

# FY24 Coordinated Early Intervening Services (CEIS) Monitoring Quick Guide for ePlan

## User Requirements: LEA-Level

### User Access

Users must have the following roles to access the CEIS monitoring instrument:

- Site-level users must be assigned the **CEIS Monitoring 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](https://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 CEIS 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 (2024), and then **CEIS-LEA**.

### Sections Page and Starting the Draft

The CEIS 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 CEIS instrument, the CEIS Monitoring 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 three-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, Personnel Activity Reports (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 three-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.

### **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 Monitoring Director** must return to the [Sections](#) page of the instrument to change the status to **Draft Completed**. Once the CEIS Monitoring 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.