

Non-Public School Annual Reporting- Quick List

☐ User Access Roles

- Ensure that users have the correct roles. Check the *Address Book* for the organization, then submit a user access form for any new role requests.
 1. The *LEA Non-Public Schools Annual Compliance - Fall Monitoring Director* begins the instrument, enters information, and submits the instrument for review.
 2. The *LEA Authorized Representative* reviews and approves the submission. Only the school principal/headmaster can have this role.

☐ Complete the Instrument

- Log into [ePlan](#). If the user has roles in multiple organizations, select the desired organization.
- Navigate to *Monitoring* from the left navigation menu.
- Select the 2026 *LEA Non-Public Schools Annual Compliance - Fall* monitoring instrument.
- On the *LEA Non-Public Schools Annual Compliance - Fall Monitoring Sections* page, the Monitoring Director clicks *Draft Started* to begin working on the instrument.
- Click *Cover Page* and complete the cover page fields. Click *Save and Go To* to return to the *Sections* page.
- Click and complete the *Attestation* page.
- Complete the required *Category* page(s).
- Return to the *Sections* page to review the *Validation* column on the sections page. If a *Messages* link appears for any page or section, review and resolve the messages. Error messages prevent the instrument being submitted. Warnings are flags for the user but will not prevent the instrument being submitted.

☐ Organization Review

- The *LEA Non-Public Schools Annual Compliance - Fall Monitoring Director* must click *Draft Complete* to submit the instrument to the *LEA Authorized Representative* for review.
- The *LEA Authorized Representative* reviews the instrument, and if approved, clicks *LEA Authorized Representative Approved*.

Note: If there are changes needed, the *LEA Authorized Representative* can click *LEA Authorized Representative Returned* to move the instrument back to *Draft Started* where the *LEA Non-Public Schools Annual Compliance - Fall Monitoring Director* may make changes to the instrument.

☐ Department Review

- After the *LEA Authorized Representative* has approved, the instrument will be reviewed in two stages at the department. Either department reviewer may return the instrument to the organization for additional information. When the instrument is fully reviewed, the *TDOE Monitoring Director* finalizes any monitoring results, then moves the instrument into *TDOE Monitoring Director Reviewed*.

☐ Monitoring Results

- Users must click *LEA Results Review Started* to view the monitoring results. See the *Monitoring Results - LEA Response* page and complete any tasks attached to the monitoring results.

☐ Monitoring Closed

- Once all monitoring results actions have been completed, the department will close the monitoring instrument.