

Open Enrollment: An Overview and How Open Enrolled Pupils are Funded

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School Administration Consultants

Parental Education Options Team

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

Agenda

- **Program Overview**
- **Funding/Payments**
- **Special Education**
- **Actual Costs for Pupils with Disabilities**
- **Important Considerations**

Open Enrollment: An Overview

**The Who, What, When,
Where, and How of Open
Enrollment**

Open Enrollment: An Overview

What is open enrollment?

- **Open Enrollment allows parents to apply for their children to attend public school in a district other than the one in which they live.**

Open Enrollment: An Overview

Who can open enroll?

- Any Wisconsin resident in grades 4K through 12 may apply.
- Open enrollment is available for 4K, prekindergarten, and early childhood only if:
 - the child's resident district offers the same type of program and
 - the child is eligible for the program in their resident district.

Open Enrollment: An Overview

- **When, Where, and How to Apply**
 - **Regular Application Period:**
 - Applying for the following school year
 - February 7 – April 29, 2022
 - Online application process (paper copy available)
 - **Alternative Application Process:**
 - Applying for the current school year
 - Begins July 1
 - Paper only application

Open Enrollment: An Overview

Processing Open Enrollment Applications

Open Enrollment: An Overview

Nonresident District: Approvals and Denials

- Applications can only be denied for reasons specified in statute and board policy.
- Nonresident district must send the parent written notification of the decision.
 - By the first Friday following the first Monday in June (June 10, 2022) for applications submitted during the regular application period.
 - Within 20 calendar days for alternative applications.

Open Enrollment: An Overview

Resident District: Approvals and Denials

- Applications can only be denied for reasons specified in statute and board policy.
- Resident district must send the parent written notification of a denial; they may send written notification of an approval.
 - By the second Friday following the first Monday in June (June 17, 2022) for applications submitted during the regular application period.
 - Within 20 calendar days for alternative applications.

Open Enrollment: An Overview

Open Enrollment Application Log (OPAL)

Open Enrollment: An Overview

The Open Enrollment Application Log (OPAL) is an:

- **Online application system**
- **Online application management**
- **Online tracking of open enrolled students**
- **Online communication system**
- **Online historical data system**

Open Enrollment: An Overview

Logged in as Jennifer Demrow



OPAL Open Enrollment for
A District A District

| | | | | | | | |
|------------------------|--------------|--------------------|------------|-------------------|----------|------------------|-------------|
| Mailbox | Students | Alt Apps | Apps | Exports | Contacts | DPI | PDF Excel |
| Actively Open Enrolled | All Students | 3rd Friday in Sept | Special Ed | 2nd Friday in Jan | Returns | SPED Actual Cost | |

Students Actively Open-Enrolled

Year: 2021-2022 Student Name:

Grade: All Grades Res Dist:

Transfers In
 Transfers Out

SPED
 Non-SPED
 Alternative Apps Only
 Withdrawals Only

This is a list of all actively opened enrolled students.

For a student to be considered "actively open enrolled", they must have been marked as open-enrolled/attending on the [3rd Friday in September tab](#) by the nonresident district or have been enrolled as an alternative to the OE application period.

Listed below are students where the district selected above is listed as the **nonresident** district.

3 students retrieved

| Grade | Name | FTE | SPED | Partial SPED | W/D | Alt App | Actual Cost | Resident District | Estimated Amount |
|-------------------|-----------|-------------------|------------|--------------|-----|---------|-------------|-------------------|------------------|
| | Student A | 1.0 | | | | | | B District | 8,161.00 |
| | Student B | 1.0 | | | | | | C District | 8,161.00 |
| | Student C | 1.0 | | | | | | D District | 8,161.00 |
| All Pages: | | 3 students | 3.0 | | | | | | 24,483.00 |

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[Open Enroll Contacts](#)

Open Enrollment: An Overview

Logged in as Jennifer Demrow



OPAL Open Enrollment for
 A District ▼

| | | | | | | | |
|------------------------|--------------|--------------------|------------|-------------------|----------|------------------|-------------|
| Mailbox | Students | Alt Apps | Apps | Exports | Contacts | DPI | PDF Excel |
| Actively Open Enrolled | All Students | 3rd Friday in Sept | Special Ed | 2nd Friday in Jan | Returns | SPED Actual Cost | |

Students Actively Open-Enrolled

Year: 2021-2022 Student Name:

Grade: All Grades Nonres Dist:

Transfers In
 Transfers Out

SPED
 Non-SPED
 Alternative Apps Only
 Withdrawals Only

This is a list of all actively opened enrolled students.

For a student to be considered "actively open enrolled", they must have been marked as open-enrolled/attending on the [3rd Friday in September tab](#) by the nonresident district or have been enrolled as an alternative to the OE application period.

Listed below are students where the district selected above is listed as the **resident** district.

2 students retrieved

| | | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | [All] |
|-------------------|-----------|-------------------|------------|--------------|-----|---------|-------------|----------------------|------------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-------|
| Grade | Name | FTE | SPED | Partial SPED | W/D | Alt App | Actual Cost | Nonresident District | Estimated Amount | | | | | | | | | | | | | | | | | | | |
| | Student A | 1.0 | | | | | | B District | 8,161.00 | | | | | | | | | | | | | | | | | | | |
| | Student B | 1.0 | | | | | | B District | 8,161.00 | | | | | | | | | | | | | | | | | | | |
| All Pages: | | 2 students | 2.0 | | | | | | 16,322.00 | | | | | | | | | | | | | | | | | | | |

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[Open Enroll Contacts](#)

Open Enrollment: An Overview

We recommend that a district's school finance staff should have access to OPAL.

- **Need approval from district superintendent.**
- **A district's superintendent, not DPI, will need to grant access to OPAL and can do so using the Application User Management System (AUM).**

Open Enrollment: An Overview

July Aid Adjustments were eliminated with the passage of the 2021-23 Biennial Budget.

- As a result, districts will need to submit all aid-related open enrollment changes by mid-May.**
- There will be no exceptions to the May deadline.**

Open Enrollment: An Overview

- May 2, 2022 – last day for districts to make open enrollment changes themselves in OPAL.
- May 13, 2022 – last day for nonresident districts to submit open enrollment changes to DPI.
- After May 13th, no more changes will be allowed for the current school year.

Open Enrollment: Funding

**How Does Open Enrollment
Affect My District's Finances?**

Open Enrollment: Funding

Pupil Count for Open Enrolled Pupils

- **Counting open enrolled pupils – the resident district counts open enrolled pupils (transfers out) for revenue limit and general aid purposes because the resident district pays for the open enrolled pupils.**

Open Enrollment: Funding

PI-1563 – Pupil Count Report

- **Nonresident district includes “transfers in” pupils in Step 1 (Head Count) and then must remove them from the Head Count under Step 2 (Nonresident Reductions).**
- **Resident district must add its “transfers out” pupils to the Head Count under Step 4 (Resident Additions) as “transfers out” pupils are not captured in Step 1 (Head Count).**

Open Enrollment: Funding

Amount of State Aid Adjustment

The 2021-22 OE transfer amounts are:

- \$8,161 – pupils without disabilities
- \$13,013 – pupils with disabilities

The 2022-23 estimated OE transfer amounts are:

- \$8,224– pupils without disabilities
- \$13,076– pupils with disabilities

Open Enrollment: Funding

Open Enrollment Payments

- For each open enrolled pupil, DPI transfers the state-set amount from the resident district to the nonresident district in the final state aid payment.
 - Transfers In – DPI increases district's final state aid payment
 - Transfers Out – DPI decreases district's final state aid payment
 - The OE payment is prorated for students open enrolled for less than a full school year.

Open Enrollment: Funding

Open Enrollment Payments

- **Unlike general state aid:**
 - **Nonresident districts are not required to reduce the property tax levy by the amount of the open enrollment payment.**
 - **Resident districts are not permitted to increase the property tax levy by the amount of the open enrollment payment.**
- **The OE payment is more comparable to the revenue limit than to state aid in that it represents funds that are or are not available to spend.**

Open Enrollment: Funding

Open Enrollment Payments are outside the revenue limit.

- **Net OE gain:**
 - **Revenue received is outside the limit.**
 - **Additional spending capacity.**
- **Net OE loss:**
 - **District cannot directly levy for that loss of revenue, but...**
 - **Those “transfers out” pupils were part of the district’s revenue limit membership, upon which the district’s revenue limit (spending authority) is based.**

Open Enrollment: Funding

- The OE payments are like marginal cost as it excludes many cost categories, such as:
 - School administration and operations
 - Maintenance
 - Debt services
 - Transportation
- Thus, the OE payment is less than the total average cost per pupil.

Open Enrollment: Funding

Nonresident District

- **Does not receive full amount of revenue per member**
- **Is only required to accept pupils for whom there is space**

| | |
|---------------------------|-----------------|
| Revenue/Member | \$10,000 |
| OE Aid Amount Received | \$ 8,161 |
| Difference | \$ 1,839 |
| Available to Spend | \$ 8,161 |

Resident District

- **Does not lose full amount of revenue per member**
- **Can retain a portion to offset fixed costs in the district**

| | |
|---------------------------|-----------------|
| Revenue/Member | \$10,000 |
| OE Aid Amount Paid | \$ 8,161 |
| Retained | \$ 1,839 |
| Available to Spend | \$ 1,839 |

Open Enrollment: Funding

Alternative Application Payments

- **Payments for alternative application pupils are the same as other open enrolled pupils:**
 - They are equal to the open enrollment transfer amount.
 - Prorated at the daily rate (OE amount/180).
 - Are paid as an aid adjustment in the same way as current open enrollment is paid.

Open Enrollment: Funding

Alternative Applications – Resident Membership Count

- Alternative application pupils may transfer in the middle of the school year.
- Therefore, the pupil may or may not have been counted by the resident district on the 3rd Friday Count.

Open Enrollment: Funding

Alternative Applications – Resident Membership Count

- If the resident district was unable to count the pupil, it may receive a revenue limit exemption in the amount of the aid transfer.
 - Taken in the following school year
 - Non-recurring exemption
- The exemption amount is calculated by DPI's open enrollment staff, provided to the School Finance team, and recorded on the district's revenue limit worksheet (line 10E).

Open Enrollment: Funding

Alternative Applications – Revenue Limit Exemption

- Resident district needs to go to the Alt Apps tab and then the Counted in Membership tab to indicate the student's 3rd Friday status.
- Counted in membership can mean one of two things:
 - The pupil was counted as a resident attending the district in the district's Head Count.
 - The pupil was counted as a Resident Addition (OE Transfer Out pupil).

Counted in Membership Tab

OPAL Open Enrollment for
A School District ▼



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- Alt Apps
- [All Alternative Apps](#)
- [Approve or Deny](#)
- [Enrollment](#)
- [Counted in Membership](#)
- [Data Entry](#)

| | | | | | | | |
|----------------------|----------|-----------------|------------|---------|-----------------------|------------|-------|
| Mailbox | Students | Alt Apps | Apps | Exports | Contacts | DPI | Excel |
| All Alternative Apps | | Approve or Deny | Enrollment | | Counted in Membership | Data Entry | |

Alternative Apps - Counted in Membership on 3rd Friday

Year: 2021-2022 ▼
 Grade: All Grades ▼
 Transfers In
 Transfers Out

Only alternative applications that have been 'enrolled' are shown below. Only the nonresident district can request an application be changed to an enrolled student.

Indicate below whether each student was counted in membership on the 3rd Friday in September.

You still need to click the Save button afterwards!

3 students retrieved

| Grade | Name | Counted in Membership | Not Counted in Membership | Nonresident District | Estimated Revenue Limit Amt | Save |
|-------------------|-----------|-----------------------|----------------------------------|----------------------|-----------------------------|------|
| | Student A | <input type="radio"/> | <input checked="" type="radio"/> | B School District | 3,083.00 | Save |
| | | <input type="radio"/> | <input type="radio"/> | | 0.00 | |
| | | <input type="radio"/> | <input type="radio"/> | | 0.00 | |
| All Pages: | | 3 students | | | 3,083.00 | Save |

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Aid Calculation Tab



OPAL Open Enrollment for



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Mailbox
[Mailbox](#)

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Contacts
[Open Enroll Contacts](#)

| Mailbox | Students | | | Alt Apps | Apps | Exports | Contacts | DPI |
|----------------------------------|---------------------------------|----------------------------------|-----------------------------------|----------------------------------|-------------------------------------|---------------------------------|----------|-----|
| Back to Students | Student Summary | Change Name, etc | Change Enrollment | Withdraw Student | Change Parents/Addr | Aid Calculation | | |

Aid Calculation, School Year 2021-2022

Student Name: **Student A** Resident School District: **A School District**
 Nonresident School District: **B School District**
 DOB / Gender:
 Age on 9/1/2021:
 Grade for 2021-2022:
Estimated Aid Amount: \$3,083
 Revenue Limit Exemption: \$3,083

Factors

| Alternative Application Enrollment Data | 3rd Friday in September Status | Withdrawal Data | SPED Status |
|--|---|-----------------|---|
| Enrollment Date: 02/22/2022 Maximum Number of Days: 68 days FTE: 1.0 | Not open enrolled In Resident Membership: No | Not withdrawn | SPED on 3rd Friday: No SPED during year: n/a |

Current Rates

Estimate or Final: Estimated

| Regular Education | 1.0 FTE | Special Education | 1.0 FTE |
|-------------------|--------------|---------------------|---------------|
| Yearly Amount: | \$8,161/year | Yearly SPED Amount: | \$13,013/year |
| Daily Rate: | \$45.34/day | Daily Rate: | \$72.29/day |

Calculation

Rate: When a student is enrolled via an alternative app, a daily rate is used.
 Days: When a student is enrolled via an alternative app, the number of days given at time of enrollment is used.
 FTE: When a student enrolls via an alternative application and was not counted on the September count date, the FTE given at time of enrollment is used.

The resident district did not count the student on the 3rd Friday in September and is eligible for a revenue limit exemption in the amount of the aid payment.

Aid is calculated as (daily rate) * (number of days as stated when enrolled as alternative app) * (FTE as stated when enrolled as alternative app), or

Open Enrollment and Special Education

Open Enrollment and Pupils with Disabilities

Open Enrollment and Special Education

Special Education Funding under OE Law

- **\$13,013 transfer of general school aids**
 - Processed by DPI in year-end reconciliation.
 - May not use IDEA funds for transfers out.
 - Other state aids withheld if general aids are insufficient.
- Resident district counts pupil for general aids & revenue limit membership.
- No revenue limit exemption for Transfer of Service (TOS).

Open Enrollment and Special Education

Special Education – Identification During the School Year

- If an open enrolled pupil is evaluated and identified with a disability after the school year begins:
 - Resident district charged a prorated amount based on the number of days the student received services.
 - In OPAL, the nonresident district enters the number of days the pupil received services and the number of days the pupil did not receive services (known as Partial SPED).

Open Enrollment: Actual Costs for Pupils with Disabilities

**Open Enrollment: Actual Costs for Pupils
with Disabilities**

Actual Costs for Pupils with Disabilities

- For open enrolled pupils with disabilities in their second or subsequent year, the aid payment will be either the per pupil payment amount or the actual costs to the nonresident district, up to \$30,000.
- Only if the nonresident district submits a financial statement to the department indicating the actual costs to the school district of providing free appropriate public education (FAPE) to the pupil in the previous school year.

Actual Costs for Pupils with Disabilities

- **A financial statement can be submitted into OPAL between the first weekday in August through the last weekday in September.**
- **Information required for the financial statement include:**
 - Local Special Education (SPED) Costs Aidable (011 or 019 via CESA/CCDEB/Other Dist)
 - Local Special Education (SPED) Costs – Non-Aidable (Other 019)
 - Grant-Funded Costs (IDEA FT/PS or Other Fund 27 Grant)
 - Grant Reimbursements
 - Medicaid School-Based Services (SBS) Claims
 - State Special Education and School-Age Parents (SPED/SAP) Categorical Aid Information (provided by DPI)


Actual Costs for Pupils with Disabilities

- **A nonresident district should only submit a financial statement if the cost of providing FAPE in the previous school year exceeded the basic open enrollment aid amount for pupils with disabilities.**
- **A nonresident district will receive the basic aid amount for pupils with disabilities if the pupil is marked as “special education” in OPAL.**

Actual Costs for Pupils with Disabilities

- **A nonresident district can withdraw a pupil's financial statement up until 4:00 pm on the second Monday in October.**
- **There are no provisions in state law that allow a resident district or the department to take any action if the resident district disagrees with a submitted financial statement.**

SPED Actual Cost Tab in OPAL


Logged in as Jennifer Demrow

OPAL Open Enrollment for Appleton Area (0147)

| Mailbox | Students | Alt Apps | Apps | Exports | Contacts | DPI | <i>Excel</i> |
|------------------------|--------------|--------------------|------------|-------------------|----------|------------------|--------------|
| Actively Open Enrolled | All Students | 3rd Friday in Sept | Special Ed | 2nd Friday in Jan | Returns | SPED Actual Cost | |

Students - SPED Actual Cost

Year: 2020-2021 Student Name: Student A
 Grade: All Grades Res Dist:
 Transfers In Transfers Out
Search Reset

Listed below are students who were open enrolled during the school year of **2019-20** and were marked as special education (SPED).

Notes:

- Costs entered should be those incurred during the previous school year of 2019-20.
- SPED/SAP categorical aid rate for the previous year of 2019-20 is **25.85%**, which is an estimate. The final rate will be determined in May 2021.
- The final Total Actual FAPE SPED Eligible Costs are capped at **\$30,000** per [Wis. Stat. 118.51\(17\)\(b\)3](#).
- FAPE = Free Appropriate Public Education.

**Aid transfer revenue is coded to Fund 27, Source 347. This will decrease a district's local costs when calculating compliance with IDEA's maintenance of effort (MOE) provision. An LEA will need to closely monitor state and local special education costs to ensure the aid transfer revenue received does not offset actual expenditures to a point where MOE is failed. Aid transfer revenue is not an exception to lowering costs under MOE. Non-compliance results in a general fund cash penalty. Questions regarding MOE can be directed to Rachel Zellmer at Rachel.Zellmer@dpi.wi.gov.*

1 student retrieved

Rows per page: 20 Refresh

Save

| Grade | Student | Local SPED Costs Aidable (011 or 019 via CESA/CCDEB /Other Dist.) | + Local SPED Costs Non-Aidable (Other 019) | + Grant-Funded Costs (IDEA FT/PS or Other Fund 27 Grant) | = Gross Actual Costs | Less Estimated SPED/SAP Categorical Aid (based on prev yr's rate) | Less Grant Reimbursements | Less Medicaid School-Based Services (SBS) Claims | = Total Actual Cost (max \$30,000) | | Resident District |
|----------------|-----------|---|--|--|----------------------|---|---------------------------|--|------------------------------------|---------------------|---------------------|
| KG | Student A | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | PDF | Neenah Joint (3892) |
| All 1 students | | | | | | | | | 0.00 | | |

Pages:

Save

SPED Actual Cost Tab in OPAL

1 student retrieved

Rows per page:

| | <u>Grade</u> | <u>Student</u> | <u>Local SPED Costs Aidable (011 or 019 via CESA/CCDEB /Other Dist.)</u> | <u>+ Local SPED Costs Non-Aidable (Other 019)</u> | <u>+ Grant-Funded Costs (IDEA FT/PS or Other Fund 27 Grant)</u> | <u>= Gross Actual Costs</u> | <u>Less Estimated SPED/SAP Categorical Aid (based on prev yr's rate)</u> | <u>Less Grant Reimbursements</u> | <u>Less Medicaid School-Based Services (SBS) Claims</u> | <u>= Total Actual Cost (max \$30,000)</u> | | <u>Resident District</u> |
|--------------------------|-------------------|-------------------|--|---|---|-----------------------------|--|-----------------------------------|---|---|------------------------------------|--------------------------|
| Withdraw | 08 | Student A | <input type="text" value="54,693.34"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | 54,693.34 | 14,138.00 | <input type="text" value="0.00"/> | <input type="text" value="532.48"/> | <input type="text" value="30,000.00"/> | <input type="button" value="PDF"/> | Freedom Area (1953) |
| | All Pages: | 1 students | | | | | | | | 30,000.00 | | |

Sample of Financial Statement



Wisconsin Department of Public Instruction

**OPEN ENROLLMENT
FINANCIAL STATEMENT FOR
SPECIAL EDUCATION ACTUAL COSTS**

PI-9401-OPAL (06-2019)

Collection of this data is a requirement of s.118.51(12)(a) and s.118.51(17)(b)3 Wis. Stats.

INSTRUCTIONS:

Nonresident district: Complete in OPAL.

Aid transfer revenue is coded to Fund 27, Source 347. This will decrease a district's local costs when calculating compliance with IDEA's maintenance of effort (MOE) provision. An LEA will need to closely monitor state and local special education costs to ensure the aid transfer revenue received does not offset actual expenditures to a point where MOE is failed. Aid transfer revenue is not an exception to lowering costs under MOE. Non-compliance results in a general fund cash penalty. Questions regarding MOE can be directed to Rachel Zellmer at Rachel.Zellmer@dpi.wi.gov.

I. AGENCY AND PUPIL INFORMATION

| | |
|--|--|
| Name of District Providing Services (Nonresident District) Appleton Area (0147) | Name of Resident District Freedom Area (1953) |
| Name of Pupil Student A | School Year 2020-21 |

II. SPECIAL EDUCATION FAPE ACTUAL COSTS

The actual costs for an open enrolled pupil with a disability may include only the costs the nonresident district incurs to provide FAPE to the pupil; non-FAPE costs are not included. Nonresident districts are eligible for up to \$30,000.00 in actual costs, not including any state or federal special education funding.

| | | |
|-------------|---|--------------------|
| | Local Special Education Costs - Aidable (011 or 019 via CESA/CCDEB/Other Dist.) | \$54,693.34 |
| ADD | Local Special Education Costs - Non-Aidable (Other 019) | \$0.00 |
| ADD | Grant-Funded Costs (IDEA FT/PS or Other Fund 27 Grant) | \$0.00 |
| | Gross Actual Costs | \$54,693.34 |
| LESS | Estimated State Special Education and School-Age Parents (SPED/SAP) Categorical Aid (Estimate based on previous year's 25.85% rate) | \$14,138.00 |
| LESS | Grant Reimbursements | \$0.00 |
| LESS | Medicaid School-Based Services (SBS) Claims | \$532.48 |
| | Estimated Total Deductions | \$14,670.00 |
| | Gross Actual Costs | \$54,693.34 |
| | Estimated Total Deductions | \$14,670.00 |
| | Estimated Net Actual Costs | \$40,022.86 |
| | Maximum Aid Amount | \$30,000.00 |
| | Lesser of Estimated Net Actual Costs or Maximum Aid Amount | \$30,000.00 |

Actively Open Enrolled Tab in OPAL



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OPAL Open Enrollment for

Appleton Area (0147)

| | | | | | | | |
|------------------------|--------------|--------------------|------------|-------------------|----------|------------------|-------------|
| Mailbox | Students | Alt Apps | Apps | Exports | Contacts | DPI | PDF Excel |
| Actively Open Enrolled | All Students | 3rd Friday in Sept | Special Ed | 2nd Friday in Jan | Returns | SPED Actual Cost | |

Students Actively Open-Enrolled

Year: 2020-2021

Student Name: Student A

SPED

Grade: All Grades

Res Dist:

Non-SPED

Transfers In

Transfers Out

Search Reset

Alternative Apps Only

Withdrawals Only

This is a list of all actively opened enrolled students.

For a student to be considered "actively open enrolled", they must have been marked as open-enrolled/attending on the [3rd Friday in September](#) tab by the nonresident district or have been enrolled as an alternative to the OE application period.

Listed below are students where the district selected above is listed as the **nonresident** district.

1 students retrieved

| A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [All] | | | | | | | | | |
|---|-----------|------------|------|--------------|-----|---------|-------------|---------------------|------------------|
| Grade | Name | FTE | SPED | Partial SPED | W/D | Alt App | Actual Cost | Resident District | Estimated Amount |
| 08 | Student A | 1.0 | Yes | | | | Yes | Freedom Area (1953) | 30,000.00 |
| All Pages: | | 1 students | 1.0 | | | | | | 30,000.00 |

Aid Calculation Tab in OPAL

| Mailbox | Students | | Alt Apps | Apps | Exports | Contacts | DPI |
|------------------|-----------------|------------------|-------------------|------------------|---------------------|-----------------|-----|
| Back to Students | Student Summary | Change Name, etc | Change Enrollment | Withdraw Student | Change Parents/Addr | Aid Calculation | |

Aid Calculation, School Year 2020-2021

Student Name: **Student A** Resident School District: Freedom Area (1953)
DOB / Gender: Nonresident School District: Appleton Area (0147)
Age on 9/1/2020: **Estimated Aid Amount: \$30,000**
Grade for 2020-2021: Revenue Limit Exemption: \$0

Factors

| Alternative Application Enrollment Data | 3rd Friday in September Status | Withdrawal Data | SPED Status |
|---|--------------------------------|-----------------|---|
| Not an alternative app | Counted: Yes FTE: 1.0 | Not withdrawn | SPED on 3rd Friday: Yes SPED during year: Always Actual Cost Used: Yes |

Current Rates

Estimate or Final: Estimated

| SPED Actual Costs | 1.0 FTE |
|---------------------|--------------|
| Yearly Actual Cost: | \$30,000 |
| Daily Rate: | \$166.67/day |

Calculation

Rate: When a student was counted on the 3rd Friday in September and is present and SPED all school year, and a SPED Actual Cost Financial Statement has been filed, the total SPED actual cost is used.

FTE: When a student was counted on the 3rd Friday in September, the FTE on that day is used.

Aid is calculated as (Yearly SPED actual cost) * (FTE on count date), or

$$\$30,000 * 1.0 \text{ FTE} = \$30,000$$

The aid amount shown of is based on the financial statement of SPED Actual Costs submitted by the nonresident district, Appleton Area (0147), at the end of the previous school year of 2019-2020. In order to receive this aid amount, the student must be counted on the 3rd Friday in September of the current school year of 2020-2021.

IDEA Maintenance of Effort

- **The SPED Actual Cost aid transfer revenue for a nonresident pupil is coded to Fund 27, Source 347.**
- **This will decrease a district's costs when calculating compliance with IDEA's maintenance of effort (MOE) provision.**

IDEA Maintenance of Effort

- **Aid transfer revenue, such as SPED Actual Cost revenue, is not an exception to lowering costs under MOE.**
- **Need to ensure that the revenue is offsetting expenditures that are increasing the district's local costs.**

IDEA Maintenance of Effort

- **Districts that choose to file a financial statement should ensure that the revenue is accounted for when reporting on the 1504 SE Budget Report.**
- **Districts should utilize the MOE Scenario Calculator located within the IDEA MOE Eligibility report to determine the SPED actual costs aid revenue impact on MOE results prior to the deadline for withdrawal.**

IDEA Maintenance of Effort

- The deadline to withdraw a financial statement is on the second Monday in October by 4:00pm.
- All questions regarding MOE can be directed to Rachel Zellmer at DPI – rachel.zellmer@dpi.wi.gov or at 608-266-1787.

Actual Costs for Pupils with Disabilities

- Procedural guidance is available on our open enrollment special education webpage (<https://dpi.wi.gov/open-enrollment/special-education>) and includes:
 - Questions and Answers - Open Enrollment Actual Costs for Pupils with Disabilities
 - Instructions for Entering a Pupil's Special Education Actual Cost Information in OPAL
 - Sample - Open Enrollment Financial Statement for Special Education Actual Costs

Open Enrollment: Important Considerations

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Special Education Transportation

- **Nonresident districts must provide transportation specified by IEP.**
- **Transportation is not part of special education space considerations.**
- **Nonresident districts may not deny open enrollment based on transportation needs or costs.**

Open Enrollment: Important Considerations

Tuition Waivers

- **Additional year tuition waivers are funded the same as open enrollment:**
 - **\$8,161 for pupils without disabilities**
 - **\$13,013 for pupils with disabilities**

Open Enrollment: Important Considerations

Open Enrollment and Tuition Agreements

- **Districts may not:**
 - **Deny open enrollment for one pupil due to lack of space, while accepting another for same grade and program with a district or parent-paid tuition agreement.**
 - **Reserve space for OE and tuition separately.**
 - **Direct parents into/out of OE based on tuition costs.**
- **Appeals of OE denial will be overturned if a nonresident district denied open enrollment but accepted pupils under tuition agreements (if you have space for tuition, you have space for OE).**

Resources

Resources

Open Enrollment Webpage

<https://dpi.wi.gov/open-enrollment>

OE Training Modules

<https://dpi.wi.gov/open-enrollment/resources/training>

Open Enrollment Bulletins

<https://dpi.wi.gov/open-enrollment/resources/bulletins>

Open Enrollment and Special Education

<https://dpi.wi.gov/open-enrollment/special-education>

Contacts

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