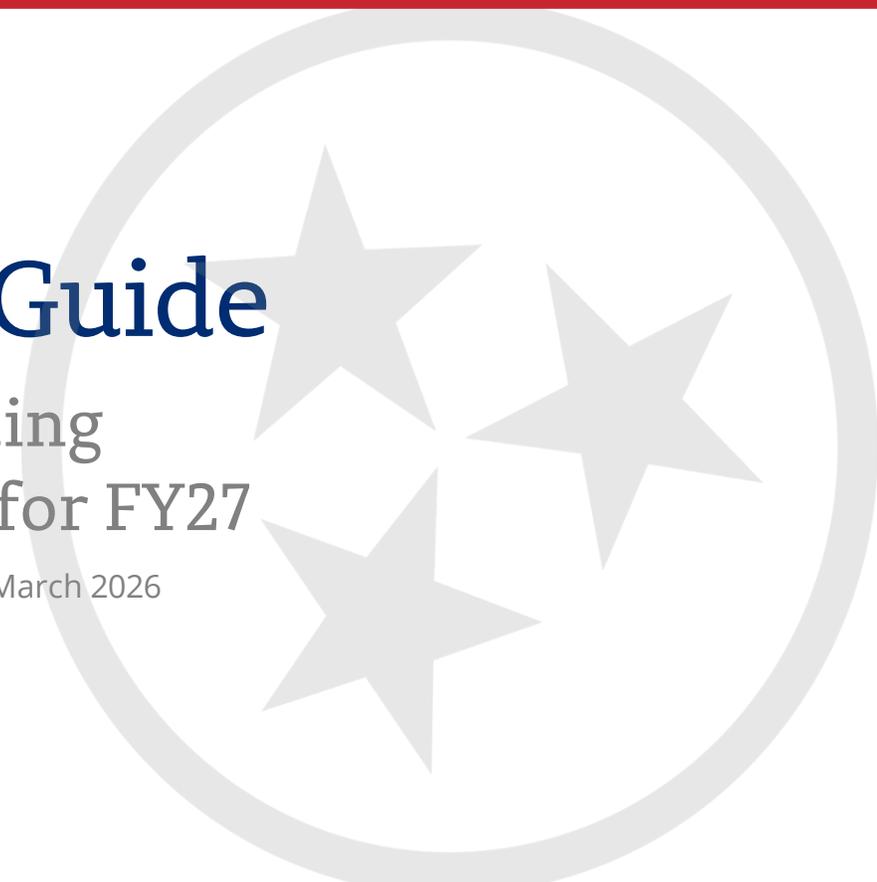




# Technical Application Guide

## Consolidated Funding Application Guide for FY27

Tennessee Department of Education | March 2026





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# Introduction

The Consolidated Funding Application (CFA) must be completed by each local educational agency (LEA). It includes funding awards for the following federal programs:

- Title I, Part A
- Title I, Part A—Neglected
- Title I, Part C—Migrant
- Title I, Part D—LEA
- Title I, Part D—State Agencies
- Title II, Part A
- Title III, Part A
- Title IV, Part A
- Title V, Part B, Subpart 2 (Rural and Low-Income Schools)
- IDEA (Part B, § 611 and § 619)

The CFA must be reviewed and approved by the state education agency (SEA), the Tennessee Department of Education (the department).

The CFA is embedded in the department's online grants management system, ePlan (<https://eplan.tn.gov>). LEAs use ePlan to access Tennessee Investment in Student Achievement (TISA) and federal funds (formula and competitive), access required LEA and school plans, upload compliance documents, and submit funding reimbursement requests.

This guide provides ePlan users with instructions and best practices for the accurate completion of the required CFA to ensure the availability of funds by **July 1, 2026**.

For a highlight of updates to the CFA, please see the [What's New: FY27 CFA](#) resource.



# How ePlan and the CFA Function

## **ePlan User Access and CFA Workflow**

All users must have the correct LEA-level ePlan user permission to access and complete the CFA. Users with existing ePlan access may check which LEA personnel are assigned each user access role in ePlan from the left navigation menu, by selecting **Address Book**, then scrolling to **LEA Role**.

New ePlan users (and existing ePlan users who need additional user LEA access roles) must request those roles using the [ePlan User Access Form for LEAs](#), available in ePlan in **TDOE Resources** in the folder titled *User Access Forms*. **TDOE Resources** is accessible without logging into ePlan. Most LEA roles can be assigned by the LEA User Access Administrator (LEA users with this role are listed in the Address Book). To request LEA Authorized Representative and LEA Fiscal Representative roles, email completed forms to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov) and allow two business days for the request to be processed.

Below are the roles, functions, and the order of the status levels specific to the CFA workflow.

ePlan Role	ePlan Function
<b>LEA Consolidated Director</b> (ESEA Director, IDEA Director) <b>LEA Fiscal Representative</b> <b>LEA Authorized Representative</b>	Change the application status by clicking <b>Draft Started</b> (or <b>Revision Started</b> for revisions) Respond to application questions and enter budgets
<b>LEA Consolidated Update</b> (Other LEA Project Directors)	Respond to application questions and enter budgets
<b>LEA Consolidated Director</b>	Click <b>Draft Completed</b> (or <b>Revision Completed</b> for revisions)
<b>LEA Fiscal Representative</b> (CFO or Treasurer)	Click <b>LEA Fiscal Representative Approved</b> (or <b>LEA Fiscal Representative Not Approved</b> ) (also may request funds after CFA is approved)
<b>LEA Authorized Representative</b> (Director of Schools)	Click <b>LEA Authorized Representative Approved</b> (or <b>LEA Authorized Representative Not Approved</b> )
<b>FPO Divisional Coordinator</b>	Click <b>FPO Divisional Coordinator Reviewed</b> (or <b>FPO Divisional Coordinator Returned—Revisions Needed</b> )
<b>FPO Leadership</b> (FPO Project Directors)	Click <b>FPO Leadership Approved</b> (or <b>FPO Leadership Not Approved</b> )

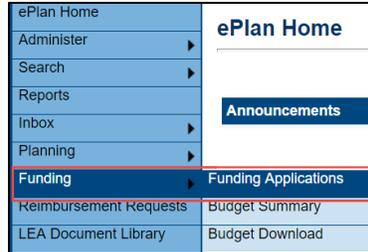
After each status change, ePlan automatically sends a notification email to all users in the LEA who have the ePlan role of the next step in the process. For example, after the *LEA Consolidated Director* clicks *Draft Completed*, ePlan automatically sends an email to all users in the LEA who have the role of *LEA Fiscal Representative*.

Once the LEA receives the notification email that the CFA status has been changed to *FPO Leadership Approved*, allocations become available for reimbursement.

## How to Access the CFA from the ePlan Homepage

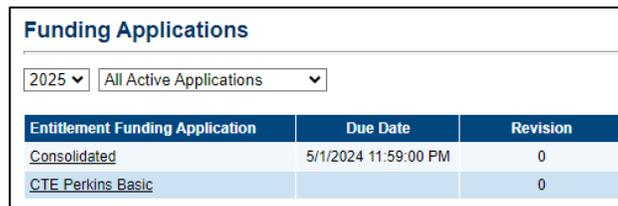
The CFA is not visible to LEAs for a new funding year until the department loads allocations. LEAs can typically view the application prior to the CFA application period beginning on March 1.

To navigate to the CFA from the ePlan homepage, select **Funding** on the left navigation menu, then **Funding Applications**.



On the Funding Applications screen, select the fiscal year from the drop-down menu. Funding applications are stored in ePlan according to the *state* fiscal year (i.e., "2026" indicates the "2025–26" school year).

Click **Consolidated** to access the application.



The application opens on the Sections page in the **Not Started** workflow status.

To begin the application, an LEA user with the *Consolidated Director*, *LEA Fiscal Representative*, or *LEA Authorized Representative* roles, must change the application status to **Draft Started**. In the **Draft Started** status, these users and users with the *Consolidated Update* role may edit the application.



## The Sections Page

Use the Sections page to access each section and page of the CFA. View this page in its entirety or in a condensed view where only the main section categories are visible. For easy navigation, users may return to the Sections page by navigating to the **Funding** tab on the ePlan blue menu bar and selecting Sections.

Users can only see grant applications and sections where an allocation exists for the LEA. For example, if an LEA does not receive Title III, Part A funding, the Title III, Part A page is not visible to that LEA.

From the Sections page, users can access each page of the application. Application pages include a variety of input fields.

- **Check boxes** are boxes that allow the user to indicate whether something applies to the LEA. On some pages, checkboxes mark other fields as *not-applicable* so that users are no longer required to respond.
- **Drop-down menus** allow users to select from a preprogrammed drop-down list of answers.
- **Radio buttons** are small circular input fields that allow users to select one option out of a list of options.
- **Narrative boxes** are boxes that allow formatting, including bolding, numbering, and font manipulation. Paste information such as text, tables, pictures, and graphs into narrative boxes.

- **Text boxes** are designed for more concise responses and do not allow as much formatting flexibility. **Note:** Some text boxes have character limits. It is still possible to paste text into a text box; however, the text may not hold its original formatting.
- **Tables** provide a structured entry for multiple pieces of related information. They may include a combination of other input fields and may feature an **Add Row** function, where users can increase the size of the table to enter additional information. Where the trash can icon appears on additional rows, users can delete unneeded rows.
- **Plus and Minus symbols** allow the user to show or hide additional questions on the page.

## How to Print in ePlan

Users may print or download a PDF from the *Sections* page.

- To print the entire application, click the **Print** link across from the word “All” at the top of the *Sections* 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 an entire section, click on the **Print** link to the far right of the section name. In the example shown, the user is printing the entire **ESEA Requirements** section.
- 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 appears. Users may rename their print job or adjust the print scale.
- Select **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 Funding Applications**.

Description ( View Sections Only View All Pages )	Validation	Print Select Items
All	Messages	<input type="checkbox"/>
+ Consolidated Checklist		<input type="checkbox"/>
+ Cover Page		<input type="checkbox"/>
+ History Log		<input type="checkbox"/>
+ Allocations		<input type="checkbox"/>
+ Contacts		<input type="checkbox"/>
- ESEA Requirements		<input checked="" type="checkbox"/>
ESEA Administration		<input checked="" type="checkbox"/>
ESEA Shared Related Documents		<input checked="" type="checkbox"/>

TDOE Resources
Below is your list of Print Requests.
<b>Print Request Name</b>
Consolidated - Cover Page and Overview - Cover Page

After generating, the PDF print file appears at the top of the **TDOE Resources** page for five (5) days. Users may use the “Delete” links to remove any print jobs.

- How to Resolve Validation Warnings and Errors to submit the CFA once it is complete, click the **Messages** link on the *Sections* page in the column labeled “Validation.” This link provides an overview of the background validations that ePlan runs to ensure that the information provided in the application meets certain criteria.
- Items marked “**Warning**” are validations that users are not required to address prior to submitting the CFA. Examples of warnings are not uploading an optional related document or budgeting an entire allocation.

Description ( View Sections Only View All Pages )	Validation	Print Select Items
All	Messages	Print
+ Cover Page		Print
Cover Page		Print

Related Documents	
The optional Related Document 'Private Schools Consultation (CFA)' has not been uploaded. Please be certain this is the intention.	Warning

Items marked “*Error*” are incorrect, and users must address each one before submitting the CFA.

- Click on the link to the left of the word “*Error*” to go to the identified page to make corrections. If the LEA does not address all “*Error*” validations, ePlan does not allow users to submit the CFA.

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, or (5) not responding to a required question.

## **How to Submit the CFA**

- Once the application is free of validation errors, a user assigned the *LEA Consolidated Director* role must click **Draft Completed** at the top of the [Sections](#) page.
- This generates an email to the *LEA Fiscal Representative* who must review the draft and click **LEA Fiscal Representative Approved** (or **Not Approved**) at the top of the [Sections](#) page.
- This generates an email to the *LEA Authorized Representative* who must review the draft and click **LEA Authorized Representative Approved** (or **Not Approved**) at the top of the [Sections](#) page.

Applications in the status of **LEA Authorized Representative Approved** are then reviewed by the LEA's FPO Divisional Coordinator. A map listing current [FPO Divisional Coordinators](#) is available on the **TDOE Resources** page.

Following the FPO Divisional Coordinator Review, the application is reviewed by FPO Program directors at the department. Once the application is approved by the department, the original CFA submission is complete.

## **What Happens if the CFA is "Not Approved"?**

LEA users and State reviewers may select **"...Not Approved"** at multiple review points. When this happens, and the CFA is in a **"...Not Approved"** or a **"... Returned—Revisions Needed"** workflow status, the CFA effectively returns to the **Draft Started** workflow status, where LEA users can make updates to the submission. When requested updates are complete, the *LEA Consolidated Director* must again click **Draft Complete**, then the *LEA Fiscal Representative* must click **LEA Fiscal Representative Approved** to resubmit the CFA for FPO Divisional Coordinator review. Most LEAs experience at least one request for additional information on the original CFA submission.

## **Grant Award Notifications**

When final CFA allocations are awarded, LEAs will be able to access *Grant Award Notifications* via the *Data and Information* tool. Navigate to the tool via the left navigation menu, click *Data and Information*, select the year, then click the Grant Award Notifications link.

*Grant Award Notifications* will provide additional funding information, the amount of the allocation, period of performance, indirect cost, and terms and conditions of the grant award.



# General CFA Pages

## **Consolidated Checklist**

On the *Consolidated Checklist* page, each section of the application reflects one of these statuses:

- **Not Reviewed:** No review occurred.
- **OK:** The section has no needed corrections and is approvable.
- **Coordinator Reviewed:** The section has been reviewed by the coordinator.
- **Attention Needed:** The section has items that must be corrected.

After the CFA has been reviewed and returned to the LEA with updates requested, LEAs must review the *Consolidated Checklist* page for general checklist comments from each application reviewer, if applicable, and for each ESEA and IDEA program section.

- After the LEA submits the application, the department reviews the application and marks each section as *OK*, *Not Applicable*, or *Attention Needed*.
- If the application contains no items that are marked as *Attention Needed*, the application is approvable.
- If the application contains items that are marked as *Attention Needed*, the application is returned to the LEA with a status of *Not Approved*. The LEA 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 sections marked *Attention Needed* need correction. Each section marked *Attention Needed* has a place where the department may provide notes to explain items needing attention. Users must check for notes and additional comments in this area.
- Once the LEA has made the necessary adjustments, the LEA resubmits the application for approval. If the department determines that the section is now correct, FPO Leadership will change *Attention Needed* to *OK*. If the items needing attention still have not been corrected, the application will be returned to the LEA with a status of *Not Approved*.
- Once the application contains no items that are marked *Attention Needed*, FPO Leadership changes the application status to **TDOE FPO Director Approved**.

## **Overview**

The **Overview** page provides a quick reference guide for the funding application roles, workflow and notifications, resources, and department contacts.

## **Cover Page**

LEA users must enter the following information:

- The LEA ID number and LEA name
- The LEA official address, including the ZIP+4 code, phone number, and LEA website address
- Name and contact information for the director of schools, ESEA director, and IDEA director
- SAM.gov information, including the Unique Entity Identifier (UEI) and CAGE code.
  - UEI: The Unique Entity ID is a 12-character alphanumeric ID assigned to an entity by SAM.gov. See: <https://sam.gov/content/duns-uei> for more information.
  - CAGE: A CAGE code is a five-character alphanumeric identifier assigned to entities located IN the United States and its territories. See <https://cage.dla.mil/Info/about> for more information.

LEA users must answer the question “Will you spend \$1,000,000 or more in Federal funds in this fiscal year?” and check the box to confirm that the cover page information provided is accurate as of the date of submission.

If any information on this page changes within the school year, an LEA user must update this page.

- Review and check the assurance at the bottom of the page that indicates that all information entered is accurate as of the date of the submission of the CFA.

The obligation period of the grant is provided at the bottom of the **Cover Page**. For FY27, the obligation period is July 1, 2026, through Sept. 30, 2027. The Tydings Amendment provides an additional 12 months of carryover. This period of availability includes the initial period authorized by the appropriations act and an additional 12 months authorized by the General Education Provisions Act § 421(b) (the “Tydings Amendment”).

## Contacts

LEAs must choose contacts for multiple positions within the LEA and indicate years of experience in the role *in Tennessee* for each contact. To choose a contact, click on the arrow to the right of the dropdown menu. The names of ePlan users in the LEA populate this dropdown box. To identify a person as a contact in the CFA, that person must be assigned the ePlan user access role: **LEA Data View**.

- If the same person holds several positions, list them for each position held.
- LEAs may name more than one contact for any position; however, the first name in the list is the “primary” contact for each position if a single point of contact is necessary.
  - ESSA requires that states publish a list of McKinney-Vento liaisons. The person listed in ePlan as the homeless liaison is on the official state list, published on the [department website](#).

If any of these contacts change throughout the school year, anyone assigned the *LEA Consolidated Update* or *LEA Consolidated Director* roles may update the page. If the application is in an editable status (i.e., **Draft Started, Revision Started**, or any of the statuses indicate that the application is in a status of **Returned Not Approved**), the *user* may make the change immediately. If the application is not in one of these statuses, the *user* must begin a revision to change contact information.

- To begin a revision, click **Revision Started** at the top of the [Sections](#) page. Make the change, and then process the application through the same status progression as an original submission.

**Note:** CFA Contacts are not the same as User Access Roles. See more: [Updating Contacts and the Address Book](#).

The names, phone numbers, and email address information that follows each contact is prepopulated from the individual’s user profile. User details, including phone number and email address, are added to each ePlan user’s profile using the information submitted on the *ePlan User Access Form*. Users who do not connect to ePlan via Single Sign On (SSO) may change their profile information in ePlan by clicking on their name (active hyperlink) located below the ePlan sign-in menu item. However, users who connect via SSO cannot update profile details. Contact [DT.Support@tn.gov](mailto:DT.Support@tn.gov) to update SSO accounts.

<div style="border: 1px solid black; padding: 5px;"> <p>ePlan Sign Out</p> <hr/> <p>Last Name, First Name</p> <hr/> <p>Test Site</p> <hr/> <p>Session Timeout</p> <p style="color: red;">00:24:44</p> </div>	<a href="#">Cover Page</a>
	<a href="#">Overview</a>
	<input type="checkbox"/> <a href="#">History Log</a>
	<a href="#">History Log</a>
	<a href="#">Create Comment</a>
	<input type="checkbox"/> <a href="#">Allocations</a>

**User Profile**

---

**Profile**

Email Address:	<input type="text" value="email@lea.gov"/>
First Name:	<input type="text" value="John"/>
Last Name:	<input type="text" value="Dow"/>
Phone Number:	<input type="text" value="615-123-1234"/>
Phone Extension:	<input type="text" value="1234"/>
Fax Number:	<input type="text" value=" - -"/>
Change Password:	<a href="#">Click Here to Change Your Password</a>

## District Assessment Information

This information has been moved to its own page and is not required until July 31.

The district assessment information URL is required per TCA § 49-6-6007. **No later than July 31** of each year, each LEA shall post on its website information about state-mandated tests and tests mandated by the LEA that shall be administered in the upcoming school year. The information shall include:

- the name of the test,
- the purpose and use of the test,
- the grade or class in which the test is to be administered,
- the tentative date or dates on which the test will be administered, and
- how and when parents and students will be informed of the results of the test.

## History Log

The *History Log* documents status changes, the name of the user who prompted the change, and the date of the change. Use the History Log to review who submitted or reviewed an application 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 application’s permanent record and are viewable on the publicly viewable approved applications.
- 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.
- See more detailed instructions here: [Creating a Comment in an ePlan Funding Application](#)

## Allocations

Amounts on the “Original” line for each grant reflect the most recent approved allocation provided by the Office of Local Finance. Should the U.S. Department of Education (ED) revise allocations, this amount is adjusted to reflect updated allocation amounts.

Allocations	
Save And Go To ▶	
	(1) Title I-A CFDA: 84.010A
Original	\$1,000,000.00

Allocation Transfers	(1) ESEA Con. Admin	(2) Title I-A CFDA: 84.010A	(3) Title I-A Neglected CFDA: 84.010A	(4) Title I-C	(5) Title I-D LEA CFDA: 84.010A	(6) Title I-D SA CFDA: 84.013A	(7) Title II-A CFDA: 84.367A
From Title I-A	\$0.00	\$0.00					
From Title I-A Neglected	\$0.00		\$0.00				
From Title I-C	\$0.00			\$0.00			
From Title I-D LEA	\$0.00				\$0.00		
From Title II-A	\$0.00	Original \$0.00 Carryover \$0.00		Original \$0.00 Carryover \$0.00	Original \$0.00 Carryover \$0.00	Original \$0.00 Carryover \$0.00	\$0.00
From Title III	\$0.00						
From Title IV	\$0.00	Original \$0.00 Carryover \$0.00		Original \$0.00 Carryover \$0.00	Original \$0.00 Carryover \$0.00	Original \$0.00 Carryover \$0.00	Original \$0.00 Carryover \$0.00
From Title V	\$0.00						
From IDEA, Part B							
<b>Total</b>	<b>\$0.00</b>	<b>\$1,637,433.34</b>	<b>\$48,660.72</b>	<b>\$1,848.89</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$275,239.16</b>

- In the bottom half of the Allocations page table, enter amounts, if any, in the ESEA Con. Admin column to transfer to consolidated administration (con admin), out of all eligible grants. **Note:** Users must include funds necessary for the administration of both public and private school programs in the amounts entered.
- Users must ensure that amounts transferred into con admin do not exceed maximums.
- The ESEA Administration report page provides a tally of ESEA Administration costs budgeted to Con. Admin, Direct Admin, and Indirect Cost. For more information, see the [ESEA Administration](#) section of this guide.
- Maximum administration percentages are calculated on the current fiscal year allocation award, include amounts transferred out, and **exclude** carryover funds.
  - Title I, Part A; Title I, Part A—Neglected; Title I, Part C; Title I, Part D; Title II, Part A; and Title V, Part B, Subpart 2 cannot exceed 20 percent according to the department.
  - Title III, Part A; and Title IV, Part A cannot exceed two percent. (The administrative percentage is calculated based on consolidated admin, direct administrative costs, and indirect costs.)
  - All ESEA programs administered with con admin funds **must** contribute a minimum of \$100 to the con admin pool according to the department.
  - All expenditures related to the administration of ESEA programs included in the con admin pool **must** be budgeted in the con admin budget. No additional administrative costs may be budgeted in the individual program budgets.

Amounts entered for con admin must include the amount needed for private school administration. LEAs must decide the amount as part of the required private school consultation process. Based on amounts entered for each program contributing to con admin, ePlan auto-calculates a percentage and populates the Con. Admin percentage on the ESEA Administration report page.

LEAs that exercise the transferability options within ESEA must indicate the amounts of money to transfer on the Allocations page.

(1)	Title I-A CFDA: 84.010A	(2) Title I-A Neglected CFDA: 84.010A	(3)	Title I-C	(4)	Title I-D LEA CFDA: 84.010A	(5)	Title I-D SA CFDA: 84.013A	(6)	Title II-A CFDA: 84.367A
From Title I-A	\$0.00									
From Title I-A Neglected		\$0.00								
From Title I-C				\$0.00						
From Title I-D LEA						\$0.00				
From Title II-A	Original \$0.00 Carryover \$0.00									\$0.00
From Title III										
From Title IV	Original \$0.00 Carryover \$0.00			Original \$0.00 Carryover \$0.00						

LEAs may transfer funds allocated under Title II, Part A, and Title IV, Part A grants. No other grant programs allow the transfer of funds.

Consultation with private schools is required *before* the transfer if a transfer affects students or educational personnel from private schools.

Eligible grant funds can only be transferred into specific grant programs:

- Title II, Part A funds may be transferred to Title I, Part A; Title I, Part C; Title I, Part D; Title III, Part A; Title IV, Part A; and Title V, Part B, Subpart 2
- Title IV, Part A funds may be transferred to Title I, Part A; Title I, Part C; Title I, Part D; Title II, Part A; Title III, Part A; and Title V, Part B, Subpart 2 (ESEA § 5103).

When transferring funds, LEAs have the option to transfer only a portion of the funds allocated or may transfer the entire allocation. Funds transferred into other grant programs take on the identity of the receiving grants and are subject to the fiscal requirements of the receiving grants. Funds transferred into Title I, Part A must be included in required set-aside calculations.

- For example, LEAs that transfer funds into Title I, Part A are required to include the funds transferred when determining the one percent parent and family engagement set-aside and private school equitable services set-aside.



# Budgeting in the CFA

## Budget

The process for entering budgets is consistent across all grants within the CFA. Users must complete each grant budget separately (e.g., Title I; Title II, Part A; IDEA). Each LEA must have a department-approved budget in ePlan before requesting reimbursement.

- To access a budget, click the [Budget](#) page link from the [Sections](#) page.

	Title I-A
	<a href="#">Budget</a>
	<a href="#">Budget Overview</a>
	<a href="#">Program Details</a>

## Copying Last Year's Budget Detail

**Important: The decision to copy a previous year's budget must be made *before* entering the current year's budget information. If a user makes a single budget entry, the link to copy budget details becomes unavailable.**

<a href="#">Copy 2024 Budget Detail</a>	<a href="#">Upload Budget Data</a>	<a href="#">Download Budget Data</a>
Modify All	Account Number	
<a href="#">Modify</a>	71100 - Regular Instruction Program	
<a href="#">Modify</a>	71150 - Alternative Instruction Program	
<a href="#">Modify</a>	72120 - Health Services	
<a href="#">Modify</a>	72130 - Other Student Support	
<a href="#">Modify</a>	72210 - Support Services/Regular Instruction Program	

Users may copy last year's budget line items and narrative descriptions into the current year's application. Once copied, LEAs only need to make changes where dollar amounts and narratives have changed since the previous year. For some grants, users may copy budgets by grant (but not all grants have this option).

- To copy last year's budget, click **Copy 2026 Budget Detail**. Click the verification link **Copy**.

## Upload Budget Data and Download Budget Data

The *Budget Upload/Download* function on the budget page allows users to download budget files as spreadsheets and then create, edit, or delete the contained budget detail data in the spreadsheet file before uploading it back into ePlan. This allows users to do the following:

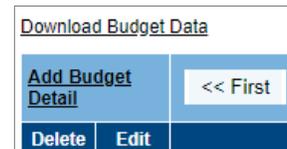
- See large numbers of budget details at one time;
- Create custom reports from budget details using Excel formulas;
- Ask individuals without ePlan access to contribute to application budgets, which the LEA user with CFA access can upload directly into the application; and
- Print the budget as an Excel file, with filtered data, such as budget details for a specific school.

Any user who can view the budget page of the application can use the download budget function, including the public, in the case of approved applications. Only users with the user role access that allows changes to the budget page may upload a file into the application. Uploads, like other budget changes, can only occur when the funding application is in an editable status (such as *Draft* or *Revision Started*, or *Returned Not Approved*). The Upload Budget Data link is unavailable when the application is in a non-editable status.

For detailed instructions about using the *Upload Budget Data* feature, please see: [Upload Budget Data and Download Budget Data](#).

## Adding Budget Details Manually

- To enter a budget manually in ePlan, on the [Budget](#) page, click the **Modify** link next to the desired account number (see screenshot on the previous page).
- For each budget item, click **Add Budget Detail**.
- Choose the desired account number, line item, budget tags, and location code from the dropdown lists. Only allowable budget line items for the grant appear as options in the dropdown lists.
- Enter the quantity and cost. Users may disregard the “Optional Program Code” for this application.
- Enter a narrative description in each large narrative textbox.
- Click **Create** to add the budget detail to the application.



**Note:** The addition of the *Upload Budget* function in FY23 changed the budget narrative from a rich text box to a simple text box. Formatting is limited in budget narratives.

## Budget Totals

ePlan auto-calculates the budget totals as budget details are entered and deducts the budgeted amounts from the awarded allocation. Users can see the total calculations at the bottom right-hand corner of the [Update Budget Detail](#) page.

- Once all budget details are complete, confirm that the amount in the *Remaining* field is \$0.00.

Total for all other Budget Details:	\$90,000.00
Total for all Budget Details:	\$100,000.00
Adjusted Allocation:	\$100,000.00
Remaining:	\$0.00

## Major Function Codes

When placing expenditures within the budgets for all grants, use the following guidelines:

- 71100—Regular Instructional Program:** Expenditures for the direct instruction of students (pre-K–12) in this major function (i.e., salaries and benefits for teachers, educational assistants, contracted services to provide direct instruction, supplies, materials, and equipment used in direct instruction).
- 71150—Alternative Instruction Program:** Expenditures for direct instruction of students (pre-K–12) in an alternative instructional setting
- 71200—Special Education Program:** Expenditures for direct instruction of students having special needs (pre-K–12 or ages 3–21) (e.g., salaries and benefits for teachers, educational assistants, contracted services to provide direct instruction to students with special needs, supplies, materials, and equipment used in direct instruction) **Note:** *If it is a single contract with one provider (e.g. Vanderbilt, LeBonheur) for speech services, include in 71200. If it is a single contract with one provider that includes speech, occupational, and physical therapy services, include in 72220.*
- 72120—Health Services:** Expenditures to provide physical and mental health services that are not direct instruction, including medical and nursing services (e.g., salaries and benefits for providing support for instructional programs in health matters, contracted services for health services for students, supplies, materials, equipment to support health educators, and professional development [PD] costs)
- 72130—Other Student Support:** Expenditures for student supports, other than health services, including guidance, evaluation, testing for general and special education students (e.g., salaries and benefits for guidance counselors, social workers, assessment and support personnel, contracted services for school resource officers [SROs], evaluation and testing services, supplies, materials, equipment for use in support of student support programs, and PD costs) **Note:** *If using for special education, only use this account series for line items not available in 72220: guidance personnel, social workers, and attendants. If paying for psychological personnel, assessment personnel, or assessment materials, those items must be budgeted in 72220.*

- **72210—Support Services/Regular Instruction Program:** Expenditures for assisting instructional staff in direct instruction for students (in grades pre-K–12); this includes activities such as curriculum development, instructional media, coaching, child development, and staff professional development (e.g., salaries and benefits for staff providing instructional support services, contracted services for support services, supplies, materials, equipment related to staff support services, and PD costs)  
*Note: Administrative expenditures for ESEA programs are typically included in 72210.*
- **72215—Support Services/Alternative Instruction Program:** Expenditures for assisting instructional staff in planning, developing, and evaluating of students having special needs (pre-K–12 or ages 3-21) in an alternative instructional setting
- **72220—Support Services/Special Education Program:** Expenditures for assisting instructional staff in planning, developing, and evaluating the process of providing learning opportunities to students with special needs (pre-K–12 or ages 3-21). This includes activities such as curriculum development, instructional media, coaching, child development, and staff PD (e.g., salaries and benefits for staff providing instructional support services, contracted services for support services, supplies, materials, equipment related to staff support services, and PD) *Note: If it is a single contract with one provider (e.g. LeBonheur) for occupational therapy and physical therapy services, include in 72220.*
- **72250—Education Technology:** Not an allowable use of funds within the CFA
- **72410—Office of the Principal:** Expenditures for the office of the principal for instructional purposes; usually used with supervision of students with disabilities
- **72520— Human Services /Personnel:** activities concerned with the recruitment, hiring, and providing correct benefits to personnel of the LEA.
- **72610—Operation of Plant:** Not an allowable use of funds within the CFA
- **72710—Transportation:** Expenditures for transporting general and special education students for instructional purposes, which includes trips between home and school (includes homeless and foster care), school activities, and mileage reimbursement to parents providing transportation (e.g., salaries and benefits for bus drivers or monitors, contracted services to transport students, supplies, and materials necessary to operate system-owned vehicles for student transportation, and auto-insurance).
- **73100—Food Service:** Not an allowable use of funds within the CFA
- **73400—Early Childhood Education Program:** activities that address the educational, health, and social service needs of preschoolers who are three and four years of age to prepare them for kindergarten. The Early Childhood Instructional Support includes teachers, assistants, and others assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for the preschools. Expenditures for instructing students and funds that are expended to instruct teachers should be recorded in the program.
- **99100—Transfers Out: Indirect Cost:** Expenditures for use with administration, personnel, and other variable costs incurred by the LEA
- **IDEA Permissive Use of Funds:** A. Adjustment to Local Effort in Certain Fiscal Years; B. Permissive Use of IDEA funds for School-Wide Program; and C. Permissive Use of IDEA Funds for Coordinated Early Intervening Services (LEAs usually use only C. for CEIS.)
- **Coordinated Early Intervening Services (CEIS):** Expenditures that allow LEAs to use up to 15 percent IDEA, Part B, Section 611 funds, in combination with other amounts (other than education funds), to develop and implement Coordinated Early Intervening Services, which may include interagency financing structures, for K–12 students (with particular emphasis on students in K–3) who have not been identified as needing special education or related services but who need additional academic and behavioral support to succeed in a general education environment. *Note: If the LEA is determined to have significant disproportionality based on race and ethnicity utilizing state criteria, the LEA must utilize Coordinated Early Intervening Services [20 U.S.C. 1418 § (d)(2)(B)]. The amount expended by the LEA under CEIS shall count toward the maximum expenditures such LEAs may reduce in Item “A” Adjustment to Local Effort.*

## Object Codes

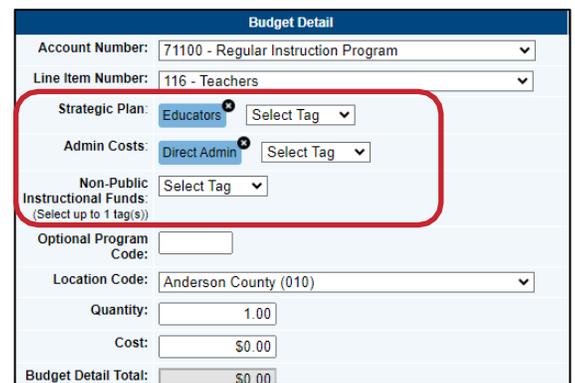
- **100—Personnel Services:** Amounts paid to employees of the LEA
- **200—Employee Benefits:** Amounts paid on behalf of employees for benefits; LEAs must budget benefits within the function in which the corresponding salary is recorded
- **300—Contracted Services:** Amounts paid for services rendered by individuals and/or companies who are not employed by the LEA
- **400—Supplies & Materials:** Amounts paid for items that are consumed, worn out, or deteriorated through use (consumables) such as classroom teaching supplies, office supplies, etc.
- **500—Other Charges:** Amounts paid for goods and services not falling into any other budget object code classification; funds carried over to the next fiscal year must be budgeted in 599
  - **524—In-Service/Staff Development Services:** Amounts paid in relation to PD, including travel expenditures, must be budgeted in this object code. Amounts paid for substitute teachers for personnel attending PD activities cannot be budgeted here.
- **700—Capital Outlay:** Amounts for equipment items having a useful life of more than one year and a unit cost of \$5,000 or more. These items require prior department approval.

## Budget Tags

Budget Tags identify the **purpose** of a budget item quickly without overly relying on the budget narratives and can be used to indicate that the money addresses a specific strategy or initiative. When utilized properly, budget tags can assist LEAs in tracking spending and help ensure that all spending requirements, including carryover requirements, are met.

To use the budget tag options for each line item, complete the following:

1. Add the new line item for the respective grant.
2. Use the drop-down menu for each Budget Tag category to select a budget tag. Some categories allow multiple selections, some categories only allow a single selection, some categories are mandatory and at least one tag must be selected, and some categories are optional, and the LEA may choose not to use the tags in that category.
3. Click **update** or **create**, and move to the next **budget item**.



The screenshot shows a 'Budget Detail' form with the following fields and values:

- Account Number: 71100 - Regular Instruction Program
- Line Item Number: 116 - Teachers
- Strategic Plan: Educators (with a 'Select Tag' dropdown)
- Admin Costs: Direct Admin (with a 'Select Tag' dropdown)
- Non-Public Instructional Funds: (Select up to 1 tag(s)) (with a 'Select Tag' dropdown)
- Optional Program Code: (empty)
- Location Code: Anderson County (010)
- Quantity: 1.00
- Cost: \$0.00
- Budget Detail Total: \$0.00

A red box highlights the Strategic Plan, Admin Costs, and Non-Public Instructional Funds sections.

Every CFA budget page, except Title IV, Part A, and Title V, Part B budget pages, has tags available for the **Best for All Strategic Plan** priorities and initiatives. The Strategic Plan budget tags are optional and include **Academics, Student Readiness, and Educators**.

**ESEA Admin budget tags** help LEAs track administration costs:

- **Con Admin:** For purchases utilizing Consolidated Administration funds.
- **Direct Admin:** For purchases utilizing direct administration (not Con Admin) funds.
- **Indirect Cost:** For funds designated for indirect cost (99100-504)

Budget tags are **mandatory for Title I, Part A; Title I, Part C, Title II-A; Title III; Title IV, Part A; Title V, Part B, and ESSA equitable services** and will help auto-populate fields/amounts on other pages of the CFA. Use only one budget tag per budget tag group for each line item number entry (i.e., one budget tag per budget tag dropdown menu).

The **Title I, Part A** tags include:

- The following mandatory LEA **Set Asides** tags:
  - Students Experiencing Homelessness
  - Required Parent and Family Engagement
  - Additional Parent and Family Engagement

- Private School Instructional Funds
- Private School Parent and Family Engagement
- English as a Second Language Programs
- Extended School Day & School Year Programs
- Foster Student Transportation
- Preschool Programs
- Professional Development Initiative
- Reservation of funds
- Salary Equalization
- Supplemental Funds for Services to Neglected Youth
- Support for Focus and Priority Schools
- Admin Costs: Direct Admin and Indirect Cost

The **Title I, Part C** tags include:

- Admin Costs: Direct Admin and Indirect Cost
- Service Period: Regular School Year and Summer
- Private School Instructional Funds

The **Title II, Part A** tags include:

- Admin Costs: Direct Admin and Indirect Cost
- Private School Funds

The **Title III, Part A** tags include:

- Admin Costs: Direct Admin and Indirect Cost
- Private School Instructional Funds

The **Title IV, Part A** tags include:

- Title IV: Well-Rounded Education Opportunities; Safe and Healthy Students; and Effective Use of Technology
- Private School Instructional Funds
- Admin Costs: Direct Admin and Indirect Cost

The **Title V, Part B** tags include:

- Authorized Programs: Title I, Part A; Title II, Part A; Title III, Part A; Title IV, Part A; and Parent and Family Engagement
- Admin Costs: Direct Admin and Indirect Cost

**IDEA, Part B** budget tags include:

- Private School Proportionate Share Amounts (PSPS)
- Admin Costs: Direct Admin and Indirect Cost

For more information about budget tags, see the respective *grant* sections of this guide and the **Filtering Budget Items** section below.

## Program Codes (Optional)

LEAs may use or disregard this field.

## Location Codes

Users may include location codes to specify expenses by school or LEA location. Title III Consortia Fiscal Agents **must include location codes** in consortium budgets.

## Filtering Budget Items

At the top of the *Budget Detail* page, users may filter the budget by account numbers, line item numbers, location codes (i.e., LEA/school organizations), and budget tags. A filter must include criteria for Object

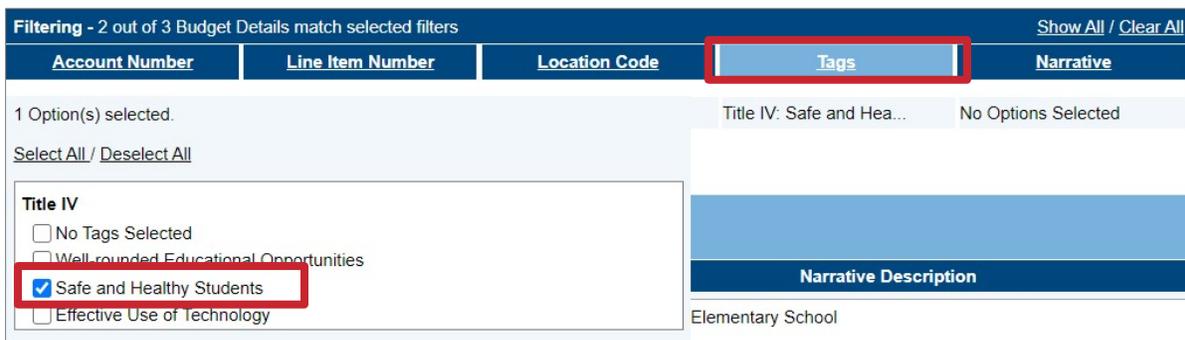
Codes, Function Codes, and LEA/School. This function is particularly helpful when looking at LEA set-asides for Title I, Part A; Title IV, Part A; and Title V, Part B. **Note:** Use only one budget tag per line item entry per budget tag group to take full advantage of the filtering function.

**To Filter by Budget Tag:**

- Once the budget has been entered and the appropriate budget tags have been selected, click **Account Number** in the Filtering box at the top of the page. Then click **Select All**.



- Next, click **Tags** to select the desired budget tag. In this Title IV, Part A example, *Safe and Healthy Students* was selected.



- With *All Account Numbers* and the *Safe and Healthy Students* budget tags filters enabled, the *Budget Detail* page shows across all account numbers only those budget entries tagged as *Safe and Healthy Students*.
- The "Total for filtered Budget Details" field at the bottom of the page now shows the total amount entered for the *Safe and Healthy Students* focus area and will auto-populate that amount on the *Title IV, Part A Program Details* page.

Total for filtered Budget Details:	\$70,000.00
Total for all other Budget Details:	\$475,819.00
<b>Total for all Budget Details:</b>	<b>\$545,819.00</b>
Adjusted Allocation:	\$545,819.00
Remaining:	\$0.00

**Transfers Out and Indirect Cost**

Indirect cost represents the expenses of doing business that cannot be clearly linked to a specific grant, contract, project function, or activity, but are necessary for the general operation of the organization and the activities it performs. These costs cannot attribute directly to any grant because the time and effort spent are not measurable. LEAs may choose to budget for indirect cost for some, all, or no grants within the CFA. Indirect cost is available on each budget page in account number "99100, *Transfers Out*."

ePlan provides automated information regarding the maximum amount permitted for indirect cost within each grant.

- Eligible funds budgeted in all accounts are totaled at the top of the budget page on the **Total Contributing to Indirect Cost** line.

Indirect Cost	
Total Contributing to Indirect Cost	\$100,000.00
Indirect Cost Rate	0.00%
Maximum Allowed for Indirect Cost	\$0.00

- Each LEA has an individualized, agreed-upon indirect cost rate that is calculated and preloaded into ePlan each year. This number and calculated Indirect Cost amounts appear in the Indirect Cost Guide at the top of each budget page.
- Users cannot exceed the **Maximum Allowed for Indirect Cost**. If the total amount budgeted in account number 99100 is more, the LEA receives a validation error and cannot submit the application.
- **Note:** *Funds budgeted for Indirect Cost in ESEA programs contribute to the calculation of the ESEA Administration maximum percentage. The Indirect Cost rate displayed on the Indirect Cost Guide on the Budget page is not the same as the maximum administration percentage. Even if the Indirect Cost rate exceeds the maximum administration percentage, the LEA may not budget more than the administration percentage across Consolidated Administration, Direct Cost, and Indirect Cost. See the [ESEA Administration report page](#) section of this document.*

Connect with the LEA's [Finance Consultant](#) for more information about Indirect Cost rates.

## **Budget Overview**

Most sections have a [Budget Overview](#) page that provides a summary of the budgeted amounts, reported by line item and account number. This page serves as a resource to provide a different view of the budgeted amounts. This page requires no input from the LEA.

## **Budget Overview Plus/Minus**

Most sections have a [Budget Overview Plus/Minus](#) page that provides a summary of prior approved budgeted amounts by line item and account number, with revision amounts displayed in red text. This page serves as a resource to provide a different view of the budgeted amounts and changes made within the current revision. This page requires no input from the LEA.

## **Budget Tag Summary**

Most sections have a [Budget Tag Summary](#) page that provides a summary of available Budget Tag groups, Budget tags, and Tagged Budget Amounts. Budget-tagged amounts may be duplicative. This page serves as a resource to provide a quick overview of the budgeted amounts. This page requires no input from the LEA.



# Program Specific Information in the CFA

## ***Program Details Pages***

All grant programs in the CFA have associated *Program Details* pages (with various names). These pages require the user to provide information regarding the program(s) implemented with grant funds.

## ***Related Documents***

Many sections in the CFA include a *Related Documents* page that allows LEAs to upload external files. Table headers indicate if the document is required or optional. If a document is required, ePlan prevents submission of the application unless an upload is made.

Where applicable, the *Document Template* column provides links to download templates or forms for application items. If “N/A” appears in this column, there is no required template for that specific item, and users may upload content in any format.

- Download the document template (if applicable), complete the document, and click the ***Upload New*** link to begin the upload.
- In the Upload Data File line, click the ***Select*** button to open the file browser.
- In the file browser window, select the correct file and then click ***Open***.
- Type the document name into the *Document Name* field. Name all file names for all uploaded documents to reflect what the file represents.
- Click ***Create*** to upload the document.

On some *Related Documents* pages, the user may post a link to a publicly accessible website that hosts the related document.

An option to upload Related Documents has been added to relevant program details pages throughout the CFA. LEA users can upload a document on the program details page ***or*** on the *Related Documents* page. Once a document is uploaded, the document is visible in both places.

## ***Program Assurances***

All programs have program assurances that LEAs must review thoroughly. Many sections have *Program Assurances* pages included in the grant section. Additional assurances are included in the Assurances section and apply to all grants. All items specified are requirements of legislation or regulation. By checking the statement at the top of the *Program Assurances* pages, the LEA user affirms that they have read and understood all requirements and that the LEA will abide by the same.

# ESEA Requirements

## ***ESEA Administration***

Under 34 CFR § 75.564(a), reimbursement of indirect costs is subject to the availability of funds and statutory or administrative restrictions. Awards for all ESEA programs have statutory or regulatory limitations on the costs of administration. As stated in the [Cost Allocation Guide for State and Local Government](#), “The costs of administration are those portions of reasonable, necessary, and allowable costs associated with the overall project management and administration. These costs can be both personnel and non-personnel, and both direct and indirect. Therefore, **the limitation applies to combined claims for indirect costs and direct administration costs.**” Please note that this limitation does not apply to Title III, Part A and Title IV, Part A. LEAs may budget up to 2 percent direct administration costs as well as the applicable indirect cost rate for these two programs.

The [ESEA Administration](#) report page provides a summary of the administration budget information provided throughout all ESEA grants in the application and allows LEAs to ensure the administrative limits are maintained for each grant. This page requires no input from LEAs.

The table below explains the data provided in each column of the [ESEA Administration](#) report page:

Column	Explanation
<b>Original Allocation</b>	Original Grant Allocation
<b>Con. Admin Contribution</b>	Amount transferred into ESEA Con. Admin ( <i>Allocation page; Column 1</i> )
<b>Con. Admin %</b>	The percentage of the original allocation contributed to Con. Admin
<b>Direct Admin</b>	Amount tagged direct admin on each budget page (No direct admin budget tags should be used if the LEA is using Con. Admin)
<b>Direct %</b>	The percentage of the original allocation tagged as direct admin
<b>Indirect</b>	Amount budgeted for Account Code and Line Item 99100-504
<b>Indirect %</b>	The percentage of the original allocation budgeted for Account Code and Line Item 99100-504
<b>Total Admin Costs</b>	Total administrative costs plus indirect costs
<b>Total %</b>	Total admin costs as a percentage of the original allocation. (This percentage must not exceed the maximum administrative percentage for the grant)
<b>Max Allowed Admin %</b>	Maximum allowed administrative percentage for this grant.

**Note:** *The maximum allowed administration percentage rate is not the same as the calculated Indirect Cost rate that is displayed on each Budget page. The LEAs calculated Indirect Cost Rate may be higher than the maximum administrative percentage allowed under the grant. LEAs must honor the maximum allowed administration percentage for the grant regardless of the LEA's calculated Indirect Cost rate.*

## ***ESEA Shared Related Documents***

No documents are required in this section.

## **ESEA Evidence**

**New for FY27:** The Every Student Succeeds Act (ESSA) requires that, to the extent practicable, federal education funds be used to support activities, strategies, and interventions that are evidence-based. This requirement applies across all ESSA programs, including:

- Title I, Part A
- Title I, Part C
- Title II, Part A
- Title III, Part A
- Title IV, Part A
- Title V, Part A

Under ESSA § 8102(21)(B), the term evidence-based, when used with respect to a State, LEA, or school activity, means an activity, strategy, or intervention that is supported by one of the following: strong evidence (Tier 1), moderate evidence (Tier 2), promising evidence (Tier 3), or evidence that demonstrates a rationale (Tier 4).

- Please describe the process the LEA uses to ensure that ESSA program funds are used, to the greatest extent possible, for evidence-based activities. Please include the following information in the response:
  - How do you identify and select evidence-based strategies or programs for ESSA programs and activities?
  - How do you determine the level of evidence (1-Strong, 2-Moderate, 3-Promising, or 4-Demonstrates a Rationale) associated with selected activities?
  - What systems or tools do you use to document, monitor, and evaluate the implementation of evidence-based practices?
  - How do you support staff and stakeholders in understanding and applying evidence-based requirements?



# Consolidated Admin Pool

The *Consolidated Admin Pool* section is not visible unless the LEA transfers funds into Consolidated Administration (con admin) on the [Allocations](#) page. ePlan does not generate this page for LEAs that do not use con admin.

**Note:** If the budget amount in the Con Admin section is incorrect, the LEA must make changes to the amounts on the [Allocations](#) page.

Consolidated Admin Pool	Messages	Print
Budget	Messages	Print
Budget Overview		Print
Program Details		Print
Plan Relationships		Print

## Budget and Budget Overview

Only codes **72210** and **99100** are allowable to budget funds for administrative costs. All costs must be administrative in nature (e.g., program director, clerical staff, bookkeeper, or equipment/inventory management salary/benefits; travel for administrative staff; supplies and equipment for administrative offices; professional development (PD) for administrative staff).

LEAs must include full-time equivalents (FTEs) in budget narratives and must match the FTEs entered in the [Consolidated Admin. Pool Program Details](#) page. LEAs must base FTEs on the percentage of time spent on the con admin cost objective.

All expenditures related to the administration of public and private school programs included in con admin **must** be budgeted in the con admin budget. **No** additional administrative costs for programs may be budgeted in the individual program budgets.

## Program Details

- The description of duties and responsibilities must include references to the administration of **all** programs that have contributed to con admin (LEAs must contribute a minimum of \$100 by each program according to the department).
- The duties and responsibilities cannot include administrative responsibilities for programs that are not part of con admin.
- Identify the *other funding sources* of staff not paid 100 percent from con admin with the description.
- LEAs must list all administrative staff referenced in the program description in the staffing area and both a head count and an FTE identified for each.
- Staffing and FTEs on this page must match the budget narratives.



# Title I, Part A

## **Budget**

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide the mandatory budget tags for LEA Set-Asides (see [Budget Tags](#) for list of required set-asides).  
**Note:** *one tag per line item per budget tag category.*
- For administrative costs, provide a budget tag identifying direct administrative cost.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.

Budget narratives **must** include, if applicable:

- Full-time equivalents (FTEs) for all employees of the LEA funded (indicate regular, summer, preschool, private, or system-level position)
- Titles of positions—**not** staff member names—funded, beside the corresponding FTE that matches the titles used throughout the application.
- If funds are to support a class size reduction (CSR) teacher, include CSR in the position title, and complete the [Class Size Reduction Personnel](#) page.
- Do not use generic titles such as “teacher” when identifying positions. Teacher titles may include—but are not limited to—interventionist or instructional facilitator.
- Include a breakdown of amounts in LEA-level set-asides for instructional initiatives.
- Label amounts to correspond to each of the set-asides identified on the [District Set-Asides and Overview](#) page (example in the budget narrative: Family Engagement - \$2,500.00).
- When totaled, amounts within the budget narratives must equal the total amounts entered on the [District Set-Asides and Overview](#) page.
- Breakdown of amounts included in the administration set-aside, if LEAs are **not** using con admin. (example in the budget narrative: Admin - \$500.00)
- If LEAs are using con admin, no additional administrative costs may be included in the budget.
- Breakdown of amounts to spend to provide private school equitable services.
- Detailed examples of equipment, materials, and supplies to fund.
- Specific professional development to support the number and type of staff who plan to participate (position titles, not employee names), and expenses to pay.
- Description of services to purchase if contracting staff or services.
- Indication of a stipend payment, if using funds to pay an existing LEA staff member for work beyond regular work hours.
- Amounts designated as part of an LEA-level set-aside and non-consolidated administrative costs **must** add up to equal amounts entered on the [District Set-Asides and Overview](#) page and the [Allocation Designation](#) (for direct administrative costs) page of the application. The direct administrative costs will auto-populate on the [Allocation Designation](#) page. The new LEA Budget Tag Summary Page will assist with amounts tagged.

## Budget Tag Summary

**Budget Tag Summary:** This page provides an overview of each budget amount for all available budget tags and administrative expenses

## Program Details

**Program Administration:** Provide a summary of how the LEA plans to administer the Title I, Part A program. If using con admin, check the box to confirm the consolidation of administrative funds. Additional information is not required.

If not using con admin, check the box stating that the LEA is not using con admin and provide a description of how the LEA administers the Title I, Part A program, including:

- staff responsible for administering the program (titles, no names);
- funding sources of each administrative position (state, local, federal, or combination—if combination, provide the percentage from each source);
- FTE of staff identified (must match budget and personnel details pages); and
- summary of duties and responsibilities handled by identified staff.

**Use of funds for pre-K:** For purposes of federal funding, “elementary schools” are schools serving any combination of pre-kindergarten through grade six (pre-K–6) [T.C.A. § 49-6-301(a)]. Indicate whether funds from this grant will be directed to pre-K students and/or instructional staff (i.e., teachers, coaches, paraprofessionals).

**School-Wide Planning:** Describe how each applicable school actively and consistently involves all planning team members and other stakeholders in the development, implementation, revision, and review for effectiveness of the school plan throughout the year.

**School-Wide and Targeted Assistance Programs:** Select all checkboxes that apply to identify the type(s) of supplemental services and supports provided for students with Title I, Part A funding. Provide a description if selecting “Other.”

- Indicate the number of class size reduction teachers in the LEA funded with Title I, Part A.

Generally describe the overall plan for the use of Title I, Part A funds within the **school-wide (SW) and/or targeted assistance (TA) schools**. Make sure to identify:

- major initiatives supported, grade level and content area focus, and if appropriate, service delivery model(s) used;
- total number of schools in the LEA served (must match the SW and TA school count on the [School Eligibility](#) page) and for TA schools, the estimated number of students served;
- any unique characteristics of one or more participating schools that are pertinent to Title I, Part A; and
- estimated numbers of students served (targeted assistance only).

**Revised for FY27 Title I, Part A Parent and Family Engagement:** As required under ESSA Title I, Part A § 1112(b)(7), describe the strategies the LEA will use to implement effective parent and family engagement under ESEA § 1116, including the barriers that exist to greater engagement by families and how the district is addressing those barriers. How does the district ensure schools are implementing effective family engagement activities that are (1) meaningful and (2) aligned with student academic achievement in the district? Also address activities specifically designed to engage the families of historically underserved student groups (i.e., economically disadvantaged students; black, Hispanic, Native American students; English learners; migratory students; students with disabilities). Include in the response:

- a) a description of the barriers that exist to greater engagement by families and how the district is addressing those barriers;
- b) the strategies being used to implement effective family and community engagement activities that are (1) meaningful and (2) aligned with student academic achievement in the district; and

- c) a description of the activities specifically designed to engage the families of historically underserved student groups as applicable (i.e., economically disadvantaged students; black, Hispanic, Native American students; English learners; migratory students; students with disabilities).

**Coordination of Funds and Services:** Available funding sources and services to specific populations of students must be coordinated with Title I, Part A, to ensure the effective use of resources and that programs are comprehensive, not fragmented.

- Indicate whether funds received are coordinated from the list of funding sources.
- Select the programs and services coordinated with Title I, Part A from the list that includes, but is not limited to, Head Start, Even Start, career and technical education (CTE), and services for youth at risk of dropping out.
- **Check N/A** if the LEA receives no funds or if the instructional program is not operating within the LEA.

**New for FY27 Needs Assessment:** LEAs are required under ESSA Title I, Part A § 1112 to meet certain requirements. The following prompts were moved from the district plan to the CFA and were designed to help LEAs show compliance with these requirements. Respond to each prompt in full.

- Describe how the district is identifying and supporting schools and student groups with the most room for improvement as required under ESSA Title I, Part A § 1112(b)(1)(B) and (C).
- As required under ESSA Title I, Part A § 1112(b)(2), describe how the district will review and analyze student discipline data and take steps to reduce lost instructional time and/or disparate impact due to student discipline.
- As required under ESSA Title I, Part A § 1112(b)(8) and (10), describe how the district facilitates effective student transitions from early childhood to elementary school, elementary to middle school, and middle to high school. What steps is the district taking to address transition challenges and meet the needs of students?
- As required under ESSA Title I, Part A § 1112(b)(10), describe how the district facilitates effective student transitions from high school to postsecondary and career. What steps is the district taking to address postsecondary transition challenges and meet the needs of all students?
- Describe how the district is supporting programs that coordinate and integrate academic and career and technical education content; these may incorporate work-based learning opportunities, experiential learning opportunities, and/or courses aimed at promoting skills attainment important to in-demand occupations or industries.

## ***Student Eligibility—Targeted Assistance Programs***

LEAs are required to complete this portion of the CFA if using Title I, Part A funds to implement targeted assistance programs within schools either in the regular school year or during the summer.

- If providing targeted assistance programs with Title I, Part A funds, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- For each identified group of students, select the type of program offered (regular year or summer) by checking the corresponding box. LEAs may select more than one box per row if the data sources used for each are the same. Add rows as needed.
- **Preschool–Grade 2:** Identify the developmentally appropriate measures that determine student eligibility for Title I, Part A supplemental services. Students must be identified through multiple measures (more than one), so add new rows as needed to demonstrate all data sources used. If selecting “Other” for any measure, provide the name of the measure. Provide a description of the specific criteria and data source to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.
- **Grades 3–12:** Identify the measures that determine student eligibility for Title I, Part A supplemental services. Identify students through multiple measures (more than one), so add new rows as needed

to demonstrate all data sources. If selecting “Other” for any measure, provide the name of the measure. Provide a description of the specific criteria and data sources to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.

- **Late-arriving students or students for whom LEA criteria data is not available:** LEAs must be prepared with procedures and processes for determining the eligibility of students who enroll late in the school year or do not have adequate data normally utilized to make eligibility decisions. Identify the alternative sources of data for these students. Students must be identified through multiple measures (more than one), so add new rows as needed to demonstrate all data sources used. If selecting “Other” for any measure, provide the name of the measure. Provide a description of the specific criteria and data sources to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.

## **Homeless Students**

ePlan prepopulates the data from the previous school year in the first column of the table.

- ePlan prepopulates the number of homeless students coded as “H” based on the estimate based on the Feb. 2026 student count. LEAs must still enter the most up-to-date student counts for students experiencing homelessness within the LEA (this may be the same number as the Feb. 2026 counts). These counts help plan for the next school year. Data must be from the current school year (when completing the initial application).
- No user entry is required in the “Title I, Part A Homeless Set Aside amount” field. All LEAs are required to set aside a portion of Title I, Part A funds to provide services and supports to students experiencing homelessness for their enrollment, attendance, and academic success. This number is prepopulated from the set-aside amount for students experiencing homelessness entered on the [District Set-Asides and Overview](#) page.
- No user entry is required in the “Title I, Part A Homeless Set Aside per-pupil amount” field. ePlan auto-calculates this amount from the current number of students experiencing homelessness enrolled in the LEA entered in the first row of the table, and the set aside amount entered on the [District Set-Asides and Overview](#) page.
- Describe how the LEA determined the Title I, Part A homeless set-aside amount. In the description, include how the LEA also considers the availability and utilization of community-based organizations (CBOs) (e.g., churches, service clubs, food banks, etc.); per pupil ratios; and data trends in the determination of the amount.
- Describe how the LEA prevents barriers to enrollment in its schools for students experiencing homelessness. Provide information on training provided to staff, policies and procedures that are in place, and other initiatives that address barriers to enrollment.
- Describe what services, resources, and supports are provided to help close the achievement gap between homeless and non-homeless students.
- Describe what student-centered factors the LEA uses to determine the best interest of the student attending the school of origin or the local attendance area school requested by the parent, guardian, or unaccompanied youth.
- Describe the transportation services that are available to homeless students and how the LEA ensures that there is no delay in getting required transportation services to students within 1-2 days of enrollment. Enrollment is defined as “attending classes and participating fully in school activities” [42 U.S.C. § 11434a(1)].
- Confirm whether the LEA coordinates Title I, Part A homeless set-aside funds by selecting all the funding sources that will be coordinated by Title I, Part A Homeless set-aside funds. Title IX McKinney-Vento Subgrant, Title IX McKinney-Vento Subgrant Hurricane Relief, or Other box for any other funding source that is coordinated with homeless set-aside.

- The McKinney-Vento Education for Homeless Children and Youth program requires LEAs to designate a liaison and carry out required duties and requirements under Section 722(g)(3) and (6) of the McKinney-Vento Act. In the first table, enter both a head count and a full-time equivalent (FTE) for Homeless Liaison. Head counts must be whole numbers (no decimals). In the “**Other**” field, add any additional staff supporting homeless programming. These additional staff, other than the designated Homeless Liaison, could be homeless assistants, transport coordinators, bus drivers, etc., who are supporting specific **McKinney-Vento requirements**. Click Add Row to add additional rows to the table.
- **Note:** This position can be supported by Title I, Part A Set Aside Funds, or other funding and can be duplicated on the system-wide personnel page. Indicate if the LEA plans to use a portion of the Title I, Part A homeless set aside for the LEA homeless liaison. If yes, identify the percentage of funds used.
- At the bottom of the page, check the assurance box to confirm that the LEA has developed and implemented a clear, written transportation policy and dispute resolution process for students experiencing homelessness.

## Students in Foster Care

ePlan prepopulates the data from the previous school year in the first column of the table.

- Enter the most up-to-date student counts for students in foster care within the LEA. These counts help plan for the next school year, so the data must be the most current and complete data possible.
- Enter the total number of best interest determination (BID) meetings held in the 2025-26 school year as of the submission date of the application.
- Enter the total number of BID meetings resulting in students remaining in their school of origin.
- No user entry is required in the “Title I, Part A foster care transportation set aside (for the following fiscal year)” field. This number is prepopulated from the set-aside amount for foster care transportation entered on the *District Set-Asides and Overview* page.
- Indicate if the LEA plans to set aside Title I, Part A funds for costs for transporting students in foster care to their school of origin. LEAs may **not** use funds set aside for students experiencing homelessness to provide for these costs.
- Check the assurance indicating that the LEA has developed and implemented clear written procedures for transporting foster youth to the school of origin, when in the best interest of the student, to ensure that (1) the LEA provides transportation for the duration of the student’s time in foster care; and (2) the LEA provides transportation promptly (**Note:** *Budget all transportation in 72710*). Checking the assurances box also indicates that the LEA provides training to building level administrators and enrollment personnel on foster care and educational stability and provides for the immediate and appropriate enrollment of each eligible student.
- Upload the LEA policy for transporting foster youth into the documents section at the top of the page or on the Title I, Part A *Related Documents* page.

## Personnel Details—System-Wide

- In the first table, enter both a head count and an FTE for all **system-wide** instruction and support staff supported with Title I, Part A funds. System-wide staff are employees not assigned to a building and work across the LEA in multiple school sites as necessary, but not as part of a planned assignment. FTEs **must** match FTEs identified in budget narratives (individually and the sum). Titles of staff **must** match titles identified within budget narratives.
- If the LEA is using consolidating administration, do not enter staff into the second table, as these staff must be included in the *Consolidated Administration* section.
- LEAs **not** utilizing con admin, but direct admin within the grant, must enter the head count and FTE for all system-wide administrative staff in the second table. These personnel typically work in the central office, handling administrative duties for Title I, Part A (e.g., monitoring, bookkeeping, completing required reports, completing the consolidated funding application).

- Titles and FTEs listed for administration **must** match the titles and FTEs identified within the budget narratives.
- Reference identified staff within the narrative description of administration within the [Program Details](#) page (titles and FTEs must match).

### **Personnel Details—Regular School Year K–12, School-level**

- Enter both a head count and an FTE for all **school-based**, K–12, regular school year instructional and support staff supported with Title I, Part A funds. School-based staff are employees assigned to one or more schools for a pre-determined time. These staff may work full time at one school or may split their time across two or more schools, but LEAs may not duplicate schools.
- Enter head counts and FTEs for staff assignments within schools across the system.
- FTEs **must** match FTEs identified in budget narratives (individually and sum). Titles of staff **must** match titles identified within budget narratives.
- Identify staff who are supported with funds spiraled to Title I, Part A schools as specified on the [PPA List](#) page. Make sure there is alignment between the funds spiraled and the staff supported.

**Note: Do not duplicate reported data. Use either the table or the spreadsheet to report personnel details by title. Ensure that the Grand Total table column accurately reflects the total head count and FTE before saving the page.**

- Enter both a head count and an FTE for all school-based, K–12, regular school year instructional and support staff supported with Title I, Part A funds. School-based staff are employees assigned to one or more schools for a pre-determined time. These staff may work full time at one school or may split their time across two or more schools, but LEAs may not duplicate schools.
- **For LEAs using the ePlan page:** School names and several staff titles are pre-populated. Enter any staff titles not falling into these pre-populated categories in the “Other” column(s) provided.
- **Alternatively, LEAs may use the Excel template** linked at the top of the page to complete the [Personnel Details](#) page to report head count and FTE. This may assist LEAs that have additional position titles that are unable to fit within the constraints of the page to calculate each staff title together.
- Enter the total Head Count and FTE included in the spreadsheet into the second last column of the table on this page. This allows aggregate data reports to be gathered at the state level, but allows LEAs the flexibility to report in the manner preferred by the LEA.

### **Personnel Details—Summer School K–12, School-Level**

If not using Title I, Part A funds to support summer school programs in Title I schools, mark this page “N/A” by checking the box at the top. No additional input is necessary on this page.

- If Title I, Part A funds **are** used to support summer school programs in Title I schools, select the appropriate funding and staffing drop downs, and both a head count and an FTE for all **summer school**, K–12, school-level instructional and support staff supported with Title I, Part A funds. These staff are hired or paid a stipend to implement summer programs in Title I schools.
- To determine an FTE for staff paid with a stipend:
  - determine the total number of hours worked by each person as part of the summer program;
  - determine the total number of hours considered full time for each person (total contracted hours during the regular school year); and
  - divide the number of hours worked in the summer program by the total full-time hours for each person to determine the FTE for the summer program.
- Enter head counts and FTEs for staff assignments within schools across the system. School names are prepopulated, and numerous staff titles are prepopulated. Enter staff not falling into these prepopulated categories in the “Other” column provided and enter a position title.

- In the “Funding” column, select the method that Title I, Part A funds have been allocated to support the summer program. Funds are either spiraled down to schools through the school allocation and are included in the total school allocation on the [PPA List](#) page or are included in the LEA set-aside and listed on the [District Set-Asides and Overview](#) page.
- FTEs **must** match FTEs identified in budget narratives (individually and sum). Titles of staff **must** match titles identified within budget narratives.
- Identify if staff will be paid through stipends or if staff members are hired specifically for the summer program only. Both may be selected if the summer program is staffed by both types of staff.

### **Preschool Personnel Details (School-Level)**

- If no Title I, Part A funds support preschool programs, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- If Title I, Part A funds support preschool programs, enter both a head count and an FTE for all **preschool**, K–12, school-level instructional and support staff supported with Title I, Part A funds.
- Enter head counts and FTEs for staff assignments within schools across the system. School names are prepopulated, and numerous staff titles have been prepopulated as well. Enter staff not falling into these prepopulated categories in the “Other” column provided and enter a position title.
- In the “Funding” column, select the method that Title I, Part A funds have been allocated to support the preschool program. Funds are either spiraled down to schools through the school allocation and are included in the total school allocation on the [PPA List](#) page or are included in the district set-aside and listed on the [District Set-Asides and Overview](#) page.
- FTEs **must** match FTEs identified in budget narratives (individually and the sum). Titles of staff **must** match titles identified within budget narratives.

### **Preschool Counts**

- If no Title I, Part A funds support preschool programs, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- If information was entered in the Preschool [Personnel Details \(School-Level\)](#) page, information **must** be entered on this page; however, it is possible for information entered on the [Preschool Counts](#) page and **not** on the [Preschool Personnel Details](#) page if no Title I funds are used to support instructional or support staff.
- Collect information on schools in which LEAs use Title I, Part A funds, either as an LEA set-aside or as part of a school allocation, to support **preschool programs** within a K–12 Title I school.
- If there is a preschool program offered in a Title I school, but funds other than Title I, Part A fully support it, do not enter information on this page for that school. If **any** Title I, Part A funds are used to support the preschool program offered in a Title I school, the information on this page must be filled out for that school.
- For each school with a preschool program supported in any way by Title I, Part A funds, complete the following information:
  - the number of preschool classes supported with Title I, Part A funds that are provided:
    - to students within the school attendance area; or
    - to students from multiple attendance areas across the LEA; or
    - to students in a separate location—not another school within the LEA;
  - the total number of students enrolled in the preschool;
  - the total number of students who are low-income (of the total number of enrolled students);
  - the percentage of students from low-income families (total preschool low-income student count divided by the preschool total enrollment); and
  - the type of preschool program offered in the school or separate location.

LEAs may only offer a school-wide preschool program in a Title I school-wide school. In a school-wide preschool program, all students are eligible for services.

A targeted assistance preschool program would be offered in a Title I targeted assistance school, and only those students identified as most at risk of failing to meet the state's academic achievement standards based on multiple, educationally related, objective criteria—such as developmentally appropriate measures of child development, teacher judgment, and interviews with parents—would be eligible for services.

### ***Class Size Reduction (CSR) Teachers***

- Under the Elementary and Secondary Education Act (ESEA) as reauthorized by the Every Student Succeeds Act (ESSA), LEAs may utilize Title I, Part A for class-size reduction (CSR) in grades K–3.
- If no Title I, Part A funds are used to fund Class Size Reduction (CSR) teachers, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- For each school with Class Size Reduction (CSR) teachers paid with Title I, Part A funds, complete all the information in the chart. After the data is entered into the table, ePlan calculates the projected state and local teacher to student ratio and the grade span projected state and local teacher to student ratio.
- Provide answers to open response questions in this area.

**In September of the school year**, additional fields will appear on this page requesting actual enrollment numbers. When available, complete the table. ePlan uses the data entered in the table to calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Additionally, LEAs must show that the educators hired as CSR teachers are proven to be highly effective. Upload the following to *ePlan* > *LEA Document Library* > (*appropriate Fiscal Year*) > *Consolidated Funding Application Documents* > *Title I CSR Teacher Justification*:

1. A letter signed by the director of schools on LEA letterhead stating that the CSR teacher:
  - meets state qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
  - is teaching in the field of discipline of the certification of the teacher; and
  - is not teaching on a waiver.
2. Documentation showing the teacher is a level three (3) or above on the latest TEAM evaluation.

**The above documentation must be submitted as described above by October 1 of the fiscal year that the CSR funds are being spent.** Contact the appropriate [ESEA divisional coordinator](#) for technical assistance.

## Identifying and Ranking Schools

**Note:** Data entered on this page cannot be changed once the original CFA is approved.

Identifying and Ranking Schools documents can be uploaded on the Identifying and Ranking Schools page or from the Related Documents page.

- *Identifying and Ranking Schools Supporting Documentation*
  - e.g., Free/Reduced Lunch Reports, Direct Certification Lists, (This list must include Reduced and/or Free depending on the poverty factor used in the School Eligibility Chart.)
  - Reports must include Student ID (PII Sensitive only), School Name, Student Grade Level, and Type of Eligibility.
- *Title I Skipped Schools Letter*
- *Title I School-wide Waiver Approval Letter*

**Low-Income Data Sources:** Choose the K-12 poverty measure(s) used by the LEA in making school eligibility determinations for Title I, Part A. This information must also be entered on the [School Eligibility](#) page. The LEA may select more than one measure, but duplication of names is prohibited. If using multiple measures, identify the data source(s) on the [School Eligibility](#) page. While LEAs may use more than one poverty measure, Census, Temporary Assistance for Needy Families (TANF), and Medicaid are typically not main data sources; rather, they are used to identify additional students who may have been missed by free- and reduced-price lunch (FRPL).

- Identify the month and year in which data was pulled and used for eligibility determinations.
  - Poverty Data could include, but not limited to: Free/Reduced Lunch, Direct Certification (DC), TANF, Medicaid Free/Reduced (included in DC list a few years ago), and SNAP. If a 1.6 multiplier is used for poverty factor, reduced students cannot be included in the count, and this includes MR for LEAs that use the Direct Certification list.
- **Ranking and Identifying Title I Schools:** Single grade span LEAs (only one school serves a grade span within the entire LEA attendance area) and LEAs with an enrollment of fewer than 1,000 students are exempted from eligibility and ranking rules. All schools are eligible for Title I, Part A services.
- Choose the method to allocate Title I, Part A funds to eligible and participating Title I schools. This information informs the sort order assigned to each school on the [School Eligibility](#) page.
- **District-Wide Ranking:** Rank K-12 schools from highest poverty to lowest poverty without regard to grade span and serve in that order.
- **Grade-Span Ranking:** Group schools according to grade spans and then rank by poverty percentage within those grade spans. Serve schools in rank order within grade spans.
  - Select the method to determine the eligibility of ranked schools. This information determines building eligibility on the [School Eligibility](#) page.
- **District-Wide Poverty Percentage:** Schools at or above the calculated district-wide poverty average are eligible for participation in Title I, Part A.
- **Grade-Span Poverty Percentage:** Each school at or above the grade span poverty percentage average is eligible for participation in Title I, Part A. If district-wide rank was chosen in the prior step, district-wide grade span average is not an option.
  - If choosing this option, identify each grade span along with the grade span poverty average for each.

Calculate grade span averages using data entered on the [School Eligibility](#) page.

- **35 Percent Rule:** Schools with 35 percent or more poverty are eligible for Title I, Part A if they are grandfathered in or receive a waiver. Ensure the school is designated as grandfathered in [GF (SW) or GF (targeted)], or school-wide waiver [SW (waiver)].

- **50 Percent High School Priority:** LEAs may elect to place priority in ranking and serving high schools with 50 percent or more low income. These high schools may receive priority over all other elementary and middle schools with higher poverty, except those with 75 percent or more low income.
- **School-Wide Waiver of 40 Percent:** LEAs may receive a waiver of the 40 percent low-income requirement for Title I, Part A school-wide programs.

Schools “Skipped” in Rank Order: If “skipping” schools within the spiral, LEAs must demonstrate that schools skipped receive **supplemental** state and/or local funds **equal to or greater** than what would have been allocated through Title I, Part A to provide services for low-achieving, at-risk students. If skipping more than one school, use the **Add Row** feature.

The LEA cannot consider state and/or local funds allocated to the school for the basic educational program offered. Only supplemental funds, in addition to those necessary for the basic educational program, may be considered when requesting to skip a school in the spiral. Be sure to include:

- names of the individual schools skipped;
- funding source(s), not federal, of the supplemental resources; and
- the amount, by school, received from the supplemental funding source.

Based on the final spiral within the CFA, the supplemental amounts listed for each skipped school must be equal to or more than the amount the school(s) would have received in the spiral.

## School Eligibility

**Note: Data entered on this page cannot be changed once the original CFA is approved, except for new or significantly expanding charter schools. For any changes in grade spans or two schools combining within a LEA, consult with your divisional coordinator before submission.**

All LEAs receiving Title I, Part A must complete this page. This page ranks schools within the LEA based on poverty, identifies Title I eligible schools, and determines the type of Title I, Part A program operated in participating schools.

**Note:** Columns A–E are prepopulated from the ePlan school record based on information in the school directory. If there are discrepancies, please report errors to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov).

**Column A—School Name:** (prepopulated from the school record in ePlan)

**Column B—LEA ID – School Number:** (prepopulated from the school record in ePlan)

**Column C—First Year of Operation:** (prepopulated from the school record in ePlan, contact [the LEA's Divisional Coordinators](#) if this field needs to be updated)

**Column D—School Type:** (prepopulated from the school record in ePlan)

**Column E—Grade Span:** (prepopulated from the school record in ePlan)

**Column F—Service:** Choose Title I service type from the drop-down box in this column for each school.

**Note:** Enter K-12 enrollment data (Columns G and H) and K-12 poverty information (Columns J through P) for each school and determine Title I eligibility before completing Column F (Title I Service).

**Column G—K-12 Public Enrollment:** Enter the current K-12 public enrollment for each school. If the school's grade span includes pre-K, *exclude the number of pre-K students from the count.*

**Column H—K-12 Private School Attendance Area:** For each school, enter the number of private school students residing within the public school attendance area. This represents the number of students who would attend the public school, based on their home address, but have chosen to attend a private school. The physical location of the private school does **not** have to be within the attendance area.

**Column I—All Students (K-12 Public Enrollment + Private School Attendance Area):** ePlan auto-calculates the total public and private count for each school by adding columns G and H.

**Column J—Poverty Factor:** Select the correct poverty factor from the drop-down menu (i.e., FRPL, DC, or DC x 1.6 multiplier). This is the main data source the LEA has chosen to identify economically disadvantaged children. The data source identified must match the data on the [Identifying and Ranking Schools](#) page and must be consistent across all schools (see the chart below for clarification). Consistency does not mean that the same data must be used by all schools, as some data sources are considered equivalents:

Poverty Factor / Data Source	Equivalent Poverty Factor/Data Source
Free & Reduced Price Lunch (FRPL)	DC X 1.6 Multiplier
Direct Certification (DC)	No Equivalent—DC must be used for all schools

**Column K—Public Count:** Enter the total number of K–12 public students identified as low-income based on the poverty factor chosen.

**Column L—Adjusted Public Count:** This is an auto-calculated field that equals the number in column K multiplied by the 1.6 multiplier if the LEA chose the poverty factor “DC x 1.6 Multiplier”. If another poverty factor was chosen, the number in Column L is the same as the number entered in Column K.

**Column M—Private School Count:** In **Column M**, based on the poverty factor used for private schools, enter the total number of students residing in the attendance area and attending private school who are low-income. **Note:** *Private school poverty counts are collected from each participating private school where identified resident children attend. Poverty may be determined using FRPL or DC (if offered by the private school), a survey that utilizes the same poverty criteria as FRPL or different source, by proportionality, or an equated measure.*

**Column N—Total Low-Income L+M:** This auto-calculated column provides a total number of K–12 low-income students by adding the numbers entered in Columns L and M.

**Column O—Percent (K+M)/I:** This auto-calculated column provides the percentage of low-income students (i.e., Column K and M divided by Column I) before any direct certification multiplier is applied.

**Column P—Adjusted Percent N/I:** This auto-calculated column provides the adjusted low-income percentage with the direct certification multiplier applied (i.e., Column N divided by Column I).

**Note:** *If “DC + 1.6 Multiplier” was not chosen, the values in Columns O and P are the same.*

**Column Q—Sort Order (Asc):** Identify the sort order assigned to each school. Schools with “1” are served first; schools with “2” are served second, and so on. Sort order is determined by the method of allocation of funds selected on the [Identifying and Ranking Schools](#) page under “Identify the method the LEA will use to identify Title I eligible schools.” The following rules apply when assigning sort order to schools:

- Schools with a 75 percent or more low-income percentage **must** be assigned a sort order of “1.” These schools must be served first, in order by low-income percentage, before any other schools can be served, regardless of grade span.
- If the LEA selected priority for high schools with 50 percent or more low-income students on the [Identifying and Ranking Schools](#) page under “Identify the method the LEA will use to identify Title I eligible schools,” these schools would be assigned a sort order of “1” unless there are schools with 75 percent or more low-income students. In that case, high schools with 50 percent would be ranked as “2” after all schools with 75 percent.
- If the LEA selected district-wide rank as the method of allocating funds on the [Identifying and Ranking Schools](#) page under “Identify the method the LEA will use to identify Title I eligible schools,” the sort order for all schools can either be “1,” or the column can be left blank. This means that the LEA plans to serve all schools in rank order, regardless of grade span.
- If the LEA selected grade span rank as the method of allocating funds on the [Identifying and Ranking Schools](#) page in the *Ranking & Identifying Title I Schools* area, the sort order of “1” would be assigned to the grade span that is served first. If there are schools with 75 percent or more low-income students, those schools would have the sort order of “1,” and the schools in the first priority grade span would be assigned a sort order of “2.” The second grade span served would be assigned a “3” sort order, etc.
- If the LEA has less than 1,000 students enrolled or has only one school per grade span, sort order is not necessary, as the ranking and serving rules do not apply.

**Column R—Eligibility for Service:** *This column does not require user input.* Checkmarks are prepopulated beside each school eligible based on all data available. The system considers the following data:

- The method of qualification of attendance areas in schools selected on the [Identifying and Ranking Schools](#) page (35 percent rule, district-wide poverty average);
- If the LEA enrollment is under 1,000 or has a single school per grade span; and
- The poverty percentages in Column P as compared to the district-wide poverty average, the district-wide grade span poverty average, or the 35 percent rule.

If the LEA selects district-wide grade span poverty average on the [Identifying and Ranking Schools](#) page, the system does not automatically determine eligibility. The LEA must compare schools within each grade span to the grade span average and indicate eligibility in Column S.

- Once school eligibility for Title I, Part A services has been determined, return to Column F and select the type of service offered to each school from the drop-down menu. Below is a list of each type of service:
  - **School-Wide (SW):** 40 percent or more low-income required
  - **School-Wide Waiver [SW (waiver)]:** A school that has received a waiver from the department to operate a school-wide program without meeting the 40 percent low-income requirement requires LEAs to upload the approval letter on the [Identifying and Ranking](#) page or the [Title I Related Documents](#) page.
  - **Targeted Assistance (TA):** allowable for any eligible school
  - **Skip School:** a school may be skipped within the eligibility rank identified if:
    - The school is receiving state or local funds to provide for Title I, Part A-like services to at-risk students.
    - The state or local funds supporting Title I, Part A-like services is at least equal to the Title I, Part A funds the school would receive if it were not skipped in the ranking.
  - **Grandfathered (GF):** a school may be grandfathered into Title I, Part A eligibility if the school was eligible (at 40 percent or above) for Title I, Part A in the prior year (based on standard eligibility options). If a school falls below 40 percent the second year, a waiver is needed.
  - Grandfathered schools must be identified as school-wide grandfathered [GF (SW)] or grandfathered targeted assistance [GF (targeted)].
  - **None:** a school that is either ineligible for Title I, Part A, or is eligible but not participating.

**Column S—Eligibility by Other Factors:** Grandfathered schools are not automatically marked as eligible in Column R. LEAs must identify these schools as eligible in this column.

**Note:** Grandfathered schools are not automatically marked as eligible in Column R. LEAs must identify Grandfathered schools as eligible in Column S.

**Column T—School Designation,** select the school designation for each school from the drop-down box. The default in column T is “None”. LEAs must change the dropdown to reflect the school designation for schools that are Focus, Priority, Reward, Comprehensive Support and Improvement (CSI), and Additional Targeted Support and Improvement (ATSI).

## ***District Set-Asides and Overview***

District set-asides are funds necessary for district-wide instructional initiatives that benefit all Title I schools across the LEA, cannot be allocated to individual schools, and require the effective implementation of set-aside Title I, Part A funds.

Set-asides identified on the [District Set-Aside and Overview](#) page must include a narrative response to describe the initiative, justify the expenditures, and identify the schools impacted by the set-aside, where indicated.

- Access the narrative entry by clicking the plus sign (“+”) within each set-aside category.

## **Required Set-Asides**

**Students Experiencing Homelessness:** ESEA requires that Title I, Part A funds be set aside in a sufficient amount to provide services and supports to students experiencing homelessness in the LEA. This set aside

**may** pay for the LEA homeless liaison salary and incremental costs to transport a homeless child or youth to and from the school of origin. While the law does not require a

specific amount, all LEAs must set aside an amount that is sufficient to meet the needs of identified students experiencing homelessness.

**Note:** Answer **all** narrative questions related to students experiencing homelessness on the Homeless Students page. No narrative questions are required on this page for the Students Experiencing Homelessness set-aside.

**Required Parent and Family Engagement for Public Schools:** LEAs receiving at least \$500,000 (including all *Original, Reallocated, and Transfers In* funds) in Title I, Part A must set-aside at least one percent of their Title I, Part A allocation for family engagement activities in Title I schools. Title I schools must allocate 90 percent of this set-aside for school-specific parent and family engagement activities. ePlan auto-calculates the required set-aside amount for public school parent and family engagement and the 90 percent amount that must be distributed to Title I schools.

**Note:** Funds transferred to Con Admin are included in the Title I allocations for the calculation of the required Parent and Family Engagement set aside.

- Enter the amount budgeted for the required parent and family engagement set-aside.
  - If the amount entered by the user is not equal to the amount calculated by ePlan, ePlan generates a validation error that prevents submission of the CFA.
  - LEAs that receive less than \$500,000 in Title I, Part A funds are not required to enter an amount in this field.
  - If the LEA is providing Title I, Part A services to private school students, and is required to set aside one percent for parent and family engagement, the required private school set-aside amount for private school family engagement is calculated and entered in the Equitable Services section.
- In the narrative boxes, describe how the LEA will use the parent and family engagement set-aside, including LEA- and school-level purchases, programming, materials, and professional development.

**Additional Parent and Family Engagement:**

- ePlan provides a summary amount of the budget items tagged with the Additional Parent and Family Engagement Set-Aside budget tag. Enter this amount in the provided cell in either of the following cases:
  - The LEA is **not required** to set aside one (1) percent for parent and family engagement activities but chooses to set-aside funds to support such activities, **or**
  - The LEA is required to set aside one percent and chooses to set aside **more than that amount** for parent and family engagement. Enter any amount over the one percent requirement here.
- In the narrative boxes, describe the LEA and school-level activities funded, and list the impacted schools.

## Set-Asides for Services to Students in Private Schools

If no private schools are participating in Title I, Part A, no entries are required in this area.

**Private Schools Instructional Funds:** ePlan prepopulates the amount of private school instructional funds, if any, from the **Equitable Services for Private Schools, Program Details-Title I, Part A** page (Line F). In the narrative boxes, describe the initiative and list all schools impacted.

**Private Schools Parent and Family Engagement:** If LEAs are required to set aside one percent for parent and family engagement and are providing Title I, Part A services to private school students, the private schools must also spend one percent of the equitable share on parent and family engagement activities. ePlan auto-calculates the Private Schools Parent and Family Engagement amount. In the narrative box, describe how the parent and family engagement set-aside will be used, including LEA- and school-level purchases, programming, materials, and professional development.

## Additional District-Wide Instructional Initiatives

For each of the additional district-wide instructional initiatives, ePlan prepopulates the amount tagged and set-aside in the budget, LEAs must provide the description and justification for the initiative, and identify which schools are impacted in the narrative boxes. See [Budget Tags](#) for more information.

**English as a Second Language Programs:** Include costs related to the facilitation of district-wide instructional initiatives for English learners.

**Extended School Day & School Year Programs:** Include costs associated with the implementation of a **district-wide** summer, before-, or after-school program. Do not include costs within individual schools, as LEAs must allocate these funds to the school via the spiral on a per-pupil basis.

**Foster Care Transportation:** Use a portion of Title I, Part A to support the costs of transporting students in foster care to the school of origin, if that is in the best interest of the student (budgeted in 72710).

**Preschool Programs:** Include costs with the implementation and of a district-wide preschool program.

**Professional Development Initiative:** Include district-wide professional development initiative costs (e.g., system-wide coaches and instructional facilitators, costs related to district-wide professional development initiatives) that cannot be spiraled down to schools as part of school allocation. Attendance at conferences and trainings are not district-wide professional development initiatives unless the conferences and trainings are specifically focused on the areas of focus identified by the LEA and are part of the district plan. Typically, professional development costs would be spiraled down to each school to align with school plans.

**Reservation of funds for FY28 (not to exceed 15 percent):** Include the funds the LEA intends to carry over into the next fiscal year. Include here any contingency funds that the LEA would like to set aside for things like workers' compensation claims, unexpected medical leave, charter school expansions, etc. When these costs occur, LEAs may remove them from this set-aside and place them into the appropriate category based on the expense.

**Salary Equalization:** Determine the average salary and benefit-cost for teachers and charge only that average amount to Title I schools for every supported teacher. Excess costs beyond the average salary and benefits are combined and set aside at the LEA-level.

**Supplemental Funds for Services to Neglected Youth:** Additional funds for instructional initiatives focused on services for neglected youth.

**Support for Focus and Priority Schools:** Include targeted, district-wide instructional initiatives focused on Title I schools in these categories. Do not include costs of programs in these schools that are not district-wide initiatives, as school-based programs must be funded out of school allocations awarded through the spiral.

The total funds amount at the bottom of the page is auto-calculated based on the entries provided by the LEA. This amount of money carries over to the [Allocation Designations](#) page, and the funds available for allocation to schools are reduced by this amount.

All amounts entered as district set-asides must equal amounts identified within the budget narrative. Budget narratives must specify set-aside amounts and must be labeled to correspond to the district-wide set-aside. For example, include all amounts within the budget that are part of a district-wide professional development set-aside within the narrative and identify them as part of the professional development set-aside. All amounts within the budget narratives must equal the amounts on the [District Set-Aside and Overview](#) page.

## Allocation Designations

All fields on this page are prepopulated.

See the table below to determine the source of prepopulated amounts.

Line Title	Source of Data
<b>Allocation Amounts</b>	
<b>Title I, Part A Regular Allocation</b>	<i>Allocations</i> page—Original Allocation plus Title II, Part A & Title IV, Part A funds transferred in, if any
<b>Carryover/Additional Funds</b>	<i>Allocations</i> page—Incoming Carryover
<b>Total Allocation Amount</b>	Auto-sum of Title I, Part A Allocation and Carryover/Additional Funds
<b>School Allocations</b>	
<b>Total Allocation Amount</b>	Auto-sum of Title I, Part A Allocation and Carryover/Additional Funds
<b>Total Set-Asides</b>	District Set-Asides page—Total Amount at the bottom of the page
<b>Total Indirect Costs</b>	Title I, Part A Budget—Total amount budgeted in line <b>99100</b> Indirect Costs
<b>Total Amount Contributed to Con Admin (public and private school)</b>	<i>Allocations</i> page—Amount entered in column 8 (Con admin) on the From Title I, Part A row
<b>Total Amount Reserved for District Administration (public and private school)</b>	<b>ePlan prepopulates the amount budget tagged as 'Direct Admin' in the Title I, Part A Budget. This should be</b> the total of funds budgeted in <b>72210</b> for public and private school administration when not using Con Admin.
<b>Total Available for School Allocations</b>	Auto-calculation subtracting set-asides, indirect costs, con admin, or administration from the total allocation amount
<b>Per Pupil Amount (PPA) for 100% Factor (Option 1)</b>	
<b>Total Available for School Allocations</b>	Auto-calculation subtracting set-asides, indirect costs, con admin, or administration from the total allocation amount
<b>Divide by total number of low-income students in Title I schools</b> ( <i>displays if the LEA is not serving any schools below 35% low-income.</i> )	<i>PPA List</i> —Total number of low-income, public school students within Title I participating schools
<b>100% Factor</b>	Prepopulated with 1.00
<b>Final PPA</b>	Auto-calculation dividing the total available for school allocations by the number of low-income, public school students in Title I schools to determine the average per-pupil amount available
<b>Per Pupil Amount (PPA) for 125% Factor (Option 2)</b>	
<b>Division by total number of low-income students in all LEA schools</b> ( <i>displays if the LEA serves any schools below 35% low-income.</i> )	<i>School Eligibility</i> page—Total number of low-income, public school students within the LEA (column J)
<b>Line Title</b>	<b>Source of Data</b>
<b>Initial per-pupil amount</b>	Auto-calculation dividing the total allocation amount from a previous step by the total low-income students in the LEA to determine the average per pupil

<b>125% Factor</b>	Prepopulated with 1.25 for LEAs that serve school(s) with a poverty percentage below 35%.
<b>Final PPA</b>	Auto-calculation multiplying the initial per-pupil amount from the prior step by 125% to determine the minimum per-pupil allocation (at least this amount must be allocated per pupil on the <i>PPA List</i> page in all Title I schools, except the final school served in the spiral).

## PPA List

Per-Pupil Allocation (PPA) is the amount of funds allocated to each low-income student within a Title I school to implement a Title I, Part A program. PPA amounts must be sufficient to operate a viable and effective program and must be at least \$100.

**Note:** LEAs **must** complete the *School Eligibility* page **before** the *PPA List* page. If the numbers and service columns on the *School Eligibility* page are empty, ePlan cannot prepopulate this page, and it will not function.

									Average Per Pupil Amount (PPA) \$	1000.00
School/ Attendance Area	Sort Order	Poverty Factor	Poverty %	# of Public Low Income Students	PPA Per Low Income Student	Total PPA Amount E X F	Family Engagement	Total G + H	Include In School-wide Pool	
A	B	C	D	E	F	G	H	I		
Example Elementary School		FRPL (Free and Reduced Lunch)	0.00	100	<input type="text"/>	0.00	<input type="text"/>	0.00	<input type="checkbox"/>	
Total Low Income				100	Total Allocations	0.00	0.00	0.00		
Remaining						100,000.00				

- **Column A—School/Attendance Area:** This column is prepopulated with all schools within the LEA from the school directory. *If errors exist in this column, contact [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov).*

ePlan prepopulates schools designated as Title I participating on the *School Eligibility* page. If the information in Columns B, C, D, or E is incorrect, the LEA must make edits to the *School Eligibility* page.

- **Column B—Sort Order:** This column is prepopulated with data from the *School Eligibility* Page.
- **Column C—Poverty Factor:** This column is prepopulated with data from the *School Eligibility* Page.
- **Column D—Poverty Percentage:** This column prepopulated with data from the *School Eligibility* Page.
- **Column E—Number of Public Low-Income Students:** This column prepopulated with data from the *School Eligibility* Page.
- **Column F—PPA Per Low Income Student:** The LEA must enter the PPA for every low-income student in each participating Title I school/attendance area.
  - In Column F, the LEA must enter the PPA determined by the LEA for all participating Title I schools, and it must be equal to or greater than the “Final PPA” amount on the *Allocation Designations* page **if** the LEA is serving one or more schools below 35 percent low-income. LEAs serving schools below 35 percent poverty may make an exception for the final school to be served. This school may be given a PPA lower than the “Final PPA. If the LEA is **not** serving any schools below 35 percent, the PPA may be lower than the “Final PPA” amount on the *Allocation Designations* page.
  - PPA amounts entered must be in rank order based on the sort order chosen earlier in the process.
  - If the LEA uses district-wide ranking, the PPA amounts must also be in rank order or all the same.
  - If the LEA uses grade span ranking, the PPA amounts must rank each grade span or all the same.

- Regardless of the sort order used, LEAs must serve schools with 75 percent or more low-income students. These schools must receive the highest PPA amount **or** the same amount as all other schools within the LEA.
- **Column G—Total PPA Amount E X F:** This is auto-calculated. ePlan multiplies the value in column E times the value in column F.
  - The total amount at the bottom of Column G must be as close to \$0 as possible (without being negative) and cannot be more than \$50. The goal is to allocate **all** available funds to participating schools. **Note:** *If the LEA has a remaining amount of more than \$50, ePlan generates a validation error, which prevents the LEA from submitting the CFA.*
- **Column H—Family Engagement:** LEAs must distribute the public school family engagement funds set-aside on the *District Set-Asides and Overview* page between each school/attendance area.
  - The total amount of column H **must be at least 90 percent** of the required district-wide family engagement set aside (if a minimum family engagement set-aside is required).
  - If the LEA is not required to set-aside funds for family engagement but has indicated an amount of **additional** family engagement funds on the *District Set-Asides and Overview* page, the total of Column H cannot exceed that set-aside amount but may be less. **Note:** *If the LEA is required to distribute 90 percent of the 1 percent set-aside for school-specific family engagement activities but has received approval from each school to allocate less than 90 percent to Title I schools, upload the appropriate documentation from **each school's principal** on the Related Documents page.*
- **Column I—Total G + H:** This is auto-calculated. ePlan adds the value in column G to the value in column H to display the total amount of funds available for public school services in each Title I school.
- **Include in School-Wide Pool:** Place a check in the box in this column for Title I schools consolidating funds into a single school-wide pool. If schools are not participating in the Title I, Part A consolidated, this column is not applicable, and check no boxes. By placing a check in one or more of these boxes, ePlan creates a new page within the CFA, *School-Wide Pool*. If clicked in error, unclick the box, and the *School-Wide Pool* page will disappear.

## Related Documents

This page includes upload options for all documents that are requested in the Title I, Part A section. LEAs may upload documentation on the Program Details page or on the Related Documents page. Uploaded documents are then available to view in both locations.

Some required templates provide supporting information as necessary, and an “Additional Supporting Document(s)” category is available to upload items that do not fall into the categories provided.

- **Identifying and Ranking Schools Supporting Documentation:** *LEAs must upload supporting documentation for the data by the month and year used to Identify and Rank Schools. LEAs must upload documentation under the Identifying and Ranking Schools page or the Related Document page within the CFA's Title I, Part A section.*
- **Foster Care Transportation Procedures:** All LEAs are required to have written procedures for providing transportation for foster care students to the school of origin. Upload written procedures, signed by the Department of Children’s Services.
- **Title I Skipped Schools Letter:** If the LEA has indicated in the Program Details page and the School Eligibility page that one or more schools are to be skipped, upload a letter that includes all required information. A school can be skipped if the following is met: 1. The school meets the comparability requirements of section 1120(A)(c). 2. The school is receiving supplemental funds from other state and local sources that are spent according to the requirements of section 1114 and 1115. 3. The funds expended from these other sources equal or exceed the amount that would be provided by Title I
- **Title I School-Wide Waiver Approval Letter:** Upload the letter of approval from the department for Title I programs for school(s) that do not meet the 40 percent threshold.
- **Personnel Details (Regular School Year - K-12 School Level):** LEAs may use the template to complete the *Personnel Details (Regular School Year - K-12 School Level)* page. This may assist LEAs that have additional

position titles that are unable to fit within the constraints of the page to calculate each staff title together.

- **Additional Supporting Document(s):** Upload any other related documents to support the CFA (e.g., family engagement letter granting approval to distribute less than 90 percent of set-aside to Title I schools from **each** school's principal).

Name all file names for all uploaded documents to reflect what the file represents (e.g., Family Engagement Funds Letter, Skipped School Letter, Budget Changes, etc.).

### ***Title I, Part A Program Assurances***

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



# Title I, Part A—Neglected

## **Budget**

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with Title I, Part A—Neglected funds;
  - Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - A breakdown of amounts to be used for Title I, Part A—Neglected administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - Amounts must equal the administrative percentage identified in the *ESEA Requirements* section.
  - Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. For example, if purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.
  - Specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid.
  - Description of services to be purchased if contracting staff or services;
  - Indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

## **Budget Overview**

*No input is required by the LEA.* A summary of the Title I, Part A—Neglected budgeted amount is reported by line item and account number. This page is a resource to provide a different view of the budgeted amounts.

## **Budget Overview Plus/Minus**

*No input is required by the LEA.* A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This section is a resource to provide a different view of the budgeted amounts and changes made within the current revision.

## **Program Details**

LEAs receiving Title I, Part A—Neglected funds must upload the following:

- A signed memorandum of understanding (MOU) or formal agreement for each facility that is served through the Title I, Part A—Neglected program.
- The needs assessment, completed by each facility on the form provided by the department.

**Note:** *Uploading the facility application, contracts, and monitoring tools would be considered a best practice but is not required.*

- Provide the name of the facility served by the LEA and identify the personnel to be hired using Title I, Part A—Neglected funds. Do not include contracted personnel. If the LEA has more than one facility use the “Add Row” link to create additional rows in the table to provide this information for each facility.
- Describe the facility (facilities) to receive Title I, Part A—Neglected funds. Describe the characteristics of children and youth participating in the program (including learning difficulties, substance abuse, and other special needs) at each of the facilities served. Describe the program details for the facility. *(e.g., This program serves males from ages 12–18, who need Alcohol & Drug (A & D) counseling for substance abuse. This is a short-term care facility where the average stay is fewer than 90 days, and most students are placed by guardians or insurance.)*
- Describe how the Title I, Part A—Neglected funds will be used in each facility to support the educational programs for students in the facility (facilities). Include enough information to show that supported services are supplemental to what the facility is required to provide in the absence of federal funds. List the intended purchases and the outcomes expected from the purchases. *(e.g., Facility A will purchase a supplemental reading program, Read 180, to increase the reading levels of the students by one grade level.)*
- Describe the LEA’s process for evaluating and monitoring the facilities participating in the Title I, Part A—Neglected program. Describe how the LEA will monitor the facility programming with on-site monitoring, not less than once every three years. (This is the minimum requirement. However, it is recommended that applicants also include details about monthly calls, inventory tracking, etc. that occur throughout the year.)

## **Related Documents**

This page includes upload options for all documents that are requested in the **Title I, Part A—Neglected** section. LEAs may upload documentation on the [Program Details](#) page or on the [Related Documents](#) page. Uploaded documents are then available to view in both locations.

An “Additional Supporting Document(s)” category is available to upload items that do not fall into the categories provided.

**Note:** *Uploading the facility application, contracts, and monitoring tools would be considered a best practice, but is not required.*

## **Title I, Part A—Neglected Program Assurances**

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

## **Important Reminders**

Ensure there is alignment between the needs assessment, the program details, and the budget. For example, if math tutoring is identified in the needs assessment, it must also be listed in the program details question that asks about how funds will be spent, and a tutoring position must be listed in the budget. Conversely, all items listed in the budget must be reflected in the needs assessment and budget details.



# Title I, Part C

## Budget

**If the LEA is releasing Title I, Part C funds, the LEA does not need to complete the Budget page.**

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Each budget item must include a budget tag specifying whether the item is budgeted for the *Regular School Year* or for the *Summer Term*.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with Title I, Part C funds;
  - Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - A breakdown of amounts to be used for Title I, Part C administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. (e.g., *If purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.*)
  - Specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid;
  - Description of services to be purchased if contracting staff or services;
  - Indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

## Budget Overview

*No input is required by the LEA.* A summary of the Title I, Part C budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## Budget Overview Plus/Minus

*No input is required by the LEA.* A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This section is simply a resource to provide a different view of the budgeted amounts and changes made within the current revision.

## Program Details

**If the LEA is releasing Title I, Part C funds, check the first box on the page to disable the remaining questions.**

**Program Administration:** This is a summary of how the LEA plans to administer the Title I, Part C program.

- If **using con admin**, check the box stating that the LEA plans to consolidate funds. No additional input from the LEA is required *in this area*.

- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how the LEA plans to administer the Title I, Part C program, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—if combination, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - A summary of the duties and responsibilities assumed by identified staff. **Note:** *If no Title I, Part C funds support the administration of the program, address the question to demonstrate that the LEA administered Title I, Part C appropriately.*

**Student Numbers for Category 1 and Category 2 students:** ePlan prepopulates the total number of eligible migratory children and youth in each category for 2022-23 and 2023-24. Review the tables.

**Priority for Services:** ePlan prepopulates the total number of eligible migratory children and youth that qualified for Priority for Services in 2023-24 and 2024-25.

ESEA § 1304(d) requires LEAs to give priority services to migratory students classified as Priority for Services (PFS). Review the Priority for Services table, then describe how the LEA will provide intensive support to migrant PFS students in addition to those services provided to non-PFS migrant students.

**Migrant Data Management:** Describe the LEA's process for the management of each of these migrant data tasks: (1) the entering and reconciling migrant data within the Student Information System, (2) entering instructional and support services into the tn-mep.net migrant data system, and (3) communicating with the State MEP Contractor on data corrections.

**Programming:** Indicate the type(s) or activities and the service period of activities supported with Title I, Part C from the checkboxes. For each option selected, provide a detailed summary of the activities supported. Descriptions must contain information regarding all expenditures that are outlined in the budget. If services are being provided with funds other than Title I, Part C, include that in the description.

**Note:** *Required programming for Title I, Part C includes **both** supplemental instructional services and supplemental support services.*

## **Title I, Part C Personnel Details—School-Based and System-Wide**

In the tables provided, categorize all staff paid with Title I, Part C funds in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each category, several widely used position titles have been prepopulated. Enter any staff not aligned to these prepopulated categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional "Other" rows to the table to provide information for additional staff. **Note:** *FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.*

- **School-Based Staff Instruction & Support:** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title I, Part C funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- **System-Wide Instruction & Support:** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title I, Part C funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.
- **System-Wide Personnel:** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title I, Part C (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## ***Title I, Part C Program Assurances***

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



## Title I, Part D

State Agencies (i.e., DOC and DCS) must contact the Non-Traditional Educational (NEP) team regarding this section.

### **Budget**

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with Title I, Part D LEA funds;
  - titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - A breakdown of amounts to be used for Title I, Part D LEA administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. (e.g., *If purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.*)
  - specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid;
  - description of services to be purchased if contracting staff or services;
  - indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

### **Budget Overview**

*No input is required by the LEA.* A summary of the Title I, Part D LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

### **Budget Overview Plus/Minus**

*No input is required by the LEA.* A summary of prior approved budgeted amounts is reported by line item and account number, with revision amounts displayed in red text. This section is a resource to provide a different view of the budgeted amounts and changes made within the current revision.

### **Program Details**

LEAs receiving Title I, Part D funds must upload the following:

- A signed memorandum of understanding (MOU) or formal agreement for each facility that is served through the Title I, Part D program.
- The needs assessment, completed by each facility on the form provided by the department.
- Provide the name of the facility (facilities) served by the LEA. Be sure to identify the personnel to be hired using Title I, Part D funds. Do not include contracted personnel. If the LEA has more than one

facility use the “Add Row” link to create additional rows in the table to provide this information for each facility.

- Describe the facility(ies) to receive Title I, Part D, Subpart 2 funds. In this section, describe the program details for the facility(ies). (e.g., *This program serves males from ages 12-18, who are adjudicated delinquent and are placed by DCS. Many need counseling for substance abuse. This is a long-term care facility where the average stay is greater than 90 days.*)
- Describe how the Title I, Part D Subpart 2 funds will be used in each facility to support the educational programs for students in the facility. List the intended purchases and the outcomes expected from the purchases. (e.g., *Facility A will purchase a supplemental reading program, Read 180, to increase the reading levels of the students by one grade level.*)
- How does the LEA successfully transition the students returning from facilities to the public schools with the LEA? What supports are offered? Describe the transition process for students leaving the facility to attend public schools. (e.g., *School staff participate in a conference call/meeting to discuss the student's unique needs prior to re-entry into the public schools.*)
- Does the LEA partner with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from facilities? If yes, please explain. (e.g., *These partnerships would include postsecondary opportunities, CTE offerings, mentoring programs, etc.*)
- Describe, as appropriate, how the program involves parents and family members in efforts to improve the educational achievement of their children. Describe any family engagement activities. (e.g., *Facility A hosts a Family Day for all students. Parents attend sessions with their child on academic achievement after transition.*)
- Describe, as appropriate, how the LEA works with probation officers and other professionals to assist in meeting the needs of children and youth returning from facilities.
  - Describe the process for facilitating meetings with the student's probation officers and other professionals (e.g., *DCS, mental health providers*) and any support that you may give as a result of these meetings.
- Describe, as appropriate, how the program finds alternative placements for children and youth interested in continuing their education, but unable to participate in a traditional public school program. Describe how the LEA works with these students to identify alternative placements. (e.g., *Alternative placements include alternative learning centers, credit recovery offerings, adult high school/night school, and HiSET prep courses.*)
- Describe the process and frequency regarding how and when the LEA monitors the facility to ensure compliance with the Title I, Part D program. Describe how the LEA monitors the facility programming with on-site monitoring, not less than once every three years. (This is the minimum requirement. However, also include details about monthly calls, inventory tracking, etc. that occur throughout the year.)
- If the LEA has a juvenile detention center within its geographical boundaries, check the box and answer the following questions:
  - Describe how the LEA will work with the JDC to ensure that children and youth are participating in an education program that is comparable to one which the children and youth would otherwise attend. (e.g., *The use of a virtual platform that allows the students to take credit-bearing courses.*)
  - Describe the process to ensure all appropriate instructional staff and facility personnel are fully implementing each student's individual education program (IEP). (e.g., *the provision of comparable services, implementation of a behavior intervention plan, etc.*)

## ***Related Documents***

This page includes upload options for all documents that are requested in the **Title I, Part D** section. LEAs may upload documentation on the [Program Details](#) page or on the [Related Documents](#) page. Uploaded documents are then available to view in both locations.

An “Additional Supporting Document(s)” category is available to upload items that do not fall into the categories provided.

**Note:** *Uploading the facility application, contracts, and monitoring tools would be considered a best practice but is not required.*

## ***Title I, Part D Program Assurances***

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

## ***Important Reminders***

Ensure there is alignment between the needs assessment, the program details, and the budget. For example, if math tutoring is identified in the needs assessment, it must also be listed in the program details question that asks about how funds will be spent, and a tutoring position must be listed in the budget. Conversely, all items listed in the budget must be reflected in the needs assessment and budget details.



# Title II, Part A

## Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- **Budget tags** assist LEAs in tracking Title II, Part A spending and help ensure that all spending requirements, including carryover requirements, are met. **Budget tags are mandatory for Title II, Part A, and will populate the amount for each focus area on the program details page. Use only one budget tag per budget tag group for each line item number entry.** See [Budget Tags](#) in this guide for more information. Title II, Part A budget tags include:
  - Admin: Con Admin, Direct Admin, Indirect Cost.
  - Private School Funds
- Provide a budget narrative for each line item within the budget to describe expenditures. If applicable, include the following components in the narratives:
  - Full-time equivalents (FTEs) for all employees of the LEA funded with Title II, Part A funds.
  - If funds are used to support the salary/benefits of class size reduction (CSR) teachers, complete the *Class Size Reduction personnel* page.
  - Titles of positions funded (**not** staff names) beside the corresponding FTE that matches the titles used throughout the application. If funds support a CSR teacher, include CSR in the position title.
  - A breakdown of amounts to be used for Title II, Part A administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - **Examples of equipment, materials, and supplies purchased, including:**
    - Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and types of expenses (conference registration, speaker fees, materials, etc.); **Note:** *Title II, Part A funds may not be used to pay for professional development activities for LEA-level staff.*
    - Description of services purchased if contracting staff or services; and
    - Indication of a stipend payment if funds are paid to an existing LEA staff member for work beyond regular work hours.
  - Any expenditures that are made for equitable services to private schools must be clearly labeled as such and must contain examples of what is purchased as specified above.

## Program Details

**Program Administration:** This is a summary of how the LEA plans to administer the Title II, Part A program.

- If **using con admin**, check the box stating that the LEA plans to consolidate funds. This option requires no additional input from the LEA.
- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how the LEA plans to administer the Title II, Part A program, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—if *combination*, provide the percentage from each source);

- An FTE of staff identified (must match budget and personnel details pages); and
- A summary of the duties and responsibilities assumed by identified staff.
- **Note:** If no Title II, Part A funds support the administration of the program, address the question to demonstrate that the LEA administered Title II, Part A appropriately.

**Use of Funds for Pre-K:** For purposes of federal funding, "elementary schools" are schools serving any combination of pre-kindergarten through grade six (Pre-K-6) (T.C.A. § 49-6-301(a)). Indicate whether funds from this grant will be directed to Pre-K instructional staff (i.e., teachers, coaches, paraprofessionals) and how many students and staff will be served.

**Program Description:** Choose the type(s) of activities supported with Title II, Part A from the checkboxes. In FY26, the list of allowable activities was expanded to allow LEAs to be more specific in their activity descriptions and provide a more comprehensive picture of the Title II program. For a description of the Title II activities included on this page, see the [Federal Funding Handbook: FY26 Coordinated Spending Guide](#) and [Title II Overview and Allowable Use of Funds](#).

- For each area selected, as applicable, enter the number of staff impacted. The count must be a head count, not an FTE. Numbers must quantify the number of staff impacted by the activities supported with Title II, Part A, not the number of staff paid from Title II, Part A.
- For each option selected, provide a concise summary of the activities supported. Descriptions must be 200 characters or less and should contain information regarding all expenditures that are outlined in the budget.
- If selecting "Teacher Testing for Hard-to Staff Areas," indicate which areas are impacted using the checkboxes in the section below.
- Describe how the activities supported with Title II, Part A funds **are in support of one or more of the strategies in the LEA plan**. ESSA requires LEAs to utilize Title II, Part A funds to support priority needs identified through a comprehensive needs assessment.
- Describe how the LEA meets the requirements of ESEA § 2102(b)(3) to **meaningfully consult** with teachers, principals, other school leaders, paraprofessionals (including organizations representing such individuals), specialized instructional support personnel, charter school leaders (in an LEA that has charter schools), parents, community partners, and other organizations or partners with relevant and demonstrated expertise **on how to best improve the LEA's activities to meet the purposes of Title II**.

## ***Title II, Part A Personnel Details—School-Based and System-Wide***

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each staffing category, several widely used position titles have been prepopulated. Enter any staff not aligned to these categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional "Other" rows to the table to provide information for additional staff. **Note:** *FTEs must match FTEs identified in budget narratives (individually and the sum), and titles of staff must match titles identified within budget narratives.*

- **School-Based Staff Instruction & Support:** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title II, Part A funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- **System-Wide Instruction & Support:** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title II, Part A funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.

- **System-Wide Personnel:** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title II, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## Preschool Personnel Details (School-Level)

- **FTEs:** Place all preschool staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). For each staffing category, several widely used position titles have been prepopulated. Enter any staff not aligned to these categories in the “Other” row and provide a position title. Use the “Add Row” link to add additional “Other” rows to the table to provide information for additional staff. **Note:** FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.
- **School-Based Staff Instruction & Support:** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title II, Part A funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- **System-Wide Instruction & Support:** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title II, Part A funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.
- **System-Wide Personnel:** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title II, Part A (e.g., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## Class Size Reduction (CSR)

- If the LEA does not plan to use Title II, Part A funds to fund CSR teachers in grades K-3, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- For each school with Title II, Part A funded CSR teachers, complete the information in the chart. ePlan uses the data entered in the chart to auto-calculate the projected state and local teacher to student ratio, and the grade span projected state and local teacher to student ratio.
- Describe the LEA’s use of funds for Class Size Reduction (CSR), **the evidence upon which the LEA is relying for its use**, and how CSR is in support of one or more of the strategies in the district plan.
- Provide answers to the remaining multiple-choice questions.

**In September of the school year**, additional fields will appear on this page requesting actual enrollment numbers. When available, complete the table. ePlan uses the data entered in the table to calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Additionally, LEAs must show that the educators hired as CSR teachers are proven to be highly effective. Upload the following to *ePlan > LEA Document Library > (appropriate Fiscal Year) > Consolidated Funding Application Documents > Title I CSR Teacher Justification*:

1. A letter signed by the director of schools on LEA letterhead stating that the CSR teacher:
  - meets state qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
  - is teaching in the field of discipline of the certification of the teacher; and
  - is not teaching on a waiver.

2. Documentation showing the teacher is a level three (3) or above on the latest TEAM evaluation.

**The above documentation must be submitted as described above by October 1 of the fiscal year that the CSR funds are being spent.** Contact the appropriate [ESEA divisional coordinator](#) for technical assistance.

### ***Related Documents***

No documents are required in this section. LEAs may upload any additional supporting documents, as applicable.

### ***Title II, Part A Program Assurances***

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



# English Learner Requirements

All LEAs must complete the *English Learner Requirements* section to identify whether it accepts Title III, Part A, or to indicate that the LEA receives no Title III, Part A funds. This section also requires each LEA to answer specific questions surrounding funding and required services for English learners (ELs).

## **English Learner Requirements Program Details**

- Select the option that describes the Title III, Part A status. Of the six options provided, the LEA **must** select one. All LEAs must complete this page even if releasing or not generating Title III, Part A funds.
  - **LEA generates \$10,000 or more:** LEAs that generate at least \$10,000 in Title III, Part A in a given fiscal year may choose to keep the funds and operate a Title III, Part A program as a stand-alone system (not a member of a consortium). The selection of this option requires the LEA to complete the *Title III, Part A* section that follows the *English Learner Requirements* section.
  - **LEA will act as the Fiscal Agent for other LEAs:** LEAs that receive less than \$10,000 in Title III, Part A in a given fiscal year must enter a consortium to access funds. LEAs may choose to be the lead fiscal agent of a consortium and manage the Title III, Part A funds of all other members of the consortium. By checking this option, the LEA retains its Title III, Part A allocation **and** has consortium members' Title III, Part A funds added to the Title III, Part A allocation before the final revisions are completed. The LEA in the lead fiscal agent role must complete the *Title III, Part A* section and budget the total amount of Title III, Part A funds received (LEA allocation + consortium member allocations).
  - **LEA does not generate at least \$10,000 and will join a consortium:** LEAs that receive less than \$10,000 in Title III, Part A, and do **not** serve as the lead fiscal agent for a consortium, must join a consortium to access allocated Title III, Part A funds. LEAs in a consortium must complete all narratives related to Title III, Part A, and budget the total amount of Title III, Part A funds received. This budget information must be completed on the *Consortia Budget Review* page. LEAs that join a consortium must provide a budget to the lead fiscal agent for the consortium upon each approved revision.
  - **LEA is releasing all generated Title III, Part A funds:** LEAs have the option not to accept Title III, Part A, regardless of the amount. If an LEA selects this option, it releases the Title III, Part A allocation, and the funds become available as part of future Title III, Part A reallocations. The LEA is **not** required to complete the *Title III, Part A* section, but must complete the *English Learner Requirements* section.
  - **LEA does not receive any Title III, Part A funds:** LEAs that have not generated a Title III, Part A allocation must choose this option. LEAs must only select this option if the LEA does not generate a Title III, Part A allocation, not if the LEA is releasing generated funds. The LEA is **not** required to complete the *Title III, Part A* section, but must complete the *English Learner Requirements* section.
  - **New for FY27: The LEA generates \$10,000 or more and will be moving funds into School-Wide Pool:** LEAs that are moving Title III, Part A allocations into school-wide pool must choose this option. LEAs that do not generate \$10,000 or more must join a consortium. If the LEA wishes to move Title III, Part A allocations into school-wide pool, they may do so after joining a consortium.

- Complete the District-wide **ESL Program Staffing** area:
  - Enter the total head count and the number of full-time equivalent certified English as a Second Language (ESL) staff, funded from state and local funds, and providing ESL services to ELs. This number must be as of Oct. 1, 2025. Only include currently hired staff. Do not include vacant positions. FTE must be equal to or less than head count.
  - ePlan prepopulates the number of ELs with students coded as “L,” “W,” “T1,” and “T2.” based on Oct. 1, 2025, counts. The staff-to-student ratio must be equal to or less than 1:35 (Oct. 1, 2024, student count divided by the number of state and locally funded ESL staff as of Oct. 1, 2024). While the Oct. 1, 2025, staff and student counts are used to determine the staff/student ratio within the CFA, LEAs are expected to maintain compliance with the ESL staffing requirements in TN SBE 0520-01-19 throughout the school year.
- If the district-wide ESL program staffing ratio as of Oct. 1, 2025, exceeds 1:35, provide a detailed description of the steps the LEA will take (including a timeline) to reach the required 1:35 ratio by Sept. 15, 2026. Complete the area pertaining to identification and enrollment.
- Complete the **English Learner Identification and Enrollment** area:
  - Select “yes” or “no” from the dropdown item regarding Home Language Surveys.
  - Review the associated assurance. By checking the statement beneath the dropdown menus, the LEA is affirming that it has read, understands, and affirms its accuracy.
- Complete the question in the **Providing Equitable Access to Programs and Services for EL/Non-EL Students:**
  - Indicate if the LEA has any current Office of Civil Rights or Department of Justice investigations. If yes, describe the investigation and include the date of filing, the subject matter, and the status.
- All LEAs, regardless of Title III funding, must complete the **Language Instruction Educational Programs** area:
  - In the table, check the box next to each type of language instruction educational program (LIEP) service model and delivery model in the schools within the LEA. Indicate “N/A” in the comments area if there are no English Learners in a school. LEAs may select more than one service model and delivery model if multiple language instruction methods are utilized. If needed, provide a written explanation in the Comments column. All schools must have both service model and delivery model indicated or “N/A” specified in the Comments column. To add a school, use the “add-a-row” option.
  - Enter the numbers of teachers who serve multiple schools as applicable.
  - Respond to: Are any teachers asked to work during lunch or planning period to provide services within the district to ELs?
  - Respond to: Are students transported to another school for ESL services? If yes, what is the district's justification for that practice?

## **Consortia Budget Review**

- The budget portion of this section is only required for LEAs participating as Title III, Part A **consortium members**. For LEAs that choose to accept Title III, Part A as a **stand-alone**, a **fiscal agent**, or are **releasing** or **do not generate** Title III, Part A funds, check the box at the top of the page indicating that the section is “N/A.”
- LEAs who were consortium members in the prior fiscal year (FY26) must check the Previous Fiscal Year box and identify the fiscal agent for the previous fiscal year.
- For each line item in the budget, select from the corresponding drop-down menu. Once the line item is selected, type the budgeted amount in the *Amount* box and complete the *Narrative Description*. This must be repeated for each line item of the Title III, Part A budget.
- For additional line items within a budget category, select *Add Row*.
- To delete a line item within a budget category, click on the trash can icon.

The entire Title III, Part A allocation must be budgeted.

## EL OCR Assurances

LEAs must review all program assurances thoroughly. All items specified are requirements of federal legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

### Title III Program Details

- Complete pages in the Title III section **only** if the LEA is a Title III LEA (stand-alone, consortia member, or fiscal agent)
- **Program Administration:**
  - If the LEA is using con admin, check the box indicating that the LEA will consolidate funds. No other information is needed regarding program administration.
  - If not using con admin, check the box stating that the LEA is not using con admin and provide descriptions of how the Title III, Part A program is to be administered, including:
    - Staff responsible for administering the program (title, no names);
    - Funding sources of each position (state, local, federal, or combination—if combination, provide the percentage from each source);
    - A full-time equivalent (FTE) of staff identified (must match budget and personnel details pages); and
    - Summary of duties and responsibilities to be handled by identified staff.

**Note:** Even if the LEA does not plan to use Title III, Part A to support the administration of the program, the LEA must address the first question to demonstrate that it appropriately administers Title III, Part A.

- Complete the **narrative questions** about the LEA's Title III program.
  - Describe the planned use of Title III funds and how it is supplemental to the programs, services, and supports that EL students must receive and/or are eligible to receive from other state and federal sources.
  - Describe how the district will measure the impact that Title III activities had on English language development. **Note:** *Discuss the annual Title III Self-Assessment in the response.*
  - Describe how the LEA will provide and implement effective activities and strategies that enhance or supplement language instruction educational programs for English learners, which shall include parent, family, and community engagement activities as required under ESEA § 3115(c)(3).
  - Complete the **Activities Serving ELs in Title III Funded LEAs During 2025–26** area.
- Select from the list all activities completed by the LEA in the 2024-25 academic year. Check all that apply. **Note:** *Items d. (professional development) and e. (parent and family engagement) are required under ESEA Title III § 3115.*

### Title III Personnel Details—School-Based and Systemwide

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each category, several widely used position titles have been prepopulated. Enter staff not aligned to these prepopulated titles in the "Other" row and provide a position title. Use the "Add Row" link to add additional rows to the table to provide information for additional staff. **Note:** *FTEs must match FTEs identified in budget narratives (individually and the sum), and titles of staff must match titles identified within budget narratives.*

- **School-Based Staff Instruction & Support:** Enter a head count **and** FTE for all **school-based** instructional and support staff funded with Title III, Part A. School-based staff are employees assigned to one or more schools for a pre-determined time. Staff may work full-time at one school or split among two or more schools.

- **System-Wide Instruction & Support:** Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title III, Part A funds. System-wide staff are employees not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.
- **System-Wide Personnel:** If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties. For Title III, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).
- For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff not falling into these prepopulated categories in the “Other” line and provide a position title.

## **Related Documents**

- **LEAs serving as fiscal agents for a Title III, Part A consortium** must upload the memorandum of understanding (MOU) used between the fiscal agent and member LEAs in the consortium. Additional information is included in the [Title III Consortia Guide](#).
- The [Related Documents](#) page includes an optional “Additional Supporting Document(s)” category for support that does not fall into the categories provided (e.g., waiver of the EL 1:35 ratio letter).

## **Program Assurances—Title III**

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



# Title III, Part A

## Budget

Title III, Part A activities must be supplemental to supports and services provided with **federal, state, and local resources**. See [Title III Allowability Guide](#), [Allowability Scenarios](#), and [Title III Supplement Not Supplant Guide](#).

- Budget funds (minus con admin funds) using the appropriate function, object code(s), and budget tag(s).
- Provide narratives for each budget line item to explain expenditures. Include, if applicable:
  - Full-time equivalents (FTEs) and position title (**not** names) for all LEA employees funded with Title III, Part A funds. Use consistent titles throughout the CFA.
  - Administration amounts tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, do not include additional administrative costs in the budget). **Note:** *LEAs may use no more than two percent of Title III, Part A funds for con admin, direct admin, and indirect cost combined;*
  - Examples of equipment, materials, and supplies to fund;
  - Explanations of how purchases and programming are supplemental to other state, local, and federal resources;
  - Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and expenses to pay;
  - Description of services to purchase (if contracting staff or services);
  - Indication of stipend payments if funds pay existing LEA staff beyond regular work hours; and
  - Any expenditures labeled for equitable services to private school students.
- Fiscal Agents **must** budget consortium funds entering the location code for member LEAs in the **Optional Program Code** field for each budget item.

## Budget Overview

*No input is required by the LEA.* A summary of the Title III, Part A LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## Title III, Title III Consortium, and English Learner Requirements Overview

See the table below to determine which sections to complete for each LEA Type.

LEA Type	EL Requirements - Program Details	Title III -Program Details	Consortia Budget Review	Title III Budget
Stand Alone (generates/retains \$10K+)	✓	✓		✓
Fiscal Agent for a consortium	✓	✓		✓
Joins a consortium	✓	✓	✓	
Releases Funds	✓			
No Funds generated	✓			

## ***FER Title III Consortia Review Page***

***This page is not viewable for LEAs until July 1, 2026.*** This page will be required for LEAs that act as fiscal agents for Title III, Part A consortia in FY26. Fiscal agents must check all relevant boxes and provide details to report FY26 consortia carryover funds.



# Title IV, Part A

## **Budget**

- Budget all funds (minus funds contributed to con admin) in the appropriate function, object code(s), and budget tag.
- **Budget tags** assist LEAs in tracking Title IV spending and help ensure that all spending requirements, including carryover requirements, are met. **Budget tags are mandatory for Title IV, Part A, and will populate the amount for each focus area on the program details page. Use only one budget tag per line item number entry, except for private school instructional funds, which must be used concurrently with the Title IV Program tags.** See [“Budget Tags”](#) in this guide for more information. Title IV, Part A budget tags include:
  - Title IV: Well-Rounded Educational Opportunities; Safe and Healthy Students; and Effective Use of Technology
  - Admin: Con Admin, Direct Admin, and Indirect Costs
  - Private School Instructional Funds
- Ensure that the amounts listed in the budget for each focus area align with the amounts listed on the *Program Details* page for each focus area.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives must include, if applicable:
  - Full-time equivalents (FTEs) and position titles (**not** names) for all LEA employees funded with Title IV, Part A funds (use consistent titles throughout the CFA);
  - A breakdown of amounts to be used for Title IV, Part A administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - Examples of equipment, materials, and supplies to be purchased, including:
    - Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and types of expenses (conference registration, speaker fees, materials, etc.);
    - Description of services purchased if contracting staff or services; and/or
    - Indication of a stipend payment if funds are paid to an existing LEA staff member for work beyond regular work hours.
  - Any expenditures that are made for equitable services to private schools must be clearly labeled as such and must contain examples of what is to be purchased as specified above.

## **Budget Overview**

*No input is required by the LEA.* A summary of the Title IV, Part A LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## Program Details

**Program Administration:** This is a summary of how the LEA plans to administer the Title IV, Part A program.

- If **using con admin**, check the box stating that administrative funds are consolidated. No additional information is needed.
- If **not using con admin**, check the box to confirm that the LEA is not using con admin. Describe how the Title IV, Part A program is to be administered, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—if *combination*, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - Summary of duties and responsibilities to be handled by identified staff.
- If no Title IV, Part A funds are used to support the administration of the program, address the question to demonstrate that Title IV, Part A is appropriately administered.

**Use of Funds for Pre-K:** For purposes of federal funding, "elementary schools" are schools serving any combination of pre-kindergarten through grade six (Pre-K-6) (TCA § 49-6-301(a)). Indicate whether funds from this grant will be directed to Pre-K students and/or instructional staff (i.e., teachers, coaches, paraprofessionals) and how many students and staff will be served.

**Consultation with Stakeholders:** Describe how the LEA meets the requirements of ESEA § 4106(c) to meaningfully consult with parents, teachers, principals, students, school leaders, specialized instructional support personnel, charter school personnel (in an LEA that has charter schools), community partners, Indian tribes or tribal organizations (when applicable), local government representatives, and others with relevant and demonstrated expertise on the improvement and coordination of activities conducted under this part as well as the design and development of the Title IV, Part A application. **Note:** *This consultation may occur as part of the LEA planning process.*

**Program Description:** ePlan auto-populates budget amounts tagged for each focus area. If the LEA receives \$30,000 or more in Title IV, Part A funding, all three focus areas must be supported.

- Well-Rounded Educational Opportunities: If the LEA receives \$30,000 or more in Title IV, Part A funds, a minimum of 20 percent of grant funds must be spent on this focus area.
- Safe and Healthy Students: If the LEA receives \$30,000 or more in Title IV, Part A funds, a minimum of 20 percent of grant funds must be spent on this focus area.
- Effective Use of Technology: If the LEA receives \$30,000 or more in Title IV, Part A funds, it must spend a portion of grant funds on this focus area. **Regardless of the Title IV, Part A allocation amount, no more than 15 percent of the amount spent on this focus area may be used to support technology infrastructure.** **Note:** *Technology infrastructure includes devices, equipment, software applications, platforms, digital instructional resources, and/or other one-time IT purchases. If the LEA is not required to spend a portion of funds on this focus area and chooses not to allocate funding here, enter \$0.00 in the amount field.*
- If the LEA receives less than \$30,000, it must support at least one focus area, with no minimum spending requirements. The 15 percent cap on technology infrastructure in the effective use of technology area still applies.
- The amount of funds to be spent in each focus area will auto-populate based on the budget tags entered on the budget page.
- In the *Effective Use of Technology* area, indicate if funds will be used to support technology. If yes, enter the amount to be spent.

- For each focus area funded, complete each of the open response questions and provide objectives in SMART goal format. Responses within each focus area must include: (1) a description of the activities to be budgeted in support of each focus area (2) an explanation of how the proposed use of funds relates to priority needs determined in the LEA needs assessment, (3) any partnerships with outside organizations, and (4) a description of the program objectives and intended outcomes for the described activities and how the effectiveness of the activities will be assessed.
- **Distribution of Funds:** Using the checkboxes, select one or more priorities the LEA will use in distributing Title IV, Part A funds.

**Assurances:** By checking the box, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

## ***Personnel Details—School-Based and System-Wide***

Place all staff in one of three areas: school-based (one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff not aligned to these prepopulated categories in the “Other” row and provide a position title. Use the “Add Row” link to add additional “Other” rows to the table to provide information for additional staff.

**Note:** *FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.*

- **School-Based Staff Instruction & Support:** Enter both a head count and an FTE for all **school-based** instructional and support staff supported with Title IV, Part A funds. School-based staff are employees who are assigned to one or more schools for a pre-determined amount of time. These staff may work full time at one school, or staff may be split among two or more schools.
- **System-Wide Instruction & Support:** Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title IV, Part A funds. System-Wide staff are employees who are not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.
- **System-Wide Personnel:** If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title IV, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## ***Preschool Personnel Details***

- If no Title IV, Part A funds support preschool programs, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- Place all preschool staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). For each staffing category, several widely used position titles have been prepopulated. Enter any staff not aligned to these categories in the “Other” row and provide a position title. Use the “Add Row” link to add additional “Other” rows to the table to provide information for additional staff. **Note:** *FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.*

- **School-Based Staff Instruction & Support:** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title IV, Part A funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- **System-Wide Instruction & Support:** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title IV, Part A funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.
- **System-Wide Personnel:** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title IV, Part A (e.g., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## **Related Documents**

No documents are required in this section. LEAs may upload any additional supporting documents, as applicable.

## **Title IV, Part A Program Assurances**

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



# Title V, Part B, Subpart 2

## **Budget**

Title V, Part B activities must be supplemental to supports and services provided with **federal, state, and local resources**.

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag.

**Budget tags** assist LEAs in tracking Title V, Part B spending and help ensure that all spending requirements, including carryover requirements, are met. **Budget tags are mandatory for Title V and will populate the amounts listed for each authorized program on the program details page. Use only one budget tag per line item number entry per budget tag group.** Refer to “Budget Tags” in this guide for more information. Title V, Part B budget tags include:

- Authorized Programs: Title I, Part A; Title II, Part A; Title III, Part A; Title IV, Part A; and Parent and Family Engagement
- Admin: Con Admin, Direct Admin, and Indirect Cost.
- Ensure that the amounts listed in the budget for each focus area align with the amounts listed on the *Program Details* page for each focus area.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures. Budget narratives must include, if applicable:
  - Full-time equivalents (FTEs) for all employees of the LEA to fund with Title V, Part B funds;
  - Titles of positions (not names) to fund, listed with the corresponding FTE that matches the titles used throughout the application; If funds are used to support a class size reduction teacher, include “CSR” in the position title, and complete the *Class Size Reduction personnel* page; do not use generic titles such as “teacher” when identifying positions.
  - A breakdown of amounts to be used for Title IV, Part B administration, tagged appropriately, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
- Examples of equipment, materials, and supplies funded, including:
  - A description of any specific professional development funded, including names of conferences and trainings supported, the number and type of staff impacted, and details about what purchases are for professional development (registration, travel, professional development [PD] materials, etc.), who plans to participate (position titles, not employee names), and expenses to pay;
  - A description of services to purchase if contracting staff or services;
  - An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

## **Budget Overview**

*No input is required by the LEA.* A summary of the Title V, Part B LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## Program Details

**NEW for FY27** Under Title V, Part B, two federal programs provide support to rural schools:

1. Small Rural School Achievement (SRSA) - Administered by the U.S. Department of Education (ED). The Tennessee Department of Education does not manage this program.
2. Rural and Low-Income Schools (RLIS) - Administered by the Tennessee Department of Education.

LEAs may qualify for both programs; however, they can only participate in one.

- Check the box to indicate if the LEA is eligible for both programs.
- Select which program the LEA will participate in:
  - The LEA will participate in the **RLIS** program administered by the Tennessee Department of Education. Complete the remainder of the page.
  - The LEA will participate in the **SRSA** program administered by ED **and is releasing the RLIS allocation**. No additional input is needed on this page.

**Program Administration:** This is a summary of how the LEA plans to administer Title V.

- If **using con admin**, check the box stating that the LEA is consolidating administrative funds. No additional information is needed.
- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how Title V is to be administered, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—if *combination*, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - A summary of duties and responsibilities to be handled by identified staff.
- If no Title V funds are used to support the administration of the program, address the question to demonstrate that Title V is appropriately administered.
- **Use of Funds for Pre-K:** For purposes of federal funding, "elementary schools" are schools serving any combination of pre-kindergarten through grade six (Pre-K-6) (TCA §49-6-301(a)). Indicate whether funds from this grant will be directed to Pre-K students and/or instructional staff (i.e., teachers, coaches, paraprofessionals) and how many students and staff will be served.
- Title V may be used for activities authorized under several other ESEA programs, including:
  - Title I, Part A
  - Title II, Part A
  - Title III, Part A
  - Title IV, Part A
  - Parent and Family Engagement for non-Title I schools **Note:** *If the LEA is utilizing Title V, Part B, Subpart 2 for parent and family engagement at schoolwide Title I schools, those activities must be noted under Title I, Part A. Only parent and family engagement activities at non-Title I schools must be noted here.*
- For each program tagged in the Title V budget, provide a clear narrative description of the activities, programs, and services to be funded, and the district plan strategy these activities support.
- For activities authorized under **Title IV, Part A**, provide the above information and describe any partnerships with outside organizations, and how the effectiveness of activities will be assessed.

## Personnel Details—School-Based and System-Wide

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff not aligned to these prepopulated categories in the “Other” row and provide a position title. Use the “Add Row” link to add additional rows to the table to provide information for additional staff.

**Note:** FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.

- **School-Based Staff Instruction & Support:** Enter both a head count and an FTE for all **school-based** instructional and support staff supported with Title V, Part B, Subpart 2 funds. School-based staff are employees who are assigned to one or more schools for a pre-determined amount of time. These staff may work full time at one school, or staff may be split among two or more schools.
- **System-Wide Instruction & Support:** Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title V, Part B, Subpart 2 funds. System-wide staff are employees who are not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.

**System-Wide Personnel:** If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title V, Part B, Subpart 2 (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## Preschool Personnel Details

- If no Title V, Part B funds support preschool programs, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- Place all preschool staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). For each staffing category, several widely used position titles have been prepopulated. Enter any staff not aligned to these categories in the “Other” row and provide a position title. Use the “Add Row” link to add additional “Other” rows to the table to provide information for additional staff. **Note:** FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.
- **School-Based Staff Instruction & Support:** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title V, Part B funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- **System-Wide Instruction & Support:** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title V, Part B funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.
- **System-Wide Personnel:** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These personnel typically work in the central office, handling administrative duties for Title V, Part B (e.g., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

## Class Size Reduction

- If the LEA does not plan to use Title V, Part B funds to fund CSR teachers in grades K-3, mark this page “N/A” by checking the box at the top of the page. No additional input is necessary on this page.
- If the LEA plans to use Title V, Part B funds authorized under **Title I, Part A** or **Title II, Part A** for CSR teachers in grades K-3, complete the *Class Size Reduction* page.
- For each school with Title V, Part B funded CSR teachers, complete the information in the table. ePlan uses the data entered in the table to auto-calculate the projected state and local teacher to student ratio and the grade span projected state and local teacher to student ratio.
- Describe the LEA’s use of funds for Class Size Reduction (CSR), **the evidence upon which the LEA is relying for its use**, and how CSR is in support of one or more of the strategies in the district plan.
- Answer the remaining multiple-choice questions.

**In September of the school year**, additional fields will appear on this page requesting actual enrollment numbers. When available, complete the table. ePlan uses the data entered in the table to calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Additionally, LEAs must show that the educators hired as CSR teachers are proven to be highly effective. Upload the following to *ePlan > LEA Document Library > (appropriate Fiscal Year) > Consolidated Funding Application Documents > Title I CSR Teacher Justification*:

1. A letter signed by the director of schools on LEA letterhead stating that the CSR teacher:
  - meets state qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
  - is teaching in the field of discipline of the certification of the teacher; and
  - is not teaching on a waiver.
2. Documentation showing the teacher is a level three (3) or above on the latest TEAM evaluation.

**The above documentation must be submitted as described above by October 1 of the fiscal year that the CSR funds are being spent.** Contact the LEA’s [ESEA divisional coordinator](#) for technical assistance.

## Related Documents

No documents are required in this section. LEAs may upload any additional supporting documents.

## Title V Program Assurances

By checking the statement at the top of the [Program Assurances](#) page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.



# School-Wide Pool

## ***Creating a School-Wide Pool***

- Consolidating federal funds is a powerful strategy that leverages federal funds for comprehensive school reform of Title I schools that operate as a schoolwide program by increasing planning and spending flexibility. To create the School-Wide Pool, check the box “include in School-Wide Pool” on the Title I, Part A [\*PPA List\*](#) page.
- On the Allocation page, designate the amounts from each grant add to the School-Wide Pool. The Title I, Part A allocation is prepopulated from the [\*PPA List\*](#) page; Enter other amounts manually.
- ePlan allows for the grant/fund contributions to be entered on the school allocations page by school, and percentages are calculated automatically for each grant program.
- The percentages calculated from the allocations page are used for reimbursements in ePlan. If more than one school participates, a line for each school is created.
- Funds combined within the School-Wide Pool are removed from the LEA's grant allocations.
- Funds are combined into one budget for the School-Wide Pool, similar to the Consolidation Administration Pool, funds are budgeted just as other grant funds are budgeted, with all possible line items available.
- LEAs using School-Wide Pool have school-wide pool specific equitable services pages for LEAs to input the appropriate numbers and amounts in a private school that takes any ESSA or IDEA funds.
- LEAs using School-Wide Pool with Title I, Part C funds must consult with parents of migratory children or organizations representing those parents, or both. The LEA must provide migratory instructional services to Priority for Service (PFS) migratory students.
- **New for FY27:** LEAs will have the option of charging Indirect Costs when consolidating funds for school-wide pool. Costs are based on the LEA's approved indirect cost rate with TDOE, and maximum indirect cost is automatically calculated during budgeting. Subcontracts in excess of \$50,000.00 (previously \$25,000) must be excluded. Equipment cost lines are automatically excluded during the budgeting process.

## ***Budget***

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.

- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with School-Wide Pool funds;
  - Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases; (For example, if purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.)
  - Specific professional development to be supported, the number and type of staff who will participate (position titles, not employee names), and expenses to be paid;
  - Description of services to be purchased if contracting staff or services;
  - Indication of a stipend payment, if funds are being paid to an existing LEA staff member for work beyond regular work hours.

### ***Budget Overview***

*No input is required by the LEA.* A summary of the School-Wide Pool budgeted amounts is reported by line item and account number. This is a resource to provide a different view of the budgeted amounts.

### ***Budget Overview Plus/Minus***

*No input is required by the LEA.* A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This resource provides a different view of the budgeted amounts and changes made within the current revision.

### ***Program Details***

- Provide a description, by school, of the activities and initiatives to be supported with school-wide pool funds. (Funds must be used in support of the Title I School-Wide plan.)
- Provide a description of the planning process to ensure intended beneficiaries of each program are addressed.
- Provide the head counts and FTE by school for all positions to be supported with School-Wide Pool funds. Use the “Add Row” link to create additional rows for additional positions and schools. Each school may have more than one row.

### ***Equitable Services Program Details— Title I, Part A***

If there are no private schools within the LEA and no known low-income students from the LEA’s Title I attendance areas enrolled in eligible private schools, mark the checkbox to indicate the page is not applicable.

The equitable share of Title I, Part A funds for private school services must be determined based on the proportionate share of low-income students attending participating private schools and must be determined before any funds are set aside or transferred.

**A. Title I Allocation (Original + Reallocation + "Original" Transfers In):** Enter this amount from the [Allocations](#) page.

**B. K-12 Private School Low Income Enrollment (From Served Schools):** Enter this amount from the total of column K on the Title I, Part A: [School Eligibility](#) page.

**C. K-12 Total Low Income Enrollment (from Served Schools):** Calculate this amount from the private school low-income total (Column K, [School Eligibility](#) page) plus (+) the total public low income in Title I participating schools (Column E, [PPA List](#) page)

**D. Total Private School Share (A x (B/C)):** ePlan auto-calculates the proportionate share of private school, low-income students in participating private school.

**E. Private School Family Engagement (Title I Allocation X 1% if Title I Allocation > \$500,000):** Calculate this amount from the proportionate share of private school, low-income students in participating private schools. The field is only populated if the LEA is required to spend one percent of Title I funds on family engagement. **Note:** This amount must be manually entered in the [District Set-Asides and Overview](#) page. For LEAs that are not required to set aside one percent for family engagement, this number (B.) is not required.

**F. Private School Administration:** During consultation with private school officials, the LEA must discuss and agree upon the amount of the equitable share used for program administration. Enter the total agreed-upon amount here (if there are multiple private schools, combine all administration costs). **Note:** The amount of administrative costs for private school services **must** be included in the amount transferred to con admin **or** the amount entered on the [Allocation Designation](#) page if not consolidating administrative funds.

**G. FY27 Private School Instructional Funds (D-(E+F)):** ePlan auto-calculates this amount by subtracting the family engagement amount and the administration amount from the Total Private School Share. The remaining amount displayed on this line is the Private /Private Schools Instructional Funds to provide instructional services and programs to participating private school students from **current fiscal year** funds. **This amount must also be entered in the [District Set-Asides and Overview](#) page.**

**H. FY26 Private School Carryover Amount:** Enter the amount of FY26 Title I funds set-aside for equitable services that will not be obligated by July 1, 2026. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**I. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** ePlan auto-calculates this number by adding rows G and H. The amount displayed is the total amount of Title I funds available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the [District Set-Aside](#) page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Title I, Part A Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to private school representatives. (Upload [Affirmation of Consultation\(s\)](#) on the [Related Documents](#) page.) **Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** to the [Related Documents](#) page.
- Select the services to provide to support the academic achievement of private school students.
- Indicate if an inter-LEA agreement/Memorandum of Understanding was developed to provide identified services. If yes, indicate which LEA(s) are to provide services.
- Describe the LEA's process for evaluating the effectiveness of the services.
- Describe both the required and additional family engagement activities that are supported with funds set aside for equitable private school services. If the LEA is required to set aside one percent for family engagement, describe how the required amount is used to support private school family engagement. If the LEA is **not required** to set aside one percent of funds, and no funds are used for family engagement activities, indicate that here.

## **Equitable Services Program Details—Title I, Part C**

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

If the LEA has private schools participating in Title I, Part C, complete this area. The equitable share of Title I, Part C funds for private school services must be determined based on a per-pupil share. The per-pupil share is determined based on the number of migratory children and youth enrolled in the LEA and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

### **A. Number of Students:**

**A1:** Enter the total number of public school migratory children and youth enrolled in the LEA. This is typically pulled from the Oct. 1 count.

**A2:** ePlan prepopulates the number of LEA-identified migratory children and youth enrolled in participating private schools. Enter the enrollment of only private schools that are participating in Title I, Part C Equitable Services.

**A3:** ePlan auto-calculates the value in this row by adding the previous two rows together.

### **B. Title I, Part C**

**B1:** ePlan prepopulates this amount from the **Title I, Part C Allocations** page. Only the current fiscal year allocation is included.

**B2:** Enter the administrative costs paid with Title I, Part C funds. This amount must include public and private school administrative costs. **Note:** If the LEA is utilizing con admin, the amount entered here **must** match the amount contributed from Title I, Part C, displayed on the **Title I, Part C Allocations** page.

**B3:** ePlan auto-calculates the total amount of Title I, Part C available for equitable services. (The LEA Allocation minus administrative costs for the public and private school Title I, Part C program.)

### **C. Per Pupil Rate:**

**C1:** ePlan auto-calculates the per-pupil amount available for each enrolled migratory student and then uses that per pupil to calculate and display the total amount of the current year.

### **D. Equitable Services:**

**D1:** ePlan auto-calculates the Title I, Part C funds that must be reserved for private school services from values in Rows A2 and C1.

**E. FY26 Private School Carryover Amount:** The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I, Part C funds set-aside for equitable services that will not be obligated by July 1, 2026. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** ePlan auto-calculates this amount by adding rows D and E. The amount displayed is the total amount of Title I, Part C funding available to provide instructional services and programs to participating private schools.

**Note:** LEAs must enter this amount on the District Set-Aside page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to private school representatives. (Upload affirmation of consultation(s) on the [Related Documents](#) page.)
- Describe the process for identifying migratory children and youth at the private school(s) that receive(s) Title I, Part C services.
- Describe the process the LEA uses to complete the Individual Needs Assessment (INA) at the private school(s) that receive(s) Title I, Part C services.
- Explain how the LEA assesses the Migrant Education Program annually at each private school that receives Title I, Part C services.
- Briefly explain what services the LEA provides to eligible migratory children and youth at each private school receiving Title I, Part C services (including, but not limited to, professional development, materials, tutoring, and equipment).

## Equitable Services Program Details—Title II, Part A

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

The equitable share of Title II, Part A funds for private school services must be determined based on the enrollment within the LEA and the participating private school enrollment before any funds are set aside or transferred.

**A. Number of Students:** Enter the district enrollment from the [School Eligibility](#) page and the participating K-12 private school enrollment from the *Private School Survey* responses from the spring. ePlan auto-calculates the sum of these two numbers.

**B. Title II, Part A:** Enter the district allocation for Title II, Part A funds then enter the total agreed-upon amount for Title II, Part A administration costs for public and private school programs in **B2** (if there are multiple private schools, combine all administration costs). ePlan auto-calculates B1-B2.

**C. Per Pupil Rate:** ePlan auto-calculates this amount by dividing **B3** by **A3**.

**D. Equitable Services:** ePlan auto-calculates this amount by multiplying the enrollment of all participating private schools by the per-pupil rate.

**E. FY26 Private School Carryover Amount:** Enter the amount of FY26 Title I funds set-aside for equitable services **that will not be obligated by July 1, 2026**. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** This amount auto-calculates by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the *District Set-Aside* page on the *Private School Instructional Funds* line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to private school representatives.  
**Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** on the [Related Documents](#) page.
- Describe the professional development activities to be provided to participating private school teachers, principals, and other school leaders.

## Equitable Services Program Details—Title III, Part A

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

Complete this page if the LEA has participating private schools in Title III, Part A. The equitable share of Title III, Part A funds for private school services must be determined based on a per-pupil share, much like Title II. The per-pupil share is determined based on the number of English learners enrolled in the LEA and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

### A. Number of Students:

**A1:** Enter the total number of public school English learners enrolled in the LEA. This typically is pulled from the third-month average daily membership (ADM).

**A2:** Enter the number of LEA-identified English learners enrolled in participating private schools from the *Private School Survey* completed in spring.

**A3:** ePlan auto-calculates this value by adding the previous two rows together.

### B. Title III:

**B1:** Enter the District Allocation from the **Title III Allocations** page. Only include the current fiscal year allocation.

**B2:** Enter the administrative costs paid with Title III, Part A funds. This amount must include public and private school administrative costs. **Note:** If the LEA is utilizing con admin, the amount entered here **must** match the amount contributed from Title III, displayed on the **Title III Allocations** page.

**B3:** ePlan auto-calculates the total amount of Title III, Part A available for equitable services. (The LEA allocation minus administrative costs for the public and private school Title III, Part A program.)

### C. Per Pupil Rate:

**C1:** ePlan auto-calculates the per-pupil amount available for every enrolled EL student.

### D. Equitable Services:

**D1:** ePlan auto-calculates the Title III, Part A funds that must be reserved for private school services.

**E. FY26 Private School Carryover Amount:** Enter the amount of FY26 Title I funds set-aside for equitable services that will not be obligated by July 1, 2026. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** This amount is auto-calculated by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the *District Set-Aside* page on the *Private School Instructional Funds* line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to private school representatives. **Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** on the [Related Documents](#) page.
- Describe the process for identifying English Learners at the private school(s) that receive(s) Title III services.
- Briefly explain how Title III services are provided at each private school that receives Title III services (including professional development, materials, tutoring, and equipment).
- Explain how the English as a Second Language program is assessed annually at each private school that receives Title III services.

## Equitable Services Program Details—Title IV, Part A

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

The equitable share of Title IV, Part A funds for private school services must be determined based on a per-pupil share, much like Titles II and III. The per-pupil share is determined based on the number of students enrolled in the public school and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

**A. Number of Students:** Enter the District Enrollment from the [School Eligibility](#) page and the Participating K-12 Private School Enrollment from the [Spring Non-Public School Survey](#). ePlan auto-calculates the sum of these values.

### **B. Title IV, Part A:**

**B1:** Enter the Title IV District Allocation from the [Allocations](#) page. Only include the current fiscal year allocation, minus funds transferred out of Title IV, Part A. **Note:** If all funds are transferred out of Title IV, Part A, private schools will not receive an equitable share of the funds through Title IV, Part A. The equitable services share will be taken from the program that funds were transferred into instead.

**B2:** Enter the administrative costs paid with Title IV, Part A funds. This amount must include public and non-public school administrative costs. **Note:** If the LEA is utilizing con admin, the amount entered here *must* match the amount contributed from Title IV, Part A displayed on the [Allocations](#) page.

**B3:** ePlan auto-calculates the total amount of Title IV, Part A funds available for equitable services. (The LEA allocation minus administrative costs for the public and private school Title IV, Part A program.)

### **C. Per Pupil Rate:**

**C1:** ePlan auto-calculates the per-pupil amount of Title IV, Part A funds available for every enrolled student.

### **D. Equitable Services:**

**D1:** ePlan auto-calculates the Title IV, Part A funds that must be reserved for private school services.

**E. FY26 Private School Carryover Amount:** Enter the amount of FY26 Title I funds set-aside for equitable services that will not be obligated by July 1, 2026. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** This amount auto-calculates by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the [District Set-Aside](#) page on the [Private School Instructional Funds](#) line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include (1) important dates, (2) modes of communication, and (3) the information provided to private school representatives. (Upload affirmation of consultation(s) in Related Documents.)  
**Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation Form** on the Related Documents page.
- Describe the activities to be provided in support of participating private school students and/or teachers.

## Related Documents

Upload the following documentation in support of the School-Wide Pool application and School-Wide Pool Equitable Services.

- Intent to Participate Document (required)
- Affirmation of Meaningful Private School Consultation
- Private Schools Consultation

## Important Reminders

No administrative activities can be included in the School-Wide Pool budget, but school-level staff may be funded in each school with pool funds.



# Equitable Services for Private Schools

## **Private Schools**

The Private Schools page provides a summary of the private schools that participate in equitable services for federal grant programs received by the LEA. ePlan prepopulates this page with data from the current year's *Non-Public School Survey*. Each LEA must survey the private schools within its boundary; additionally, in the case of Title I, Part A eligibility, LEAs must survey private schools where students residing within the LEA Title I attendance areas are enrolled. LEAs complete the *Non-Public School Survey* in ePlan under **Data and Information** each year.

## **Equitable Services Program Details— Title I, Part A**

If there are no private schools within the LEA and no known low-income students from the LEA's Title I attendance areas enrolled in eligible private schools, mark the checkbox to indicate the page is not applicable.

The equitable share of Title I, Part A funds for private school services must be determined based on the proportionate share of low-income students attending participating private schools and must be determined before any funds are set aside or transferred.

**A. Title I Allocation (Original + Reallocation + “Original” Transfers In):** This amount is prepopulated from the [Allocations](#) page.

**B. K-12 Private Low Income Enrollment (From Served Schools):** This amount is auto-populated from the total of column K on the [School Eligibility](#) page.

**C. K-12 Total Low Income Enrollment (from Served Schools):** This amount is auto-calculated from the private low-income total (Column K, [School Eligibility](#) page) plus (+) the total public low income in Title I participating schools (Column E, [PPA List](#) page)

**D. Total Private Share (A x (B/C)):** This amount is auto-calculated based on the proportionate share of non-public, low-income students in participating private schools.

**E. Private Family Engagement (Title I Allocation X 1% if Title I allocation > \$500,000):** This amount is auto-calculated based on the proportionate share of private school, low-income students in participating private schools. The field is only populated if the LEA is required to spend one percent of Title I funds on family engagement. **Note:** *This amount auto populates the field on the **District Set-Asides and Overview** page. For LEAs that are not required to set aside one percent for family engagement, this number (B.) is not required.*

**F. Private School Administration:** *This amount does **not** auto-calculate and requires entry.* During consultation with private school officials, the LEA must discuss and agree upon the amount of the equitable share used for program administration. Enter the total agreed-upon amount here (if there are multiple private schools, combine all administration costs). **Note:** *The amount of administrative costs for private school services **must** be included in the amount transferred to con admin **or** the amount entered on the **Allocation Designation** page if not consolidating administrative funds.*

**G. FY27 Private School Instructional Funds (D-(E+F)):** ePlan auto-calculates this amount by subtracting the family engagement amount and the administration amount from the Total Private School Share. The

remaining amount displayed on this line is the Private Schools Instructional Funds to provide instructional services and programs to participating private school students from **current fiscal year** funds. **This amount must also be entered in the *District Set-Asides and Overview* page.**

**H. FY26 Private School Carryover Amount:** *The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I funds set-aside for equitable services that will not be obligated by July 1, 2026. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.*

TDOE Adjustment: TDOE Adjustment field. In special cases, Department staff can use this field to manually adjust the applicable allocation amount for Equitable Services. No LEA action is required here.

**I. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** ePlan calculates this number by adding the rows G and H. The amount displayed is the total amount of Title I funds available to provide instructional services and programs to participating private schools. **Note:** *LEAs must enter this amount on the District Set-Aside page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.*

### Title I, Part A Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. **Note:** *LEAs must upload documentation showing **Affirmation of Consultation(s)** on the Related Documents page by the CFA due date on **May 1, 2026**. LEAs using the combined form: **Affirmation of Meaningful Private School Consultation and Agreement Form** can upload to the Related Documents page in May if it is available.*
- Select the services to provide to support the academic achievement of private school students.
- Indicate if an inter-LEA agreement/Memorandum of Understanding was developed to provide identified services. If yes, indicate which LEA(s) are to provide services.
- Describe the LEA's process for evaluating the effectiveness of the services.
- Describe both the required and additional family engagement activities that are supported with funds set aside for equitable private school services. If the LEA is required to set aside one percent for family engagement, describe how the required amount is used to support private school family engagement. If the LEA is **not required** to set aside one percent of funds, and no funds are used for family engagement activities, indicate that here.

### Equitable Services Program Details—Title I, Part C

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

If the LEA has private schools participating in Title I, Part C, complete this area. The equitable share of Title I, Part C funds for private school services must be determined based on a per-pupil share. The per-pupil share is determined based on the number of migratory children and youth enrolled in the LEA and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

#### **A. Number of Students:**

**A1:** Enter the total number of public-school migratory children and youth enrolled in the LEA. This is typically pulled from the Oct. 1 count.

**A2:** ePlan prepopulates the number of LEA-identified migratory children and youth enrolled in participating private schools. Enter the enrollment of only private schools that are participating in Title I, Part C Equitable Services.

**A3:** ePlan auto-calculates the value in this row by adding the previous two rows together.

## **B. Title I, Part C**

**B1: ePlan** prepopulates this amount from the **Title I, Part C Allocations** page. Only the current fiscal year allocation is included.

**B1A:** TDOE Adjustment field. In special cases, Department staff can use this field to manually adjust the applicable allocation amount for Equitable Services. No LEA action is required here.

**B2:** Enter the administrative costs paid with Title I, Part C funds. This amount must include public and private school administrative costs. **Note:** *If the LEA is utilizing con admin, the amount entered here **must** match the amount contributed from Title I, Part C, displayed on the **Title I, Part C Allocations** page.*

**B3:** ePlan auto-calculates the total amount of Title I, Part C available for equitable services. (The LEA Allocation minus administrative costs for the public and private Title I, Part C program.)

## **C. Per Pupil Rate:**

**C1:** ePlan auto-calculates the per-pupil amount available for each enrolled migratory student and then uses that per pupil to calculate and display the total amount of the current year.

## **D. Equitable Services:**

**D1:** ePlan auto-calculates the Title I, Part C funds that must be reserved for private school services from values in Rows A2 and C1.

**E. FY26 Private Carryover Amount:** The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I, Part C funds set-aside for equitable services *that will not be obligated by July 1, 2026*. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private Instructional Funds (FY26 Carryover and FY27):** ePlan auto-calculates this amount by adding rows D and E. The amount displayed is the total amount of Title I, Part C funding available to provide instructional services and programs to participating private schools.

**Note:** *LEAs must enter this amount on the District Set-Aside page on the Private Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.*

## **Narrative Questions**

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to private school representatives. (Upload affirmation of consultation(s) on the [Related Documents](#) page.)
- Describe the process for identifying migratory children and youth at the private school(s) that receive(s) Title I, Part C services.
- Describe the process the LEA uses to complete the Individual Needs Assessment (INA) at the private school(s) that receive(s) Title I, Part C services.
- Explain how the LEA assesses the Migrant Education Program annually at each private school that receives Title I, Part C services.
- Briefly explain what services the LEA provides to eligible migratory children and youth at each private school receiving Title I, Part C services (including, but not limited to, professional development, materials, tutoring, and equipment).

## **Equitable Services Program Details—Title II, Part A**

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

The equitable share of Title II, Part A funds for private school services must be determined based on the enrollment within the LEA and the participating private school enrollment before any funds are set aside or transferred.

**A. Number of Students:** This area auto-calculates from the [School Eligibility](#) page and *Non-Public School Survey* responses from the spring.

**B. Title II, Part A:** This amount calculates based on the district allocation for Title II, Part A funds (minus the administration costs).

**B1A:** TDOE Adjustment field. In special cases, Department staff can use this field to manually adjust the applicable allocation amount for Equitable Services. No LEA action is required here.

**C. Per Pupil Rate:** ePlan auto-calculates this amount by dividing **B3** by **A3**.

**D. Equitable Services:** ePlan auto-calculates this amount by multiplying the enrollment of all participating private schools by the per-pupil rate.

**E. FY26 Private Carryover Amount:** The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I funds set-aside for equitable services **that will not be obligated by July 1, 2026**. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private Instructional Funds (FY26 Carryover and FY27):** This amount auto-calculates by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the *District Set-Aside page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.*

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. **Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** on the [Related Documents](#) page.
- Describe the professional development activities to be provided to participating private school teachers, principals, and other school leaders.

## Equitable Services Program Details—Title III, Part A

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

Complete this page if the LEA has participating private schools in Title III, Part A. The equitable share of Title III, Part A funds for private school services must be determined based on a per-pupil share, much like Title II. The per-pupil share is determined based on the number of English learners enrolled in the LEA and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

### A. Number of Students:

**A1:** Enter the total number of public-school English learners enrolled in the LEA. This typically is pulled from the third-month average daily membership (ADM).

**A2:** ePlan prepopulates the number of LEA-identified English learners enrolled in participating private schools from the *Non-Public School Survey* completed in spring.

**A3:** ePlan auto-calculates the value in this row by adding the previous two rows together.

### B. Title III:

**B1:** This count is prepopulated from the **Title III Allocations** page. Only the current fiscal year allocation is included.

**B1A:** TDOE Adjustment field. In special cases, Department staff can use this field to manually adjust the

applicable allocation amount for Equitable Services. No LEA action is required here.

**B3:** ePlan auto-calculates the total amount of Title III, Part A available for equitable services. (The LEA allocation minus administrative costs for the public and private school Title III, Part A program.)

**C. Per Pupil Rate:**

**C1:** ePlan auto-calculates the per-pupil amount available for every enrolled EL student.

**D. Equitable Services:**

**D1:** ePlan auto-calculates the Title III, Part A funds that must be reserved for private school services.

**E. FY26 Private School Carryover Amount:** The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I funds set-aside for equitable services *that will not be obligated by July 1, 2026*. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** This amount is auto-calculated by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the District Set-Aside page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. **Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** on the [Related Documents](#) page.
- Describe the process for identifying English Learners at the private school(s) that receive(s) Title III services.
- Briefly explain how Title III services are provided at each private school that receives Title III services (including professional development, materials, tutoring, and equipment).
- Explain how the English as a Second Language program is assessed annually at each private school that receives Title III services.

## Equitable Services Program Details—Title IV, Part A

If there are no private schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

The equitable share of Title IV, Part A funds for private school services must be determined based on a per-pupil share, much like Titles II and III. The per-pupil share is determined based on the number of students enrolled in the public school and in participating private schools that are geographically located within the LEA. This area calculates the equitable share.

**A. Number of Students:** This area is auto-calculated based on the information from the [School Eligibility](#) page and *Spring Non-Public School Survey*.

**B. Title IV, Part A:**

**B1:** This count prepopulates from the *Title IV Allocations* page. Only the current fiscal year allocation is included, minus funds transferred out of Title IV, Part A. **Note:** *If all funds are transferred out of Title IV, Part A, private schools will not receive an equitable share of the funds through Title IV, Part A. The equitable services share will be taken from the program that funds were transferred into instead.*

**B1A:** TDOE Adjustment field. In special cases, Department staff can use this field to manually adjust the applicable allocation amount for Equitable Services. No LEA action is required here.

**B3:** ePlan auto-calculates the total amount of Title IV, Part A funds available for equitable services. (The LEA allocation minus administrative costs for the public and private school Title IV, Part A program.)

**C. Per Pupil Rate:**

**C1:** ePlan auto-calculates the per-pupil amount of Title IV, Part A funds available for every enrolled student.

**D. Equitable Services:**

**D1:** ePlan auto-calculates the Title IV, Part A funds that must be reserved for private school services.

**E. FY26 Private School Carryover Amount:** The LEA must calculate this amount and enter it. The amount entered must be the amount of FY26 Title I funds set-aside for equitable **services that will not be obligated by July 1, 2026**. LEAs must carry over these remaining funds and add them to the FY27 funds for equitable services.

**F. Total Amount of Private School Instructional Funds (FY26 Carryover and FY27):** This amount auto-calculates by adding the rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating private schools. **Note:** LEAs must enter this amount on the District Set-Aside page on the Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY26 and final allocation revisions are processed.

## Narrative Questions

- Describe the consultation process between the LEA and the private school(s). Include (1) important dates, (2) modes of communication, and (3) the information provided to non-public/private school representatives. (Upload affirmation of consultation(s) in Related Documents.) **Note:** LEAs must upload the completed **Affirmation of Meaningful Private School Consultation Form** on the Related Documents page.
- Describe the activities to be provided in support of participating private school students and/or teachers.

## Equitable Services for Private Schools Program Assurances

By checking the statement at the top of the Program Assurances page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

## Related Documents

LEAs have the option to upload a combined **Affirmation of Meaningful Private School Consultation & Agreement** form. LEAs using the combined form meet the obligation to forward final agreements with private schools to the ombudsman (typically due at the beginning of the school year) and do not have to upload final agreements to ePlan.

LEAs that prefer to use the traditional **Affirmation of Meaningful Private School Consultation Form** or that feel that final agreements have not been confirmed with private schools when submitting the CFA may upload the traditional form to the FY27 CFA.

LEAs using the traditional form must upload final agreements to the ePlan LEA document Library by **September 15, 2026**.

- LEAs can use these templates across multiple ESEA equitable services programs.
- Upload any additional supporting documents.



# IDEA Requirements

In this section, LEAs must document the special education staff employed by the LEA, provide a breakdown of private/non-public school funds to be expended for students with disabilities if required, provide the projected General Purpose Special Education budget for the next school year, the number of students with disabilities receiving special transportation per their IEP, and provide the maintenance of effort information/amounts for the previous school year and the projected amounts for the next school year. After July 1, the LEA must update this page to the actual amounts expended from the last school year to ensure the LEA is meeting the requirements for Maintenance of Effort (MOE).

Staff included in the *Personnel Details* pages are staff members paid with IDEA, Part B funds (611); IDEA Preschool funds (619); and/or state and local funds. Staff titles/positions, head counts, and full-time equivalents (FTEs) must match the supporting IDEA, Part B (611); IDEA Preschool; and the LEAs' uploaded general purpose special education budget.

## **IDEA Personnel Details—Systemwide Admin/Instruction & Support**

- **Systemwide Administration:** Enter both a head count and an FTE for all systemwide administrative staff supported with IDEA, Part B funds (611); IDEA Preschool funds (619); and general purpose special education funds. Staff members listed in this table are typically personnel working in the LEA's central office, providing administrative oversight of special education programs. The head counts, FTEs, and staff titles/positions must match the information provided in the IDEA, Part B (611); IDEA Preschool; and the general purpose special education budget narratives. The positions within this page are typically budgeted in account number 72220. Several widely used position titles are prepopulated within this page, but "Other" rows may be added as needed to list all staff. If entering staff information in an "Other" line, provide a title for the position and ensure this title is used consistently throughout the entire application. Do not include instructional staff in this section; only administrative staff.
- **System-Wide Instruction & Support:** Enter both a head count and an FTE for all systemwide instruction and support staff who are located either in the central office or providing support to more than one school site on an irregular schedule. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B, and IDEA Preschool budget narrative descriptions or the general purpose special education budget. The positions within this page are budgeted in 71150 or 71200 if instructional staff are providing direct services to students with disabilities; or budgeted in 72120, 72130, 72215, 72220, if support staff are providing services, depending on the duties of the staff employed. All transportation personnel must be budgeted in 72710. Several widely used position titles are prepopulated within this page. Add "Other" rows as needed to list all staff. If entering staff information in an "Other" category, provide a title for the position, and use this title throughout the application. List all extended school year (ESY) personnel on this page.

## **IDEA Personnel Details—School-level (6–21) —Teachers & Ed Assistants**

School names and LEA ID-school numbers are prepopulated from the school directory.

- Enter head counts and FTEs, by school, for school-level teachers and educational assistants providing special education services to students aged 6–21. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611) and general purpose special education funds.

The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget narrative descriptions and/or the general purpose special education budget uploaded to *General Purpose Special Education Budget* or *Non-Supplanting/Maintenance of Effort pages*. Staff members listed on this page must be budgeted in account number 71200 in the IDEA, Part B (611) or general purpose special education budget or 71150 in an alternative setting.

### ***IDEA Personnel Details—School-Level (6–21): Other Positions (Nurses, Psychologists, etc.)***

School names and LEA ID-school numbers are prepopulated from the school directory.

- Enter head counts and FTEs by school for the following personnel: speech pathologists, psychologists, nurses, and other related services personnel providing special education services to students aged 6–21. If entering data in the “Other” column, specify the position title. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611) and general purpose special education funds. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget narrative descriptions and/or the general purpose special education budget uploaded to *General Purpose Special Education Budget* or *Non-Supplanting/Maintenance of Effort pages*.

Staff members listed on this page are typically budgeted in account series 72220, 72215, and/or 72710 in the IDEA, Part B budget, or the general purpose special education budget, depending on the duties of the staff employed. Other account series that could be used, in limited situations, include 72120, 72130, and 72215.

### ***IDEA Personnel Details—School-Level (3–5): Teachers & Ed Assistants***

School names and LEA ID-school numbers are prepopulated from the school directory.

- Enter head counts and FTEs by school for school-level teachers and educational assistants providing special education services to students aged 3–5.

Staff information must be broken down and entered based on funding sources: IDEA, Part B (611), IDEA Preschool (619), and general purpose special education funds.

The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget and IDEA Preschool budget narrative descriptions, and/or the general purpose special education budget uploaded to *General Purpose Special Education Budget* or *Non-Supplanting/Maintenance of Effort pages*.

Staff members listed on this page must be budgeted in account number 71200 in the IDEA, Part B, IDEA Preschool, and/or the general purpose special education budget.

### ***IDEA Personnel Details—School-level (3–5): Other Positions (Nurses, Psychologists, etc.)***

School names and LEA ID-school numbers are prepopulated from the school directory.

- Enter head counts and FTEs by school for the following personnel: speech pathologists, psychologists, nurses, and other related services personnel providing special education services to students aged 3–5. If entering data in the “Other” columns, specify the position title. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611), IDEA Preschool (619), and general purpose special education funds. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B, and IDEA Preschool budget narrative descriptions, and/or the general purpose special education budget uploaded to *General Purpose Special Education Budget* or *Non-Supplanting/Maintenance of Effort pages*.

Staff members listed on this page are typically budgeted in account numbers 72220, 72215, and/or 72710 in the IDEA, Part B; IDEA Preschool, or general purpose special education budget depending on the duties of the staff employed. Other account series that could be used, in limited situations, include 72120, 72130, and 72215.

## IDEA Private/Non-Public School Details

The department determines the proportionate amount of IDEA funds that must be spent on services for parentally placed students based on information that the LEA submits in December before the CFA opens via the *IDEA Private Schools Parentally Placed Non-Public School Reserve Calculation*. This form can be found in **ePlan** > *Data and Information* > *IDEA Private Schools Parentally Placed Non-Public School Reserve Calculation*. Until final IDEA allocations are determined, LEAs must reserve the state-provided estimated amount of funds, if any, and complete this page and budget funds using those estimates from the department.

If proportionate share amounts are revised, LEAs must submit the final amounts from the revised IDEA Private Schools Proportionate Amounts form with final budget revisions by **Sept. 30**, or after any change in IDEA, Part B and/or IDEA Preschool allocations.

- In item 1, indicate whether the LEA is required to reserve a portion of their IDEA funds (IDEA 611 funds [6-21] and/or IDEA 619 funds [3-5]) to provide services to parentally placed non-public school students, including homeschooled students. All LEAs must check yes or no for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5).
- In item 2, indicate if the LEA will carry over any prior year non-public/private school proportionate share funds for use in the current year. Identify the estimated amount of carryover funds separately for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5). All LEAs must check yes or no for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5)
- In item 3, identify account number(s) with line item(s) where these expenditures are located within the IDEA 611 and IDEA 619 budgets. Please do not include any monetary amounts in this table. Private School Proportionate Share budget items must be tagged with the **IDEA > Private School Proportionate Share** budget tag. The private school proportionate share includes the 'PSPS' budget tags.

## General Purpose Special Education Budget

The purpose of this new page is to provide documentation that the LEA has budgeted at least the minimum amount of funds required for maintenance of effort. These questions were previously answered on the *General Purpose Special Education Budget Upload* cover page.

- LEAs must complete the "GP Summary" sheet and confirm that the LEA has budgeted the minimum amount necessary to meet maintenance of effort (MOE) requirements for the fiscal year.
  - **Yes** means the projected expenses for the next year will meet MOE, either by total expenses and/or per-pupil expenses, including if the LEA used any of the exceptions to reduce MOE. LEAs must include an explanation in the *IDEA, Part B* section, on the [Non-Supplanting/Maintenance of Effort](#) page under question #7.
  - **No** means the projected expenses for the next year will not meet MOE. LEAs must explain why the projected and actual expenses for next year will not meet MOE. LEAs must also include an explanation in the *IDEA, Part B* section, on the [Non-Supplanting/Maintenance of Effort](#) page under question #7.
- LEAs must complete and upload the provided Excel document "[General Purpose Special Education Budget](#)". Information within the budget is used to determine if the LEA is in compliance with MOE eligibility requirements. If the LEA is not in compliance with MOE eligibility, the application cannot be approved.

LEAs must answer the following:

- Indicate where the funding sources are state, local, or a combination.
- Indicate whether funds for gifted students have been identified and removed from the budget.
- Indicate if any funds for services to functionally delayed students are included in this budget; the LEA assures that an examination of student records has been made, and those students were eligible for services under one or more of the federal categories.

- Indicate whether funds for functionally delayed students have been identified and removed from the budget.
- Provide the number of functionally delayed students qualifying under a federal category and for whom services are not included in this budget.
- Confirm that the LEA has budgeted the minimum amount necessary to meet maintenance of effort requirements for the coming year.

## Special Transportation

This page asks LEAs to provide information about whether the LEA provides special transportation to students with disabilities.

LEAs must indicate the number of students with disabilities aged 3-5 and aged 6-21 who receive special transportation.

All LEAs must respond with a student count. Enter “0” into the field if no students received special transportation.

## State Special Education Expenditure Report (SSEER)

Complete this page **after July 1, 2026**, to report financial expenditures for the instructional and related service needs of special education students from general purpose special education funds.

- LEAs must complete the SSEER page to include all of the general purpose special education expenditures from the previous fiscal year. If applicable, upload a maintenance of effort exception or additional supporting documents.
- Check the assurance box at the bottom of the page.

## Non-Supplanting/Maintenance of Effort

LEAs must upload the State Special Education Expenditure Report (SSEER) by **Sept. 1**. The SSEER determines if the LEA has met MOE compliance. If the LEA is not in compliance with MOE requirements, the department will return the application Not Approved. LEAs may not reduce the amount of local funds, or the combination of state and local funds spent for the education of students with disabilities—by the total amount expended; per-pupil expenditures; or by one of the exceptions allowed by Law—below the amount spent in the preceding fiscal year (or the subsequent year, based on subsequent year rule) [34 CFR § 300.203(b)(1)]. By maintaining the level of support, LEAs demonstrate Maintenance of Effort (MOE). There are two components to the LEA Maintenance of Effort (MOE)—eligibility and compliance.

MOE **eligibility** is determined when the IDEA, Part B application is submitted in the spring of each year. LEAs must meet the MOE requirements to receive IDEA, Part B funds each year. **Compliance** with MOE is determined after the State Special Education Expenditure Report (SSEER) is submitted in September. LEAs must meet both compliance requirements.

Provide the following documents:

- *General Purpose Special Education Budget*: Download and complete the provided Excel document. Information within the budget is used to determine if the LEA is in compliance with maintenance of effort (MOE). If the LEA is not in compliance with MOE eligibility, the application cannot be approved.
- The optional *Maintenance of Effort Exception* upload link is provided for LEAs seeking an exception for maintenance of effort (MOE) to upload to support the need for a Maintenance of Effort Exception.
- **After July 1**: LEAs must upload the State Special Education Expenditure Report (SSEER) by **Sept. 1**. The SSEER determines if the LEA has met MOE compliance. If the LEA is not in compliance with MOE requirements, the department will return the application not approved.
- The optional *Maintenance of Effort Exception* upload link is provided for LEAs seeking an exception for maintenance of effort (MOE) to upload to support the need for a Maintenance of Effort Exception.

## Expenditures

- Identify the method used in determining compliance with MOE requirements by selecting either “State/Local Funds” or “Local Funds Only.”

Row		A	B	C	D
		2020-21	2021-22	* 2022-23 Select... ▼	2023-24
1	Actual amount expended for students with disabilities (SWD) served (State Special Education Expenditure Report)	\$7,364,245.25	\$8,109,435.36	* \$ <input type="text"/>	
2	Total unduplicated count of disabled students served by the school system (End of Year Report)	1288	1302	* <input type="text"/>	
3	Per pupil expenditures (Row 1 divided by Row 2)	\$ <input type="text" value="5,717.58"/>	\$ <input type="text" value="6,228.44"/>	\$ <input type="text" value="0.00"/>	
4	System's total enrollment (All Students)			* <input type="text"/>	
5	Percentage of Special Education Students (Row 2 divided by Row 4)			<input type="text" value=".00"/> %	
6	Projected Expenditures (Total Expenditures General Purpose Funds)				* \$ <input type="text"/>

Based on the method selected, provide the following information:

- Row 1:** Actual amounts expended for providing services to students with disabilities in the years specified. These amounts must match the amounts submitted in the respective SSEER and as approved in prior applications.
- Row 2:** The total unduplicated count of students with disabilities served by the school system in each year specified. These numbers must match the reported student counts in the End of Year Reports (as provided in **TDOE Resources** for each LEA and at the bottom of the page).
- Row 4:** The total number of all students enrolled in school during the preceding school year (as indicated by the year given in the column designation).
- Row 6:** Projected general purpose expenditures for special education in the application year. This amount **must** match the total special education expenditures in the general purpose special education budget that must be uploaded to IDEA Shared Related Documents before submission. **Note:** When submitting the original application for the upcoming fiscal year, select **“Projected”** in the column C drop-down box. All data entered in this column is projected until final numbers are entered as part of the final budget revision. When the SSEER is uploaded into ePlan, the LEA must change the dropdown to **“Actual”** and update the data for the fiscal year.
- If the amount entered in row 6 is less than the amount entered in row 1, column B (the latest year for which the LEA has documented expenditures), provide an explanation in item 7. The only acceptable explanations are those allowable exceptions permitted in IDEA listed in item 9. The LEA can project whether these would be applicable as reasons to reduce MOE for the upcoming school year.

**Do not complete the remaining items (8 & 9) until after the SSEER is submitted.** These questions ensure the LEA has met the compliance requirement of MOE for the prior year.

**The SSEER is due by Sept. 1.** Upload the **completed** SSEER then change the selection in table header to “Actual,” and enter actual information for the prior year (expenditures and student counts).

Determine the compliance requirement for MOE by comparing the amount in row 1, column C to row 1, column B.

Based on actual information, respond to items 8 and 9 to indicate the method used to meet MOE requirements and, if necessary, the exceptions needed to meet the requirements, if any. The allowable exceptions permitted in IDEA are identified below:

- Voluntary departure or departure for just cause of special education or related services personnel;
- A decrease in the enrollment of students with disabilities;
- Termination of the LEA’s obligation to provide an exceptionally high-cost special education program to student(s) because the student(s) is leaving the LEA’s jurisdiction, aging out of the LEA’s program, or no longer in need of the program.
- Termination of costly expenditures for long term purchases; or
- Assumption of costs by the high-cost fund operated by the SEA.

If the LEA uses any of the “Other allowable exceptions” in item 9, a maintenance of effort exception letter must be uploaded.



# IDEA, Part B

## **Budget**

- Budget all funds awarded using the appropriate account number(s), line item(s), and budget tag(s).
- Provide a budget narrative description for every line item within the budget to explain and describe expenditures appropriately.
- Where appropriate, use the following Budget Tags to identify budget items. These budget tags will improve review and reporting processes at the state-level:
  - Private School Proportionate Share budget items must be tagged with the **IDEA > Private School Proportionate Share** budget tag
- Administrative costs must be budgeted with the appropriate Admin Costs tag, **Direct Admin** or **Indirect Cost**.

Budget narrative descriptions must include, if applicable:

- Full-time equivalents (FTEs) for all employees of the LEA to fund with IDEA B funds;
- Titles of positions (**not** names) funded, beside the corresponding FTE that matches the titles used throughout the *IDEA Requirements* section, general purpose special education budget, and other related documents uploaded in support of the CFA;
- Examples of equipment, materials, and supplies to fund;
- Specific professional development, the number and type of staff who participate (position titles, not employee names), and expenses to pay;
- A description of services for contracting staff or services;
- An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours – an explanation why the stipend is provided to the employee (purpose); and
- Labeled expenditures for non-public/private school proportionate shares to non-public school(s) and homeschooled students.

## **Budget Overview**

*No input is required by the LEA.* A summary of the IDEA, Part B budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## **Equipment Purchases Requiring Prior Approval**

Equipment having a useful life of more than one year, with a per-unit purchase price of \$5,000 or more, must be approved prior to purchase (2 CFR § 200.313). Identify any items purchased that meet these criteria on this page.

- If no purchases require prior approval, mark this page as “N/A.”

For each item that requires prior approval, provide the budget codes (account number and line item) under which it will be budgeted, the quantity to be purchased, a description of the item, the unit cost (must be \$5,000 or more), and a justification for the purchase. (The LEA must indicate the **need** for the item. Why is the equipment necessary?) Justifications must be 500 characters or less.

- Add rows as needed by clicking the “Add Row” link.
- All items listed on this page must be in the IDEA, Part B budget, in the account number and budget line indicated.

## A. Adjustment to Local Effort

If the LEA elects **not** to participate in *A. Adjustment to Local Effort*, then no information is required on this page.

If the LEA elects to participate in *A. Adjustment to Local Effort* in the IDEA, Part B grant, check the box to enable the page fields; the information on this page **must** be completed.

Complete the table in Part A:

- Row 1: Enter the estimated or final IDEA, Part B allocation for the current year (once the final allocation has been uploaded into ePlan, the actual allocation must be used to assure the amounts are allowable);
- Row 2: Enter the final IDEA, Part B allocation for the prior year;
- Row 3: ePlan auto-calculates the amount of the increase in IDEA, Part B funds from the prior year by subtracting row 2 from row 1; **Note:** *If the difference is a negative amount, the LEA has **not** experienced an increase in IDEA, Part B funds and cannot adjust maintenance of effort (MOE).*
- Row 4: ePlan auto-calculates the amount the LEA will reduce MOE if it is less than the maximum amount as half of the value of Row 3.
- Row 5: If applicable, enter the amount of funds the LEA is using for CEIS.
- Row 6: ePlan auto-calculates the maximum amount available.
- Row 7: Enter the amount reduced if less than the maximum amount is available.

In the Budget and Justifications area, explain how the amount of decreased general purpose special education funds from Part A will be spent in support of ESEA programs. (Once the general purpose special education funds are decreased, the funds are no longer considered general purpose special education funds.)

- List the ESEA Programs under which funds will be used. Separate multiple program names with commas.
- List each expenditure in the table, including the account number, expenditure account name, FTE, and amount budgeted, and justification. Use the “Add Row” feature to provide information about additional expenditures. **Note:** *Do not use special education account codes when providing information on the use of funds. The account codes must be general education account codes because these funds are being used to support general education services that are allowable under one or more ESEA programs.*

## B. Schoolwide Program

If the LEA elects **not** to participate in *B. Schoolwide Program*, then no information is required on this page.

If the LEA elects to participate in *B. Schoolwide Program* in the IDEA, Part B grant, check the box to enable the page fields; the information on this page **must** be completed.

	A	B	C	
School Name	IDEA Allocation	No. of SPED Students in LEA	No. of SPED in School-Wide School	(A/B) x C = Amount for School-wide
 <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/> 0.00
<a href="#">Add Row</a>				
			<b>Total:</b>	\$ <input type="text"/> 0.00

- Identify the schools that are consolidating IDEA, Part B funds with other federal, state, and/or local funds. For each school, identify the total LEA IDEA, Part B allocation, and the total number of students with disabilities in the LEA and the school. The maximum amount that may be consolidated in a school is auto-calculated and displayed for each school entered. To enter additional schools, click "Add Row."



# IDEA Preschool

## **Budget**

- Budget all funds awarded using the appropriate account number(s), line item(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Where appropriate, use the following Budget Tags to identify budget items. These budget tags will improve review and reporting processes at the state-level:
  - Private School Proportionate Share budget items must be tagged with the **IDEA > Private School Proportionate Share** budget tag
- Administrative costs must be budgeted with the appropriate Admin Costs tag, **Direct Admin** or **Indirect Cost**.

Budget narratives must include, if applicable:

- FTEs for all employees of the LEA funded with IDEA Preschool funds;
- Titles of positions—not staff names—funded, beside the corresponding FTE that matches the titles used throughout the IDEA Requirements section, general purpose special education budget, and other related documents uploaded in support of the CFA;
- Examples of equipment, materials, and supplies to be funded;
- A description of services to be purchased if contracting staff or services;
- An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours; and
- Labeled expenditures for equitable services to non-public schools.

## **Budget Overview**

*No input is required by the LEA.* A summary of the IDEA Preschool budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

## **Equipment Purchases Requiring Prior Approval**

According to 2 CFR § 200.302(b)(4), LEAs must establish and maintain effective internal control. The department added the guideline that equipment having a useful life of more than one year, with a per-unit purchase price of \$5,000 or more, must be approved prior to purchase. Any items the LEA plans to purchase that meet these criteria must be identified on this page.

- For each item, provide the account code and line item, the quantity to be purchased, a description of the item, the unit cost (must be \$5,000 or more), and a justification for the purchase. Justifications must be 500 characters or less.
- Add rows as needed by clicking the “Add Row” link.

All items listed on this page must be in the *IDEA, Part B, Section 619* budget, in the account and budget line indicated. If no purchases requiring prior approval will be made, mark this page as “N/A.”

## A. Adjustment to Local Effort

If the LEA elects **not** to participate in *A. Adjustment to Local Effort*, then no information is required on this page.

If the LEA elects to participate in *A. Adjustment to Local Effort* in the IDEA Preschool grant, check the box to enable the page fields; *the information on this page must be completed.*

- Enter the following information in area A:
  - The estimated or final IDEA, Part B, Section 619 allocation for the current year (once the final allocation has been uploaded into ePlan, the actual allocation must be used to assure the amounts are allowable);
  - The final IDEA, Part B, Section 619 allocation for the prior year;
  - The amount of the increase in IDEA, Part B, Section 619 funds from the prior year (subtract line 2 from line 1). **Note:** *If the difference is a negative amount, the LEA has **not** experienced an increase in IDEA, Part B, Section 619 funds and cannot adjust maintenance of effort (MOE); and*
  - the amount the LEA will reduce MOE if it is less than the maximum amount that is auto-calculated and appears on line 4 of this page.
- Describe how the amount of decreased general purpose special education funds entered from the previous step will be spent in support of ESEA programs. (Once the general purpose special education funds are decreased, the funds are no longer considered general purpose special education funds.) If more than one ESEA program is to be supported with these funds, list all programs in the text box titled “Give the ESEA Program under which funds will be used,” and then list each expenditure in the table below it. **Note:** *Do not use special education account codes when providing information on the use of funds. The account codes must be general education account codes because these funds are used to support general education services that are allowable under one or more ESEA programs.*

## B. Schoolwide Program

If the LEA elects **not** to participate in *B. Schoolwide Program*, then no information is required on this page.

If the LEA elects to participate in *B. Schoolwide Program* in the IDEA Preschool grant, check the box to enable the page fields; the information on this page **must** be completed.

- Identify the schools that are consolidating IDEA, Part B, Section 619 funds with other federal, state, and/or local funds, along with the total LEA IDEA, Part B, Section 619 allocation, and the total number of students with disabilities in the LEA and the school. The maximum amount that may be consolidated in a school is auto-calculated and displayed for each school entered. To enter additional schools, click “Add Row.”

## C. Coordinated Early Intervening Services (CEIS)—Voluntary

If the LEA elects **not** to participate in *C. Coordinated Early Intervening Services (CEIS) - Voluntary*, then no other information is required on this page.

If the LEA elects to participate in *C. Coordinated Early Intervening Services (CEIS) - Voluntary* in the IDEA, Part B grant, check the box to enable the page fields; *the information on this page must be completed.*

LEAs that are voluntarily using IDEA, Part B funds for CEIS must calculate the maximum amount permitted. The use of funds for CEIS has a direct impact on the adjustments that LEAs may make to state and local special education expenditures and vice versa. See examples below:

A. Prior Year IDEA B Allocation	B. Current Year IDEA B Allocation	C. Increase from Prior Year (B-A)	D. Max Available for MOE Reduction (C x 50%)	E. Max Available for CEIS (B x 15%)
\$900,000	\$1,000,000	\$100,000	\$50,000	\$150,000

- If the LEA chooses to set aside the maximum amount for CEIS (\$150,000), it **cannot** reduce its MOE. (The amount of CEIS set-aside is more than the maximum allowable MOE reduction.)
- If the LEA chooses to set aside only \$50,000 for CEIS, it **cannot** reduce its MOE. (The amount of CEIS set-aside is equal to the maximum allowable MOE reduction.)
- If the LEA chooses to set aside only \$30,000 for CEIS, it **may** reduce its MOE by up to \$20,000. (The CEIS set-aside is \$20,000 less than the maximum allowable MOE reduction.)
- If the LEA chooses **not** to set aside any funds for CEIS, it **may** reduce its MOE by up to \$50,000. (The maximum allowable MOE reduction is available because no funds have been set aside for CEIS.)
- If the LEA is voluntarily choosing to set aside IDEA, Part B funds for CEIS, all subsections must be answered.

**1) Funds Available Calculation:** This area calculates the amount of funds allowable to use. The LEA may elect to use up to 15 percent of the IDEA, Part B funds for CEIS. **Note:** *If the LEA voluntarily takes up to 15 percent, the funds must be spent from July 1–June 30; any remaining funds must be returned to IDEA for programming.*

**2) Narrative for the Voluntary Use of Funds:** *How were the at-risk students identified?* This narrative must be completed to explain the identification of at-risk students.

**3) Projected Expenditures for Coordinated Early Intervening Services:** This area must be completed by all LEAs using funds for CEIS to identify the expenditures in support of CEIS. General education account codes must be used, as these expenditures are supports to regular education students, not students with disabilities. Expenditures identified here **must** also be included in the IDEA, Part B budget under 99100-590 Transfers Out; place the letters CEIS in the block for “Optional Program Code.”



# Assurances

## ***ESEA Assurances***

LEAs must review all ESEA program assurances thoroughly. All items specified are requirements of ESEA legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

## ***IDEA Assurances***

LEAs must review all IDEA program assurances thoroughly. All items specified are requirements of IDEA legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

## ***OCR Assurances***

LEAs must review all OCR assurances thoroughly. All items specified are regulations applicable under the Office of Civil Rights. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

## ***Fiscal OMB Single Audit Assurances***

LEAs must review all Fiscal OMB Single Audit assurances thoroughly. All items specified are regulations applicable for Single Audit. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

## ***Fiscal OMB 2 CFA 1.100 Assurances***

LEAs must review all Fiscal OMB 2 CFR § 1.100 assurances thoroughly. All items specified are regulations applicable for OMB 2 CFR § 1.100. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

## ***FERPA Assurances***

LEAs must review all Family Educational Rights and Privacy Act (FERPA) assurances thoroughly. All items specified are regulations applicable for 20 U.S.C. § 1232g; 34 CFR Part 99. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

# After the CFA is Approved

## Reimbursement Requests

- LEA users with the LEA Fiscal Representative, LEA Fiscal Update, and LEA Authorized Representative roles may request reimbursement through ePlan following CFA approval and grant expenditures.
- Reimbursements are only available for 25 percent of CFA grant budgets until final allocations are made available. See here for more details: [Reimbursement Request Instructions](#).

## Revisions to the CFA

After the original CFA submission is approved by the department and the LEA Authorized Representative changes the status to **Approved**, the LEA may revise the application to amend one or more budget or program items.

- To begin a revision, users assigned the role of *LEA Consolidated Director*, *LEA Consolidated Update*, *LEA Fiscal Representative*, or *LEA Authorized Representative* may click **Revision Started** at the top of the [Sections](#) page.

Application Status: **LEA Authorized Representative Approved**

Change Status To: Revision Started  
 Or  
 FER Draft Started

When the CFA is in **Revision Started** status, users may make edits to all programs in the CFA as needed.

The application process flows in the same manner as the original submission. Until full approval, budget changes do not move into the reimbursement screens.

- On the [Sections](#) page, in the **Revision** column, users may view any changes made to the application as part of a revision by clicking the generated **Details** link.

Description ( View Sections Only View All Pages )	Revision	Validation	Print Select Items
All	Details	Messages	Print
[-] Cover Page			Print
Cover Page			Print
[-] History Log			Print
History Log			Print
Create Comment			
[-] Allocations	Details		Print
Allocations	Details		Print

To view the original application or a prior revision, from the dropdown menu on the *Funding Applications* screen, choose the menu item for *All Approved Applications*. The page then displays all formerly approved revisions. **Note:** *If there is a current application in progress (Not Approved), it does not appear in the All Approved Applications list. After reviewing prior revisions, remember to return the dropdown selection to All Active Applications.*

Funding Applications		
Alamo (171) Public District - FY 2017		
2017	All Approved Applications	
	All Active Applications	
	All Approved Applications	
	Last Approved Applications	
Entitlement		Revision
Consolidated		4
Consolidated		3
Consolidated		2
Consolidated		1
Consolidated		0

## Final Expenditure Requests (FER)

After **June 30, 2026**, the **LEA Fiscal Representative** initiates the Final Expenditure Review for the CFA. CFA grants reimbursement requests must be completed before beginning the FER.

See [Final Expenditure Request \(FER\) Instructions](#) for more information or contact the LEA's [Fiscal Consultant](#).