

ePlan User Audit Instructions

Local Educational Agencies (LEAs)

The ePlan User Audit is important to ensure that user access is accurately assigned and to maintain the integrity of the funding and program information that is provided to the department through ePlan. Please see the instructions below for completing the ePlan User Audit.

Topic	Contact
ePlan technical support and user access	ePlan.Help@tn.gov
User Access Forms	ePlan User Access Form for LEAs

Workflow

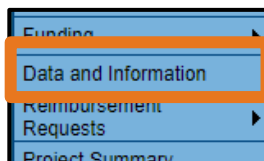
ePlan Role	ePlan Function
LEA ePlan User Audit Director	Click Draft Started Respond to questions
LEA ePlan User Audit Director	Click Draft Completed
LEA Authorized Representative (Director of Schools)	Click LEA Authorized Representative Approved (or LEA Authorized Representative Not Approved)
TDOE LEA ePlan User Audit Director Reviewed or Returned (Department project directors)	Click TDOE LEA ePlan User Audit Director Approved (or TDOE LEA ePlan User Audit Director Returned)

What's New:

1. There is a new section to request that all roles be removed.

ePlan User Audit Instructions:

1. The ePlan User Audit must be completed by the **LEA ePlan User Audit Director**.
Note: This role was pre-assigned to LEA Authorized Representatives and User Access Administrators. Other ePlan users may request the role by completing the [ePlan User Access Form for LEAs](#).
2. To navigate to the *ePlan User Audit* from the ePlan homepage, click on *Data and Information* on the ePlan main menu.



3. Select the *Fiscal Year 2026* from the drop-down box. Select the *LEA ePlan User Audit* from the list of *Data and Information* tools.

Data and Information

Any LEA (123_ANY) Public District - FY 2026

2026 ▾ Active ▾

Data and Information

- Academic Special Courses
- Alternative Education Survey
- APR Local Determination Acknowledgement Form
- ARP ESSER Liquidation Extension Request
- Carryover and Expiring Funds Review
- Civil Rights and Bullying Compliance Report
- Coordinated School Health Action Plan
- CTE Special Programs of Study
- Data Report for Students with Disabilities
- ESSER Reporting and Recording Federal Interest
- Excess Cost
- Federal Program Waiver Request
- Federally Designated District and School Plans
- Grant Award Notifications
- Homeless Immunization Report
- IDEA Parentally-Placed Non-Public School Reserve Calculation
- IDEA Partnership & AALN Reports
- Indirect Cost
- LEA ePlan User Audit**

4. Data and Information tools open to the Sections Page. From here, click *Draft Started*. If you are unable to click *Draft Started*, hover over the *Draft Started* button to see a list of individuals who have access. **Only users with the *ePlan User Audit Director* roles may click *Draft Started*.**

Status: Not Started

Change Status To: **Draft Started**

5. Click *Confirm* to change the *ePlan User Audit* status to *Draft Started*.

You are about to change the status of this Data and Information to Draft Started. Click Confirm to change the status.

Confirm Cancel

6. The table below describes each page:

Roles Page Title	Roles Description
Overview	Instructions for completing the User Access Audit
LEA Authorized Representative, User Access Administrator, and Fiscal Roles	The <i>LEA Authorized Representative</i> role is reserved for the <i>Director of Schools</i> . LEA <i>User Access Administrators</i> can add LEA and School Roles in ePlan, except for the roles listed on this page. Fiscal roles are assigned as needed to allow users to provide fiscal approval or complete <i>Reimbursement Requests</i> and <i>Final Expenditure Reports</i> .
Assurances	The assurances must be reviewed and completed.
School Planning Roles	Instructions and Assurance for completing the <i>School Planning Roles</i> audit; these roles are only assigned to school-level staff.

7. Select the **Overview** page. Review the Audit instructions.



8. Click *Save and Go To*, then select *Next Page* to navigate to the **LEA Authorized Representative, User Access Administrator, and Fiscal Roles** page.

9. Roles, Names, and Email addresses of the individuals who are assigned each role are prepopulated into the data and information tool. Complete the page by reviewing each role.

10. To request a role be removed from an individual, please click the checkbox in the *Remove Role* column.

	User Name	User Email	Remove Role
Director	John Doe	john@email.org	☐ - check to remove this role
Representative	John Doe	john@email.org	☐ - check to remove this role

11. If all roles for an individual need to be removed, complete the **Remove All Roles** table.

Remove All Roles		
User Name	User Email	Remove All Roles
		☐ - Check this box to request all roles be removed for this user.
Add Row		

12. To request a new user be assigned a user role, please navigate to the [ePlan User Access Form for LEAs](#) and follow the instructions on the form.

13. Navigate to the *Assurances* page by clicking *Save and Go To*, then *LEA ePlan User Audit*, and then *Assurances*. On the *Assurances* page, read the assurances, check the box to indicate that the conditions have been met for the ePlan User Audit, and then return to the Sections Page by clicking *Save and Go To*, then *Sections*.

Go To 

☐
ePlan User Audit Assurance is hereby provided that:

1. The LEA ePlan Address Book has been reviewed for accuracy by the LEA Authorized Representative and/or district user access administrator.
2. The Fiscal Representative, Fiscal Update and User Access Administrator user roles deemed unnecessary have been marked to be removed.
3. The LEA User Access Administrator has removed roles for all outdated users.
4. The LEA Authorized Representative role is only assigned to the Director of Schools who has final legal authority for the organization.
5. The individual assigned the LEA Authorized Representative role is not assigned the LEA Fiscal Representative role.
6. Each month the LEA User Access administrator will be responsible for uploading ePlan User access forms for each role that is assigned.

14. Complete the School Planning Roles user audit by clicking *Address Book* on the ePlan left Navigation menu, then the **View All District Contacts** link. Scroll to view School Contacts.

15. Ensure that all listed School Contacts are correctly assigned user roles.

16. Remove any school users who no longer need school roles by **Sept. 30, 2026**. See [instructions on how to remove and add school plan users and roles](#).

17. Check the assurance on the School-Level Audit – School Planning Roles page that all School User roles are correctly assigned. Any outdated roles have been removed.

Instructions
1. Please review Users currently assigned School-level ePlan user roles by navigating to the Address Book , clicking the " View All District Contacts " link, and scrolling to view School Contacts . Click this link to read how to change the ePlan address book view.
2. Ensure that all listed users are correctly assigned user roles
3. Remove any school users that no longer need school roles by Sept. 30, 2025 . Click here for instructions on how to remove and add school plan users and roles.
Confirm that School User Roles are correct
☐ * All School User roles are correctly assigned. Any outdated roles have been removed.

18. Return to the *Sections* page by clicking *Save and Go To*, then *Sections*.

19. On the *Sections* page, the person assigned the *LEA ePlan User Audit Director* role **must** change the *ePlan User Audit* status to *Draft Completed*.

Status:	Draft Started
Change Status To:	Draft Completed

20. Click *Confirm* to submit the *ePlan User Audit*.

You are about to change the status of this Data and Information to Draft Completed. Click Confirm to change the status.	
Confirm	Cancel

21. On the *Sections* page, the *LEA Authorized Representative* **must** change the *ePlan User Audit* status to *LEA Authorized Representative Approved*. (If the *LEA Authorized Representative* is completing the audit without input from other staff members, the *LEA Authorized Representative* must complete both status changes.)

Status:	Draft Completed
Change Status To:	LEA Authorized Representative Approved
	LEA Authorized Representative Returned with Feedback

22. Click *Confirm* to submit the *ePlan User Audit*.

The LEA-Level/School-Level user audit has been reviewed for accuracy and any user roles deemed unnecessary have been marked to be removed.	
You are about to change the status of this Data and Information to LEA Authorized Representative Approved. Click Confirm to change the status.	
Confirm	Cancel

23. After the ePlan User Audit is submitted, the ePlan team will remove the requested roles. The timeline for removal may be up to a month. LEA ePlan User Audit Directors will receive an email when User Access removals are complete.