



Department of
Education

Non-Public Schools Agency Annual Reporting ePlan Technical User Guide

Tennessee Department of Education | August 2025

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Introduction of Reporting Process

Overview

Tenn. Code Annotated § [49-1-201](#) authorizes the commissioner of the Tennessee Department of Education (department) to “inspect, approve, and classify private schools in accordance with the rules of the state board of education.” Further, the Tennessee State Board of Education (SBE) Rules [0520-07-01](#) and [0520-07-02](#) provide specific requirements for the approval and administration of non-public schools including reporting and monitoring. Category II, III, and IV non-public schools are approved by accrediting and membership agencies authorized by SBE Policy [3.500](#) and Tenn. Code Ann. § [49-50-801\(a\)](#).

Reporting and Review Process

1. Data Collection:

Authorized accrediting and membership agencies will submit annual reporting data through the department’s online platform, [ePlan](#), during the collection window in the fall. The *Non-Public Schools Agency Annual Report* instrument opens on September 1 each year with submissions due by October 15.

2. Technical Assistance and Office Hours:

The non-public team is available to answer questions and provide assistance via phone and email prior to the required submission date. In addition, the team will host weekly open office hours during the reporting period. The reporting window email notification will contain the link and dates of office hours.

3. Completion and Submission of the Reporting Instrument:

The department recommends that agency directors lead the submission process to ensure the accuracy of the content within the instrument. Designated representatives must provide *agree* or *disagree* responses to the questions for the appropriate section(s), fill-in-the-blank responses and submit uploads of specific documentation appropriate to the designated category. The Overview section contains guidance on the instrument’s workflow and how to access assistance, if needed. A technical guide is accessible from all sections within the instrument.

The *Non-Public Schools Agency Annual Report* instrument is due annually by **October 15**.

4. Department Review:

Upon receipt of the completed reporting instrument, the non-public schools program team will review the submitted information. If necessary, the coordinator will contact the appropriate agency representative to request clarity or additional information; however, it is expected that reporting instruments are completed with sufficient information prior to submission. The department’s review of timely fall submissions will be completed annually by **December 1**.

5. Follow-up and Technical Assistance:

The *Non-Public Schools Agency Annual Report* instrument contains Monitoring Results, shared with the agency at the conclusion of the review. The department will close monitoring for completed submissions that are accurate and complete. Conversely, if areas of non-compliance are discovered, the department may assign required action steps, including additional document uploads, to ensure compliance with state board rules and federal or state laws. Upon resolution of the areas of non-compliance, the department will close monitoring.

How to Access the Instruments

User Requirements: Agency Access

All users must have the correct ePlan user access permission to complete the *Non-Public Schools Agency Annual Report* instrument. Each accrediting and membership agency will need users assigned to two specific roles for each instrument: *LEA Non-Public Schools Agency Report Monitoring Director* and *LEA Authorized Representative*.

Role	Permissions
LEA Non-Public Schools Agency Annual Report Monitoring Director	Users with this role can enter information into the reporting instrument and submit the instrument for final approval to the LEA Authorized Representative. Although not recommended, this role can be assigned to the same person assigned as the <i>LEA Authorized Representative</i>, or preferably, someone else within the organization as determined by the agency.
LEA Authorized Representative	Users with this role can provide final approval for the reporting instrument by submitting it to TDOE for review. This role is assigned only to the agency's director or director designee.

Users with existing ePlan access can check their current user access permission by logging into ePlan.tn.gov and navigating to the Address Book under the main menu on the left side of the page. LEA Roles are listed near the top of the page. Users can also see which other individuals have assigned roles in the organization.

Users may have roles in multiple organizations. When this occurs, users must select the correct organization on the ePlan homepage before menu options, including the address book, will appear.

New ePlan users and existing ePlan users who need additional User Access roles must request those roles using the [ePlan User Access Form for Non-Public School Accrediting Agencies](#). Access the form by navigating to eplan.tn.gov > [TDOE Resources](#) > User Access Forms. Users do not need to log in to ePlan to access TDOE Resources in ePlan. Follow the instructions on the *User Access Form* to submit. User access requests may take up to two business days to process. Users will receive an email reply when access has been granted.

Navigating to the Non-Public Schools Agency Annual Report Instrument

- For best results, open ePlan.tn.gov in a Google Chrome browser window. Other browsers (e.g., Safari, Mozilla Firefox, or Internet Explorer) can interfere with the ePlan platform's functionality.
- Once in ePlan, navigate to the *Non-Public Schools Agency Annual Report* instrument by logging in and then select **Monitoring > Monitoring Instruments** from the left menu options. Remember that users with roles for multiple organizations must select the desired organization from the ePlan homepage before menu items will be available for that organization. Users can switch between organizations by returning to the home page and selecting a different organization.
- On the *Monitoring Instruments* page, select the current fiscal year, then **Non-Public Schools Agency Annual Report**.

Sections Page and Starting the Draft

The *Non-Public Schools Agency Annual Report* instrument loads to the Sections page. From this page, users can see a list of sections in the instrument and the status of the instrument.

To begin working on the *Non-Public Schools Agency Annual Report* instrument, the instrument status must be changed from **Not Started** to **Draft Started**. Users with the **LEA Non-Public Schools Agency Annual Report Monitoring Director** role can make this change by clicking **Draft Started** then **Confirm**.

From the Sections page, users can select a section of the instrument to view or complete. To return to the Sections page or navigate to other sections of the instrument, users can hover over the *Save and Go To* box at the top of the screen and make the appropriate selection. In various locations within the instrument, users can click on the plus symbol to expand a selection and the minus symbol to collapse it.

Step-by-Step Instructions

The instructions below will assist users with completing the information for each section of the instrument. Fall Monitoring Directors will complete the three pages in the Overview section and one additional section to correspond with the school's designated category.

Overview: Introduction and Overview of Monitoring Process

Review general information about the instrument, including authorization, workflow, and contacts for requesting assistance. This page is informational, and no user action is required on the page.

Workflow	
Not Started	The monitoring tool cannot be edited until the draft is started. Individuals assigned the <i>LEA Non-Public Schools Agency Annual Report Monitoring Director</i> role can move the application into <i>Draft Started</i> status.
Draft Started	The <i>LEA Non-Public Schools Agency Annual Report Monitoring Director</i> role can edit the monitoring in the <i>Draft Started</i> status.
LEA Non-Public Schools Agency Annual Report Monitoring Director Draft Completed	The <i>LEA Non-Public Schools Agency Annual Report Monitoring Director</i> role can click <i>Draft Completed</i> .
LEA Authorized Representative Approved or Returned	The <i>LEA Authorized Representative</i> can click <i>Approved</i> or <i>Returned</i> .
SEA Non-Public Schools Agency Annual Report Monitoring Consultant Reviewed	The <i>SEA Non-Public Schools Agency Annual Report Monitoring Consultant</i> can click <i>Reviewed</i> .
SEA Non-Public Schools Agency Annual Report Monitoring Director Reviewed or Returned	The <i>SEA Non-Public Schools Agency Annual Report Monitoring Director</i> can click <i>Reviewed</i> or <i>Returned</i> .
LEA Results Review Started	The <i>LEA Non-Public Schools Agency Annual Report Monitoring Director</i> must click <i>LEA Results Review Started</i> , and check the assurance box. Monitoring results from the department are provided on the <i>Monitoring Results - LEA Response</i> page for the Non-Public School to review. Monitoring Results may require Non-Public Schools to complete a follow up action or provide additional documentation.
Monitoring Closed	<i>SEA Non-Public Schools Agency Annual Report Monitoring Consultant</i> and <i>Director</i> will review any <i>Actions Required</i> . When there are no outstanding <i>Action Required</i> , the <i>SEA Non-Public Schools Agency Annual Report Monitoring Director</i> will change the status to <i>Monitoring Closed</i> .
TDOE Review Reopened	If necessary, The <i>SEA Non-Public Schools Agency Annual Report Monitoring Director</i> can reopen the monitoring to provide additional notes or request additional follow up.

Overview: Cover Page

The Cover Page requires users to select all categories for which the agency is authorized to approve non-public schools and the agency's directory information. Each agency must provide a secondary point of contact in the event the director or primary contact changes or is unavailable. All fields with an asterisk are required.

Agency Directory Information	
Agency Information	
* Organization Name:	
* Address	

Notice of SBE Rules and Laws

Read the text and click the links to access the current SBE rules and state laws. Acknowledge the links have been reviewed by selecting Agree in the dropdown menu. If disagree is selected, provide an explanation

Accrediting and membership agencies can access links to the current SBE Rules Chapters 0520-07-01 and 0520-07-02, State Board Policy 3.500, and applicable state laws on the department's [Non-Public Schools webpage](#) under the heading Laws/Rules/Policies at the bottom of the page. SBE Rules are also accessible on the Tennessee Secretary of State's [Official Compilation of Rules and Regulations webpage](#).

* I have reviewed the provided links and can access the current Tennessee SBE Rules and state laws. I understand that if I have questions, I may contact Private.Schools@tn.gov.

Select... ▼

If Disagree selected, please explain:

Respond to the assurance statements by selecting Agree or Disagree in the dropdown for each one. If the user selects Agree, no further information is required.

* The agency notifies the Tennessee Department of Education's non-public schools team within ten (10) days when a

Agree ▼

If Disagree selected, please explain:

If the user selects Disagree, an explanation must be entered into the corresponding text box containing the reason the agency is unable to meet the requirement and any additional information that is relevant.

* The agency notifies the Tennessee Department of Education's non-public schools team within ten (10) days when a

Disagree ▼

If Disagree selected, please explain:

Required Uploads: Related Documents

In this section, agencies will provide the required information as stated in State Board Rules [0520-07-01-.04\(4\)](#). Users can hover on the information icon (blue symbol) to learn more about the required upload and what should be included. Uploads with missing elements may not be approved.

Required Documents		
Type	Document Template	Document/Link
(Non-Public Agency) Agency Approved Schools List [Upload at least 1 document(s)]	 Blank Agency Approved School List	Upload New
(Non-Public Agency) Link to Published Accreditation Policies [Upload at least 1 document(s)]	N/A	Upload New
(Non-Public Agency) Link to Published List of Accredited and/or Member Schools [Upload at least 1 document(s)]	N/A	Upload New

Users will click *Upload New* in the *Document/Link* column to open the window for the upload. Click the empty box or the *Select* button next to *Upload Data File* to choose a document from the local device to upload. In the *Document Name* field, users will type the name of the document using the agency's name and document type (examples: ABC Agency Approved NPS List). Click *Create* to upload the document into the ePlan instrument.

Attestation

Read both statements and confirm agreement by checking the boxes next to each statement to attest the user acknowledges the submitted responses and documentation accurately reflect the operations of the agency and that the agency certifies receipt of the SBE Rules and state laws.

Once the user has completed the entire section, proceed to the [Validations](#) section of this guide.

Validations

After responding to all applicable sections, review the *Cover Page*, *Notice of SBE Rules and Laws*, *Related Documents*, and *Attestation* pages to ensure full completion.

When the reporting instrument is complete, return to the [Sections](#) page. If present, click the **Messages** link in the column labeled "Validation." This link provides an overview of the validations that ePlan is running behind the scenes.

Any required items that were not completed may appear in the list as an **"Error."** Users can click *Review* to go to the corresponding section to make any necessary corrections.

If the user does not address all **"Error"** validations, ePlan does not allow users to submit the instrument. Examples of errors are not uploading a required related document or not responding to a required question.

Messages appearing in the validation column may also appear as a "Warning." Warnings may be items that have been overlooked, but are not required, or they may be items that are missing from a category that is not applicable to the school. Review all warnings before submitting the instrument to ensure that any warnings appearing in the agency's applicable instrument are addressed.

Once all errors, and any applicable warnings, have been resolved, the instrument is ready to submit.

Once users have completed their entries, the *Monitoring Director* or the *Authorized Representative* (i.e., agency director) (in this order) must return to the [Sections](#) page to change the status to submit the self-assessment work to the department. At each level, the instrument may be approved or returned. Returning the instrument allows the instrument to be edited.

How to Submit the Instrument

Draft Completed

When there are no validation errors remaining in any of the pages, users assigned the **LEA Monitoring Director** role may return to the [Sections](#) page of the instrument to change the status to **LEA Non-Public**

Schools Agency Annual Report Director Draft Completed. Once a user chooses the status, they must press **Confirm** before the status updates.

Authorized Representative Approved

Users who have the *role* of **LEA Authorized Representative** (agency director or designee only) may change the status from **LEA Non-Public Schools Agency Annual Report Monitoring Director Draft Completed** to **LEA Authorized Representative Approved**. By changing the status, the director agrees that all information submitted is accurate.

After this status has been set, department staff will receive a notice that the instrument has been submitted for review.

If additional work is needed in the instrument, the **LEA Authorized Representative** can instead change the status to **LEA Authorized Representative Returned**. Once a user chooses the status, they must press **Confirm** before the status updates. With the instrument in the **LEA Authorized Representative Returned** status, users can continue making changes to the instrument. When changes are complete, the **LEA Monitoring Director** role may return to the [Sections](#) page of the instrument to change the status to **LEA Non-Public Schools Agency Annual Report Monitoring Director Draft Completed** and the LEA Authorized Representative may review the instrument again.

Note: *If one person serves in both roles mentioned above, that individual must change the status twice.*

Printing

Users may print or download a PDF from the [Sections](#) page.

- To print the entire monitoring instrument, click the **Print** link across from the word “All” at the top of the [Sections](#) page. Note that a print request does not include any uploaded related documents.
- To print a single page, click on the **Print** link across from the name of the page.
- To print an entire section, click on the **Print** link to the far right of the section name.
- To choose multiple pages, check the **Print Select Items** box at the top of the print column to select more than one page. The **Print** links appear as checkboxes. Select all text boxes for the desired print request.
- Select the checkboxes and click **Print** at the top of the column.
- The **Print Request** screen pops up. If necessary, Users may rename their print job here.
- Click **Print**.
- The **Generating Document** screen appears. The system takes 20–30 seconds to generate the print job. For larger files, expect an email from the ePlan system when the file is ready to download.
- After ePlan generates the print file, click **Return to Planning** to return to the [Sections](#) page of the Monitoring instrument.
- A PDF generates and appears at the top of the page from the **TDOE Resources** menu item in ePlan. The PDF link remains in **TDOE Resources** for five days. Users may use the “Delete” links to remove any print jobs if desired.

Monitoring Results

Monitoring Results—Department Response

Upon receipt of each agency’s instrument, the department initiates two levels of review. The non-public school’s coordinator reviews the submission for completion and accuracy, and the monitoring director will complete a final review to determine whether the results are compliant or non-compliant. If necessary, the

coordinator or director will contact the agency to request clarity or additional information; however, it is expected that monitoring instruments are completed with sufficient information prior to submission. If the instrument is not fully completed, the department's monitoring director will return the instrument and request an updated submission.

The *Non-Public Schools Agency Annual Report* instrument review will be completed annually by **December 1**. The review contains Monitoring Results, shared with the agency at the conclusion of the review, and may result in findings of non-compliance if areas of non-compliance are discovered. The department may include required action steps, including additional document uploads, to ensure compliance with state board rules and state or federal laws.

Monitoring Results—LEA Response

Once the agency receives an automated notification from ePlan that the status has changed to TDOE Director Reviewed, Monitoring Results are ready to view. The agency must first change the status to **LEA Results Review Started** and **Confirm**. Hovering the mouse over the status will allow users to see who is able to change the status on behalf of the school.

Once the status has been changed, scroll to the bottom of the **Sections** menu, then choose **Monitoring Results-LEA Response** to view results. There are three possible results for each item.

 **Finding(s) of Non-Compliance:** Compliance concerns of required components

 **Corrections Needed:** Missing or incorrect submission of required components

 **Met Requirements:** Satisfactory compliance of reviewed components

Findings of Non-Compliance or Corrections Needed include descriptions, action steps, and required documentation that the agency must respond to by uploading items. Use the Pencil Icon to upload a document where required. Once the upload has been saved, the department will automatically receive a notification on the Wednesday and Sunday after the upload until it has been reviewed and marked as approved or not.

If the coordinator marks an item as approved, no additional action is required by the agency for the purposes of this monitoring process. If a coordinator marks an item as not approved, he/she will contact the agency to provide technical support until all items have been marked approved.

Upon marking the last item as approved, the coordinator will request that the director conduct a final review and change the status to **Monitoring Closed**.

Technical Assistance and Support

Program Support

Please contact the following people for support, including support about how to answer questions that do not seem clear or addressing specific uploads.

Diana Burton

Senior Manager of Non-Public
School Programs

Diana.Burton@tn.gov

(865) 253-0901

Sandy Couch

Non-Public and Home School
Specialist

Sandy.Couch@tn.gov

(865) 978-4854

April Keel

Non-Public Schools Customer
Service Coordinator

April.Keel@tn.gov

(629) 259-0339

General Email

Private.Schools@tn.gov

ePlan Support

Please contact the **ePlan Help** team at ePlan.Help@tn.gov

Extensions to Deadlines

If an agency must request an extension to the submission deadline or a Monitoring Result deadline, please reach out via email to Private.Schools@tn.gov before the date listed within the instrument to request an extension and include the reason for the request. All written requests will be considered within two business days and the user who made the request will receive a reply via email.