

WISEgrants

Introduction to the Federal Grants Portal

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Department of Public Instruction

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

WISEgrants

This session will provide a brief introduction to WISEgrants, including:

- Various features and application components; and
- Tips and tricks for using WISEgrants.

WISEgrants is continuously growing as new grants are added to the system and new features are developed to align with federal requirements and/or identified needs from our stakeholders (external and internal).

Please feel free to log into WISEgrants and follow along...

What is WISEgrants?

- **Web-based portal for federal grants administered by DPI.**
- **Creates consistency in federal grant accounting across DPI programs.**
- **Utilizes WUFAR as the foundation for budgets and claims.**



Grants at a Glance (not an exhaustive list)

- ★ Titles I-A, I-D, I-C, II-A, III-A, IV-A and V-B RLIS
- ★ IDEA Flow-through & Preschool
- ★ Perkins CTE
- ★ Title I-A and IDEA Discretionary
- ★ Education for Homeless Children and Youth
- ★ Wisconsin Charter Schools Program
- ★ Comprehensive Supports and Improvements
- ★ Stimulus Grants: GEER, ESSER I, ESSER II, ESSER III, EBIS Grant, ARP HCY, ARP LSTA, LETRS

Each grant has established its own set of “allowable costs” within WISEgrants through the options available in the grant budget’s drop-down menus.

Landing Page



ions ▾ Reports ▾ Message Board (13) 🔍

WISEgrants User Landing Page

Messages ▾

- **Reporting Issues of concern:** If you are experiencing something with your application or claim that you think is a bug or otherwise incorrect, or you have a technical support question, please submit a [WISEgrants help ticket](#). Guides for submitting a help ticket exist for [subrecipients](#) and [DPI staff](#), and contain a hyperlink to the form.

Announcements ▾

NOTICE! Stimulus Grants: ESSER, ARPA-LSTA, ARP HCY I and II, and other stimulus grant programs - - Disregard the Automated Final Claims Message

- An automated message from WISEgrants went out about submitting final claims for stimulus grants including ESSER II and III, ARP-HCY I and II, ARPA-LSTA (as well as any other relevant stimulus grants). This message was sent in error. As you know, the period of performance for ESSER II is open until September 30, 2023, and the period of performance for ESSER III is open through September 30, 2024. There is still plenty of time to submit claims and it does not need to be done right now as the message indicated.

New! Required ESSER Reporting: School-level Learning Modality

- All LEAs receiving ESSER funds must complete required school-level learning modality reporting in WISEgrants by **October 14, 2022**. LEAs will be unable to submit ESSER II and ESSER III budget revisions or claims until the LEA has completed the required reporting.
- LEAs must provide information on which public schools are providing which mode of instruction: fully in-person, fully online, hybrid, or a combination.
- Use the [School-level Learning Modality - ARPA ESSER III technical assistance document](#) (Google Doc) to learn the details about the reporting requirement and how to report in WISEgrants.
- Navigate to Programs > ESF Reporting > School-level Learning Modality to complete the report.

Grant Summary ▲

Application Status ▲

Application Status Panel

| | | Budget Last Status | Budget Status Date | Budget Revisions | Claim Last Status | Claim Status Date | Claimed to Date |
|--|---------|--------------------|--------------------|------------------------|-----------------------------------|-------------------|-----------------|
| Title I-A | Public | Under DPI Review | 12/18/2019 | No revisions made | Partial - Approved | 02/06/2020 | \$221,528.78 |
| | Private | | | | Partial - Approved | 02/06/2020 | \$19,069.55 |
| Title II-A | Public | Returned | 02/24/2020 | No revisions made | | | \$102,669.20 |
| | Private | | | | | | \$596.10 |
| Title IV-A | Public | Approved | 01/08/2020 | Revised, not submitted | Partial - Under Review by DPI | 02/24/2020 | \$31,759.76 |
| | Private | | | | Partial - Approved | 01/21/2020 | \$4,605.00 |
| Carl Perkins CTE | | Approved | 01/02/2020 | No revisions made | Partial - Submitted to Authorizer | 01/13/2020 | \$10,646.10 |
| Title V-B RLIS | | Approved | 11/04/2019 | No revisions made | Partial - Approved | 01/08/2020 | \$1,332.76 |
| IDEA - Flow-through - CEIS | | Unlocked | 07/17/2019 | No revisions made | | | \$0.00 |
| IDEA - Flow-through - Title I Schoolwide | | Approved | 12/18/2019 | No revisions made | Partial - Returned | 01/10/2020 | \$28,663.24 |
| IDEA - Flow-through | | Submitted | 02/12/2020 | No revisions made | Partial - Approved | 01/24/2020 | \$198,766.89 |

Claimed to Date is the Approved amount (does not include submitted)

Grant Summary Panel

| Grant | Allocation Amount | Public Carryover Amount | Private Carryover Amount | Fund Management Selection |
|-------------|-------------------|-------------------------|--------------------------|--|
| | .00 | \$0.00 | N/A | Consortium - Cooperative Ed Serv Agcy 11 |
| | .00 | \$213,006.19 | N/A | Manage Own |
| | .00 | \$0.00 | N/A | Manage Own |
| | .00 | \$56,225.82 | \$1,450.35 | Manage Own |
| Title II-A | \$75,124.00 | \$17,940.31 | \$2,583.74 | Manage Own |
| Title III-A | \$3,832.00 | \$0.00 | N/A | Consortium - Cooperative Ed Serv Agcy 11 |
| Title IV-A | \$27,107.00 | \$3,524.73 | \$771.37 | Manage Own |

Carryover, or if applicable Public/Private carryover (ESEA Formula grants)

Preliminary or Final carryover

Menu Search

- ★ Another option to quickly navigate the application
- ★ Magnifying Glass in the menu bar
- ★ Search by keyword
- ★ Grant-specific menu items only appear if the user has the grant open
- ★ Menu items limited to the user's access rights
- ★ Not fast enough? You can open the search menu with Ctrl-Shift-Q



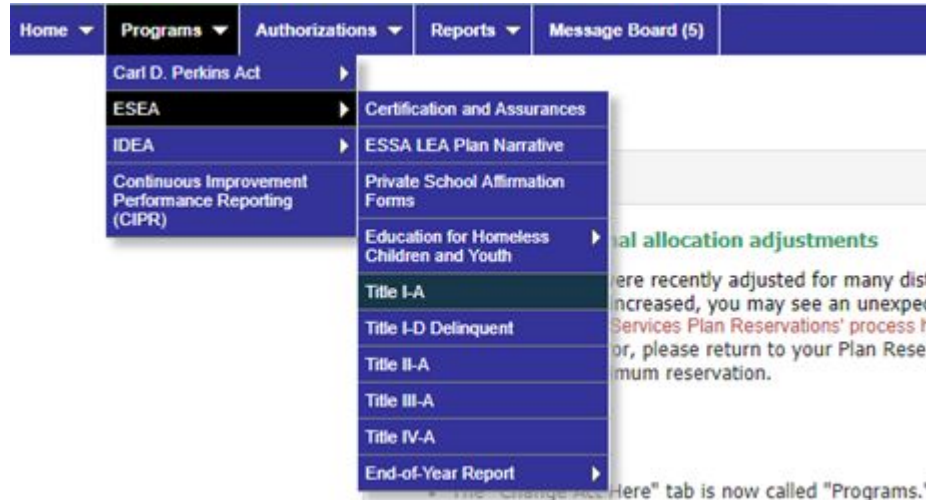
The screenshot displays the WISEgrants Administrator Landing Page. At the top, the logo for WISEgrants is shown alongside the text "Wisconsin Information System for Education Federal Grants Portal". Below the logo is a navigation bar with several menu items: "Application", "Reports", "Message Board (5)", and a search icon (magnifying glass). The search icon is highlighted, indicating it is the focus of the slide. To the right of the search icon, the text "(UAT Server) Appleton Area Sch Dist -" is visible. Below the navigation bar, the main content area displays the title "WISEgrants Administrator Landing Page". A section titled "Reporting issues of concern" provides instructions for submitting a help ticket. At the bottom, a red banner reads "CARES Act Reporting Now Open and Due Soon".

Navigation

The blue menu bar is available throughout the system:



WISEgrants User Landing Page



Grant Application

Once a grant has been selected, navigate through the application using the blue dropdown menu or the links on the screen.

The screenshot displays the WISEgrants User Landing Page. The top navigation bar includes 'Programs', 'Application', 'Authorizations', 'Reports', and 'Message Board (5)'. The 'Application' dropdown menu is open, listing various options. A red box highlights the 'Application' dropdown menu and the corresponding links on the page.

WISEgrants User Landing Page

- Grant Contacts
- Select Fund Management
- View / Edit Funding
- Public School Enrollment
- Private Schools Outside of LEA
- Private School Enrollment
- Proportional Share for Equitable Participation
- Plan Reservations
- Verify Title I-A Services for Homeless/Neglected and Delinquent Students
- TI Public Schools Eligibility
- TI Private Schools Eligibility
- LEA Plan Narrative Questions
- Budget
- Submission History
- Title I A Comparability
- Enter Claims
- Reports

Public School Enrollment

Private School Enrollment

Proportional Share for Equitable Participation

Plan Reservations

Verify Title I-A Services for Homeless/Neglected and Delinquent Students

TI Public Schools Eligibility

TI Private Schools Eligibility

LEA Plan Narrative Questions

Budget

- Public
- Private

Submission History

- Title I-A Public

Title I A Comparability

Enter Claims

- Title I-A Public
- Title I-A Private

Reports

- Private School Equitable Participation Summary Report
- Enrollment Data by Public School Attendance Area Report

View/Edit Funding - Current Funding

Current Funding

Title IV-A - Preliminary Allocation

\$21,389.00

Field editable until finalized
carryover loaded

This additional amount cannot
be claimed until finalized

\$1,158.00

\$345.00

Preliminary

Save

Current Funding

IDEA - Flow-through - Final Allocation

\$1,711,977.00

Fields locked once finalized
carryover loaded

IDEA - Flow-through - Final Carryover

\$358,912.70

\$0.00

IDEA - Preschool - Final Allocation

\$85,742.00

IDEA - Preschool - Final Carryover

\$46,487.68

Final

Save

View/Edit Funding - Current Preliminary Carryover

This panel displays funding information by grant subbudget for most formula grants

Preliminary carry over amounts displayed below are based on the submission of final and revised final FY 2019-2020 claims. These amounts will update if additional claims are submitted. Preliminary carry over amounts can be entered and saved by the user in the Current Funding panel above. Final carry over amounts will be loaded by DPI later in the fiscal year.

| Sub Budget Name | 2019-2020 Total Available Amount | 2019-2020 Approved Claimed to Date | Claim Type | Current Preliminary Carryover Available |
|-------------------|----------------------------------|------------------------------------|------------|---|
| Title I-A Public | \$3,035,933.14 | \$743,077.13 | Partial | Unknown, no final claim approved |
| Title I-A Private | \$176,434.13 | \$22,325.88 | Partial | Unknown, no final claim approved |

The Current Preliminary Carryover Available field will display a projected amount of carryover based on unspent funds in the previous fiscal year.

This field will populate only once a final claim has been approved for the corresponding subbudget.

Preliminary carry over amounts displayed below are based on the submission of final and revised final FY 2018-2019 claims. These amounts will update if additional claims are submitted. Preliminary carry over amounts can be entered and saved by the user in the Current Funding panel above. Final carry over amounts will be loaded by DPI later in the fiscal year.

| Sub-Budget | 2018-2019 Total Available Amount | 2018-2019 Approved Claimed to Date | Claim Type | Current Preliminary Carryover Available |
|---------------------|----------------------------------|------------------------------------|------------|---|
| IDEA - Flow-through | \$2,198,589.73 | \$1,839,677.03 | Final | \$358,912.70 |
| | | 95.81 | Final | \$46,487.68 |

Additional factors such as carryover limitations (TI-A) or Tydings may cause final carryover to differ from the amount displayed

Tydings Amendment

Formula grant funds are available for 27 months (and not just 12) because of the Tydings Amendment.

However, at the end of 27 months, funds not obligated and liquidated are no longer available to the subrecipient.



Senator Joseph Tydings

First In, First Out

Carryover and Tydings

- ❖ The oldest grant funds are always paid out first.
- ❖ For a subrecipient to have an issue with the Tydings timeline, the aggregated claimed amounts for 27 months would need to be less than the original allocation amount.

**Original
Allocation:**
\$100,000

—

**Amount
Claimed First 12
Months:**
\$50,000

—

**Amount Claimed
Second 12
Months:**
\$40,000

—

**Amount Claimed
Final
3 Months:**
\$7,000

=

**Amount Lost
to Tydings:**
\$3,000

View/Edit Funding - Tydings Table

IDEA - Flow-through Tydings Table

2022-23 Application

FY 2020-2021 Unspent Funds
 This is Tydings amount to be obligated by September 30, 2022;
 liquidated and claimed by November 22, 2022

Tydings Amount Claimed between 7/1/2022 - 9/30/2022

Tydings Obligated Amount Claimed between 10/1/2022 - 11/22/2022

Tydings Amount Remaining

| |
|-------------|
| \$26,095.97 |
| \$0.00 |
| \$0.00 |
| \$26,095.97 |

[Amount Allocated FY 1]
 minus
 [Amount Claimed FY 1]
 minus
 [Amount Claimed FY 2]
 equals

Fiscal year two years prior

2022-23 Application

Title I-A Tydings Table

ESEA received a waiver to extend availability of 2019-20 funds to 9/30/2022.

ESEA formula grant funds are tracked by Public and Private subbudget, if applicable

FY 2019-2020 and FY 2020-2021 Unspent Funds
 This is Tydings amount to be obligated by September 30, 2022;
 liquidated and claimed by November 22, 2022

Tydings Amount Claimed between 7/1/2022 - 9/30/2022

Tydings Obligated Amount Claimed between 10/1/2022 - 11/22/2022

Tydings Amount Remaining

Public

Private

| |
|-------------|
| \$11,983.22 |
| \$0.00 |
| \$0.00 |
| \$11,983.22 |

| |
|-------------|
| \$28,089.17 |
| \$0.00 |
| \$0.00 |
| \$28,089.17 |

Amount claimed by 9/30
 (or by 11/22 if obligated by 9/30)

Amount not spent within Tydings window and LOST

The Reports Menu



- ★ Located in menu bar
- ★ Viewable by all users
- ★ Displays view-only reports with LEA-specific information
- ★ Includes reports to view:
 - Entire ESSA LEA Plan
 - Completed assurances
 - List of LEA users with authorizer access
 - Grant subawards
 - Budget summary by grant subbudget
 - Chart of available WUFAR combinations by grant

Tydings Report

Includes same information as Tydings panel on View/Edit Funding screen, but displays all formula grants

Tydings Report for Kenosha School District - 2019-2020

| Agency Code | Agency Name | Grant | FY 2018-2019 Claim Type | FY 2017-2018 Unspent Funds | FY 2019-2020 Amount Obligated between 7/1/2019 - 9/30/2019 | FY 2019-2020 Amount Claimed between 7/1/2019 - 9/30/2019 | FY 2019-2020 Obligated Amount Claimed between 10/1/2019 - 11/22/2019 | Tydings Amount Remaining |
|-------------|-------------------------|----------------------|-------------------------|----------------------------|--|--|--|--------------------------|
| 302793 | Kenosha School District | IDEA - Flow-through | Final | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | IDEA - Preschool | Final | \$0.00 | \$0.00 | \$9,644.23 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | Title I-A | Final | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | Title I-D Delinquent | Final | \$0.00 | \$0.00 | \$2,788.86 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | Title II-A | Final | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | Title III-A | Final | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 302793 | Kenosha School District | Title IV-A | Final | \$0.00 | \$0.00 | \$2,398.87 | \$0.00 | \$0.00 |

Let's Talk Reconciliations

- ★ A subrecipient's ledger should match what is claimed through WISEgrants. Even if crosswalks are employed with function and object codes, the PROJECT CODE tied to expenditures must match.
 - If the subrecipient has claimed \$125,000 of Title I-A funds in FY 2021-22, then the subrecipient's ledger *must* have \$125,000 in expenditures tagged with the project code 141 in FY 2021-22.
- ★ The 1505 Special Education Annual Report reconciliation process during the past few years has demonstrated that a significant portion of subrecipients are not identifying the correct number of expenditures on their ledger or 1505 SE Annual report.

Detailed Ledger Report

The image shows a navigation menu for a web application. The menu items are: Home, Admin Menu, Programs, Authorizations, Reports, and Message Board (8). The 'Reports' menu is expanded, showing a list of report types: ESEA, Certification and Assurances, Title I, Title II, Title III, Flowthrough, Preschool, Detailed Ledger Report, Subrecipient Authorizers, Grant Sub-Budget Summary, Grant Award Report, Tydings Report, and WUFAR Combinations by Grant. A green arrow points to the 'Detailed Ledger Report' option. On the left side of the page, there are sections for 'Messages' and 'Announcements'. The 'Messages' section contains a link for 'Reporting issues help ticket.' The 'Announcements' section contains a 'New! ESEA Final' announcement with two bullet points: 'DPI has load' and 'If there is a you to make Carryover to determine how to resolve app'.

Home ▾ Admin Menu ▾ Programs ▾ Authorizations ▾ Reports ▾ Message Board (8)

ESEA ▶
Certification and Assurances
Title I ▶
Title II ▶
Title III ▶
Flowthrough ▶
Preschool ▶
Detailed Ledger Report
Subrecipient Authorizers
Grant Sub-Budget Summary
Grant Award Report
Tydings Report
WUFAR Combinations by Grant

Messages

- Reporting issues help ticket.

Announcements

New! ESEA Final

- DPI has load
- If there is a you to make Carryover to determine how to resolve app

Detailed Ledger Report

https://wisegrants.dpi.wi.gov/WISeg... | wisegrants.dpi.wi.gov/WISeg.../DetailedLedgerReport

WISegments Wisconsin Information System for Education Federal Grants Portal

Carl D. Perkins Act | Tammy Nicholson, WISegments Administrator

Home | Admin Menu | Programs | Authorizations | Reports | Message Board (8) | Ashwaubenon Sch Dist - 050182 | 2019-2020

Detailed Ledger Report

ESEA
Certification and Assurances
Title I
Title II
Title III
Flowthrough
Preschool
Detailed Ledger Report
Subrecipient Authorizers
Grant Sub-Budget Summary
Grant Award Report
Tydings Report
WUFAR Combinations by Grant

Ashwaubenon School District

IDEA - Flow-through X | IDEA - Preschool X

2018-2019 X

Run Report

Financial Details (based on the last DPI approved) | Export to Excel

Please Wait - Loading

Drag a column header and drop it here to group by that column

| Fiscal Year | Grant | Sub-Budget Claim Grouping | Account Number | Account Description | Amount |
|---------------------|---------------------|---------------------------|----------------|---------------------|--------------|
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100156200341 | Salaries | \$377.16 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100156600341 | Salaries | \$1,000.00 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100156600341 | Salaries | \$851.69 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100158000341 | Salaries | \$219,391.25 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100159100341 | Salaries | \$5,393.05 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100221300341 | Salaries | \$11,276.90 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27100223300341 | Salaries | \$39,984.10 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27200156200341 | Employee Benefits | \$53.22 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27200156600341 | Employee Benefits | \$300.00 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27200156600341 | Employee Benefits | \$197.95 |
| 2018-2019 | IDEA - Flow-through | Flow-through | 27200158000341 | Employee Benefits | \$76,977.53 |
| IDEA - Flow-through | Flow-through | | | | \$430.73 |
| IDEA - Flow-through | Flow-through | | | | \$1,441.16 |

11 Screencastify - Screen Video Recorder is sharing your screen. Stop sharing Hide

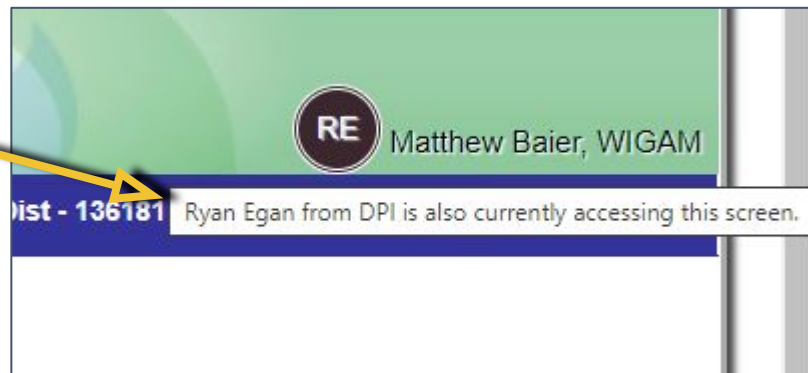
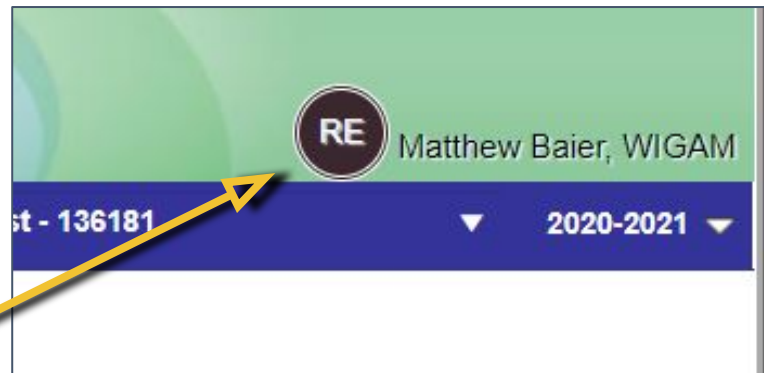
10:49 AM 3/1/2020

Real-time User Tracking

Indicates other active users on the same screen, or within the same set of screens (such as any of the different budget sections within a subbudget)

- Displays the initials of the other user in the upper right of the screen
- Additional user information available if you hover over the bubble

We find this useful when providing technical assistance to ensure we're looking at the same screen as you.



Search by Budget Combination

- ★ Often reconciliation errors occur because the individual preparing the budget does not know where or how to add certain items to the budget to match up with the subrecipient's ledger.
 - The most common question we receive is “*where is it?*”
- ★ A recently added feature to WISEgrants is the “Search for Budget Items” available at the top of every budget section in every grant:

Search for Budget Combinations

Instructions:

1. Type a term into the search bar below.
2. The search tool will display a list of all WUFAR combinations containing the specified term(s).
3. Select the desired WUFAR combination from the list.
4. If the WUFAR combination you are looking for is not listed, try using a different search term. (The search tool will not search by Program Type).

Search for Budget Combinations

Search by Budget Combination

Search for Budget Combinations

Instructions:

1. Type a term into the search bar below.
2. The search tool will display a list of all WUFAR combinations containing the specified term(s).
3. Select the desired WUFAR combination from the list.
4. If the WUFAR combination you are looking for is not listed, try using a different search term. (The search tool will not search by Program Type).

Search for Budget Combinations

Purchased Services

Program Type: Public School

Type of Purchase: Communication

Function: Select a Function Label...

Amount: \$0.00

Vendor:

Detailed Description:

Purchase Detail: Postage

Object: Select an Object Number...

General Ledger Account:

Search by Budget Combination

If it is not available through the search, check:











- ★ Are you in the right budget section? Some items located under Purchased Services versus Non-Capital Objects are not intuitive.
 - Postage is a “purchased service,” whereas the envelopes the mailings go into are a supply under “non-capital objects.”
- ★ Is it an allowed cost under the grant? Look for technical assistance, such as the IDEA Allowables document (<http://bit.ly/idea-allowable>).
- ★ Is it the correct WUFAR combination? Common errors:
 - Function “156600” (S/L) with Object “370” (purchased instruction).
 - Fucntion “XXXX” with Object “XXX”

The Kendo Grid

One of the primary interfaces within WISEgrants consists of Kendo grids.

These grids display application, budget, and claims data and offers the user several options for viewing or manipulating the information contained within the grid.


The grid displayed below is an example from the grant budget Non-Capital Object budget section.

| Program Type | Purchase Item | Purchase Item Detail | Function Number | Function Label | Amount | Description | Edit | Delete |
|--------------|-------------------------|--------------------------|-----------------|------------------------------|------------|---|---|---|
| Schoolwide | Private Vendor Contract | Family Engagement | 219000 | Other Pupil Services | \$700.00 | Newsletters in math, science, and language arts for parents (161). |  |  |
| Schoolwide | Private Vendor Contract | School Climate | 219000 | Other Pupil Services | \$1,000.00 | Author to visit school (168). |  |  |
| Schoolwide | Private Vendor Contract | School Climate | 219000 | Other Pupil Services | \$4,000.00 | Brendan Kiely |  |  |
| Schoolwide | Private Vendor Contract | Professional Development | 221300 | Instructional Staff Training | \$785.00 | Registration fees for instructional staff to participate in professional development to enhance instruction for learning (168). |  |  |
| Schoolwide | Private Vendor Contract | Professional Development | 221300 | Instructional Staff Training | \$500.00 | Instructional staff will participate in professional development to enhance |  |  |









The Kendo Grid

Filter box: Allows user to search (in all columns) by word or number and filters the grid with search results

Export to Excel: Exports currently visible columns, sections, and data to Excel as a .csv file

Filter: Clear Filter Refresh  Export to Excel





Drag a column header and drop it here to group by that column

| Program Type | Purchase Item | Purchase Item Detail | Function Number | Function Label | Amount | Description | Edit | Delete |
|--------------|----------------------------------|---------------------------------------|-----------------|------------------------------|-------------|--|---|---|
| Schoolwide | Private Vendor Contract | Professional Development | 221300 | Instructional Staff Training | \$16,850.00 | EL Education for Staff Services (146). |  |  |
| Schoolwide | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | Shuttle Services | \$640.00 | Students will engage in instructional field trips (167). |  |  |
| Foster Care | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | Shuttle Services | \$20,000.00 | Transportation for students in out of home care to maintain school of origin |  |  |
| Schoolwide | Technology and Software Services | Reading | 122000 | English Language | \$1,800.00 | Read software license (155) |  |  |

The Kendo Grid

Sort by column content: Click on the vertical ellipsis and select Sort Ascending/Descending or click on column header to sort by the contents of selected column

Section by column content: Drag column header to top of grid to create sections and subsections within the kendo grid. This will create sections from the data in the selected column.

| Program Type | School Name | Purchase Item | Purchase Item Detail | Function Number | Function Label | Amount | Description | Edit | Delete |
|---|-------------|-------------------------|---------------------------------------|-----------------|------------------------------|-------------|--|---|---|
| ▲ Purchase Item: Private Vendor Contract | | | | | | | | | |
| ▲ School Name: Frank El | | | | | | | | | |
| Schoolwide | Frank El | Private Vendor Contract | Professional Development | 221300 | Instructional Staff Training | \$16,850.00 | EL Education for Staff Services (146). |  |  |
| ▲ Purchase Item: Pupil Transportation | | | | | | | | | |
| ▲ School Name: | | | | | | | | | |
| Foster Care | | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | Shuttle Services | \$20,000.00 | Transportation for students in out of home care to maintain school of origin |  |  |

The Kendo Grid

Columns options: Click on the vertical ellipsis to view the Columns menu to select which columns will be visible with the grid

Filter options: Click on the vertical ellipsis to view the Filter menu to filter grid data by custom values

Filter:

Drag a column header and drop it here to group by that column

| Program Type | School Name | Purchase Item | Purchase Item Detail | Function Number | Function | Amount | Description | Edit | Delete |
|--------------|-------------|----------------------------------|---------------------------------------|-----------------|------------------|----------|---|------|--------|
| Schoolwide | Frank El | Private Vendor Contract | Professional Development | 221300 | | 6,850.00 | EL Education for Staff Services (146). | | |
| Schoolwide | Wilson El | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | | \$510.00 | Students will engage in instructional field | | |
| Foster Care | | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | | | students in out of state school of origin | | |
| Schoolwide | McKinley El | Technology and Software Services | Reading | 122000 | English Language | | use (155) | | |
| Schoolwide | McKinley El | Technology and Software Services | Mathematics | 124000 | Mathematics | | use (155). | | |

The image shows a Kendo Grid with a filter set to "services". A context menu is open over the "Function" column header, with the "Filter" option selected. The filter menu is also open, showing a search for "services" with the "Contains" operator selected. The "Columns" menu is also visible, showing the grid's column structure.

The Kendo Grid

Purchased Services











Filter:

Clear Filter

Refresh

 Export to Excel

Drag a column header and drop it here to group by that column

| Program Type ↓ | Purchase Item | Purchase Item Detail | Function Number | Function Label | Amount | Description | Edit | Delete |
|----------------|----------------------------------|---------------------------------------|-----------------|------------------------------|--------------------|--|---|---|
| Schoolwide | Private Vendor Contract | Professional Development | 221300 | Instructional Staff Training | \$16,850.00 | EL Education for Staff Services (146). |  |  |
| Schoolwide | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | Shuttle Services | \$640.00 | Students will engage in instructional field trips (167). |  |  |
| Schoolwide | Technology and Software Services | Reading | 122000 | English Language | \$1,800.00 | Read software license (155) |  |  |
| Schoolwide | Technology and Software Services | Mathematics | 124000 | Mathematics | \$1,800.00 | Math software license (155). |  |  |
| Foster Care | Pupil Transportation | Pupil Transportation-Shuttle Services | 256720 | Shuttle Services | \$20,000.00 | Transportation for students in out of home care to maintain school of origin |  |  |
| | | | | | Total | | | |
| | | | | | \$41,090.00 | | | |

State Superintendent of Public Instruction Carolyn Stanford Taylor, Department of Public Instruction
125 S Webster Street

P.O. Box 7841, Madison, WI 53707-7841 (800) 441-4563

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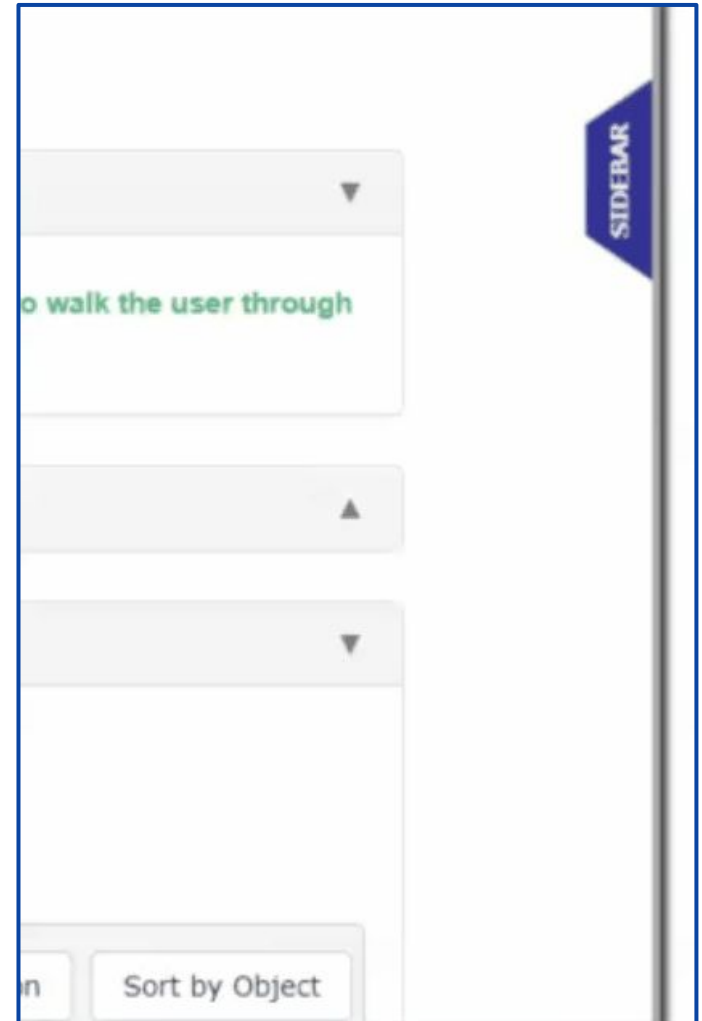
Budget Sidebar

- ★ Displays summary grant budget and claim information
- ★ Easy to reference while working in the budget
- ★ Can be opened or hidden as needed
- ★ Really the only excuse I have left to use the word 'trapezoid' in day-to-day conversation



Also on Enter Claims screen

- ★ In addition to the budget screens, the sidebar is available on the Enter Claims screen for all grant subbudgets
- ★ Also available on the IDEA Flow-through/Preschool Plan Reservations screen



Budget Validations

The budget landing page/submission screen will contain a detailed list of all budget validations.

These validations address fiscal or program requirements that will need to be resolved prior to submitting a budget revision OR claim.

In order to submit the Title IV-A (Public, Private) budget, complete the tasks identified here:

- The amount budgeted of \$528,138.19 for Public exceeds the amount available of \$527,550.02 for Public.
- The amount budgeted for indirect cost recovery is currently greater than the amount allowed. The amount budgeted must be fixed before budget submission.
- The ESEA Assurances form has not been digitally signed by your District Authorizer. Contact your District Authorizer and have them digitally sign the ESEA Assurances form on the [Authorizations screen](#)
- The amount budgeted for Technology Infrastructure cannot exceed 15 percent of the total amount budgeted for the Effective Use of Technology and Technology Infrastructure program types (Public, Private) combined.
- Question #'20' in the Title IV-A LEA Narrative questions is required. Please complete your answer to submit your [LEA Plan Title IV-A Questions](#).

Claim Overage Validation

Claiming over the budgeted amount will require you to revise your budget prior to submitting a budget revision or additional claim.

Claim overage validations display on submission screen and in the specific budget section.

Carl Perkins CTE Budget - All Schools

Non-Capital Objects

[Submission](#) [Personnel](#) [Purchased Services](#) [Non-Capital Objects](#) [Capital Objects](#) [Insurance](#) [Other Objects](#) [Indirect](#) [Program Requirements](#)
[View All Sections](#)

Please complete the tasks identified here:

- **The following budget combinations have been claimed in amounts greater than the current budget revision. Please update the following items and submit for approval:**
 - Non-Capital Objects - 470/Textbooks & Workbooks - 130000/Vocational Curriculum: The cumulative claimed to date amount is \$19,826.21. Line items with this combination must be increased by \$5,029.21

Enter Claims Screen

Budget validations need to be resolved prior to submitting claim. Claim data can be saved but not submitted.

Maintain Claims - Title IV-A Public

Messages

- Claim data can now be entered by using the Upload / Download spreadsheet feature located below this message panel. A tutorial screencast is available to walk the user through this process.
- Edits to this claim can be saved but not submitted unless it is a claim amendment and the amount requested remains \$0. The Title IV-A Public budget has validations that must be resolved prior to claim submission. To see a list of required corrections, visit the budget landing page.

Upload Title IV-A Public - Claim

Title IV-A Public - Claim

Enter Claims Screen

- ★ Downloadable .CSV claims template that can be populated with claims data and uploaded
- ★ Data will only upload in the Obligations and Amount Requested this claim columns
- ★ Uploads will overwrite any previously draft claims information

[Upload Title II-A Public - Claim](#)

LEAs may enter data manually or use a template to upload expenditure information for the claim.

1. Click "Download" to download an Excel file listing the the approved budget items..
2. Enter data on the template.
3. Save the file to your computer as a .CSV file.
4. Click "Select File" to find the file on your computer.
5. Click on the file name.
6. Click "Open"
7. Click "Upload" to upload the file. (This may take a few seconds.)
8. Review the data to make sure it is correct. Data will only upload in the **Obligations and Amount Requested this claim** columns.
9. Changes may be made to individual records or the template may be re-loaded.

Note: Every time a file is uploaded, all previous draft claim data is deleted and replaced with data from the new file.

Download

↑ Select files...

Upload

Enter Claims Screen

- ★ LEAs identified during risk assessment may be required to submit detailed general ledger data that ties to the claim
- ★ Upload as PDF
- ★ Documentation will be reviewed by the grant accountant during claim review

Upload Fiscal Monitoring Supporting Documentation

For this federal grant claim, a PDF report of the LEA's detailed general ledger that ties to the claim must be uploaded using the button below. Be sure to provide enough information that the accountant reviewing the ledger report will be able to recognize the accounts that tie to the line item on the claim for reimbursement. As a reminder, expenditures must be directly coded to the appropriate federal grant project code when recorded in the general ledger.

After selecting the file, click on the "Upload" button to attach the report to the claim. The uploaded document is viewable by selecting the "View Ledger Report" button below the claim.

Note: Every time a supporting document is uploaded, the previous document is deleted and replaced with the new file.

 Select files...

Upload

Enter Claims Screen

Set Report Period Ending Date

Report Period Ending Date: 06/30/2020

Partial Claim Final Claim

Set Claim Type - A Final claim will need to be submitted for each grant for each fiscal year

Obligations column must be cleared prior to submitting Final claims

| Account | Object Name | Approved Budget | Total Amount | Obligations | Amount Requested this Claim | Amount Remaining | Cumulative Claimed to Date |
|-------------------|---------------|-----------------|--------------|-------------|-----------------------------|------------------|----------------------------|
| 10-386-221300-365 | Payment to CE | | \$0.00 | \$1,000.00 | \$1,500.00 | \$3,000.00 | \$0.00 |
| | Subtotal | \$3,000.00 | \$0.00 | \$0.00 | \$0.00 | \$3,000.00 | \$0.00 |
| | Indirect | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | Running Total | \$3,000.00 | \$0.00 | \$0.00 | \$0.00 | \$3,000.00 | \$0.00 |

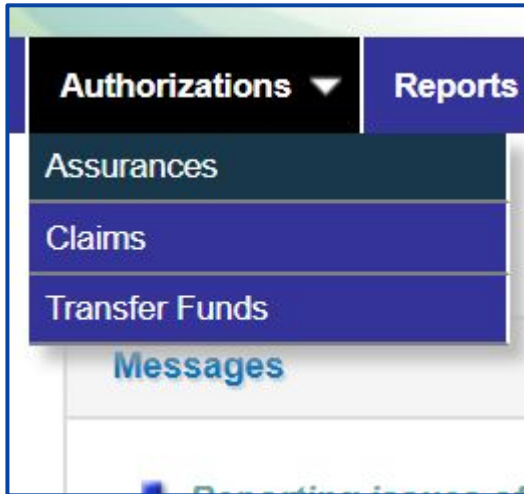
Error:

- There cannot be any outstanding obligations present on a final claim. Please remove any obligations listed or select partial claim.

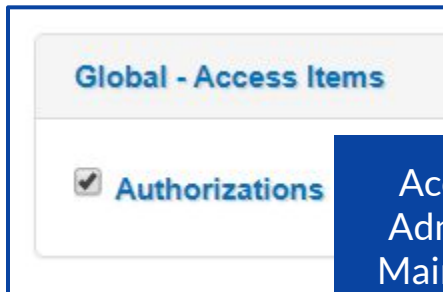
Submit

View PI-1086

Authorizations Menu



- ★ Accessible through the menu bar
- ★ Only visible to LEA users with Authorizations access
- ★ Assurances - Authorizers digitally sign off on required forms, including Act and Grant-level assurances and consortium verification
- ★ Claims - Authorizers check and authorize submitted claims prior to them being submitted to DPI
- ★ Transfer Funds - Under ESEA, if the LEA is transferring funds from one formula grant to another, the funds transfer must be authorized by a subrecipient authorizer



Access set on
Admin Menu >
Maintain User >
Edit Access screen

Notification Management

ESEA

- LEA Plan
- End-of-Year Report
- Private School Affirmation Forms

IDEA

- Maintenance of Effort (MOE)

Allows the user to determine which Act and Grant-level system notifications the user will receive.

Certain notifications, such as notifications related to Authorizer access, cannot be opted out of

Save

Grant - Notifications

Drag a column header and drop it here to group by that column

| Act | Grant | Budgeting <input checked="" type="checkbox"/> | Claiming <input checked="" type="checkbox"/> |
|---------------------|---|---|--|
| Carl D. Perkins Act | Carl Perkins CTE | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ESEA | 1003(a) District Improvement Grant | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ESEA | Comprehensive Supports and Improvements (CSI) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ESEA | Title I-A | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Help is Just a Click Away

Messages

- **Reporting issues of concern:** If you are experiencing something with your application or claim that you think is a bug or otherwise incorrect, or you have a technical support question, please submit a [WISEgrants help ticket](#). Guides for submitting a help ticket exist for [subrecipients](#) and [DPI staff](#), and contain a hyperlink to the form.

Wisconsin Department of Public Instruction - Jill K. Underly PhD, State Superintendent
125 South Webster Street · P.O. Box 7841 · Madison, WI 53707-7841
(608) 266-3390 - (800) 441-4563 (Language assistance available)

For telephone accessibility for those who are deaf, deafblind, or hard of hearing, visit www.wisconsinrelay.com

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WISEgrants Help Ticket

WISEgrants Contact Form

Agency *

Please Select Agency



First Name *

Enter First Name

Last Name *

Enter Last Name

Phone Number *

() - Ext:

Email Address *

What is the best email to contact you at?

I Want To *

- Ask a question
- Make a Suggestion for Improvement
- Report a Problem (user access issue, bug or error message)
- Request to add a WUFAR combination
- Other

Which WISEgrants grant or feature are you contacting us about? *

Include fiscal year, specific grant or feature

Description of the issue *

Submit

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Claiming or Returning
Federal Funds

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WISEGRANTS / WISEGRANTS WEB PORTAL

WISEgrants Web Portal

Click to login:



What do IDEA, ESEA, Carl Perkins, and many other federal education grants have in common? In Wisconsin, they have WISEgrants, an innovative federal grants management system designed, developed and operated by the Wisconsin Department of Public