

# Fall at a Glance

## WASBO New Admin/Support Staff

**Mark Elworthy, Director  
School Financial Services Team**

**September 6, 2023**



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

# Reasons for Fall at a Glance

- **Connections**
- **Resources**
- **Priorities**
- **Developing your plan**



# Connections

- Introduction SFS Team members
- Relationships matter



# RESOURCES



- **Get to know your team**
- **Review prior budgets, audits and school board meetings**
- **Learn how is the board updated monthly on the budget**



# Table Exercise



- **First three community members you met**
- **First projects completed**
- **Next three projects**

# Priorities



- Know what is expected of you in the first 100 days
- Complete budget reports so October 15  
General Aid can be calculated
- Develop/finalize budget for the current year

# Developing your plan

- Elevator speech about the district and budget
- Quick wins
- Long-term goals and developing a plan to support the educational goals
- Challenge – Using someone's budget format



# Juggling Three Years

<b>Prior Year 2022-23</b>	<p>Most of your DPI reporting involves submitting prior year data in the fall</p> <p>Affects most current year state aids</p>
<b>Current Year 2023-24</b>	<p>Active budget you are working under</p> <p>Pupil counts are <u>very</u> important!</p> <p>October is about Revenue Limit and Tax Levy</p>
<b>Next Year 2024-25</b>	<p>Budget-building process starts over the winter and goes into the spring and summer</p>



# How will I keep track of all this?

- **Fiscal Year at a Glance – Due dates for reports by name & purpose**
- **Fiscal Year "Multi-tasker" Planning Calendar**  
- **What to do related to prior year, current year and next year**

[dpi.wi.gov/sfs/communications/calendars/overview](https://dpi.wi.gov/sfs/communications/calendars/overview)

# Fiscal Year at a Glance

YEAR AT A GLANCE: District Financial Reports Due to the DPI SFS Team 7/1/2021 to 6/30/2022 (select non-SFS reports shown in orange, other program-specific reports not shown)

REQUIRED FOR ALL

PI # / Report Title	Purpose / Data Collected	Data Year	Open Date	Due Date	What is affected?	Impact
<b>COMPLETED BY ALL DISTRICTS (MANDATORY)</b>						
PI-1547 Transportation (Regular)	Ridership data for the regular school-year (number of pupils transported by mileage category)	2020-21	5/17/2021	8/13/2021	Regular Transportation Aid	January 2022 Transportation Aid Payment (not High Cost)
PI-1505 Calendar	Days and hours of instruction	2020-21	6/1/2021	8/13/2021	State Aid and Federal Reporting	N/A
PI-1505 Census	Data on the number of district residents ages 4 through 20 as of June 30, 2021	2020-21	6/1/2021	8/13/2021	Common School Fund-School Library Aid	April 2022 Common School Fund Payment
PI-1505 AC Aid Certification	District revenue/expenditure data: "preliminary" Annual Report to meet statutory deadline of September 1st	2020-21	7/12/2021	8/27/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1506 AC AUDITOR Aid Certification	Auditor reported revenue/expenditure data: The District's PI-1505 Annual must match the PI-1506-AC Report	2020-21	7/12/2021	9/10/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1506 FB AUDITOR Ending Fund Balance	District Fund Balance data, is an auditor report, but the district's Annual Report must match the PI-1506 FB report	2020-21	7/12/2021	9/10/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1505 Annual Report	All district revenue/expenditure data: "complete" Annual Report	2020-21	7/12/2021	9/17/2021	State Aid and Federal Reporting	Validation of PI-1506 auditors' reports
PI-1505 SE Special Ed Annual	District detailed special education (Fund 27) expenditure data	2020-21	7/12/2021	9/17/2021	Special Education and School-Age Parents Aid; IDEA Maint. of Effort	2021-22 Spec Ed Aid payments; 2020-21 IDEA MOE compliance
WISEgrants	Final federal grant claims for 2020-21 (including ESSER/GEER programs)	2020-21	N/A	9/30/2021	Federal Grant Claim Revenue	Annual reporting, district financial statements
School Level Annual Report (WISFIP)	Financial Transparency Report of Per pupil expenditures by Location (ESSA)	2020-21	7/12/2021	10/1/2021	Federal Reporting Requirement for ESSA	ESSA Compliance
PI-1563 Pupil Count-September	MEMBERSHIP: 3rd Friday in September pupil count for Revenue Limit and General / Equalization Aid	2021-22	9/17/2021	10/1/2021	Equalization / General Aid and Revenue Limit	2021-22 Revenue Limit and 2022-23 General Equal. Aid
Tax Levy Report (WISFIP)	District's current year tax levies by fund	2021-22	10/15/2021	11/5/2021	2021-22 Revenue Limit	November 10 Levies Certification to Municipalities
WISEdata Finance Budget Snapshot	District's planned revenues & expenditures for the current year	2021-22	N/A	12/1/2021 (approx.)	N/A	Meets statutory budget report requirement
Financial Statements	Audited Financial Statements	2020-21	N/A	12/15/2021	State Aid and Federal auditing compliance	State Statutory Compliance
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (7/1/2021 through 9/30/2021)	2021-22	N/A	12/31/2021	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs
PI-1563 Pupil Count-January	MEMBERSHIP: 2nd Friday in January pupil count for General / Equalization Aid	2021-22	1/14/2022	1/28/2022	Equalization / General Aid (not Revenue Limit)	2022-23 General Equalization Aid Eligibility
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (10/1/2021 through 12/31/2021)	2021-22	N/A	3/31/2022	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs
WISEdata Finance Budget Snapshot	District's planned revenues & expenditures for the current year	2021-22	N/A	6/1/2022 (approx.)	General Aids	July 1 Estimate of General School Aids
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (1/1/2022 through 3/31/2022)	2021-22	N/A	6/30/2022	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs

AS APPLICABLE

<b>COMPLETED BY DISTRICTS AS APPLICABLE</b>						
Energy Efficiency Reporting (will be moving to WISFIP)	To update utility savings for districts that issued debt under an energy efficiency resolution	2021-22	Always	9/1/2021	Revenue Limit	Calculation of the correct Revenue Limit exemption
PI-5000 Transfer of Service Part A	Formal request for a Transfer of Service Exemption to the Revenue Limit (including narrative requests)	2021-22	5/20/2021	9/17/2021	2021-22 Revenue Limit	Step 1 of 3 step process
PI-5000 Transfer of Service Part B	Confirmation of student information by other Wisconsin school districts	2021-22	5/20/2021	9/24/2021	2021-22 Revenue Limit	Step 2 of 3 step process
PI-5000 Transfer of Service Part C	Submission of Transfer of Service total requests	2021-22	5/20/2021	10/1/2021	2021-22 Revenue Limit	2021-22 Revenue Limit TOS Adjustment

# Fiscal Year at a Glance

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# Multi-Tasker Calendar

## SCHOOL FINANCE “Multi-tasker” PLANNING CALENDAR

Month of 2021-2022	Prior Fiscal Year Activities LAST YEAR	Current Fiscal Year Activities THIS YEAR	Future Fiscal Year Activities NEXT YEAR
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Items new, modified, or deleted for the 2021-2022 calendar are highlighted in yellow.


JULY/AUGUST	2020-2021	2021-2022	2022-2023
ANNUAL DPI REPORTS, DATA CERTIFICATIONS, REQUIREMENTS, and OTHER NOTIFICATIONS	<ul style="list-style-type: none"> <li>• PI-1547 Regular Transportation</li> <li>• PI-1505 Calendar</li> <li>• PI-1505 Census</li> <li>• PI-1505-AC Aid Certification</li> <li>• PI-1589 Group and foster home FTE log follow-up</li> <li>• Use PI-1504 Budget/SE data for IDEA Maintenance of Effort calculation</li> <li>• Final aid payment withholding June/July file posted to DPI payment webpage</li> <li>• Finalize collection of data for PI-5000 Transfer of Service Requests for students that plan to return in the fall</li> <li>• Review federal IDEA MOE Compliance Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Review PI-1500 District Contacts</li> <li>• Review WiSFIP/WISEdata Finance access in WISEsecure</li> <li>• General Equalization Aid estimate released July 1<sup>st</sup></li> <li>• Use Summer Course information to complete the PI-1804 workbook (membership)</li> <li>• Reconcile summer fees in the PI-1804 workbook</li> <li>• Gather Summer Transportation ridership for PI-1547-SS</li> </ul>	

# Table Exercise



How do you organize  
your days, weeks,  
months, years

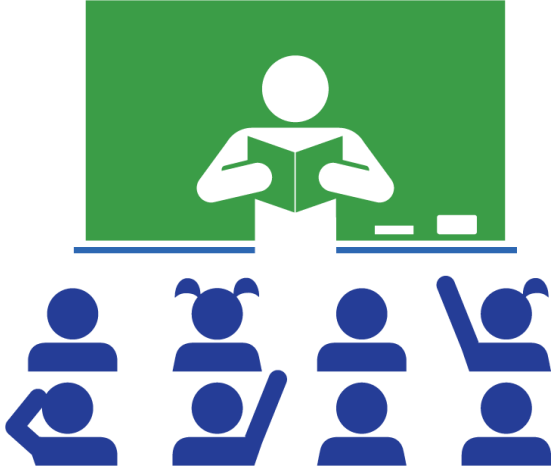
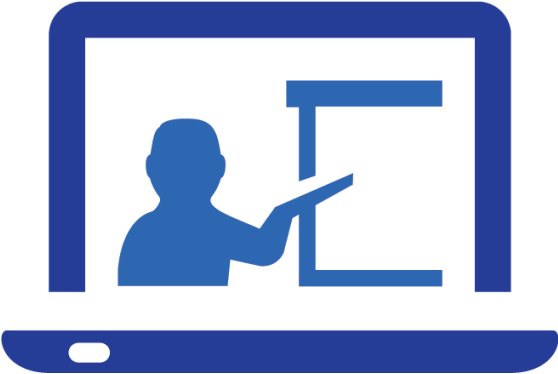
# Reports due in September

- **Annual Report**
  - **Transfer of Service**
  - **Third Friday Pupil Count**
  - **Final 2022-23 Grant Claims**
- 

# Where are you at with these reports?



# Third Friday of September Count





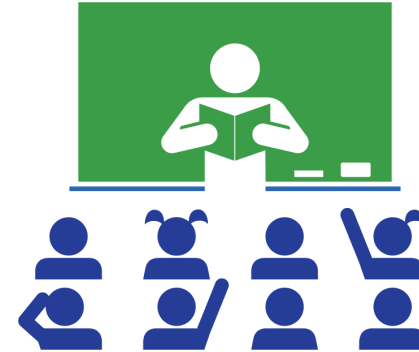
# Membership vs. Enrollment

## MEMBERSHIP



- Where students live
- Drives district revenues

## ENROLLMENT



- Where students learn
- Drives district expenses

# This Year Affects the Future

School Year	Funding Impacts
2021-22	Revenue Limit (1/3 of 3-year average membership) ...and Tax Levy  Per Pupil Aid (also uses 3-year average)
2022-23	General State Aids (last year's membership) and Revenue Limit (3-year average)...and Tax Levy  Per Pupil and Other Categorical State Aids
2023-24	Revenue Limit and Per Pupil Aid
2024-25	Revenue Limit (starts with comparison to the previous year's 3-year average)

# Revenue Limits

**A revenue limit restricts (controls) the amount of money a district can receive from:**

- **General State Aids (mostly Equalization Aid)**
- ~~**High Poverty Aid (no longer July 2023)**~~
- **Local Property Taxes**
- **Department of Revenue Exempt Computer and Personal Property Aids**

# General State Aids

General State Aids are state funds within the revenue limit that partly offset your local tax levy.

Aid formula is a comparison of your district to the 420 others in Wisconsin.



## How do you explain funding to:

- Staff
- Parents
- Community member

# Remember!

- **Revenue Limit membership:**  
3-year rolling average
- **Aid membership:**  
Last year's membership for this  
year's general school aids

# The Bottom Line - District Planning



# The Bottom Line – Community Impact



**General State Aids function as tax relief under the Revenue Limit.**



# More about Aid & Revenue Limits...

How is your district aided?

DPI Resource – Longitudinal Aid

[Multi-Year Aid: 2010-11 to current.](#)

# Required Reports to generate October 15 General Aids

Step #5

October 15 General Aid

Step #4

Due October 27 – School-Level Annual Report

Step #3

Due September 22 - Annual Report

Step #2

Due September 15: Auditor Aid Certification and Fund Balance

Step #1

Due September 1: District Aid Certification

# District Aid Certification (Formerly the PI-1505-AC Aid Certification)

- **Was due September 1**
- **“Baby Annual Report” with data for Oct. 15 aid certification**
- **Auditor submits & compares the same for Auditor Aid Certification (formerly their PI-1506 reports)**

## Annual Report Module

[Home](#) [Accounts](#) [Report Summary](#) [Aid Certification](#) [Validations](#) [Addenda](#) [Certification](#) [Help](#) [Admin](#)

### --- Aid Certification Overview Page ---

The Department of Public Instruction is required by **s.121.15(4)(b)** Wis. Stats. to certify a General Aid amount to school districts by October 15 of each year. General Aid is comprised of Equalization, Inter-District, Intra-District and Special Adjustment Aids (although most districts receive only Equalization Aid). The October 15 General Aid Certification is the level of state General Aid districts will receive in that fiscal year. Districts must use the certified amount when calculating their Revenue Limit Computation in determining property tax levies in November.


The Aid Certification is based off of Actual amounts for specific accounts in Funds 10, 38, 39 and 41. Additional data is collected related to Indigent Transportation, Environmental Remediation, 3-Year Old Programs and Revenue Limit Exemptions for Energy Efficiency Projects. The financial data displayed in the Aid Certification is pulled from WISEdata Finance. Changes to your Aid Certification data are made by updating your district ledger and pushing financial data to WISEdata Finance.

Upon district submission of Aid Certification, DPI will review the district's data. Once the data has been accepted and confirmed by DPI, the auditor will be able to complete the Auditor Aid Certification Report.

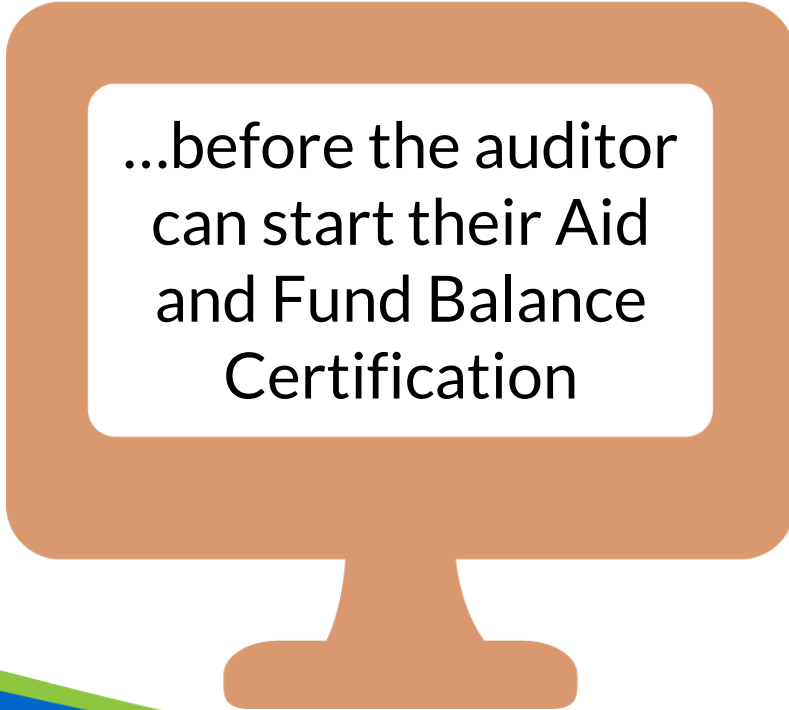
# Auditor Aid Certification and Fund Balance (PI-1506-AC/FB Auditors' Reports)

- You won't see these
- **Due Sept. 15**
- Confirm/update your District Aid Certification
- Report ending fund balances & variance from audit statements

# Tying It Together



Your District Aid Certification must be reviewed and approved...



...before the auditor can start their Aid and Fund Balance Certification

# Annual Report (PI-1505 Annual Report)

- **Due on Sept. 15**
- **“Full Annual” with complete data for all funds**
- **Majority of your fall reporting work**

--- Annual Report Home Page ---

**Note:** This report opens on **Tuesday, August 15, 2023** and will be due on **Friday, September 22, 2023**

## Welcome to the WiSFIP Annual Report!

This online report replaces the legacy SAFR PI-1505 report, allowing districts and LEAs to review annual data submitted via the WISEdata Finance portal, compare that data against data uploaded via the legacy SAFR PI-1505 system and ensure that all submitted data is appropriate.

**Note:** To review the data, you must already be a District Data Administrator within this WiSFIP portal. Contact [School Financial Services](#) for further information.

## To Get Started

Click the blue button below to begin!

Accounts


## Module Announcements

### Aid Certification


( from Thursday, August 31, 2023 )

Please note, as of the morning of Thursday 8/31, WISEdata Finance, the Annual Report, and the Aid Certification have been updated to display the beginning fund balance accounts for 2022-23 from the 2021-22 PI-1505

# Tying It Together



The auditor's Aid Certification and Fund Balance reports must be approved...



...before you can submit your Annual Report.

# PI-1505-SE Special Ed Annual Report

- Also due **Oct. 17**
- Detail report for special education (Fund 27) expenses
- Used for state special education aid

Fiscal Year: 2020 Current Entity: Adams-Friendship Area (0014)

Main Menu Enter/Edit Data Errors Addenda Data Reports Submit

Selecting from the filter list dropdown (step 1) will automatically clear all account criteria listed in step 2 and retrieve the data from the option selected. To limit the retrieved data by account, enter account parameters in step 2 and click Go after step 1 has been done. Only 10 pages of data will display. Not all boxes need to be filled in and partial account numbers can be entered. Example: Enter 2 for 200 series objects.

Filter list of Accounts:  
 (Step 1) Limit Search to: Reported Values

Number of Errors: 0  
 Number of Warnings: 1

(Step 2) Fund Type - Function - Obj/Src - Project  
 Account Number:  -  -  -

#	Alert	Account	Description	Amount
1		27E-000000-000-000	All Functions-All Functions-Object 000-Not Project Specific	\$3,745,920.19
2		27E-150000-000-000	Summary - Special Education Curriculum	\$2,766,363.53
3		27E-152000-100-011	Early Childhood--Salaries-Local Aid-Eligible	\$30,500.22
4		27E-152000-100-340	Early Childhood--Salaries-Direct IDEA Grant	\$16,000.00
5		27E-152000-212-011	Early Childhood--Employer's Share-Local Aid-Eligible	\$1,740.72
6		27E-152000-212-340	Early Childhood--Employer's Share-Direct IDEA Grant	\$1,365.78
7		27E-152000-219-011	Early Childhood--Other Employee Benefits-Local Aid-Eligible	\$3,000.00
8		27E-152000-220-011	Early Childhood--Social Security-Local Aid-Eligible	\$1,600.60
9		27E-152000-220-340	Early Childhood--Social Security-Direct IDEA Grant	\$1,205.40
10		27E-152000-230-011	Early Childhood--Life Insurance-Local Aid-Eligible	\$4.34
11		27E-152000-230-340	Early Childhood--Life Insurance-Direct IDEA Grant	\$3.72
12		27E-152000-240-011	Early Childhood--Health Insurance-Local Aid-Eligible	\$21,444.12
13		27E-152000-240-340	Early Childhood--Health Insurance-Direct IDEA Grant	\$2,864.26



# Tying It Together

IDEA grant costs  
must match



PI-1505-SE detail  
must match the full  
PI-1505 Annual

# More about Annual Reports coming up...

**Q: Why did we cover these slides?**

**A: All of these reports build to the calculation  
of the October 15 General Aids**



# School Level Annual Report

- **Due on Oct. 1**
- **Expenditures only broken down by**
  - School or District
  - Federal or State/Local
  - Funded
  - “Exclusions”
- **Used for federal ESSA per pupil reporting**

## District/LEA Data

Enrollment	Exclusions	Federal	State/Local	Total
1,198	\$8,135,921	\$441,374	\$5,091,537	\$13,668,832

## School Data

Location	Enrollment	Federal	State/Local	Total
Advanced Learning Academy of Wisconsin	49	\$0	\$347,673	\$347,673
Almena Elementary	39	\$63,265	\$421,996	\$485,261
Barron Area Montessori School	32	\$0	\$318,733	\$318,733
Barron High	359	\$5,524	\$3,850,321	\$3,855,845
North Star Academy	0	\$0	\$98,519	\$98,519
Ridgeland-Dallas Elementary	78	\$0	\$545,374	\$545,374
Riverview Middle	339	\$4,638	\$2,645,964	\$2,650,602
Woodland Elementary	302	\$281,717	\$2,477,232	\$2,758,949
<b>Totals:</b>	<b>1,198</b>	<b>\$355,144</b>	<b>\$10,705,812</b>	<b>\$11,060,956</b>

**Grand Total: \$24,729,788**

Finalize Report

# Tying It Together



School Level Report  
total, exclusions &  
federal costs...



...are reconciled to  
the full Annual  
Report.

# Annual Report Reviews

- **DPI review including reconciling data**
- **DPI may identify errors in your SE data**
- **DPI may request additional information**
- **Changes in one district may impact another**
- **All changes must be made by February**
- **Timely responses are important for all to meet the deadline**

# Financial Reports

- September Pupil Count (PI- 1563 in SAFR)
- Tax Levy (WiSFIP)

## SFS Tax Levy Report Module

Home

Contact Data

Tax Levy Data

Levies by Referendum

Reasonability Check

Completion

Help

Admin ▾

### --- Tax Levy Report Home Page ---

**Note:** This report opens on **Friday, October 13, 2023** and will be due on **Friday, November 03, 2023**

### Welcome to the WiSFIP Tax Levy Report!

This online report collects levy amounts by fund from each school district, automatically apportions the total levy across the underlying municipalities, and generates individual municipal tax invoices as PDFs. The school district clerk then signs and delivers the tax invoices to the municipal clerks.

On behalf of the school districts, DPI reports levy amounts to the Wisconsin Department of Revenue. Districts may return and amend their data after the original submission, but after the second Monday in November districts must first contact an [SFS Consultant](#) to re-open this application.

**Note:** To enter data, you must already be assigned as a Finance Data Administrator within the

### Module Announcements

#### Tax Levy Report Welcome

*( from Monday, October 31, 2022 )*

Welcome to the new WiSFIP Tax Levy Report module, which replaces the PI-401 Tax Levy Report in SAFR. While the

# The Future is Here

## WISEdata Finance

The screenshot shows the WISEdata Finance application interface. At the top, there is a navigation bar with links for Home, Data Reviews, Account Reviews, Validation Messages, Admins, Settings, and a user profile for Daniel B (Wis Dept of Public Instruction). Below the navigation bar, there is a section for 'Validation Message Summary' for the 'School Year: 2020'. This section contains a table with the following data:

2019 - 2020	
Data Format L2 Validation Count	0
Budget L2 Validation Count	0
Actual L2 Validation Count	0

Below the table, there is a 'Data Pipeline Status' section. It shows 'School Years' for '2019 - 2020' and a 'Vendors' dropdown menu. A 'Vendor / WISEdata Communication Status' section is expanded, showing a list of vendors and their communication status. The text below the list states: 'This section provides a list of vendors used by your district that you have approved for integration with WISEdata Finance. The goal is to alert you of the status of the specific vendor's communication in the last 24 hours. Vendor READ transactions may be included or excluded depending on whether the user setting is check / unchecked (Include API Read (GET) transactions) in last communication date/time, calculations determining given/rev status and in drill-down counts and record detail. If there are communication errors (often called Level 1 validation errors) you will see a red 'x' icon. Click on the vendor box indicating errors have occurred to see the detail. While much of the data in the drill down is a bit more technical, it can sometimes be obvious as to the issue or it can provide enough information to log a ticket with your vendor to let them know that data they are attempting to obtain, send or delete within WISEdata isn't happening.'

Finance data reported just like student data, directly from your data system

## WiSFIP

The screenshot shows the Wisconsin School Finance Portal (WiSFIP) interface. At the top, there is a navigation bar with links for SFS WSFIP, Applications, and Links, and a user profile for Welcome Anonymous - Public User (Public). Below the navigation bar, there is a section for 'Wisconsin School Finance Portal (WiSFIP)'. This section contains a 'Welcome!' message and a 'Portal Announcements' section. The 'Welcome!' message states: 'This collection of related Department of Public Instruction (DPI) School Financial Services (SFS) applications is intended for use by DPI personnel, school districts and the general public throughout Wisconsin. Click the appropriate application button below to get started (WAMS login credentials required)'. The 'Portal Announcements' section contains a 'School Level Reporting OPEN for Annual 2019-20 Report' announcement. The text below the announcement states: 'The WSFIP School Level Reporting module has again been re-opened and is now allowing districts to submit their 2019-20 Annual Report. If your district has yet to submit its 2019-20 FY 1905 Annual Report, please do so first as that data is needed to support this report.'

Reports compiled from WISEdata Finance and additional information you provide

# What's Next? Membership!

- **Federal SLDS Grant is funding development of membership reporting & parental choice tools with WISEdata (Student)**
- **Pupil Count Pilot in 2023-2024 (30 districts)**

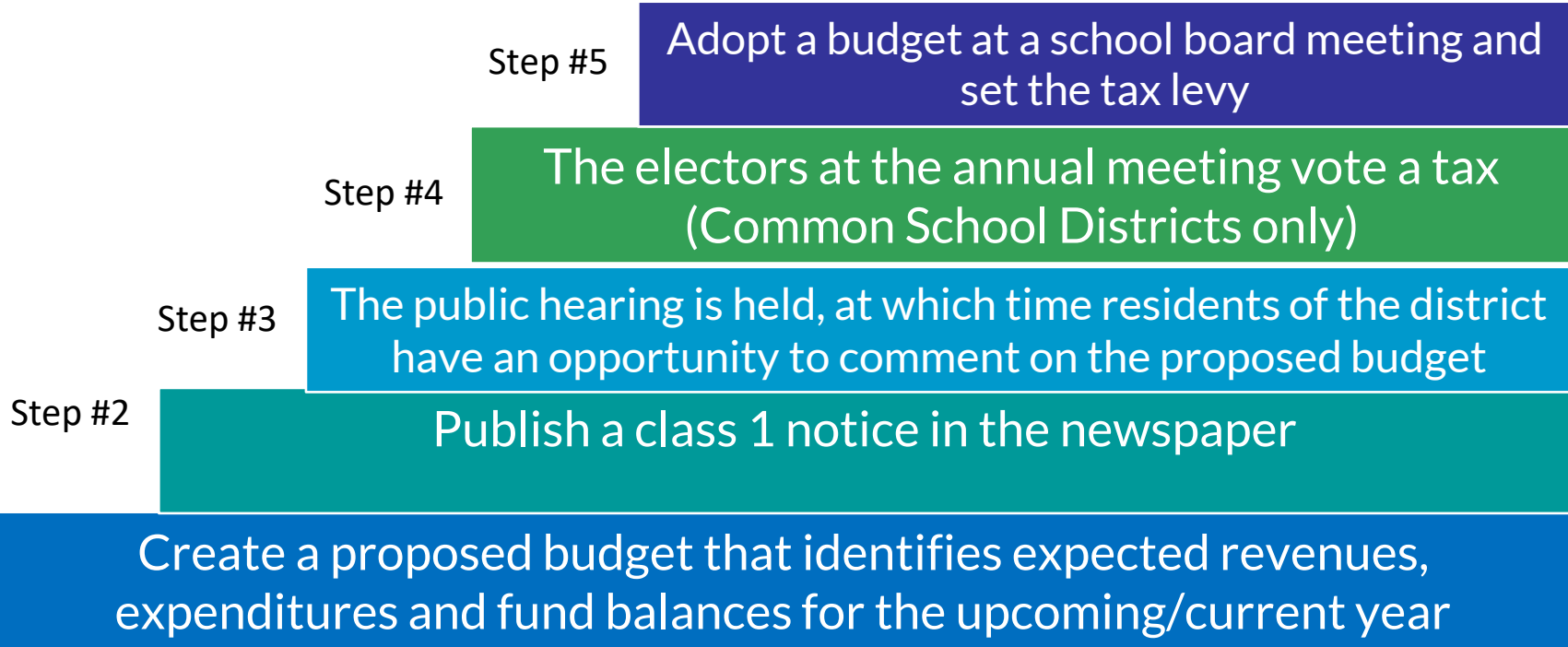


# Budget to Tax Levy...



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

# Overview: Budget Adoption and Tax Levy



# Budget Adoption

The school board shall adopt a budget at a school board meeting after the public hearing and no later than the meeting in which the tax levy is set. This is sometimes referred to as the “original” budget.

**Deadline November 1<sup>st</sup>**

Step #5

Adopt a budget at a school board meeting and set the tax levy

# Contacting the SFS Team

- Email: [dpifin@dpi.wi.gov](mailto:dpifin@dpi.wi.gov)
- Phone: (608) 267-9114
- Web: [dpi.wi.gov/sfs](http://dpi.wi.gov/sfs)

Team Directory:

[dpi.wi.gov/sfs/communications/staff-directory](http://dpi.wi.gov/sfs/communications/staff-directory)

# My Contact Information

- **Mark Elworthy**

Director

DPI School Financial Services Team

[mark.elworthy@dpi.wi.gov](mailto:mark.elworthy@dpi.wi.gov)

(608) 266-9534

# Recommended DPI Bookmarks

- **SFS Team Page and Assignments**
- **Sign-up for the Newsletter**
- **Year at a Glance and Planning Doc**
- **SAFR Portal**
- **Comparative Costs per member**
- **PI 1500 Contacts**