

DPI Current Updates, Reminders and Reporting Requirements

Roger Kordus, Consultant
Kathy Fry, Consultant
Bob Soldner, Assistant Director
School Financial Services Team

WASBO Spring Conference
May 11, 2023



WISCONSIN DEPARTMENT OF
Public Instruction
Jill K. Underly, PhD, State Superintendent

Agenda

1. Energy efficiency exemption to revenue limits
2. Summer school FTE & fee reconciliation
3. Fund 80 eligible costs
4. Transfer of service (TOS) exemption to revenue limits
5. WISEdata Finance and WiSFiP

Energy Efficiency Exemptions

Energy Efficiency Exemptions - Overview

Energy Efficiency Exemption Resolution Overview

A school board was able to adopt a resolution to increase the revenue limit otherwise applicable to a school district under [s. 121.91 \(2m\)](#), Wis. Stats. in any school year by an amount spent by the school district in that school year on a project to implement energy efficiency measures or to purchase energy efficiency products. District may use this non-recurring exemption to the revenue limit to pay for an energy efficiency project in a single year or to repay a note, bond or loan used to finance the project.

Energy Efficiency Exemptions - Overview

Energy Efficiency Exemption (EEE) to the Revenue Limit

Per 2017 Wisconsin Act 59 (2017-19 Budget), school boards are prohibited from adopting a resolution to utilize the Energy Efficiency Exemption to the revenue limit after December 31, 2017 (through December 3018).

A School Board may issue debt after December 31, 2017, to fund the energy efficiency exemption project(s) that were approved by the School Board prior to December 31, 2017. Under current law, resolutions may not be passed after December 31, 2017. This includes changes to any existing resolutions.

Energy Efficiency Exemptions - Overview

2017 Wisconsin Act 59 Moratorium

Districts are no longer able to enter energy efficiency data into the School Finance Portal for the portal has been closed per [2017 Wisconsin Act 59](#) (2017-19 Budget).

Districts may review their utility savings by going to the [SAFR Reporting Portal](#). However, districts that need to update their energy efficiency utility savings or have other related questions should contact dpifin@dpi.wi.gov

Energy Efficiency Exemption is an Allowable Exemption Revenue Limits Non-Recurring - Line 10 C

The EEE is on line 10C of the revenue limit worksheet. A non-recurring exemption to fund a project to implement energy efficiency measures or to purchase energy efficiency products. See DPI Rule and information at: [Exemptions](#)

Districts will need to review their Utility Savings to determine if they are up to date in the District's Financial Data Home EEE page in [DPI SAFR](#)

Districts must complete the multi-year reconciliation located on page 4 of the worksheet when completing revenue limit worksheet.

Energy Efficiency Exemption is an Allowable Exemption Revenue Limits Non-Recurring - Line 10 C

Test District 9 (9999)

Financial Data Home

Financial data, such as **revenues, expenses, account balances, or taxes**, are collected in the following categories. Please see [Status & Deadlines](#) for exact

- [Aid Certification](#) (PI-1505-AC)
- [Annual Report](#) (PI-1505)
- [Special Education Annual](#) (PI-1505-SE)
- [Budget Report](#) (PI-1504)
- [Special Education Budget](#) (PI-1504-SE)
- [Tax Levies](#) (PI-401)
- [Debt Schedules](#) (PI-1505-Debt)
- [Referenda](#) (PI-1572) Reporting
- [Energy Efficiency Resolution Reporting](#)
- [Fraud Reporting Form](#) (PI-1999)

Energy Efficiency Exemptions – Utility Savings

Board Resolution To Exceed Revenue Cap for Energy Efficiencies - Non-Recurring

The School Board of the Mineral Point Unified School District is exercising its taxing authority to exceed the revenue limit for energy efficiency measures and energy efficiency products.

Yes

Yes

BE IT RESOLVED that the Mineral Point Unified School District is exercising its taxing authority under s. 121.91 (4)(o), Wis. Stats., on or before December 11th, to exceed the revenue limit on a non-recurring basis by an amount the district will spend on new energy efficiency measures and energy efficiency products for projects in the 2017-2018 school year.

Energy Efficiency Exemptions – Utility Savings

	Amount	Fall Tax Levy Year	Utility Savings
1)	62034	2018	2500
2)	62034	2019	2500
3)	62034	2020	2500
4)	62034	2021	2500
5)	62034	2022	2500
6)	62034	2023	2500
7)	62034	2024	2500
8)	62034	2025	2500
9)	62034	2026	2500

Step 3: Determine Allowable Exemptions

Line 10C Energy Efficiency

2022-23 ENERGY EFFICIENCY EXEMPTION NET TOTAL - LINE 10C.		
(Carry bright yellow box amount to Line 10C. on page 1. See detail computation boxes below.)		
ENTER ALL NUMBERS AS POSITIVE EXCEPT WHERE INDICATED. FORMULAS WILL AUTO-CALC.		
1.) 2020-21 Adjustment for Unspent Energy Exemption (see box below)		-79,689
2.) 2021-22 Adjustment for Unspent Energy Exemption (see box below)		0
3.) 2022-23 EE Expenses for Non-Debt (1-Year Project) per Board Resolution		0
4.) 2022-23 EE Expenses for Debt per Board Resolution		249,588
5.) Measured Utility Savings Applied in 2022-23 (entered as a negative)		-48,786
6. Total 2022-23 Energy Efficiency Exemption (carry to Line 10 C. on page 2)		\$121,113
		(Amount can be < 0.)

The 2022-23 Net EE exemption will include adjustments for unspent Fall 2020 Levy (DEBT) and Fall 2021 Levy (NON-DEBT) BOE resolutions. Actual expenditures will be reported to DPI by your auditor in September 2022 via the PI-1506-AC. Until then, districts are to enter their estimates of expenditures made related to the respective EE BOE resolutions.

If, after you enter your anticipated expenditures, negative numbers appear in Line 1 (cells X40 and X49) in either or both the 2020-21 or 2021-22 tables below, this indicates the estimated expenditures entered are less than the amount of the exemption that year. Call a finance consultant if you have questions.

2020-21 Energy Efficiency Reconciliation - Debt		
1.) 2020-21 Adjustment for Unspent Energy Exemption (-A+B+C, can be < 0)		-79,689
A. 2020-21 EE Debt Amount Levied (per 20-21 PI-1506-AC, entered as a negative)	-204,483	
B. Jan-Jun 2021 Debt Service Payment (per 20-21 PI-1506AC)	124,794	
C. Jul-Dec 2021 Debt Service Payment (per 21-22 PI-1506AC, Aug 2022)	0	
(If Line 1 in this box is < 0, see 2020-21 Adjustment in "2022-23 Net Energy Efficiency Exemption" box above.)		

2021-22 Energy Efficiency Reconciliation - Non-Debt		
1.) 2021-22 Adjustment for Unspent Energy Exemption (-A+B, can be < 0)		0
A. 2021-22 EE Non-Debt Amount Levied (per 21-22 PI-1506-AC, entered as a negative)	0	
B. 2021-22 Actual EE Expenses (per 21-22 PI-1506AC, Aug 2022)	0	
(If Line 1 in this box is < 0, see 2021-22 Adjustment in "2022-23 Net Energy Efficiency Exemption" box above.)		

Summer School FTE & Fees

Summer Membership Reporting

- PI-1804 or the PI-1804-1805 Excel Workbook
- Milwaukee and the suburban districts use a special workbook (W1804-1805) that counts ITP students (Chapter 220)
- Report Totals Using On-line PI-1804 Reporting Portal in the Non-Financial Data within [DPI SAFR](#)

Summer Membership Reporting-PI-1804

- Summer and Interim Sessions start and end during periods outside of the school year.
- The first day of summer school is typically the start of the next school year for membership purposes only, not the fiscal year.
- The Excel worksheet (PI-1804/PI-1804-1805) is available to calculate minutes used for calculating a school district's Summer FTE.

Summer School Reporting

- The data on the 1804 W2 Summary Sheet of the Excel worksheet is reported to DPI through the PI-1804 on-line portal at the conclusion of summer school and is due September 29, 2023.
- The summer school report is one of the few reports that asks you to calculate the FTE count as opposed to a head count.
- Keep the Excel spreadsheet, as your auditor will review the information used to calculate your summer membership FTE and fee reconciliation.

Summer School Reporting

CALCULATING MINUTES OF INSTRUCTION FOR SUMMER MEMBERSHIP FULL-TIME EQUIVELANCY FTE			
Academic Courses for Summer and Interim Session Membership			
Total Resident Pupil Minutes From PI-1804-W2 Academic Courses, Col. 8b	48,600	Minutes =1 summer FTE	0
Total Non-Resident Pupil Minutes From PI-1804-W2 Academic Courses, Col. 9b. (The non-resident pupil minutes is not reported to DPI, Districts are to record data locally).			0
PI 17.03(2)(d) Online Courses (meeting requirements of 118.33(1)(a)1.) ONLY			
Under certain circumstances, online classes may be attended virtually. See PI 17.03(2)(d) and report the following for students that earned credit for certain online courses where 8,100 minutes of direct instruction are required to earn one (1) credit.		No. of Successful Completers	Pupil Minutes
Resident students participating in virtual summer or interim classes per PI 17.03(2)(d) From PI-1804 -W2 Online Courses Cols. 8a and 8b			0
OE non-resident students participating in virtual summer or interim classes through the district's virtual charter school; OR			
OE non-resident students participating in virtual summer or interim classes by attending within the school boundaries (on-site):			0
Total Minutes from certain online classes per PI 17.03(2)(d), from PI-1804-W2 Online Courses, Cols. 8b and 9b			0
This is not a duplicate count. Be sure to count a child only once.	Total FTE (Total Resident & Non-Resident Pupil Minutes/48,600)		0
Total Number of Resident Students entering grades 4K-12 that participated (attended at least once) in Summer or Interim Session classes			
Number of Non-Resident Students entering grades 4k-12 that participated (attended at least once) in Summer or Interim Session classes (not Online)			
Number of Non-Resident Students entering grades 7-12 that took ONLINE Summer or Interim Session classes			

Summer School Reporting

Academic Courses FEE Reconciliation

Course Title	Fee Charged for Course	Number of Fee Waivers Granted	Number of Residents charged a Fee	Number of Non-Residents charged a Fee	Enter Value of Each Individual Use Supply or Material Provided (per Student per Class)					Total Individual Supplies Cost	Individual REFUND DUE	EXCESS FEE REVENUES (Rounded)
					Item 1	Item 2	Item 3	Item 4	Item 5			
0	-									\$ -	\$ -	\$ -

Summer and Interim Session Fees

DPI SFS Team's School Fees

Legislative changes such as revenue limits, changes in the equalized aid formula and general tightening of school funding have led some school districts to explore the use of "user fees" to supplement their budgets. Proponents argue that such fees can result in lower local taxes and increased services for students. Opponents argue that fees place a burden on poor and middle income families, thereby denying them equal educational opportunities.

Click the appropriate links below for more information.

- [Overview](#)
- [Statute-authorized Fees](#)
- [Statute-prohibited Fees](#)
- [User Fee Categories](#)
- [Frequently Asked Questions](#)

Summer and Interim Session Fees

- The fee must fund an item that is legally permitted and actually purchased for summer school use
- The fee may not be used to subsidize the cost of any other classes, students or administration
- The fee must be based upon the actual cost of the applicable item(s) the student received
- If your district is required to have a membership audit, the auditor will also review your summer school FTE and any associated summer school fees

Summer and Interim Session Fees

Fees for the resident student or parent may be charged for individual use supplies (towels, gym clothes, band instruments, notebooks, pencils), textbooks, or similar items (workbooks) if the district claims the members for State General Aid under ss. 121.14.

Fees may be charged for social, recreational, or extracurricular summer classes and programs which are neither credited toward graduation nor eligible for State General Aid [s. 118.04(4)].

DPI SFS Team's School Fees

Fund 80 - Community Programs and Services

Fund 80

The authority for a school board to operate Community Programs and Services (Fund 80) is established under sec. 120.13(19), Wis. Stats., and PI 80.

120.13(19) concludes with this sentence:

- *The school board may not expend moneys on ineligible costs, as defined by DPI by rule.*
- *Costs associated with such programs and services shall not be included in the school district's shared cost under [s. 121.07 \(6\)](#).*

Fund 80 Community Services Overview

Fund 80

A bit of history of Fund 80

- The levy for Fund 80 was removed from revenue limit control starting in the 2000-01 school year [s. 121.91(2m)(e)1.]
- Fund 80 community programs and services are mostly completely funded by local taxpayers.
- Fund 80 costs have never been a factor in the equalization aid calculation.
- Chapter PI 80 Community Programs and Services was created per 2013 Wisconsin Act 306. Effective Date: May 1, 2015.

[Fund 80 Community Services Overview](#)

Fund 80

In addition, PI 80.02 defines ineligible Fund 80 costs as:

1. Costs for any program or service that is limited to only school district pupils.
2. Costs for any program or service whose schedule presents a significant barrier for age-appropriate school district residents to participate in the program or service.
3. Costs that are not the actual, additional cost to operate community programs and services under s. 120.13 (19), Stats. (No percentages of cost allowed).
4. Costs that would be incurred by the school district if the community programs and services were not provided by the school district

Does a program or service belong in Fund 10 (General) or Fund 80?

It is the Board of Education and the District Administration who decide what meets the criteria to be in Fund 80. It is a local decision.

Districts are encouraged to use the “Decision Tree for potential Fund 80 Community Programs and Services” [Fund 80 Community Services Decision Tree](#) before proceeding with a change.

Through this evaluation process the Board and Administration will decide if certain activities are associated with:

- a. The educational curriculum (curricular and extra-curricular activities) including summer school programs where student minutes will be counted (Fund 10); or
- b. If the program has the primary function of serving the community. (Fund 80).

Fund 80 (PI-80)

- 2013 Act 306 requires that Fund 80 expenditures be audited by the school district's auditor.
- State law has consistently excluded from Shared Costs (for General Aid purposes) any Fund 80 expenditures.
- If a Fund 80 expenditure audit determines that a district had inappropriately coded Fund 80 expenditures to Fund 10, those expenditures would have to be removed from Fund 10 and would decrease the district's Shared Costs for General Aid purposes. [Wis. Stat. § 121.91\(4\)\(r\)](#)
- Districts using Fund 80 will need to address this question: When the program/activity is held in a K-12 facility, which Fund is paying for the utilities and other related cost?

Fund 80 (PI-80)

Current law requires DPI to determine if ineligible Fund 80 expenditures exist

If reported in the audit process; DPI must reduce the district's allowable revenue limit authority the following year by the amount of the ineligible Fund 80 expenditures; structured as a negative exemption rather than a reduction to the district's base.

This was first applied to the Revenue Limit calculation for the 2015-16 school year, based on 2014-15 expenditures.

Fund 80

Preparing for an CPS audit;

Each program or service will need to be documented within the district's accounting system.

Supporting documentation will be part of the audit process.

Community Service Fund Information Wisconsin Uniform Financial Accounting Requirements (WUFAR) will assist each district in this process.

Our [Fund 80 Community Services Overview](#) webpage provides the most recent information regarding Fund 80.

“Latest News” includes information on how Fund 80 could re-pay Fund 10 for operational costs.

What is a Transfer of Service (TOS)?

- The Transfer of Service Exemption ([Wis. Stat. § 121.91\(4\)\(a\)3](#)) provides that a school district which assumes responsibility for a program or service from another governmental unit may request and be granted an exemption to the district revenue limit.
- The Transfer of Service (TOS) request is for the estimated additional, increased cost as determined after a review of the district's current staffing and service capacity of that program or service.
- A TOS request can be for an individual student or between the school district and a local municipality, such as city or county.

What is a Transfer of Service (TOS)?

- Transfer of financial responsibility between a school district and a local municipality, where the municipality previously paid related costs are processed through a [Narrative Transfer of Service](#) process.
- Individual student requests are processed through the [PI-5000](#) TOS online portal.
- Majority of requests are for individual students.

TOS Eligibility

Eligibility Requirement #1: Be within the current application timeline

		2022-23 (Fiscal Year 23)														
May 22	Jun 22	Jul 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sept 23
TOS app open for FY23																
	Students eligible for FY24 TOS app															
												TOS app open for FY24				

TOS Eligibility

Eligibility Requirement #1: Be within the current application timeline

2023-24 (Fiscal Year 24)																
May 23	Jun 23	Jul 23	Aug 23	Sept 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sept 24
TOS app open for FY24																
	Students eligible for FY25 TOS app															
													TOS app open for FY25			

TOS Eligibility

Eligibility Requirement #2: The student came to your district from another governmental unit

Wisconsin school districts, including:

- **A district that educates a student as a result of their residing in a juvenile detention facility, county jail, group or foster home, or another county-ordered placement without an educational program (whether or not that district received State Tuition reimbursement for the student).**
- **A district that places a student with one of the DPI schools (WCVBI or WESP-DHH).**
- **District charter school.**

TOS Eligibility

Eligibility Requirement #2: The student came to your district from another governmental unit

Other Wisconsin governmental units :

- **Independent (2r or 2x) charter schools.**
- **Wisconsin counties with birth-to-three programs for children with disabilities.**
- **Facilities run by the State of Wisconsin which are considered LEAs: Lincoln Hills School, and the Winnebago and Mendota Mental Health Institutes.**

TOS Eligibility

Eligibility Requirement #2: The student came to your district from another governmental unit

Public schools outside Wisconsin, including :

- **Schools operated by another state or sub-unit of another state,**
- **Schools operated by the federal government; and**
- **Schools operated by a foreign country or sub-unit of a foreign country.**

TOS Eligibility

Eligibility Requirement #3: The student is a student with a disability or limited English proficiency

- **Transferred into the district with an identified need.**
- **Typically, the need will be identified by an Individualized Education Program (IEP) or English Learner (EL) service plan with a Limited English Proficient (LEP) classification of 1 through 5.**
- **A district is not eligible to receive a Transfer of Service exemption for new services required by an evaluation or re-evaluation of a student after they transfer into the district.**

TOS Eligibility

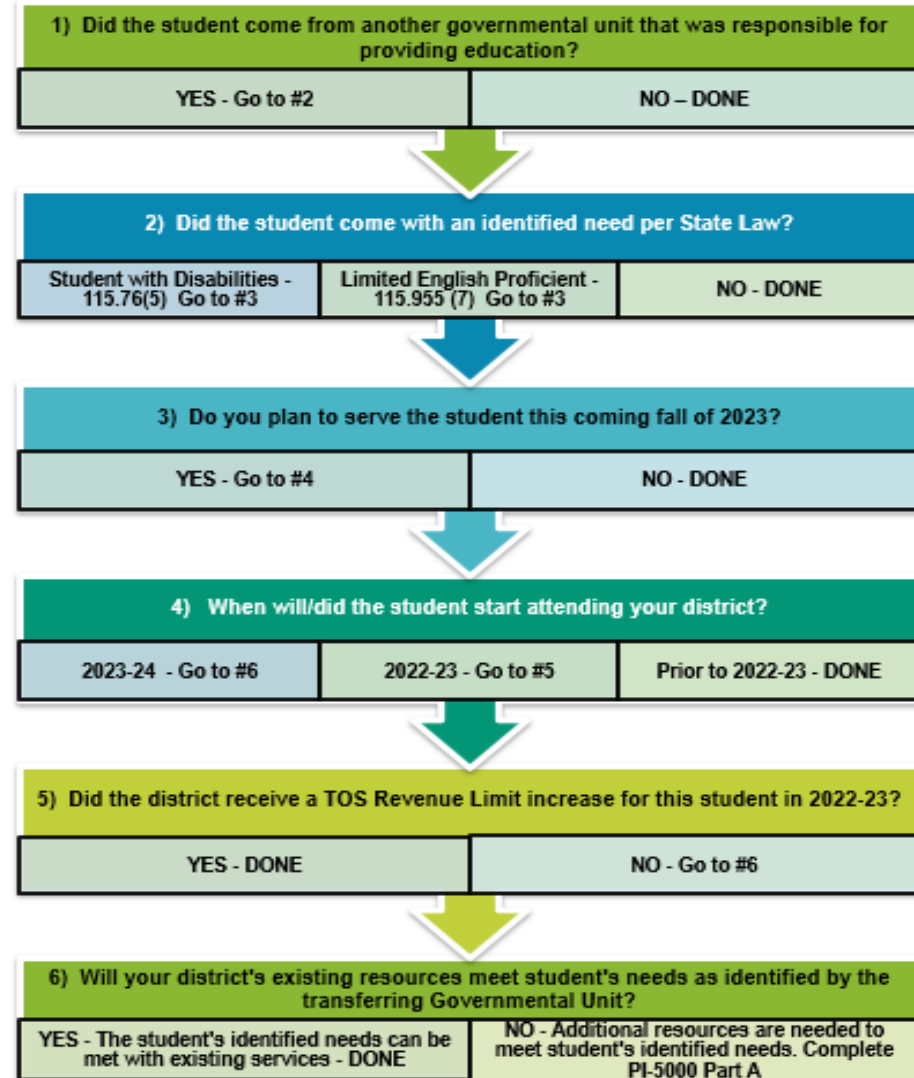
Eligibility Requirement #4: There is an increased cost for the district

- **This is not the same as just an increase in service. A district's total program costs must increase over the prior year.**
- **TOS Eligible Example: The district never had a speech and language teacher before, now they have a new student who needs that service so they must hire a speech and language teacher.**
- **Not TOS Eligible Example: The district has a new student who needs speech and language services and will now participate in their existing speech and language program.**

Using the Decision Tree

Please use our Transfer of Service Decision Tree to assist you with the TOS process located on our website at <https://dpi.wi.gov/sfs/limits/exemptions/transfer-service>

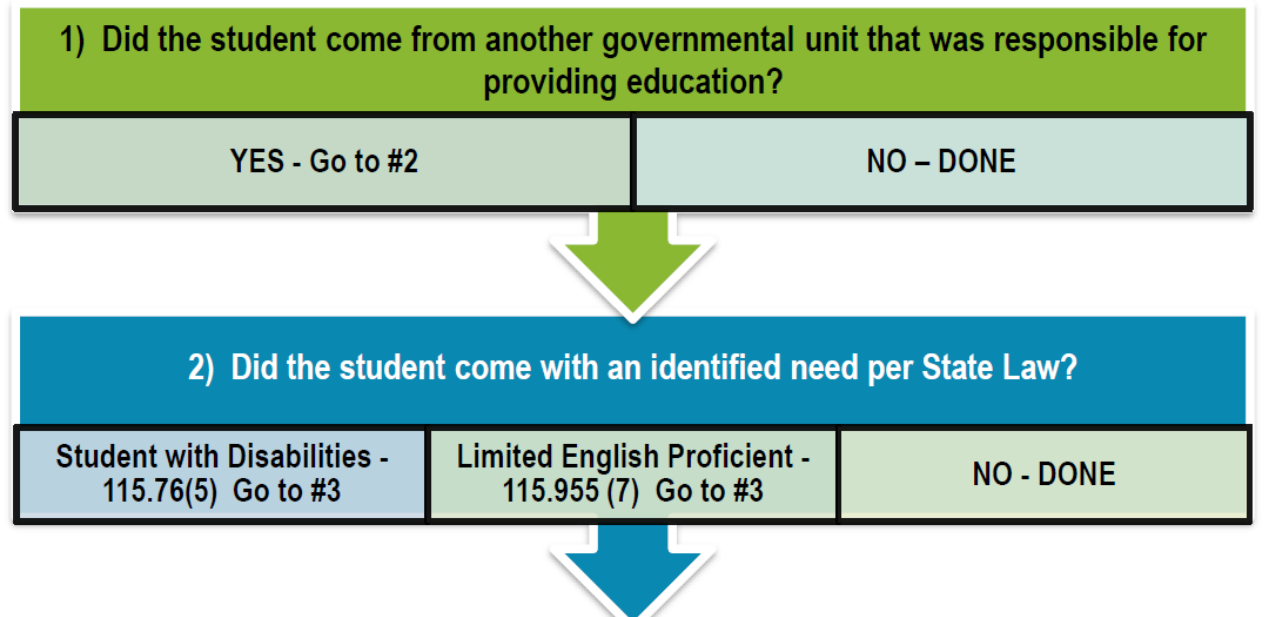
Transfer of Service (TOS) Decision Tree for a 2023-24 Revenue Limit Exemption, Consider Question #6 before starting...



Using the Decision Tree

Someone should be collecting the names of students who move into your school district this school year, where the student came from (another governmental unit school), and did they arrive with:

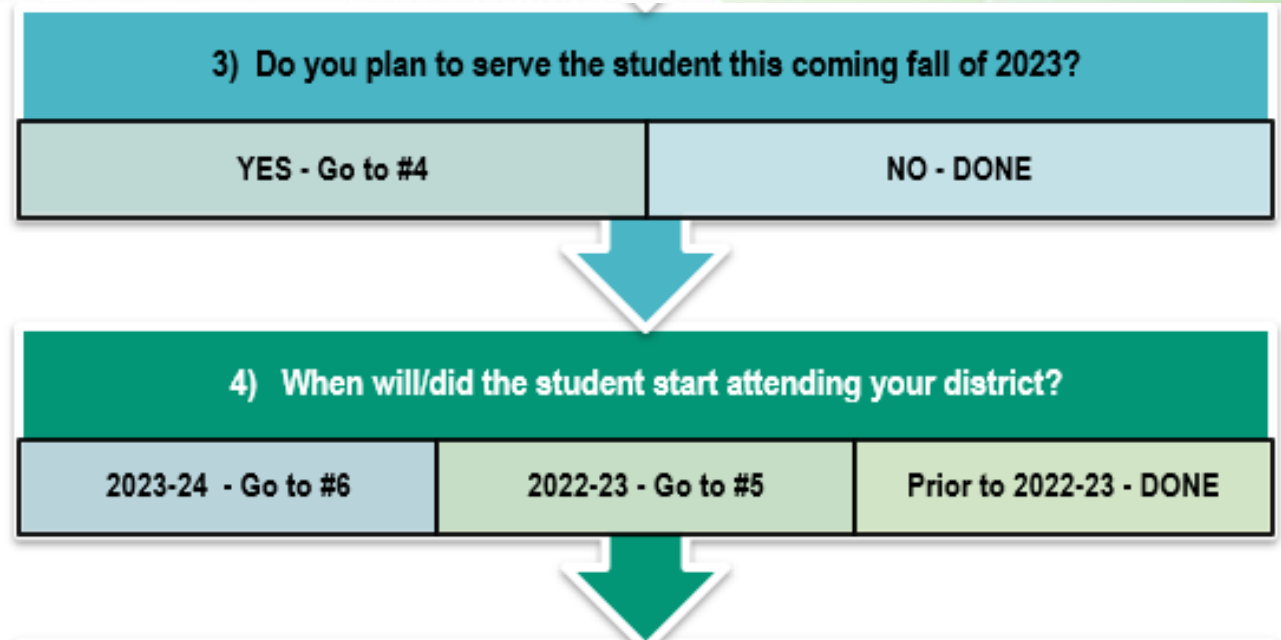
- an identified disability or
- participating in a limited English proficiency program.



Using the Decision Tree

In late April or early May, the district should review the list of students identified and determine the following for each student:

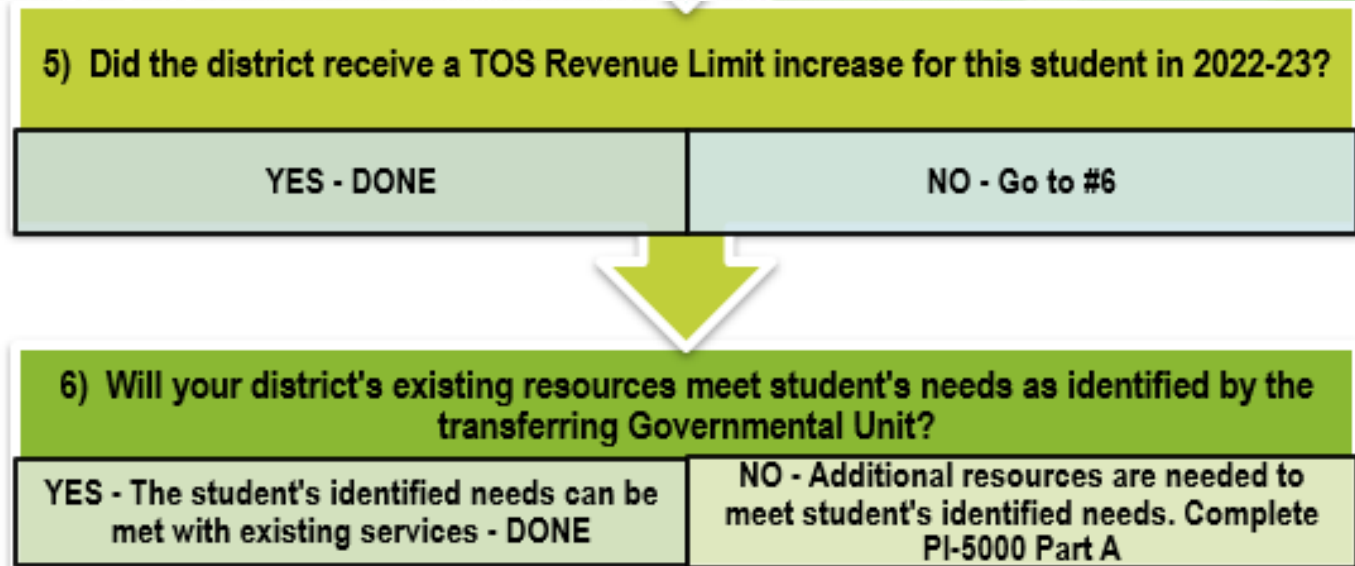
- Did the student arrival cause the district to incur a cost that was not budgeted for in the current year?
- Does the district believe this student will return in the fall?



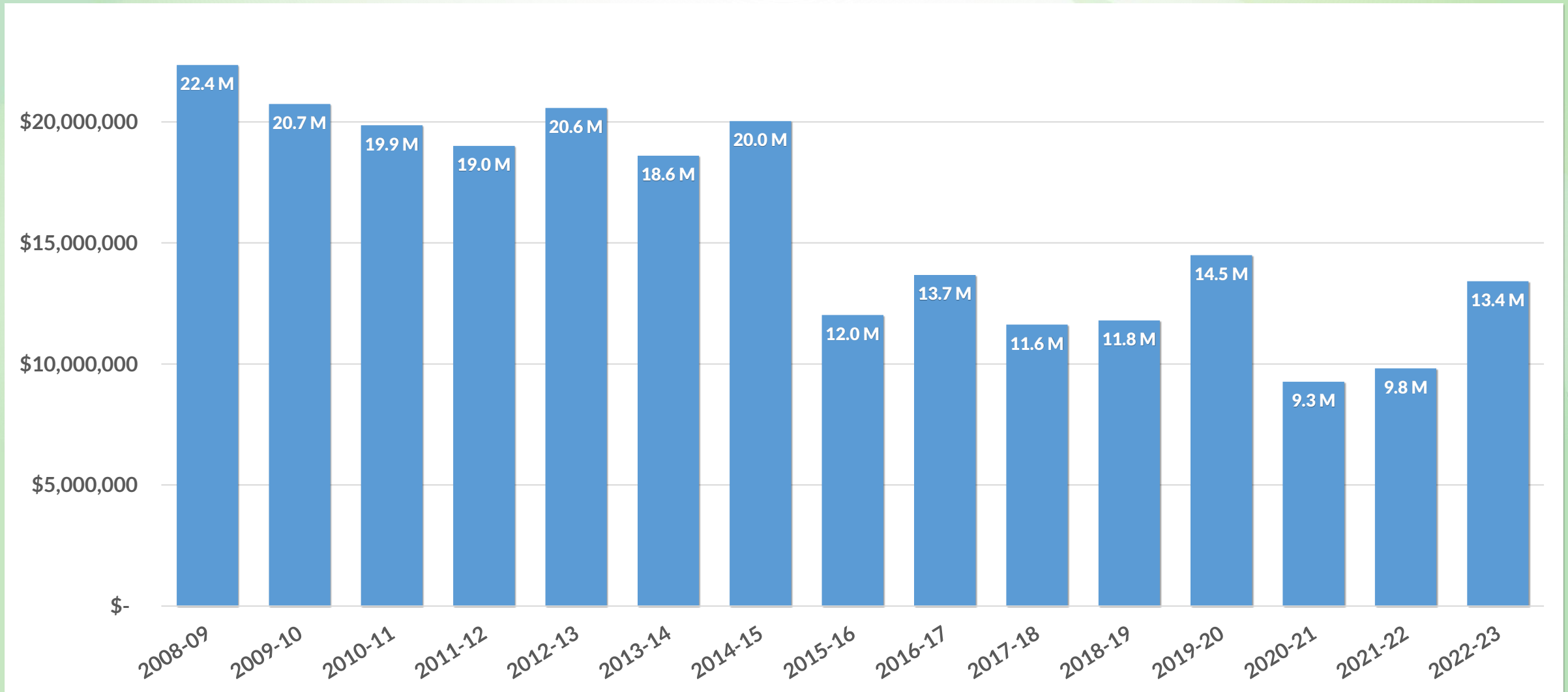
Using the Decision Tree

Determine what additional resources the district needs in the coming year (not including the current year cost) to meet the identified needs the student arrived with?

- Review available resources
- Resources made available because other students have graduated or relocated
- Previous TOS request approved



Transfer of Service 15-Year History



Making a TOS Request

Getting Access to the PI-5000

- The TOS online application security is processed through the Application User Management (AUM) system.
- District administrators already have access to AUM for Open Enrollment (OPAL) and Homeschool Reporting (HOMER) applications.
- Only your district administrator can authorize district staff to have access to Transfer of Service-LEP and/or Transfer of Service-SPED applications.

Making a TOS Request

Completing Part A

- Questions similar to the Decision Tree
- Where did the student come from
- Enrollment dates
- Confirming the student is with a disability or limited English proficiency
- Verifying the district's current resources cannot meet the student's needs and providing financial information to support that
- Due date September 15, 2023

Making a TOS Request

Completing Part B

- If the student transferred from a WI school district, the other school district now confirms your information from Part A
- Confirms the student was a resident in that district
- Withdraw date
- Withdraw date to enrollment to your district must be within 45 days
- Confirms the student is with a disability or limited English proficiency
- Verifying there were costs involved to meet the student's needs
- Due date September 22, 2023

Making a TOS Request

Completing Part C

- Review your information entered from Part A
- You will need to enter values in the New Costs column
- The values entered by the district under the New Costs will be the actual transfer amount being requested by the school district
- If totals have changed between Part A and Part C, we suggest the district provides a narrative in the text box at the bottom of the screen to further explain reason for the change
- Due date September 29, 2023

Making a TOS Request

Narrative Request Process

- 1. Explain the program or service that the local municipality will no longer provide to the school district and a brief historical description of this working relationship.**
- 2. Name the local municipality who was financial responsible for the program or service.**
- 3. Is the local municipality willing to continue the program or service to the school district for a payment greater than paid in the previous school year? If yes, explain what it cost in the previous school year.**

Making a TOS Request

Narrative Request Process

4. Is the school district able to receive this program or service from another source? If yes, explain.
5. Provide the Transfer of Service amount being requested and a breakdown on how the value was determined.
6. If there is financial support available to off-set the cost to the school district, provide an explanation.

Making a TOS Request

Narrative Request Examples

- The city used to pay for crossing guards but now they are passing this cost onto the district.
- Our CCDEB is dissolving and we need to hire our own SPED teacher.
- The city used to pay for the School Resource Officer but now they are passing this cost onto the district.

TOS Frequently Asked Questions

Question:

I understand to qualify for TOS there must be an increased cost but what about shifting costs? For example, we have 5 students with 1:1 aides. One student graduates so we would lay off one of those aides. However, a new student enters the district from another governmental unit that requires a 1:1 aide. Can I request a TOS; after all if the new student did not arrive the aide would have been dismissed?

TOS Frequently Asked Questions

Answer:

No, in this example the district is not eligible for a TOS. The law states “if a school board increases the services that it provides by adding responsibility for providing a service that is transferred to it from another governmental unit for a child with a disability”. TOS allows a district to increase its revenue limit, if its costs increase because of the need to increase services above the level of services currently provided.

TOS Frequently Asked Questions

Question:

I have a student who moved to our district from another Wisconsin school district, but I learned that student did not actually attend that school district. They opened enrolled to a different school district during those years. Which district do I identify in my TOS request; the district the student lived in or the district the student actually attended?

TOS Frequently Asked Questions

Answer:

Transfer of service always goes to the resident district. A student who was open enrolled out will have student records from a different school district. However, for the transfer of service process, enter the school district where the student lived in the previous year even though they may or may not have been the district that served the student.

TOS Frequently Asked Questions

Question:

We have a student who open enrolled to our district with significant special needs; can we submit a request for a transfer of service?

TOS Frequently Asked Questions

Answer:

No, when a special education student open enrolls, the nonresident district does collect the basic open enrollment amount. In the second year of open enrollment, the nonresident district can choose to continue to receive the open enrollment basic aid amount or be reimbursed for actual costs of providing FAPE to the pupil in the previous school year, up to \$30,000. Therefore, even though the nonresident district is increasing services, they are being compensated by the resident district.

TOS Frequently Asked Questions

Question:

A family is planning to move into the district in September 2023, do we file for a TOS for 2023-24 OR can we wait until we have a better cost estimate to implement the existing IEP during the 2023-24 school year AND then apply for a TOS in 2024-25 based on the actual 2023-24 costs to implement the IEP?

TOS Frequently Asked Questions

Answer:

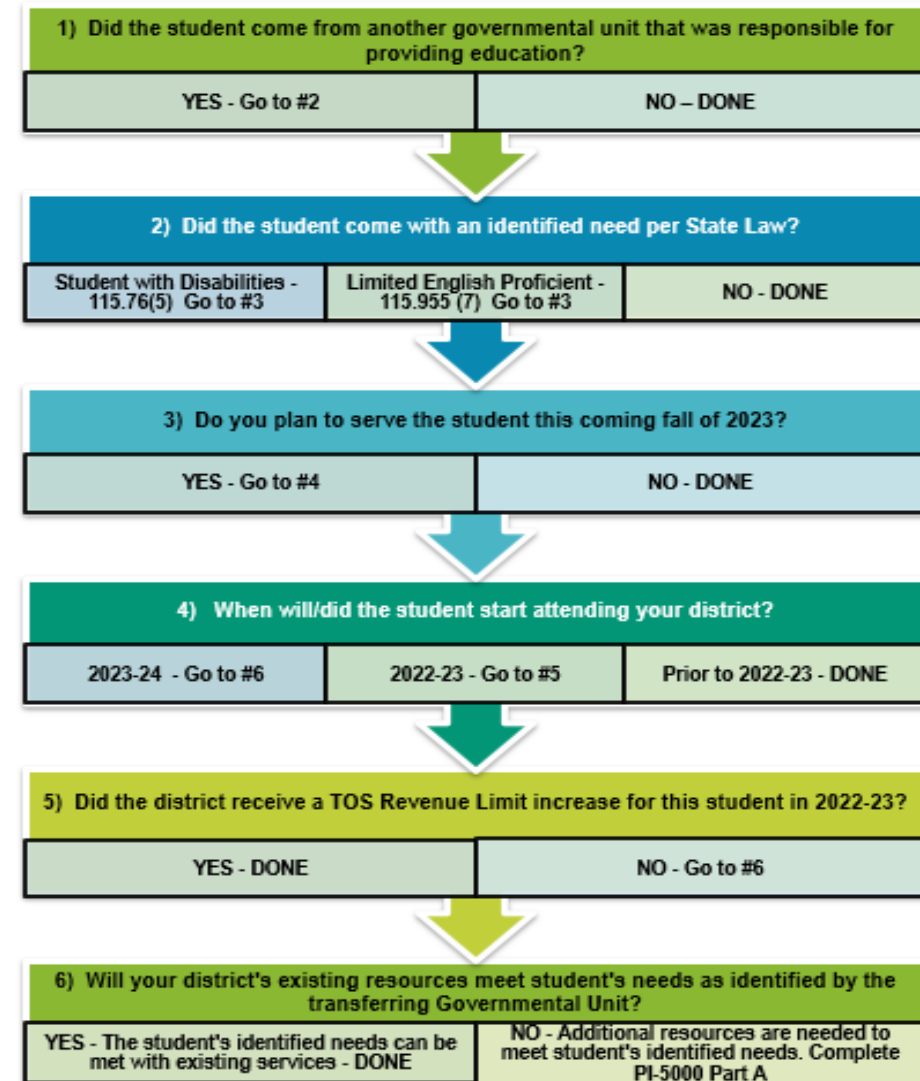
Yes. The TOS eligibility period allows a district to delay the TOS request (depending on when the student is first served by the resident district), to the next succeeding school year.

Examples

A high needs 4th grade student from a public school in Ohio enrolls in late January of 2023. This student comes with the IEP calling for a full-time registered nurse (RN).

- Your district currently receives standard nursing services from the County at no cost.
- The estimated cost will be \$80,000 for an additional RN from the County or as a district hire.

Transfer of Service (TOS) Decision Tree for a 2023-24 Revenue Limit Exemption, Consider Question #6 before starting...



Examples

A high needs 4th grade student from a public school in Ohio enrolls in late January of 2023. This student comes with the IEP calling for a full-time registered nurse (RN).

- Your district receives standard nursing services from the County at no cost.**
- However, in March of 2023 the County gives the District formal notice that as of July 1, 2023 they will no longer provide any nursing services.**
- The estimated cost will be \$160,000 to hire two RN positions.**

Examples

Two TOS requests can be submitted.

- The first request (student's IEP identifies an RN) was described in the pervious slide and will be made through the PI-5000 portal for the student in the amount of \$80,000.
- The second request for the standard nursing services would be a Narrative TOS request, submitted in writing following the steps previously outlined in slides 21 & 22 in the amount of \$80,000.

TOS Takeaway

- 1. Keep track of students moving in and what governmental unit they are coming from.**
- 2. Do they have an identified disability or participating in a limited English proficiency program?**
- 3. Will the district continue serving the student into the fall?**
- 4. Review available resources and determine if more are needed to meet the identified needs for the student.**
- 5. Use the Decision Tree to help you through the process.**
- 6. Don't be afraid to ask questions.**

WISEdata Finance - What's Next?

2022-23 Budget Snapshot is June 9, 2023

Over the next few weeks, we will be concentrating on the following:

- Working with all districts to ensure they are pushing complete financial data either through their vendor or by utilizing the Alternative Reporting Mechanism (ARM)
- You should be reviewing your submitted 2022-23 Budget data for accuracy by comparing against previous reporting
- The 2022-23 Budget is used to calculate the July 1st aid estimate for 2023-24.
 - June 30, 2023: Release date for 2023-24 general school aids estimate

WISEdata Finance - What's Next?

Over the next few months, we will be concentrating on the following:

- 2022-23 Annual (actual revenues and expenditures for 2022-23) will be submitted via WISEdata Finance (WDF).
 - The PI-1505 AC and PI 1505 in SAFR will **not** be used to collect financial data.
- Check your 2022-23 validation messages in WDF. Addressing validation messages is critical in preparation for annual reporting and the next fiscal year.
- Continue to report issues and provide feedback as we continue to improve the portal.

WISEdata Finance - What's Next?

- Over the next few months, we will be concentrating on the following:
- Communicating news about WDF for 2022-23 Annual reporting
 - ONLY WDF for 2022-23 revenue and expenditure reporting
 - Opening the PI-1505 Calendar and Census reports in mid-June
 - SAFR will ONLY be used to collect non-financial data. Membership reporting will continue via the PI-1563 for 2023-2024 and 2024-25.
 - Development of new views tied to WDF within WiSFiP. Budget, Annual, Tax Levy, Referenda and Debt Schedules will be completed first.

Questions ? and Contact Information

- Questions ?

- SFS Contact:

dpifin@dpi.wi.gov or 608-267-9114