

# When and How to use Transfer of Service

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WISCONSIN DEPARTMENT OF  
**Public Instruction**  
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# What is a Transfer of Service (TOS)

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

# What is a Transfer of Service (TOS)

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

# TOS Eligibility

Eligibility Requirement #1: Be within the current application timeline

2021-22 (Fiscal Year 22)															
Jun 21	Jul 21	Aug 21	Sept 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sept 22
TOS app open for FY22															
Students eligible for FY23 TOS app															
												TOS app open for FY23			

# TOS Eligibility

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

**Wisconsin school districts, including:**

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

# TOS Eligibility

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

## **Other Wisconsin governmental units :**

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

# TOS Eligibility

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

**Public schools outside Wisconsin, including :**

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

# TOS Eligibility

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

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



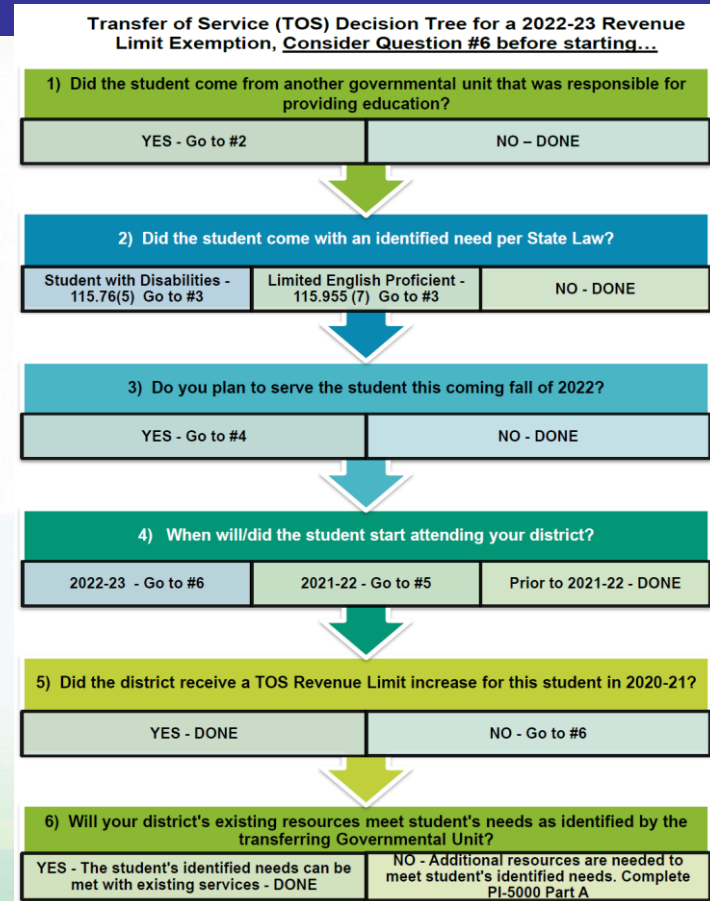
# TOS Eligibility

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

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

# Using the Decision Tree

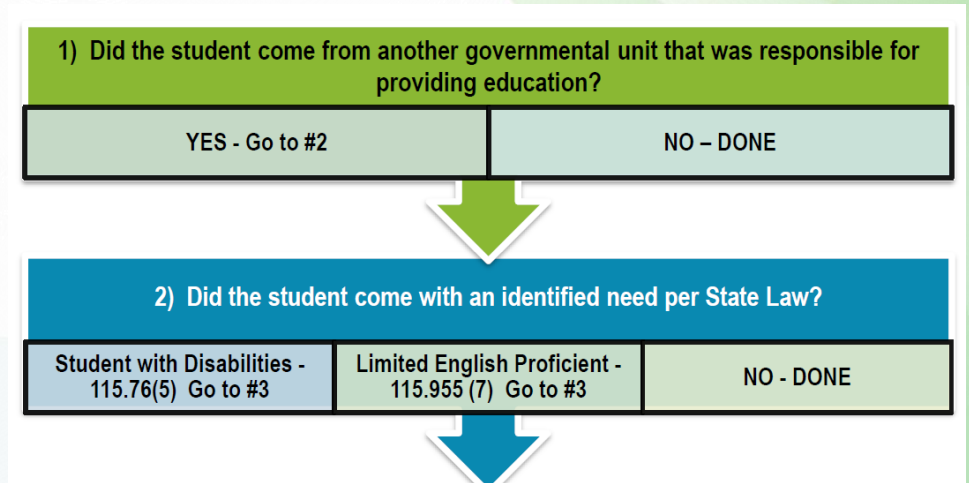
Please use our Transfer of Service Decision Tree to assist you with the TOS process located on our website at <https://dpi.wi.gov/sfs/limits/exemptions/transfer-service>



# Using the Decision Tree

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

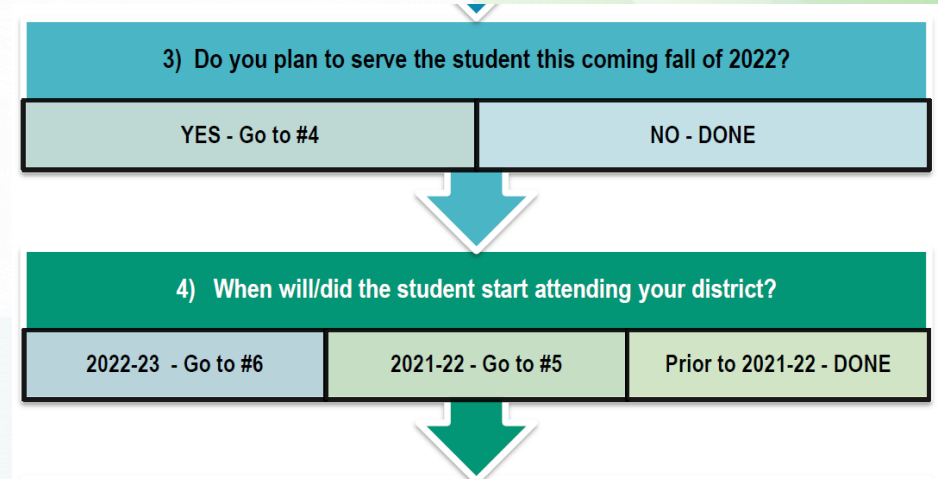
- an identified disability or
- participating in a limited English proficiency program.



# Using the Decision Tree

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

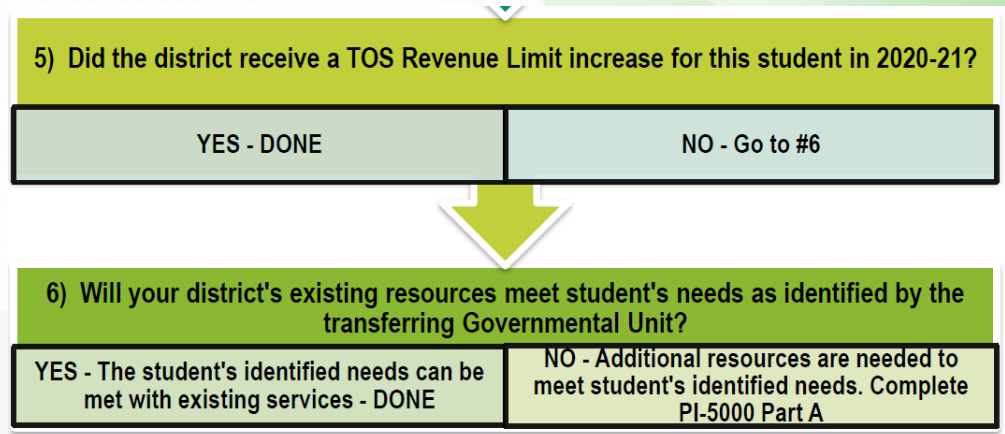
- Did the student arrival cause the district to incur a cost that was not budgeted for in the current year?
- Does the district believe this student will return in the fall?



# Using the Decision Tree

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

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



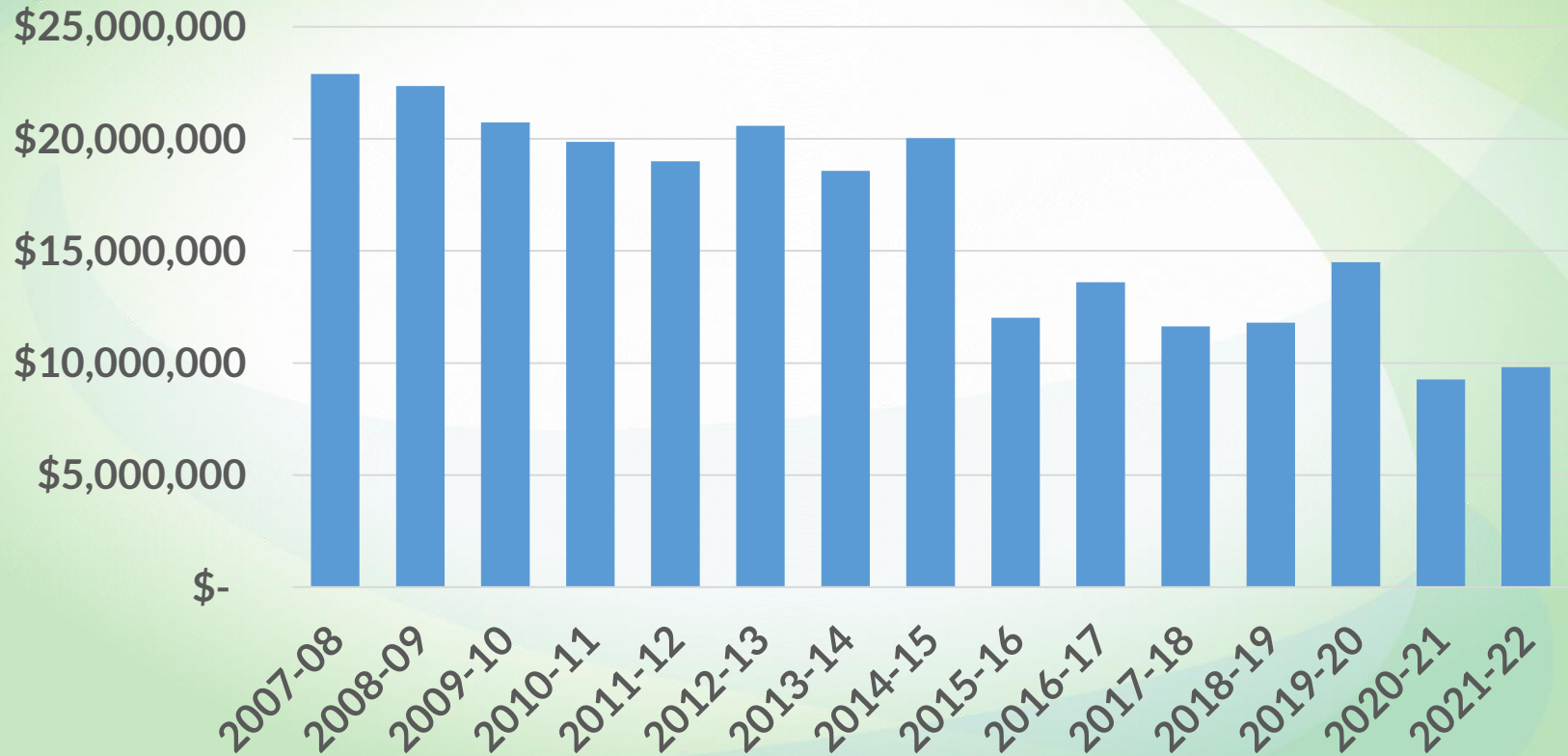
# MJSD Process

- Create a shared spreadsheet
- Keep separate tabs for ELL and Special Education Students
- FY23 Timeline: June 2021 – September 2022
- Track expenses for the school year and the summer
- Track new students coming *into the district from other governmental units with an IEP or LEP need*
- *Hold a meeting in late May/early June with key staff who work with IEP or LEP students to evaluate possible TOS requests*

# MJSD Process

- **In late June/early July enter each TOS request that can be justified.**
- **Monitor enrollment of students that leave the district over the year and summer.**
- **Reevaluate staffing ratios/double check staffing levels**
- **Utilize the decision tree to determine eligibility**

# Transfer of Service 15-Year History





# Making a TOS Request

## Getting Access to the PI-5000

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

# Making a TOS Request

## Completing Part A

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

# Making a TOS Request

## Completing Part B

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

# Making a TOS Request

## Completing Part C

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

# Making a TOS Request

## Narrative Request Process

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

# Making a TOS Request

## Narrative Request Process

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

# Making a TOS Request

## Narrative Request Examples

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

# TOS Frequently Asked Questions

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



# TOS Frequently Asked Questions

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

# TOS Frequently Asked Questions

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

# TOS Frequently Asked Questions

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

# TOS Frequently Asked Questions

**Question: We have a student who open enrolled to our district with significant special needs; can we do a transfer of service?**

# TOS Frequently Asked Questions

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

# TOS Frequently Asked Questions

**Question: Our district forgot to file the transfer of service last year when it was due; can we do one this year?**

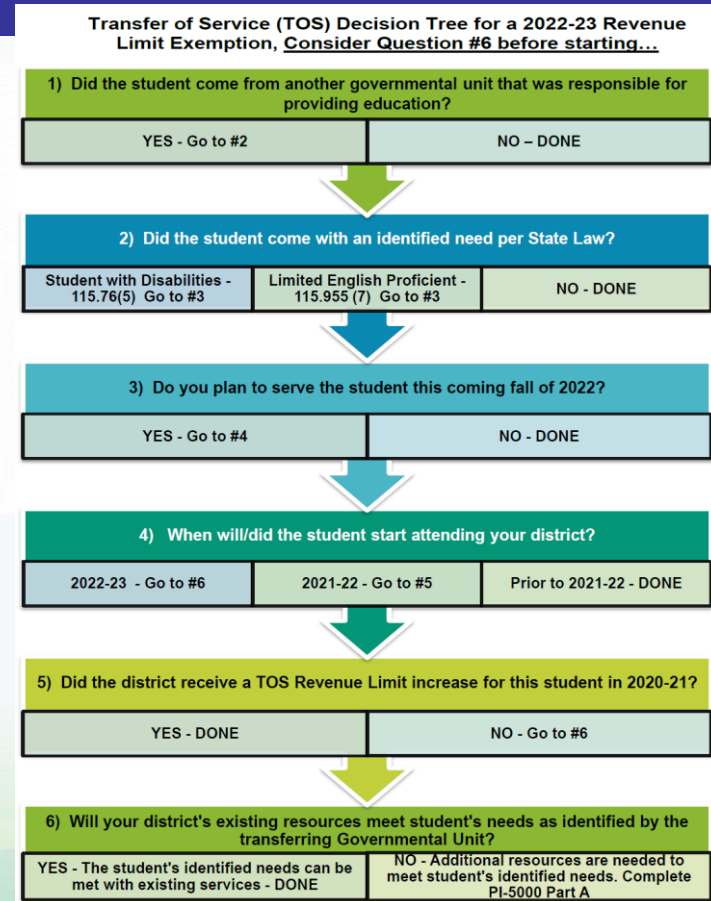
# TOS Frequently Asked Questions

**Answer: No, while we understand oversights like this can happen, both state law and our transfer of service guidance are clear that requests must be submitted timely with the eligible increase in cost. Transfer of service is based on a cost increase from one fiscal year to next. If you miss submitting your request the year the increase happened, then technically there is no increase from the missed year to the current year and the request no longer meets the requirement of a TOS.**

# Examples

A high needs 4<sup>th</sup> grade student from a public school in Ohio enrolls in late January of 2022. This student comes with the IEP calling for a full-time registered nurse (RN).

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





# Examples

A high needs 4<sup>th</sup> grade student from a public school in Ohio enrolls in late January of 2022. This student comes with the IEP calling for a full-time registered nurse (RN).

- Your district receives standard nursing services from the County at no cost.
- However in March of 2022 the County gives the District formal notice that as of July 1, 2022 they will no longer provide any nursing services.
- The estimated cost will be \$160,000 to hire two RN positions.

# Examples

Two TOS requests can be submitted.

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

# TOS Takeaway

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

# More Information

- Transfer of Service Website:

[Transfer of Service | Wisconsin Department of Public Instruction](#)

- SFS Consultant:

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