

# **WISEdata Finance and WiSFiP Implementation Timeline**

**School Financial Services Team**

**DPI Spring Workshop**

**March 17, 2022**



WISCONSIN DEPARTMENT OF  
**Public Instruction**  
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# WISEdata Finance

## **PI-1504 Budget and PI-1505 Actual\***

District Level Budget and Actual Reports Existed in **SAFR** (current SFS Team reporting portal)

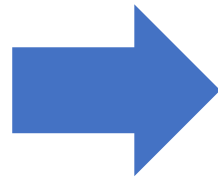
- **PI-1504 Budget in SAFR retired after 2020-21**
  - **Completed**
- **PI-1505 Actual planned retirement after 2020-21**
  - **Revised to continue for 2021-22**

\* Includes multiple reports: PI-1505, PI-1505 SE, PI-1505 AC, PI-1506 AC, PI-1506 FB, etc.

# Background

In 2016 DPI changed how student data was reported...

**ISES**

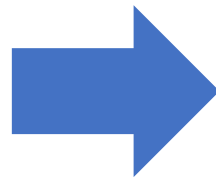


**Student**

# Background

...In 2022 we planned to do the same for financial data

**SAFR**



**Finance**

# What is WISEdata Finance?

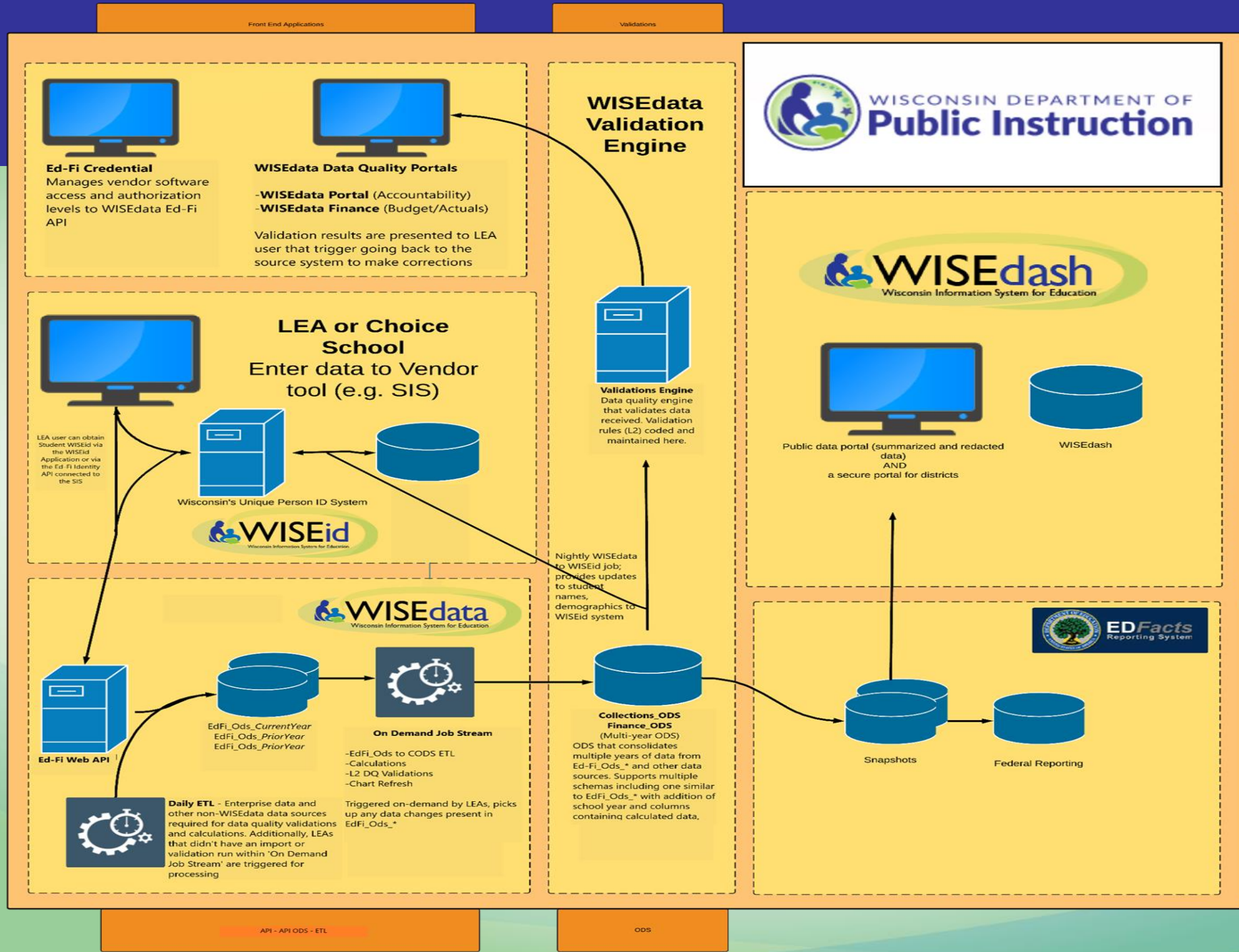
- **Extension of the Ed-Fi API for robust financial data collection**
- **New financial data reporting system for Wisconsin LEAs (districts and independent charter schools)**

# What is WISEdata Finance?

- **Financial data is sent directly to DPI via the WISEdata Ed-Fi API from the LEA's financial system, just as student data is sent directly from the LEA's Student Information System (SIS)**

# Why WISEdata Finance?

- **Eliminate the manual part of financial reporting to DPI**
- **Better consistency with DPI and local accounts**
- **Improved accuracy**
- **Easier reporting compliance (ESSA School Level Report, PI-1504 Budget, PI-1505 Actual, etc.)**



Front End Applications

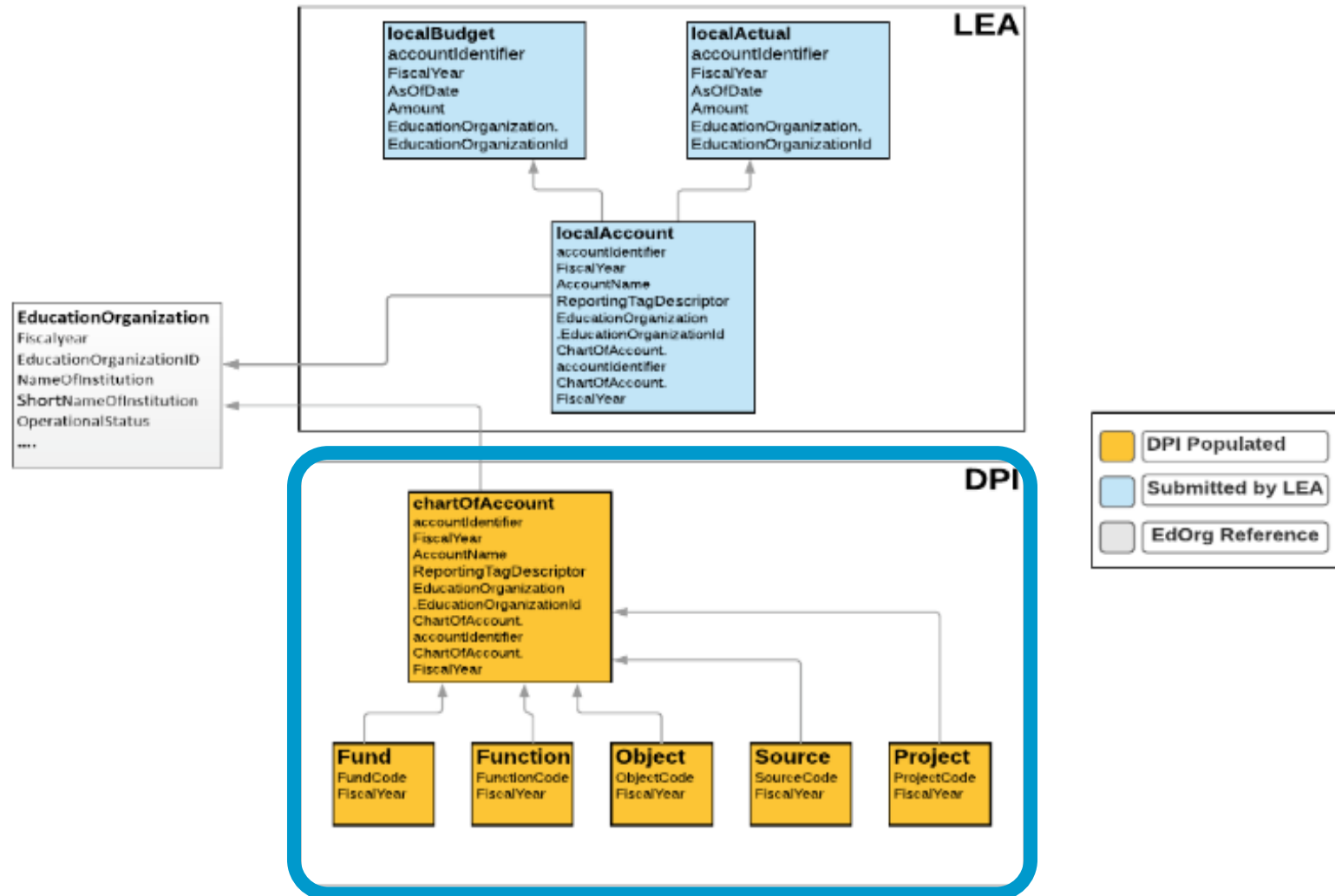
Data Warehouse



# WISEdata Finance Ed-Fi API

- Accounting system data available from DPI via the API

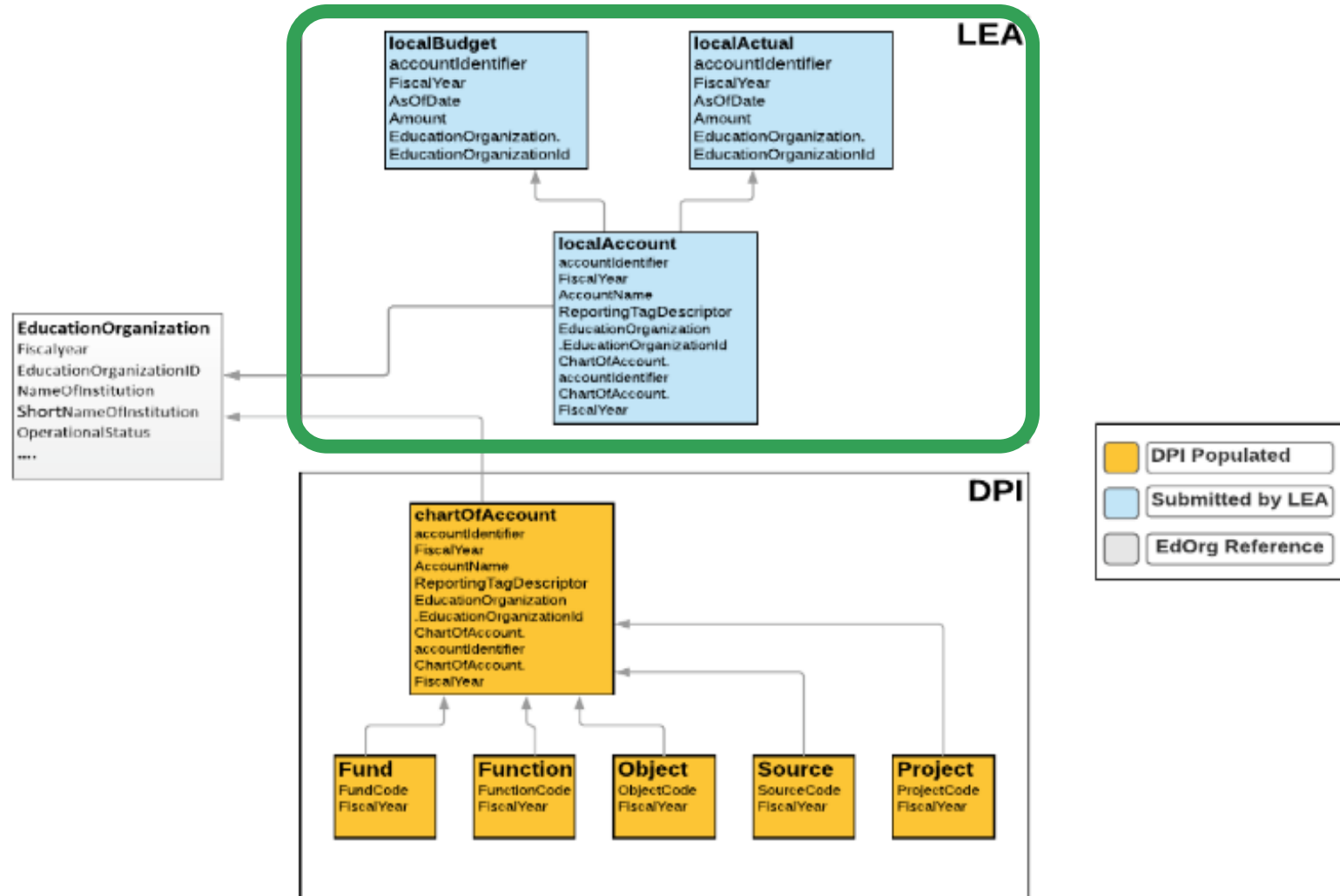
## FINANCE ENDPOINT OVERVIEW



# WISEdata Finance Ed-Fi API

- Financial budget & actual data submitted by account using the API

## FINANCE ENDPOINT OVERVIEW



# What Does This Mean For LEAs?

- **LEA's financial ledger (the local "books") must be consistent with WUFAR accounting and the DPI validations to avoid WISEdata Finance reporting quality issues**
- **Validations are triggered via WISEdata Finance**
- **WiSFiP will be developed to collect additional information to supplement WISEdata Finance data.**

# WISEdata Finance and WiSFiP Implementation Timeline

Original Timeline	Current Timeline (Revised Once)	Recommended Timeline
<b>Spring 2018 – Summer 2019: Development</b>	No change	No change
<b>Fall 2019 – Spring 2020: Vendor and District Piloting</b>	Spring – Fall 2020: Vendor and District Piloting	No change
<b>Summer – Fall 2020: Training for Districts and Vendors</b>	Fall 2020 – Spring 2021: Open Beta Testing (districts work with vendors, test the system and identify issues)	No change
	Winter 2020—Summer 2021: Training for Districts and Vendors	No change
<b>Fall 2020: 2020-21 Budget Collection</b>	Fall 2021: 2021-22 Budget Collections	In process, but delays
<b>Summer 2021: 2020-21 Annual Collection</b>	Summer 2022: 2021-22 Annual Collection	Continue WDF, but use SAFR as a parallel reporting system.

# WiSFiP Implementation

- Budget data views will be created for districts.
- Budget data view/report will be created for SFS Team to calculate the July 1 General School Aids estimate for 2022-23.
- PI-1505, PI-1505 SE, PI-1505 AC, PI-1506 AC, and PI-1506 FB need to be validated/confirmed in Wisedata Finance and created in WiSFiP.
- Public views via WISEdash will be developed.

# Points to Remember

- **Parallel reporting of 2021-22 actual revenues and expenditures in WISEdata Finance and SAFR.**
- **SAFR Addenda and Errors will need to be “cleared”, but you will be required to modify your financial ledger and submit revised data via WISEdata Finance.**
- **SFS Team will use 2021-22 data and experiences to develop new WiSFiP views during 2022-23.**

# Questions? Comments?



# Contact Us

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