

Release of Grant Funds ePlan Instructions

Overview

A local education agency (LEA) or community-based organization (CBO) that decides to release federal funds¹ after funds have been budgeted in ePlan through an entitlement or competitive grant must:

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

Once reviewed by the department, released funds will be removed from the allocation in the ePlan funding application.

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	Alfred.Thomas.Garrett@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
ARP ESSER (ESSER 3.0)	Jerri.Nave@tn.gov	Kate.Smitheal@tn.gov
Lottery for Education Afterschool Programs (LEAPs)	Anessa.Ladd@tn.gov	Mario.Pennington@tn.gov
Title V, Part B	Brinn.Obermiller@tn.gov	Alfred.Thomas.Garrett@tn.gov
Title IX – McKinney-Vento	Vanessa.Waters@tn.gov	Alfred.Thomas.Garrett@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 Divisional 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 who are assigned the **LEA Release of Funds Director** role can work on the Release of Funds instrument in ePlan. See the LEA's *Address Book* in ePlan to determine who has been 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 Sept. 30, 2024, were automatically assigned the *LEA Release of Funds Director* role.
- Navigate to the 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.

Data and Information

Example County (###) Public District - FY 2026

2026 ▼ Active ▼

Data and Information

[Release of Funds](#)

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

Change Status To: **Draft Started**

- 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 released.
 - 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".
 - Click "Add Row" as needed to release funds from other programs.

Program or Grant Name	Fiscal Year of Original Allocation	Amount to Be Released	Reason for the Release of Funds and Additional Notes	The program funds are hereby released to be allocated to other LEAs.
Where applicable, select the grant from the dropdown menu then complete the additional information. Click "Add Row" to release funds from additional grants.				
<div> <div> <div></div> <div>Select...</div> </div> </div>		\$	<div> <div></div> <div>Check Spelling</div> <div>0 of 8000 characters</div> </div>	<input type="checkbox"/>
Add Row				
Additional Grants (Not listed on the drop down, please write the grant name in the fields below). Click "Add Row" to release funds from additional grants.				
<div> <div></div> <div></div> </div>		\$	<div> <div></div> <div>Check Spelling</div> <div>0 of 8000 characters</div> </div>	<input type="checkbox"/>
Add Row				

- Enter the state **Fiscal Year** the funds are being released from (i.e., the fiscal year the funds were originally allocated). For example, if the LEA/CBO is releasing funds awarded July 1, 2024 for the 2024-25 school year, enter FY25 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.

Status:	Draft Started
Change Status To:	Draft Completed

- 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 *DOE 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 program managers listed above or your assigned [FPO Divisional Coordinator](#).