Release of Grant Funds

ePlan Instructions

Overview

A local education agency (LEA) or community-based organization (CBO) that decides to release federal funds[1] after funds have been budgeted in ePlan through an entitlement or competitive grant must:

1. Complete the release of funds instrument in ePlan.
2. Communicate the request via email to the appropriate Tennessee Department of Education program and fiscal contacts listed in the table below.

Once reviewed by the department, released funds will be removed from the allocation in the ePlan funding application and marked as complete in the release of funds instrument.

The full list of programs included on the Release of Funds instrument can be found below with contact information for the program and fiscal managers:

Grants and Points of Contact

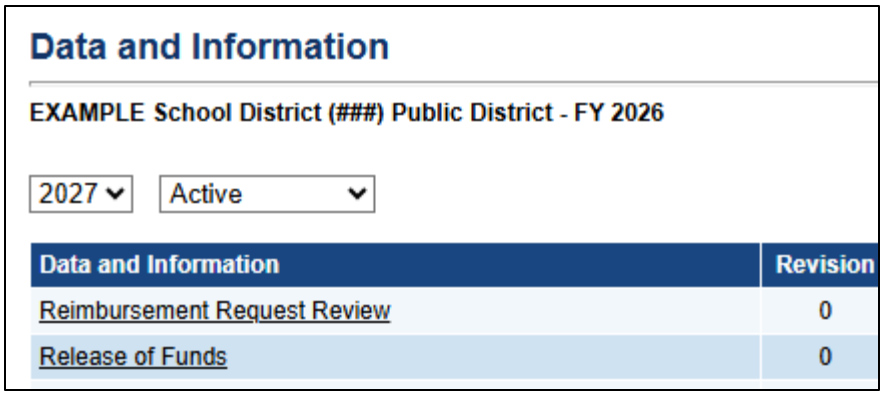
Grant	Program Manager	Fiscal Manager
Title I, Part A	Deborah.Thompson@tn.gov	Kate.Smitheal@tn.gov
Title I, Part C	Hannah.Gribble@tn.gov	Kate.Smitheal@tn.gov
Title I, Part A - Neglected	Jackie.Jacobson@tn.gov	Kate.Smitheal@tn.gov
Title I, Part D, Subpart 1	Erin.Christian@tn.gov	Kate.Smitheal@tn.gov
Title I, Part D, Subpart 2	Jackie.Jacobson@tn.gov	Kate.Smitheal@tn.gov
Title II, Part A	Michelle.Harless@tn.gov	Kate.Smitheal@tn.gov
Title, III, Part A	Hannah.Gribble@tn.gov	Kate.Smitheal@tn.gov
Title, IV, Part A	Brinn.Obermiller@tn.gov	Kate.Smitheal@tn.gov
Title IV, Part B – 21st CCLC*	Anessa.Ladd@tn.gov	Mario.Pennington@tn.gov
Lottery for Education Afterschool Programs (LEAPs)	Anessa.Ladd@tn.gov	Mario.Pennington@tn.gov
Title V, Part B	Brinn.Obermiller@tn.gov	Kate.Smitheal@tn.gov
Title IX – McKinney-Vento	Vanessa.Waters@tn.gov	Kate.Smitheal@tn.gov
IDEA Part B	Scott.Indermuehle@tn.gov	Brett.Printz@tn.gov
IDEA Preschool	Scott.Indermuehle@tn.gov	Brett.Printz@tn.gov
CTE Perkins*	Candi.Collier@tn.gov	Zarema.Maxwell@tn.gov
School Improvement*	Robin.Copp@tn.gov	Zarema.Maxwell@tn.gov
Other*	FPO Oversight Coordinator	Kate.Smitheal@tn.gov

*** Please provide specific grant and sub-grant information**

[1] State funds managed by the division of Federal Programs and Oversight (FPO) may also be included in this instrument.

Release of Funds ePlan Instructions

- ePlan users assigned the ***LEA Release of Funds Director*** role can work on the Release of Funds instrument in ePlan. See the LEA's ePlan *Address Book* to determine who is assigned this role. To add a new or additional role, complete the ePlan User Access Form for LEAs and submit it according to the directions on the form. Users who had the LEA Consolidated Director role on **Aug. 16, 2026**, were automatically assigned the *LEA Release of Funds Director* role.
- In ePlan, navigate to the ***Release of Funds*** instrument by selecting ***Data and Information*** from the main ePlan menu. On the *Data and Information* page, select the current fiscal year from the drop down, then click **Release of Funds** to open the data and information tool.



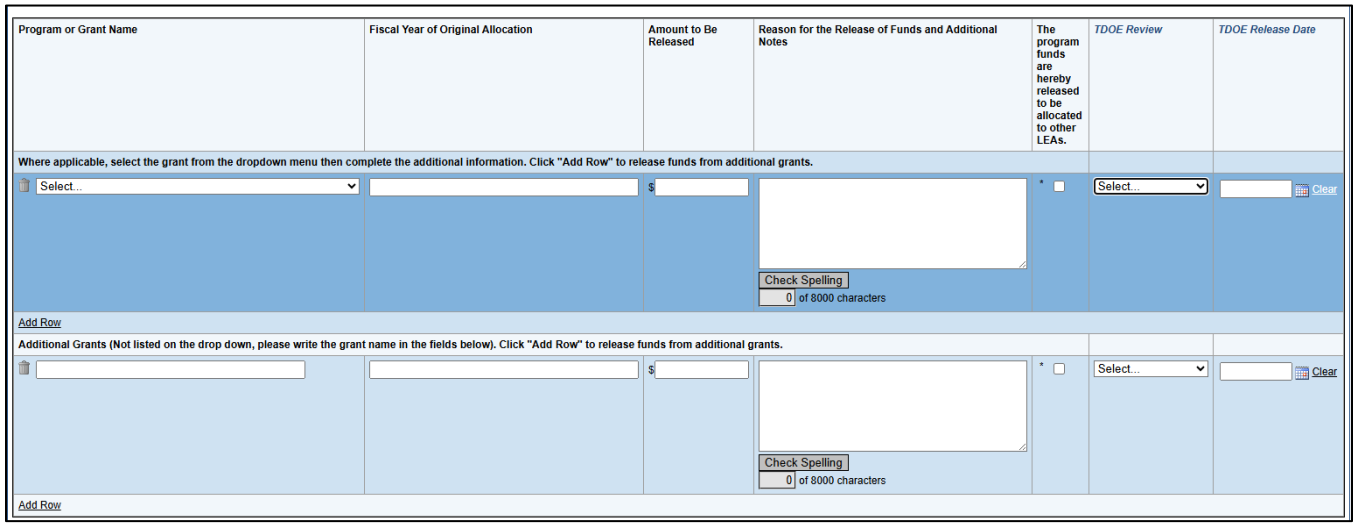
- To begin the request, click ***Draft Started*** at the top of the Sections page.



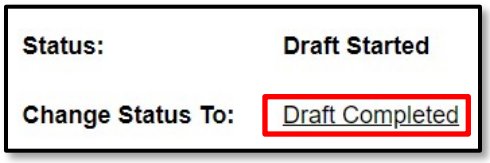
- The *History Log* records status changes dates with the name of the user who prompted the change. Use it to review who submitted or reviewed a request or the date when it was last approved or returned.
- Users may place a note in the *History Log* by clicking on the **Create Comment** link. Use *Create Comment* with caution, as comments remain part of the requests' permanent record and are viewable by the public on approved requests.
- To create a comment, click on **Create Comment**. A narrative box appears. The user may type or paste a comment in the narrative box. Once the comment is complete, click *Save and Go To* > *Current Page* at the top of the screen to save.

Release of Funds Section

- Complete the *Cover Page* which requests basic contact information.
- On the *Release of Funds Details* page, complete the table to indicate the funds to be realeased.
    - Select the **Program or Grant Name** from the drop-down menu. If the program is not listed in the drop-down, enter the information toward the bottom of the page under "Additional Grants". Make sure it is very clear which grant award, funding application, and fiscal year the funds are to be released from.
    - Click "Add Row" as needed to realease funds from other programs in each section.



  - Enter the state **Fiscal Year** the funds are being released from (i.e., the fiscal year the funds were orginally allocated). For example, if the LEA/CBO is releasing funds awarded **July 1, 2025** for the **2025-26** school year, enter **FY26** in this field.
  - Enter the **Amount to be Released**.
  - Enter the **Reason for Release and Additional Notes**.
  - **Check the box** to indicate that funds are to be released and reallocated.
  - No LEA action is required for columns with "TDOE:" in the header. These columns are to reflect internal review and processes.
  - Repeat this process for all applicable program funds that the LEA/CBO would like to release.
- Once all requests have been entered, click **Draft Completed** at the top of the *Sections* page.



- The Release of Funds instrument must be approved by the *LEA Fiscal Representative* and the *LEA Authorized Representative*. Once approved by the *LEA Authorized Representative*, the Release of Funds request will be sent to the department for review.
- Department reviewers will select their name from the TDOE Review drop down column for each release request line.
- Once the release is processed, the department will update the date in the TDOE release data column and then update the status to *TDOE Release of Funds Director Approved*.
- Requests that require revisions will be marked as *TDOE Release of Funds Director Returned Not Approved*. LEAs/CBO must view the *Checklist* to read comments from reviewers.

Questions?

Please contact the fiscal or program managers listed above or your assigned FPO Divisional Coordinator.