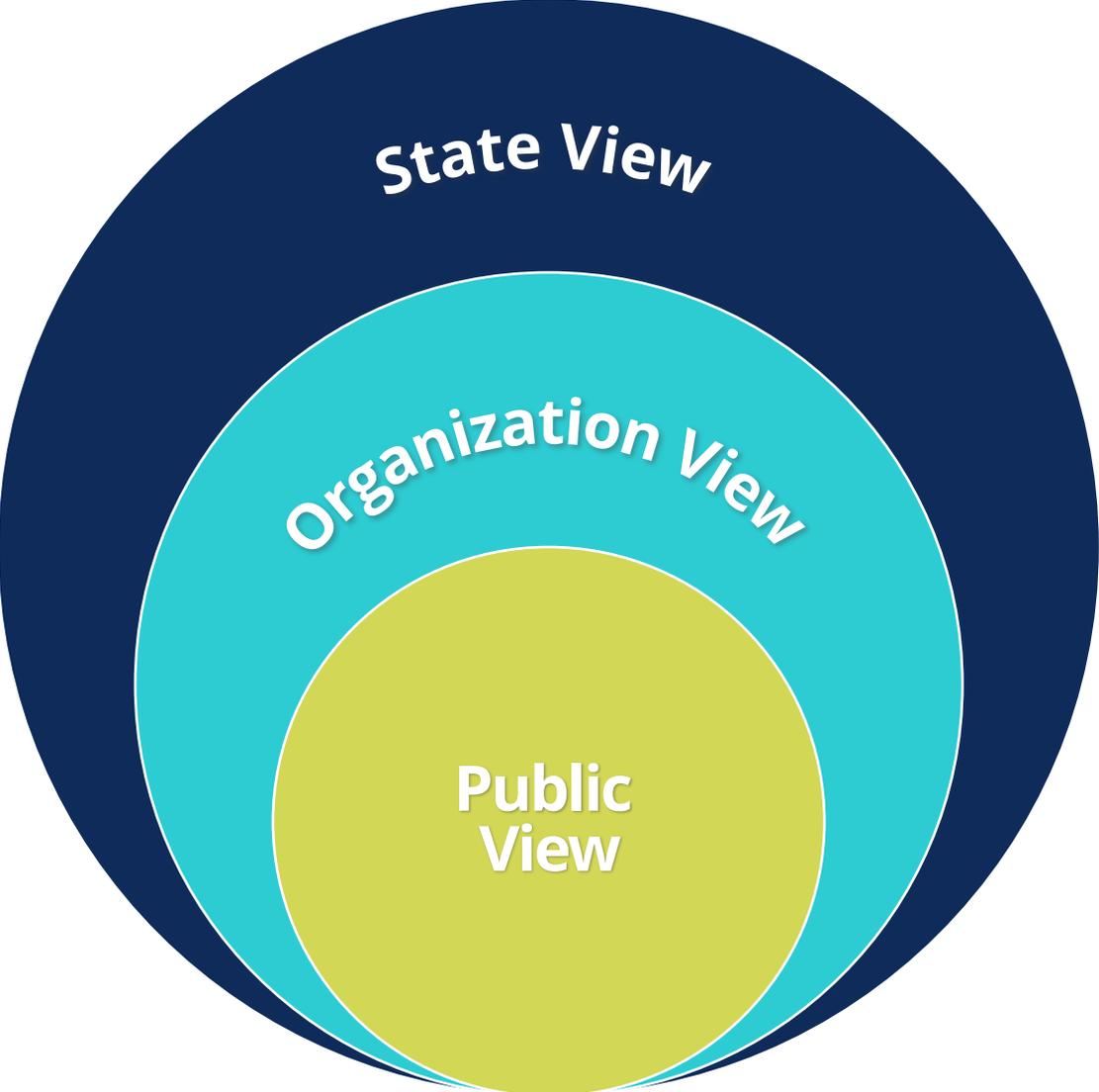
- Public Access
 - User Access
 - Technical Resources
 - Public Home Page
- Organization Access
 - How to Find Components & Revision Details
 - Workflow
 - Print PDFs
 - Inbox
 - Reports
 - Address Book
 - Reimbursement Requests
- Closing



Public Access

Who knew the public can access ePlan?

Different ePlan for Different Purposes



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

TN Department of Education
Tennessee's Electronic Planning and Grants Management System

LEA ePlan User Access Form

I. Funding Application Roles for LEAs

Instructions:

1. Indicate **new user access role(s)**; do not include existing role(s). See [ePlan User Access Roles for LEAs](#) for a complete list.
2. To remove or copy access from current/previous users, check the appropriate box and write in the previous user(s)'s full names.
3. Obtain the required signatures.
4. Submit this form to the LEA User Access Administrators to request user roles (except those marked with a star ★).
5. Alternatively, this form may be emailed to ePlan.Help@tn.gov to request the role. For user access roles marked with a star ★, email the completed form to ePlan.Help@tn.gov.

User's Name: _____ LEA Name: _____ LEA ID #: _____
Email (ePlan User ID email, add SSD Agent): _____ Phone: _____

Funding Application/Grant Director Roles	
1	
2	
3	
Monitoring Roles	
1	
2	
Data and Information Roles	
1	
2	
3	
Grouping Roles	
1	
Other Roles	
1	
2	

Fiscal & Approve Roles	
<input type="checkbox"/>	LEA Authorized Representative: final approval of any funding app. & monitoring document (Only the Director of Schools (DOS) may have this role) ★
<input type="checkbox"/>	LEA Fiscal Update* (Bookkeeper); request reimbursements from any funding app (CFD approval required for this role) ★
<input type="checkbox"/>	LEA Fiscal Representative (CFO/Finance Director); fiscal approve funding app.; Complete FER; submit state funds app.; request reimbursements from any funding app. ★
<input type="checkbox"/>	Board Chair: approve state funds app.
<input type="checkbox"/>	County/City Clerk or SSD Recorder: approve state funds app.
LEA-Level Planning Roles	
<input type="checkbox"/>	LEA Plan Data Entry: edit LEA Plan. (This role is not for editing individual school plans.)
<input type="checkbox"/>	LEA School Plan Reviewer: edit school- & LEA-approve school plan. (For LEA-level staff to review school plans)
Data View	
<input type="checkbox"/>	LEA Data View Only: view all ePlan components and upload to LEA Document Library but can't edit other ePlan components. (Allows the user to be selected as a contact in the CFA)

To replace or copy from current/previous user(s): Select the correct check box(es) and provide name(s) of previous user(s)

<input type="checkbox"/> Copy all access from the current/previous user	<input type="checkbox"/> Remove all access from current/previous user	Previous User(s): _____
<input type="checkbox"/>	<input type="checkbox"/> Remove access indicated above only	

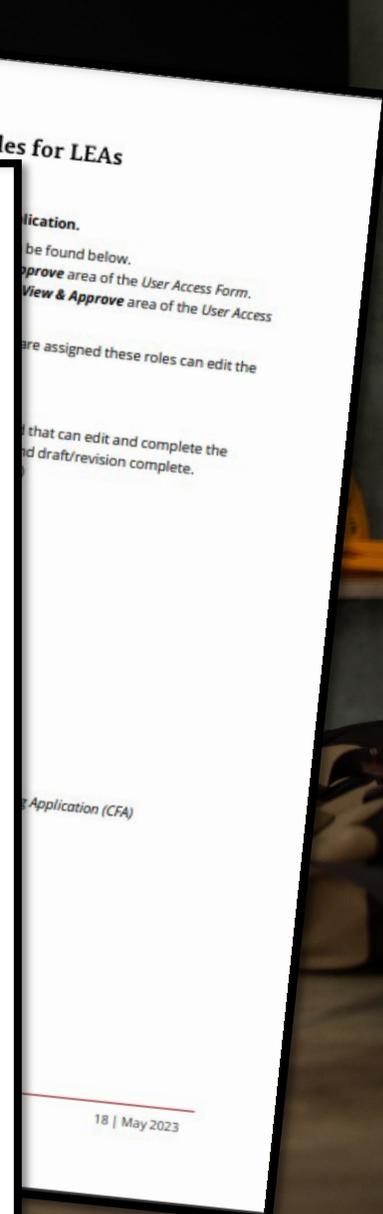
New User Signature and Date: _____ New User Title: _____
Director of Schools Signature and Date: _____ CFO Signature and Date *Required for Fiscal Update users: _____ LEA User Access Admin Initials for roles added: _____

Note: 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).

Adobe Certified Signatures are acceptable. Instructions: <https://helpx.adobe.com/acrobat/using/creating-digital-based-signatures.html>

For roles added by the LEA, LEA User Access Administrators must upload the completed forms to the LEA Document Library each month.

February 2023



Technical Resources

- Available in **Public View**
- ePlan's TDOE Resources

The screenshot shows the TN Department of Education ePlan interface. On the left is a navigation menu with links: ePlan Home, Search, TDOE Resources, Help for Current Page, Contact TDOE, and ePlan Sign-In. The main content area is titled "TDOE Resources" and features a search box with a dropdown menu for "Choose Keyword" and a text input field for "Or Enter Text". At the bottom, there are links for "Public Access" and "Production".

Below are the TDOE Resources. Expand the nodes to view the folders and documents

TDOE Resources [\[Expand All\]](#) [\[Collapse All\]](#) [\[Hide Documents\]](#)

- + 1. User Access Forms
- + 2. User Resources ePlan Help
- + 3. TDOE Support Teams (Consultants Maps)
- + 4. Department Communications (Calendar, Newsletters, Homepage messages)
- + 5. Funding Applications and Grants
- + 6. Relief Funding
- + 7. Data and Information Tools
- + Alternative Education (Alt Ed)
- + CFA Reference Documents (ESSA/IDEA Consolidated Funding Application)
- + Charter Schools
- + District & School Planning
- + Equitable Services to Non-Public Schools (CTE/ESSA/IDEA)
- + ESSA Information, Guidance, PPTs, & Webinars
- + Federal Programs Data
- + Federal Programs and Oversight (FPO)
- + Fiscal - District Technical Assistance
- + IDEA Information, Guidance, PPTs, & Webinars
- + Miscellaneous
- + Monitoring
- + Non-Traditional Educational Programs (NEP)

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**.

1.

Reminders

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 form:

- [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.](#)

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.

4.

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.

5.

Office Hours (12/28/2019)

6.

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

ePlan Home

Search ▶

TDOE Resources

Help for Current Page

Contact TDOE

 ePlan Sign-In

Public Access

Production

ePlan Sign-In

Sign-In

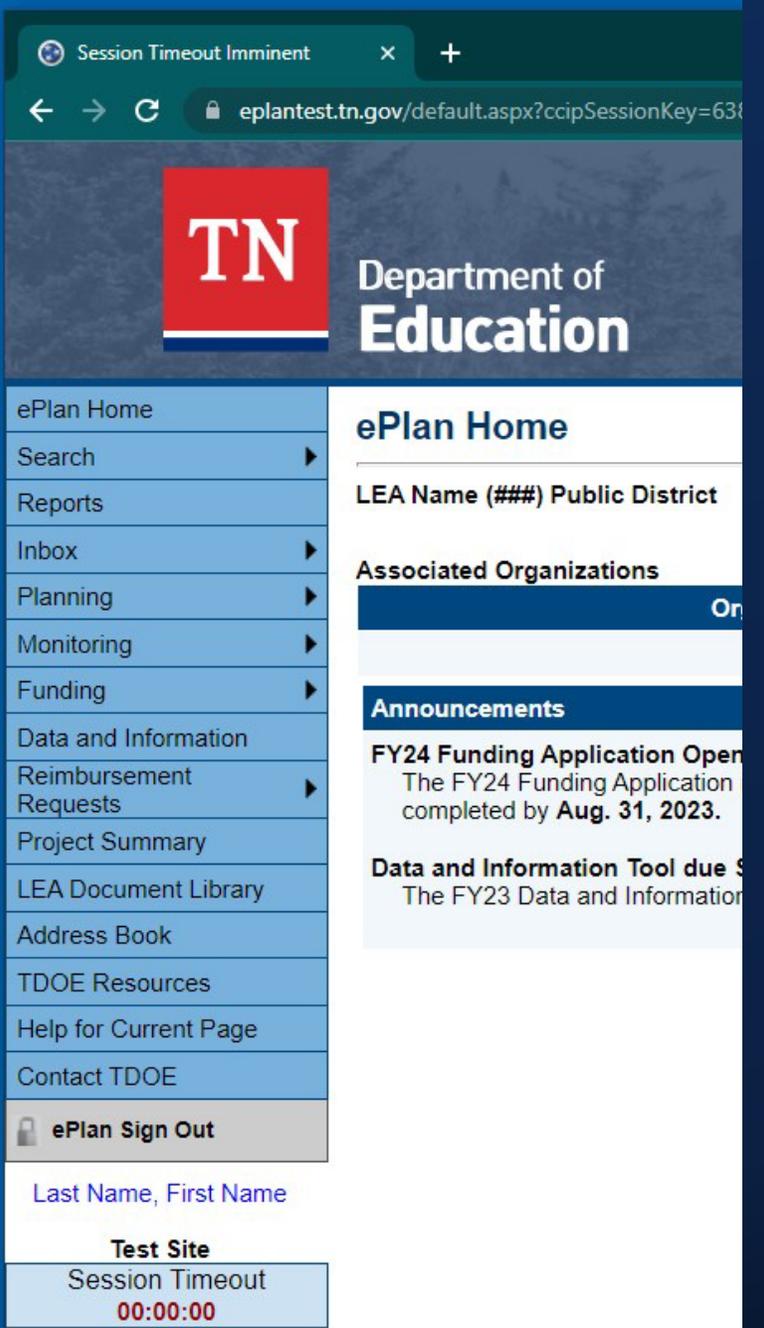
Email Address:

Password:

[Forgot your password?](#)

Or

 Sign in with TDOE Orion



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**

A screenshot of a web application interface showing a dropdown menu for selecting a fiscal year. The menu is open, displaying a list of years from 2014 to 2024. The year 2024 is currently selected and highlighted in blue. To the right of the year list, the text 'All Active Applications' is visible, indicating the current filter setting.

2024	All Active Applications
2023	ent Funding Application
2022	ated
2021	
2020	kins Basic
2019	lementation Support Grant
2018	hool Security Grant
2017	
2016	nds
2015	corps
2014	

- View by **Application Type**

A screenshot of a web application interface showing a dropdown menu for selecting an application type. The menu is open, displaying a list of application types: 'All Active Applications', 'All Approved Applications', and 'Last Approved Applications'. The 'All Active Applications' option is currently selected and highlighted in blue. To the left of the application type list, the text '2024' is visible, indicating the current filter setting.

2024	All Active Applications
	All Active Applications
	All Approved Applications
	Last Approved Applications
	Consolidated

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.

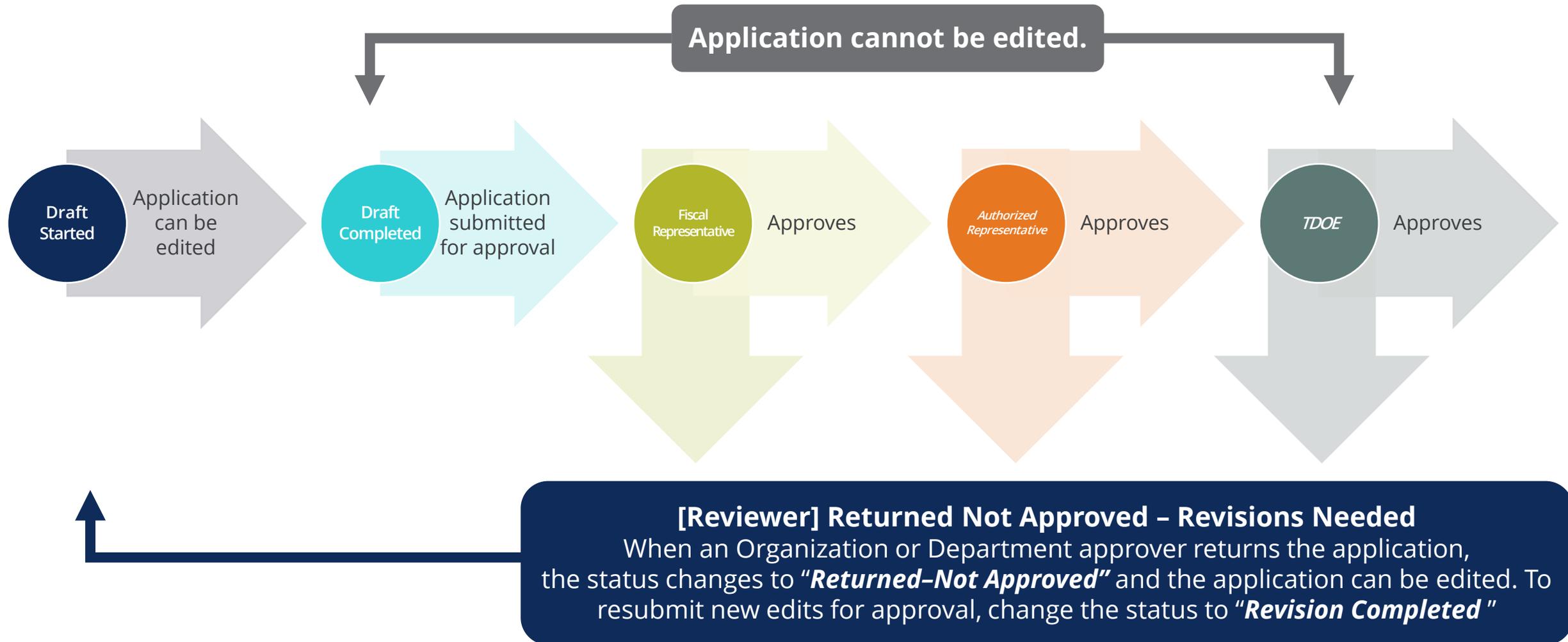
Component Workflow

- 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



Print and TDOE Resources

- Print one or multiple component

Description (View Sections Only View All Pages)	Validation	Print
All	Messages	<input type="checkbox"/> Select Items Print
<input type="checkbox"/> History Log		Print
History Log		Print
Create Comment		

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

ePlan Home

Search

Reports

Inbox

Planning

Monitoring

Funding

Data and Information

Reimbursement Requests

Project Summary

LEA Document Library

Address Book

TDOE Resources

TDOE Resources

Public District - FY 2024

Below is your list of Print Requests.

Print Request Name	Request Date	Expiration Date	
Any Print Job	7/25/2023 2:01:59 PM	7/30/2023 2:01:59 PM	Delete

TDOE Resources Search

Choose Keyword:

Or Enter Text:

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

ePlan Home
Search
Reports
Inbox
Planning
Monitoring
Funding
Data and Information
Reimbursement Requests
Project Summary
LEA Document Library
Address Book
TDOE Resources

Email Message Archive

Public District

Show Items: from the last 7 days

Received (displaying 1 through 1 of 1)

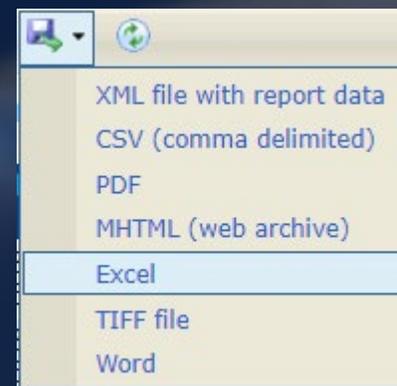
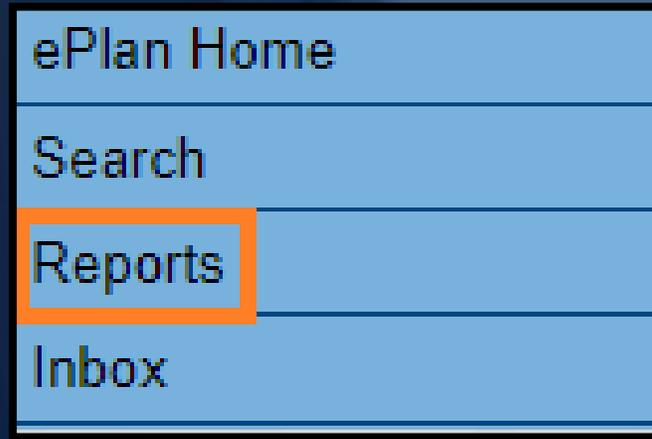
From	Subject
<u>Any, Name</u>	PDF Generated

Sent (displaying 1 through 3 of 3)

To	Subject
<u>Any, User</u>	Funding Application Comment Added: Union County (870) Public District - FY 2024 - Consolidated - Rev 0 - History Log

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 \neq 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

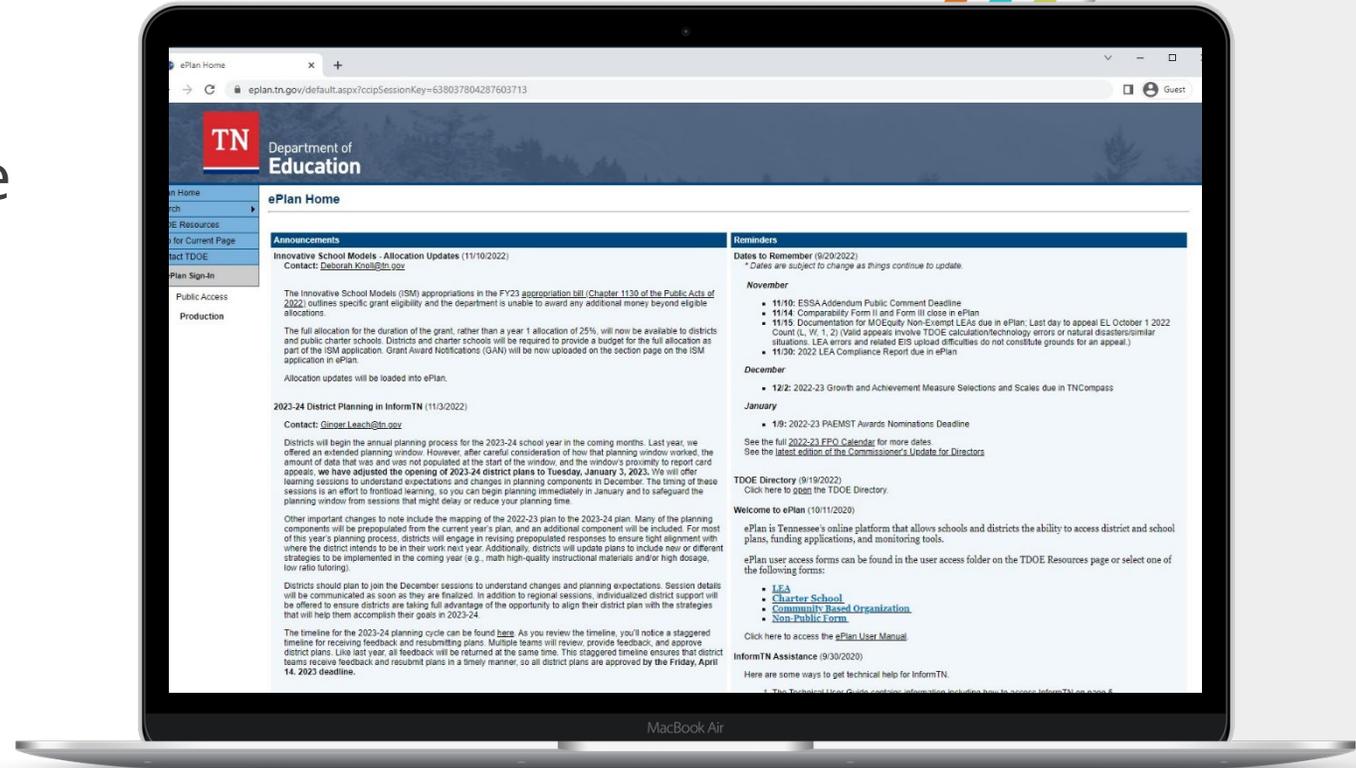
Closing



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

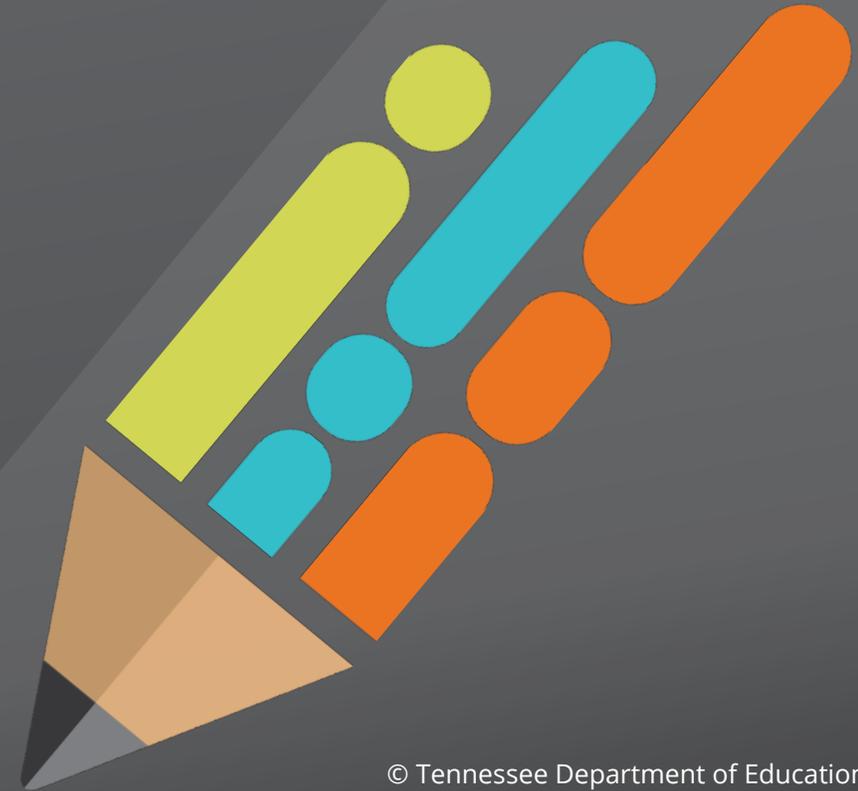
Permission is granted to use and copy these materials for non-commercial educational purposes with attribution credit to the "Tennessee Department of Education". If you wish to use these materials for reasons other than non-commercial educational purposes, please contact Joanna Collins (Joanna.Collins@tn.gov).

Tuesday-Thursday

Please Share Your Feedback:

You may access the PD by navigating here:

https://stateoftennessee.formstack.com/forms/2023fpi_pd_survey



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>