

TISA Accountability Report: ePlan Data and Information Guide

Tennessee Department of Education | August 2025

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Introduction

The Tennessee Investment in Student Achievement (TISA) public school funding formula, introduced ahead of the 2023-24 school year, marked a significant update in how Tennessee invests in public education. The TISA funding formula updates the way Tennessee funds public education to empower each student to read proficiently by third grade, prepare each high school graduate for postsecondary success, and provide resources aligned to students' needs to ensure they succeed.

Pursuant to <u>T.C.A. § 49-3-112</u>, each school district is required to submit an accountability report to the Tennessee Department of Education (department) by November 1 of each year. The report must include the following:

- Goals for student achievement
 - One of the goals must include the district's plan to pursue the goal of seventy percent (70%) or more of the district's third grade students to score "met expectations" or "exceeded expectations" on the English Language Arts (ELA) portion of the TCAP tests. This goal must also detail the district's goal to increase 3rd grade ELA proficiency rates by 15% of the gap over the next three years to achieve the district's stated goal of at least 70% of 3rd grade students proficient in ELA. The 2022-23 TCAP results served as the baseline for initial 3rd grade ELA goal setting.
- Explanation of how the district's stated goals can be met within the district's budget.
- A description of how the district's budget and expenditures from the prior school year enabled the district to make progress toward the stated student achievement goals. The requirement to include reflections on the prior year began with the 2024-25 school year report.

Districts developed the first TISA Accountability Report with long-range goals in the 2023-24 school year. When setting goals for the report, districts were encouraged to consider the achievement goals that existed within their 5-year strategic plan and aligned within the annual LEA plan so they would streamline work toward the same short and long-term outcomes and utilize resources most effectively. This alignment across plans and reports will continue to be a priority as the TISA Accountability Report serves as a communication to stakeholders about the priorities and usage of funds toward those priorities.

Each district's TISA Accountability Report is required to be presented to the public for review and comment before the report is submitted to the department. Additionally, the TISA report must be presented for local school board approval. The TISA Accountability Report must be submitted annually to the department by November 1st.

Furthermore, pursuant to T.C.A. § 49-3-114, each district's TISA Accountability Report is required to be reviewed annually by the TISA Progress Review Board to determine if an LEA is taking the proper steps to achieve the 3rd grade ELA TCAP proficiency goal. At the end of the three-year period, the board will verify goal attainment and determine if further recommended actions are needed.

The TISA Accountability Report Data and Information tool will be the avenue for districts to submit their accountability reports to the department. This will increase the ease of use of districts and improve reporting by the department. It can be accessed through the Tennessee Department of Education's eGrants platform, <u>ePlan.tn.gov</u>.

ePlan User Access

All users must have the correct ePlan user access role to access and complete the Data and Information tool. Users with existing ePlan access can verify current user access roles in the Address Book. To view existing access, visit **ePlan.tn.gov**, navigate to the **Address Book** and **LEA Role**.

Existing ePlan users with the LEA Authorized Representative, LEA Plan Data Entry, or LEA Fiscal Representative role were automatically assigned the role of *LEA TISA Accountability Report Director*. Users with this role will be able to edit and submit the TISA Accountability Report.

New ePlan users and existing ePlan users who need to request a User Access role must request the additional role using the <u>ePlan User Access Form for LEAs</u>. The form can also be accessed by navigating to eplan.tn.gov > TDOE Resources > User Access Forms. User Access Forms and select the correct form according to organization type.

ePlan Data and Information Tool

Accessing the TISA Accountability Report

To navigate to the TISA Accountability Report, click the **Data and Information** tab on the left menu bar.



Select the desired fiscal year from the dropdown in the upper left corner of the screen. Data and information tools are stored in ePlan according to the state fiscal year (i.e., 2022 indicates the 2021–22 school year). Click on the Data and Information tool name, *TISA Accountability Report*, to access the tool. The tool loads to the Sections page. To begin the tool, next to **Change Status To:** click on *Draft Started*.



Saving Data and Information Pages

After working in a Data and Information Tool, users must click the "Save and Go To" button, then ensure that the page has finished saving before closing ePlan or leaving the page.

Users can tell that the page has not saved when the browsers spinning wheel or loading icon is still occurring. The screenshot below shows an example of a page that has not finished saving. Please make sure that the browser's loading icon is no longer spinning before closing the page



The best way to see if a change to the tool was saved after leaving the page is to review the change log. The change log for the Data and Information tool can be accessed from the Sections Page.



Data and information tool Sections and Pages

The **Sections** page lists all the available sections and pages within a data and information tool such as: **Change Log**, **History Log**, **Create Comment**, **Cover Page**, **Related Documents**, and **Checklist**. The **Sections** page is helpful in navigating to the specific sections and pages which must be completed.

TISA Accountability Report Sections

Public District - FY 2026 - TISA Accountability Report - Rev 0

Status: Not Started

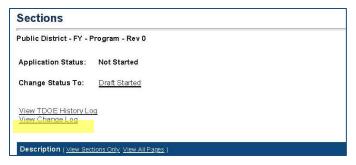
Change Status To: Draft Started

View Change Log

Des	scription (View Sections Only View All Pages)	Validation	Print Select Items	
	All	Messages	Print	
=	History Log		Print	
	History Log		Print	
	Create Comment			
-	TISA Accountability Report	Messages	Print	
	Overview		Print	
	Cover Page		Print	
	District Goal Statements		Print	
	Goal #1	Messages	Print	
	Goal #2	Messages	Print	
	Goal #3	Messages	Print	
	Goal #4	Messages	Print	
	Goal #5	Messages	Print	
	Goal #6	Messages	Print	
	Public Comment and Board Approval		Print	
	Related Documents		Print	
=	TISA Accountability Report Checklist		Print	
	TISA Accountability Report Checklist		Print	
	All	Messages	Print	

Change Log

The **Change Log** may be accessed on the main sections page for every data and information tool. It lists every change or update since the previous status. This helps users identify changes that have been made to the data and information tool since they last viewed it. More information about the **Change Log** is available in the <u>ePlan User Manual</u>.



History Log and Create Comment

The **History Log** contains a record of status changes and comments made on the data and information tool. ePlan users may want or need to create a comment in an ePlan funding data and information tool for one of the following reasons:

- To provide an explanation as a part of the data and information tool's history.
- To provide information that a user cannot add into the main data and information tool due to the data and information tool's current status (users can only edit data and information tools that are in a *Draft Started* or *Revision Started* status.)

ePlan creates a running record of all comments. Any comment created and saved in an ePlan data and information tool will always be available as a part of the data and information tool's history log.

To Add a Comment in a Data and information tool:

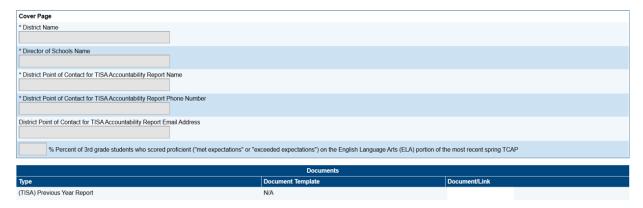
- 1. Navigate to the data and information tool's main **Sections** page.
 - To navigate to the main data and information tool page from other pages in the data and information tool, click **Go To** and **Sections**.
- 2. Select **Create Comment** from under the *History Log* on the main section page.
- 3. On the **Create Comment** page, type your comment in the box.
- 4. If desired, a hyperlink can be inserted in a comment by clicking the hyperlink icon.

Overview

The *Overview page* provides details of the accountability report history, requirements, resources, reminders, and submission deadline of November 1.

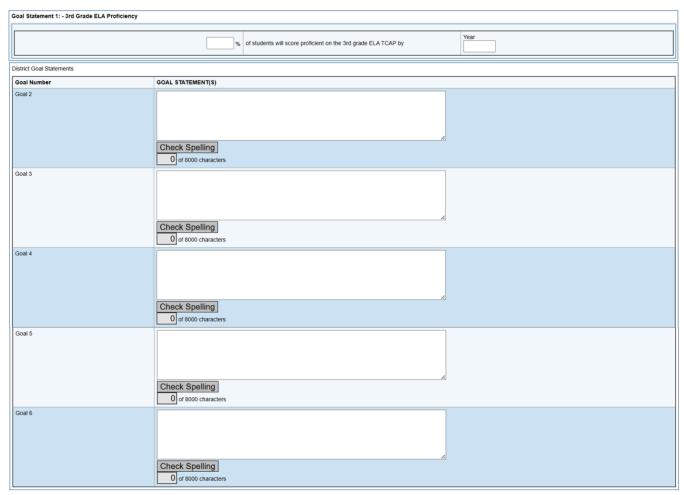
Cover Page

The **Cover Page** requires entry of general organization information: District Name, Director of Schools Name, and name, email and phone contact information for report point of contact. Additionally, the **Cover Page** requires the district to report the most recent (2024-25) 3rd grade ELA TCAP proficiency. To support completion of the remainder of the report, the district's previous year TISA Accountability Report has been uploaded to the **Cover Page** to provide easy access and reference during completion of the 2025-26 report.



District Goal Statements

The **District Goal Statements** page provides an overview of all goals included within the TISA Accountability Report. Goals from the previous year report have been prepopulated in the 2025-26 report. As required in T.C.A. § 49-3-112, Goal 1 identifies the year in which the district will reach 70% proficiency on the grade 3 ELA TCAP. This long-range goal was established in the first year of the report during the 2023-24 school year. The remaining goal statements have been prepopulated from the district's previous year report. Longrange goal statements should remain the same from the 2025 to the 2026 report.



Note: This is a required goal pursuant to T.C.A. § 49-3-112 and must include 70% or more of 3rd grade students proficient on the ELA.TCAP. If your district already has 70% or more of 3rd grade students proficient in ELA, please state a goal that either maintains or increases that proficiency rate.

Individual Goals

For each individual goal, users will provide an update on actual outcomes achieved, progress to intended target for the most recent year, impacts on future plans, previous year major TISA investments including rough estimates and if and/or how investments contributed to goal progress, current year strategies for meeting annual target, and how the budget supports those strategies.

When possible, information from the previous year report or other sources has been used to prepopulate fields as appropriate. The *Annual Outcome Targets* were prepopulated using the following methods:

• The 2023-24 school year has been populated with the actual outcome as entered in the previous year report. If this metric is blank for grade 3 ELA, the previous year's report did not appear to reflect the district's 2023-24 actual outcome.

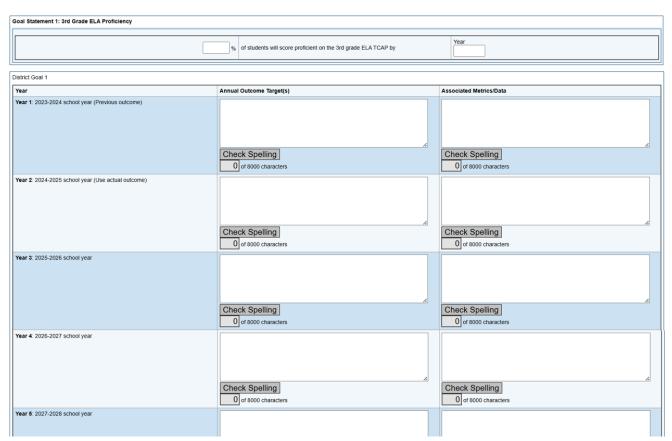
- The 2024-25 school year will require the district to populate the actual outcome results for each goal except for the grade 3 ELA. This outcome has been populated with data from the 2025 District-Level Assessment File.
- The 2025-26 school year has been populated with the target established in the previous year report.
- The 2026-27 and 2027-28 school years have been populated with the target established in the previous year report.

Associated Metrics/Data, the number(s)/percentage(s) the district intends to meet by the end of each of the stated school years in order to reach the long-range goal, have also been prepopulated using the previous year report. See the FAQ for example associated metrics for annual outcome targets.

For Goal 1: 3rd grade ELA proficiency, the 2025-26 school year marks the last year of the first, three-year cycle of increasing proficiency by 15% of the gap to 70% on grade 3 ELA TCAP. For this reason, the annual target for the 2025-26 school year should remain as previously established. Districts will set a new three-year 15% proficiency increase in a future TISA Accountability Report. See the FAQ for a refresher of the calculation of the 3rd grade goal.

For goals 2 through 6, the long-range goal should remain as defined in the previous year report to ensure consistency across reports and allow insight into how progress is being made toward each. However, if applicable, the annual outcome targets for intermediate years can be refined. For 2025-26, the district might consider how to align the annual outcome targets for this report with those established in the LEA plan.

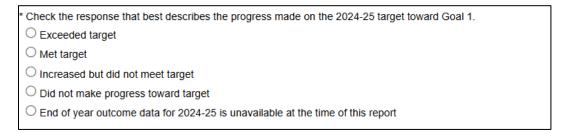
If a goal is no longer applicable and the district intends to remove the goal from the 2025-26 report, all questions except the *Action Plan* and the *Budget Narrative* are still required. Please note in the *Action Plan* and the *Budget Narrative* text box that the "Goal is no longer applicable." It should also be noted on the **District Goal Statements** page that the "Goal is no longer applicable." If adding a new goal, complete all goal statement components and questions except the progress made, Reflection - impact on action plan, and TISA investments. Please note "New goal beginning 2025-26" where appropriate. The new goal should be added to the **District Goal Statements** page.



Districts should use the following guidance when completing the progress reflection, major TISA investments, *Action Plan* and *Budget Narrative* portions of each goal.

Determine the progress of the previous year's annual target by reflecting on the intended and actual outcome. Check the response that best describes the progress made on the 2024-25 target.

- Exceeded target
- Met target
- Increased but did not meet target
- Did not make progress toward target
- End of year outcome data for 2024-25 is unavailable at the time of this report



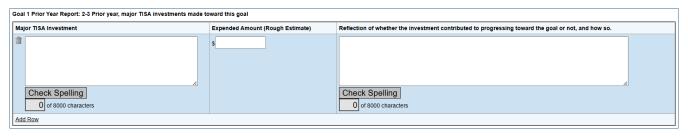
Reflection: Based on progress toward the goal, how will this impact your action plan for the coming years?

 Consider the progress as noted in the previous question. How will this impact the district's focus, intentionality, and resource allocation of previously implemented strategies? Were new strategies introduced for implementation in the current year?

Reflection:	Based	on progr	ress towar	d the goal,	how will thi	s impact you	r action plar	n for the com	ing years?	
										- /

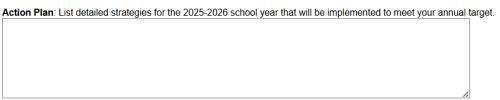
Prior Year Report: 2-3 Prior year, major TISA investments made toward this goal should include the major investments toward strategy implementation that directly support goal progress or attainment.

- What were the 2-3 major TISA investments made in the strategies that are specific to this goal?
- For each, what is the rough estimate of the amount of TISA dollars expended?
- Did the investment contribute to positive progress toward the goal? If so, how? If no, why?
- If federal or local dollars were braided with TISA dollars to support the funding for this strategy and the district finds it helpful to also include this level of insight on the report, please include this information in the *Major TISA Investment* box and clearly identify the funding source and amounts. However, the *Expended Amount (Rough Estimate)* should **only** include the estimated TISA dollars expended.



Action Plans should include descriptions of improvement strategies, programs, and intervention services that will be implemented by the district in the 2025-26 school year to support meeting the outcome.

- What are the strategies the district will implement to reach the goal?
- Consider how the specific and high-level strategies from the 2025-26 LEA plan might align to and support the goals established in this report.



Budget Narratives describe how the district intends to use their TISA dollars to execute the strategies and meet the stated outcome.

- How will the district's budget directly support the outlined action plan to reach the goal for the current year?
- Responses should be specific to the strategies provided in the action plan.
- Specific dollar amounts are not required.
- Districts should include strategies that directly support the goal and are funded through TISA dollars. If the district chooses to include federally or locally funded high-leverage strategies to better understand the full picture of improvement work toward the identified goals, the provided budget description must clearly differentiate how strategies are funded.

Budget Narrative : Describe how your district intends to use their budget to execute the strategies and meet the s	tated goal.

Please see the FAQ for examples of action plan and budget narrative starters.

Public Comment and Board Approval

On the **Public Comment and Board Approval** page, district's will provide details regarding the request for public comment pursuant to <u>T.C.A. § 49-3-112</u>. Additionally, districts will mark whether local board approval has been received and approval documentation uploaded or if approval will be received after the required November 1 submission deadline and planned approval documentation uploaded. Supporting documentation must be uploaded to *Related Documents* to support the response to the board approval question.

Regardless of the board approval status, the TISA Accountability Report must be submitted by November 1.

If local board approval is received after the submission deadline, the district will click *Revision Started* on the previously submitted report, upload the board meeting minutes that demonstrate approval, and update the board approval question on the **Public Comment and Board Approval** page.

The TISA accountability report must be presented for public comment to parents, educators, and local community members prior to its submission to the department by November 1.						
Details	Answer					
Date(s) of opportunity for local public comment						
Description of public comment opportunities (e.g. collection of written comments, public hearing, local board meeting discussion, etc.)	a de la companya de					
Summary of public comment received. If no comments were received, state, "None received."						
Description of how your district did or did not incorporate public comment received into the final accountability report submission.						
Board Approval						
TISA accountability reports should be presented to the local school board for approval prior to its submission to the department by November 1. Please select the option that best describes the board approval status when submitting the TISA accountability Report to the department.						
Board approval received. Minutes documenting board approval have been uploaded to the 'Related Documents' section.						
Board approval to be received after Nov. 1. The board agenda for the upcoming meeting or a memo referencing the board meeting date for which the TISA accountability will be on the agenda has been uploaded to the 'Related Documents' section. Immediately upon approval, my district will upload the minutes documenting board approval to the 'Related Documents' section and adjust the response to this question.						

Related Documents

Users must upload local board approval documentation. If approval is received by the November 1 deadline, districts should upload meeting minutes that demonstrate the board has approved the report. If

approval will be received after the November 1 deadline, districts should upload an agenda or memo noting when the accountability report is being presented for approval. Once approved, the district will click *Revision Started*, upload the board meeting minutes and update the board approval question on the **Public Comment and Board Approval** page.

Required Documents			
Type	Document Template	Document/Link	
(TISA) Board Approval [Upload at least 1 document(s)]	N/A		

Checklist

The department will review TISA Accountability Reports to ensure fields are completed and board approval documentation is uploaded. Feedback on the quality of reports will not be provided. For this reason, the **Checklist** is limited to completed fields and required uploads.

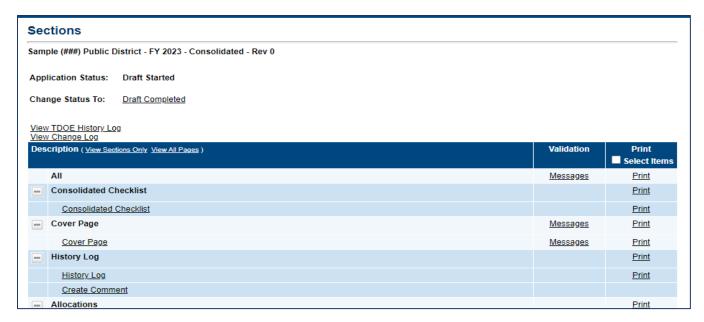
After submission, the department reviews the data and information tool and marks each section as *OK, Not Applicable, Consultant Reviewed,* or *Attention Needed*. If the data and information tool contains no items that are marked as *Attention Needed*, the data and information tool has been accepted. Note that the TISA Accountability Report must have local board approval so a revision must be submitted if documentation of board approval is not available by November 1.

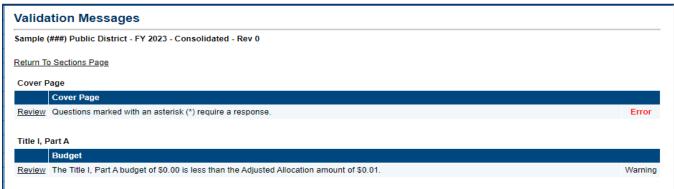
If the data and information tool contains items that are marked as *Attention Needed*, the data and information tool will be returned to the user. The user must review the checklist for items that are marked *Attention Needed* and make the necessary changes to those items. Only the checked items in the areas marked *Attention Needed* need correction. Each section marked *Attention Needed* includes notes to explain items needing attention. The user should check for notes and additional comments.

Once the user has made the necessary adjustments, the user resubmits the data and information tool for review. If the department determines that the area is corrected, *Attention Needed* will be changed to *OK* or *Consultant Reviewed* by department leadership. If the items needing attention still have not been corrected, the data and information tool will be returned again.

Validations

ePlan runs data and information tool validations as checks to help users complete the data and information tool correctly. Users can view validation messages from the Sections page, by clicking "Messages" in the Validation column. Users can view all validation messages in the data and information tool, or validation messages for the individual section or page.

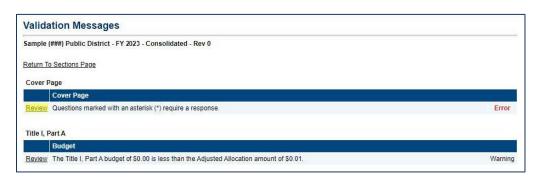




On the Validation Messages page, items marked *Warning* are validations that users are not required to address prior to submitting the data and information tool. Examples of warnings are not uploading an optional related document or budgeting an entire allocation.

Items marked *Error* are incorrect, and users must address each one before submitting the data and information tool. Examples of errors are (1) budgeting for more than the allocation, (2) budgeting more indirect cost than is allowable, (3) not budgeting in a section where there is an allocation, (4) not uploading a required related document, and (5) not responding to a required question.

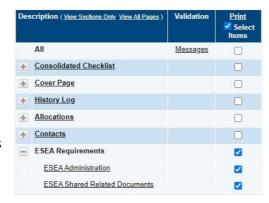
• If the user does not address all *Error* validations, ePlan will not allow a user to submit the data and information tool. Click on the *Review* link to go to the identified page to make corrections.



How to Print in ePlan

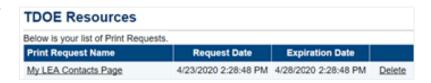
Users may print or download a PDF from the <u>Sections</u> page. **NOTE:** Print requests do not include any uploaded related documents.

- To print a single page, click on the **Print** link across from the name of the page.
- To print certain pages of the report, check the *Print Select Items* box at the top of the print column. Select all checkboxes for the desired print request. Click the *Print Select Items* button that appears at the bottom of the screen. Users may rename their print job here. Click *Print*.



- The *Generating Document* screen appears. The system takes 20–30 seconds to generate small print documents. 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.

The PDF generated by ePlan appears at the top of the page from the *TDOE Resources* menu item. The PDF link remains in *TDOE Resources* for five (5) days. Users may use the "*Delete*" links to remove any print jobs.



In order to make the TISA Accountability Report available for public comment, the district will need to print the *Overview, Cover Page, District Goal Statements*, and *Goal #1 – Goal #6*, as applicable, pages. For local board presentation and approval, the previously noted pages and the *Public Comment and Board Approval* should be printed.

Troubleshooting

The following are answers to common questions about ePlan application functionality.

User Access

If an ePlan user is not able to work in a data and information tool, it is usually due to one of these three reasons:

- The user is not using the Google Chrome browser. For best results: always use Google Chrome to access ePlan. ePlan does not have the same functionality in other browsers.
- The tool is not in the right work step or status. Users can only edit a data and information tool when it is in **Draft Started** or **Revision Started** status.
- The user does not have the right role to work on the data and information tool. When hovering the cursor over **Change Status To** options, a tooltip appears that indicates the roles with access to make the status change. This tooltip will list the names of individual users associated with each permitted role. Users can also access the address book to see which roles an ePlan user has.

ePlan's address book for each organization contains a list of every user that has an ePlan role.

- The LEA Role Contacts list all the roles. If the role is not listed in the address book, no one has been assigned to that role.
- User Access forms are in ePlan's TDOE Resources in the User Access Form folder.
 - Users do not need an ePlan role to access TDOE Resources.

See ePlan User Access for more information about the ePlan user roles.