TN Department of Education

ePlan User Audit Instructions

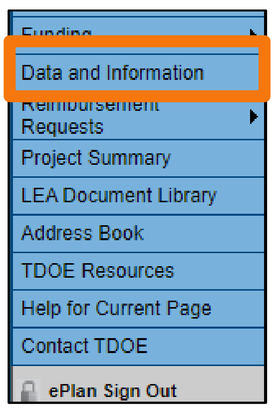
Non-Public Schools

The ePlan User Audit important to ensure that user access is accurately assigned and to maintain the integrity of the funding and program information that is provided to the department through ePlan. Please see the instructions below for completing the ePlan User Audit.

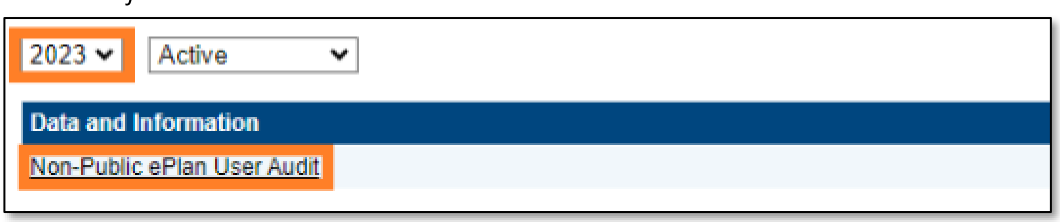
ePlan User Audit Instructions

1. The *ePlan User Audit* must be completed by the *ePlan User Audit Director.*
   Note: This role was pre-assigned to *LEA Authorized Representatives* in October 2023. This ePlan audit role can be added by completing the ePlan User Access Form ***if needed)***

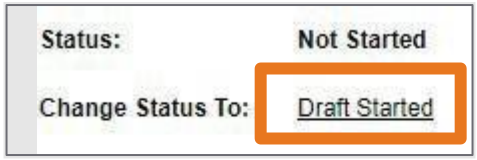
2. Login to ePlan and navigate to the *ePlan User Audit* from the ePlan homepage, click on *Data and Information* on the ePlan main menu.



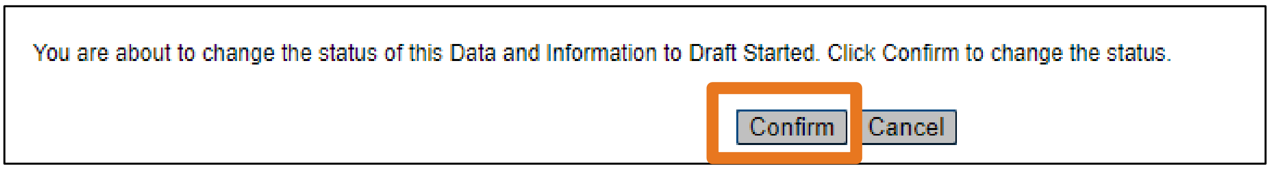
3. Select the *Fiscal Year 2023* from the drop-down box. Select the relevant *ePlan User Audit* from the list of *Data and Information* tools.



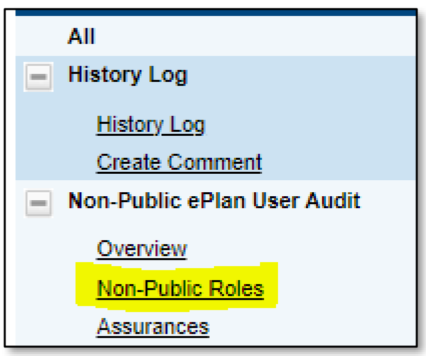
4. Click *Draft Started*. If you are unable to click *Draft Started*, hover over the *Draft Started* button to see a list of individuals who have access. **Only users with the *LEA Authorized Representative or ePlan User Audit Director* roles may click *Draft Started.***



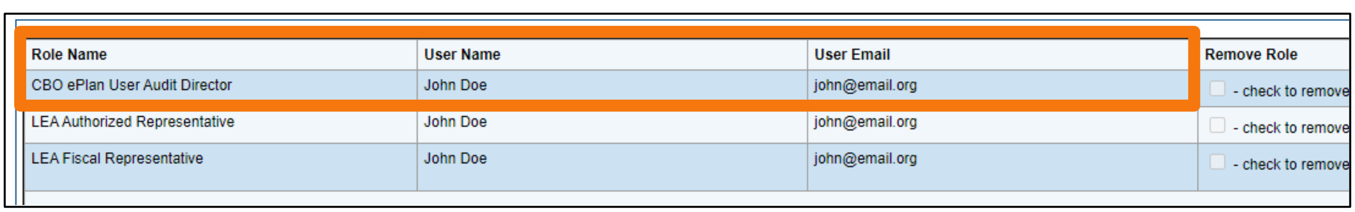
5. Click *Confirm* to change the *ePlan User Audit* status to *Draft Started.*



6. Select the organization *Roles* page**.**

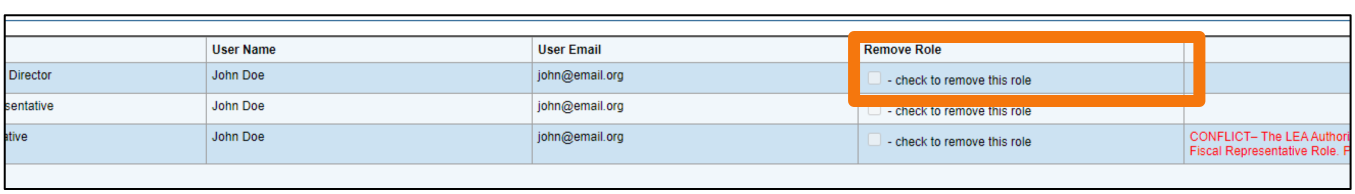


7. Roles, Names, and Emails address of the individuals that are assigned each role are prepopulated into the data and information tool. Complete the page by reviewing each role. **Please note** any roles added <u>after</u> **Oct. 6** will not be in the list below. We **do not need** the list updated to include any roles that have been added after **Oct. 6.**



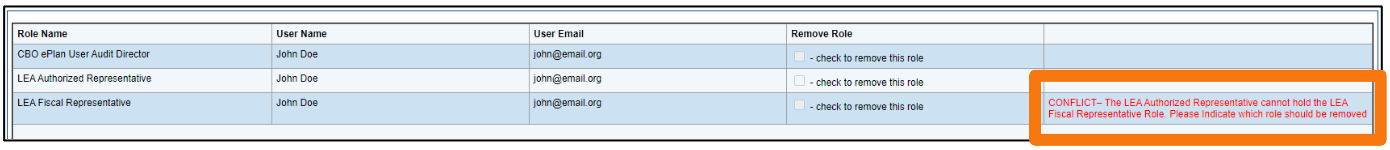
Role Name	User Name	User Email	Remove Role
CBO ePlan User Audit Director	John Doe	john@email.org	- check to remove
LEA Authorized Representative	John Doe	john@email.org	- check to remove
LEA Fiscal Representative	John Doe	john@email.org	- check to remove

8. To request a role be removed from an individual, please click the checkbox in the *Remove Role* column.



	User Name	User Email	Remove Role	
Director	John Doe	john@email.org	- check to remove this role	
sentative	John Doe	john@email.org	- check to remove this role	
tive	John Doe	john@email.org	- check to remove this role	CONFLICT– The LEA Authori Fiscal Representative Role. F

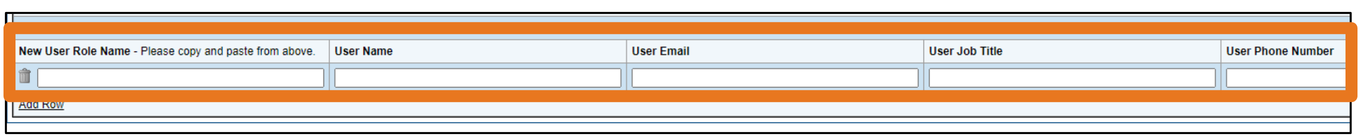
9. Where applicable, the fifth column of the page highlights serious role conflict between *LEA Authorized Representative* roles and *LEA Fiscal Representative* roles. If this column contains a red "*Conflict*" message, the organization must specify which role should be removed to resolve the conflict. This action will be completed after the completion of the audit period. Note: The message will not disappear when the action is selected.

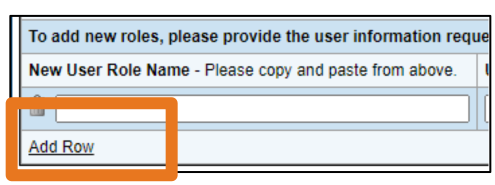


See the table below for possible conflict resolution actions.

ConflictMessage	**PossibleResolutions**
CONFLICT— LEA Authorized RepresentativeRole may only be assigned to one user account.	• Check the box to remove the *LEA Authorized Representative* role for all individuals *<u>except</u>* for the individual who is employed as the principal or organization director. The individual assigned the *LEA Authorized Representative* role must have final legal authority for the organization.
CONFLICT—The LEA Authorized Representative cannot hold the LEA Fiscal Representative Role. Please indicate which role should be removed	• Check the box to remove the *LEA Authorized Representative* role for this individual. *or* • Check the box to remove the *LEA Fiscal Representative* role for this individual. *or* • Check both boxes to remove both roles from this individual.

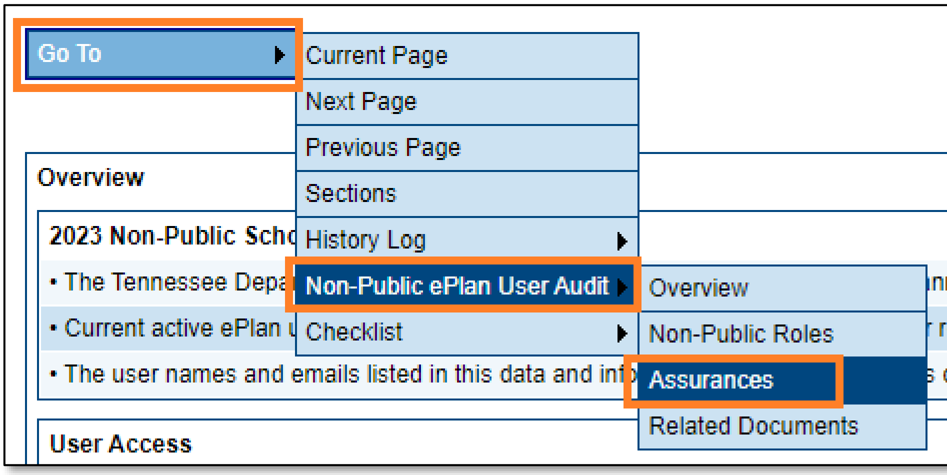
10. Existing ePlan users are those individuals listed on the page. To request a new role for an existing user, provide the new role by copying and pasting it from the table, then provide the users name, email address, job title and phone number. Click "Add Row" to add more than one role. New roles for existing users can also be added via the ePlan User Access form.



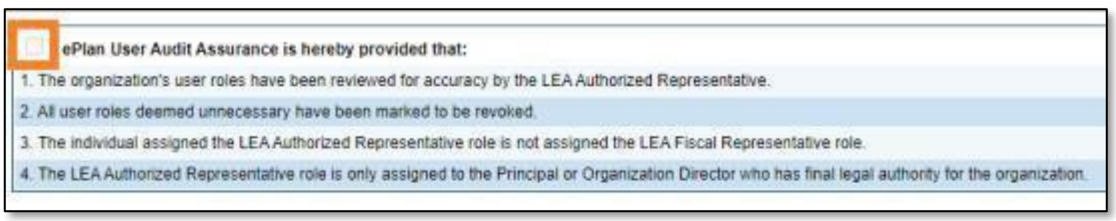


11. To request roles for a new user, please navigate to the appropriate User Access Form, and follow the instructions on the form. User Access Form links are provided on the page, or at the top of this document.

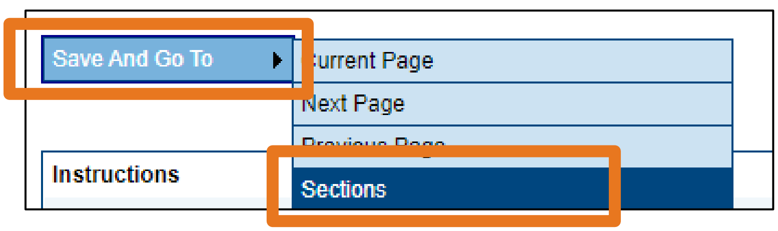
12. Navigate to the *Assurances* page, by clicking *Save and Go To*, then *[Organization Type] ePlan User Audit*, and then *Assurances*.



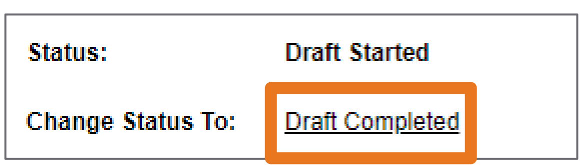
13. On the *Assurances* page, read the assurances and check the box to indicate that the conditions have been met for the ePlan User Audit.



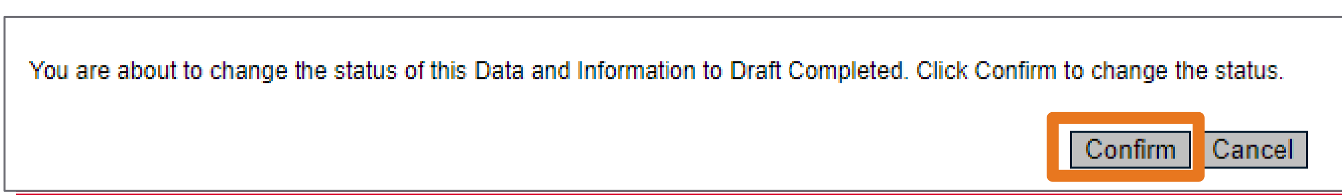
14. Return to the *Sections* page by clicking *Save and Go To*, then *Sections.*



15. On the *Sections* page, the person assigned the *LEA ePlan User Audit Director* role must change the *ePlan User Audit* status to *Draft Completed*.



Click *Confirm* to submit the *ePlan User Audit.*



16. The Draft Completed is the last step. When you see the below status, the audit is ready for TDOE to review and no further steps are needed to complete the audit by the school.

Status:	**Draft Completed**
Change Status To:	TDOE Non-Public ePlan User Audit Director Approved or TDOE Non-Public ePlan User Audit Director Returned Not Approved

17. After the ePlan User Audit is submitted, the ePlan team will make the requested role changes. The timeline for removal may be up to a month. *Non-Public ePlan User Audit Directors* will receive an email when User Access removals are complete.