



Instructions for Transfer of Service Requests

The Transfer of Service Exemption §[121.91\(4\)\(a\)3](#) Wis. Stats. 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 equal to the increased cost due to that program or service. If the service transferred is a student that requires Special Education or ESL services, the exemption will be reduced by the amount of categorical aid the district will receive the following year as determined by the Department of Public Instruction (DPI).

Please see below for instructions on submitting a Transfer of Service Request.

By clicking the direction links below (Access, Part A, Part B, or Part C) the document will automatically navigate there.

- [How to Assign Transfer of Service **Access** to School District Staff Member](#)
- [How to complete On-Line TOS Wizard \(**Part A**\)](#)
- [How to complete On-Line TOS Wizard \(**Part B**\)](#)
- [How to complete On-Line TOS Wizard \(**Part C**\)](#)

INSTRUCTIONS – Assigning Transfer of Service Access to School District Staff Members

The Transfer of Service Portal provides you with a practical process to submit the [PI-5000 Transfer of Service \(TOS\) on-line application](#) related to your district.

The 2023-24 Year TOS on-line application security will continue to be processed through the [Application User Management](#) system. District administrators already have some familiarity with it, as it is used for both *Open Enrollment* (OPAL) and *Homeschool Reporting* (HOMER) applications.

Authorizing Additional Users

All school district administrators are authorized to access the *Transfer of Service-LEP* and *Transfer of Service-SPED* application by using the user ID and password they were issued through the Application User Management system. If any other district staff members are to have access to *Transfer of Service-LEP* and/or *Transfer of Service-SPED* applications, the district administrator must authorize them as users. *Transfer of Service-LEP* users are not automatically authorized to use *Transfer of Service-SPED*. Please inform administrators and other staff members of the names and contact information for district staff members that are authorized to use *Transfer of Service-LEP* and/or *Transfer of Service-SPED*.

To authorize additional users for *Transfer of Service-LEP* and *Transfer of Service-SPED*, the district administrator must:

1. Sign into the user administration page at: <https://sms.dpi.wi.gov/AUM>. Only the district administrator's ID and password can access this site.
2. If the person you are authorizing DOES NOT appear in your main list, click **Add New User**. If the person does appear in your main list, see step 5 below.
3. Enter the information for the new user. To provide access to *Transfer of Service-LEP*, check 'Transfer of Service – Limited English Proficiency'. To provide access to *Transfer of Service-SPED*, check 'Transfer of Service – Special Education'.
4. Click **Save**. **This screen is the ONLY page with both the new user's ID and password. Print this page and give it to the PI-5000 user, who will need to keep it in a secure place. This is the only time their password will appear in writing. If it is forgotten, it must be reset.**
5. If the individual you are authorizing for *Transfer of Service-SPED* or *Transfer of Service-LEP* already appears on your main list, click **Edit** to the right of that person's name. On the User Detail page, click on the appropriate Transfer of Service box to extend authority to the desired application click **Save**. The staff member will use the same user ID and password to access each of the applications approved by the district administrator.
6. To reset a password, the district administrator will need to sign into the user administration page and click **Edit** to the right of the person's name. Then click **Reset Password**. The **AUM** system will generate a new password for the specific end user. It is not possible for the district administrator to create a new password requested by the end user.

7. It is important to update the PI-1500 District Contacts Report and under the “Report Access” tab, scroll to the bottom of the list and under the “Receive Info” column check the box so this individual will receive the emails sent by the PI-5000 Transfer of Service system.

INSTRUCTIONS – Using the On-Line TOS Wizard (Part A)

The Transfer of Service Portal provides the process to submit the [PI-5000 Transfer of Service \(TOS\) on-line application](#) related to your district.

If you do not have access to the TOS Portal, please follow the directions for [Assigning Transfer of Service Access to School District Staff Member](#)

To access the TOS Portal, go to [School Financial Services](#) home page.

On the right-hand column, under Reporting Portals click **Transfer of Service** link.

- Click on the [PI-5000 On-line Application](#) near the top of the page.
- At this screen you will be asked to login using your ID and Password and click on the green **Login** button. *Please remember due to the identification of specific students, security is of high importance in this process.*
- This is the Status Summary screen.

Status Summary screen: A row of eight tabs is located just below the bar and the **Status** tab is white, while the others are green. In the left navigation bar you will find links to the same screens. This feature provides you with options when moving between screens. The system will have preset the **Fiscal Year** as it should reflect the school year in which the revenue limit calculation would be impacted.

If your district has not yet started the application process and no other district has yet made a request to you for verification of one of your former pupils, the information on this page will be very minimal.

- In the center of the screen, below the **Fiscal Year**, you will find a chart that gives you a quick status report of any applications that have been filed in the fiscal year selected.
- On the right side of the chart you will see the four (4) steps in the TOS process. Additional information is available to you by clicking on the links provided or scrolling down the screen.

To start the process, select the **Part A** tab and you will be taken to the **Part A Request:**

Master List screen. On this screen you should check the **Fiscal Year** for accuracy.

- If you were granted authority by the district administrator to enter both the LEP and the SPED applications, you will find to the right of the Fiscal Year three filter buttons. The default is **Both LEP and SPED** so that you can see all the current requests.
- By selecting either **SPED** or **LEP** button you see the applications already entered this school year in each respective area.
- Below the green bar with several descriptors, you will see a list of applications in process for the fiscal year.
 - If any applications are listed, you will see symbols indicating the status of that record. Near the bottom this webpage is a **Key to Symbols** and these symbols will help you determine the status of each listed application.
- To start an application, you will select the appropriate gray button located in the center of the screen.
 - **Add SPED Request**
 - **Add LEP Request**
 - If the student has service requirements in both SPED and LEP, you will need to enter information in each area from this screen.
- Regardless of the type of request, you will need to provide specific information regarding the individual student.
- After entering the student's personal data, the student's personal information will continue to populate at the top of the page on every screen. This feature is intended to minimize any incorrect data entries where multiple applications are to be submitted.
- In addition to providing the student's personal data, there are several questions you are required to answer over the next series of screens. The answers you choose determine the questions that will follow. All required information must be provided, or the application will not let you proceed, and an indicator will appear on the webpage that there is data missing.
- **Questions 1-3** are at the bottom of this screen and the district is required to answer either **Yes** or **No** to each question.

A few things to note before getting started:

- Use your mouse to advance to the different entry fields when entering the student's personal data. The tab key does not always work correctly in this application.
- The application will automatically default to standard capitalization of student's name. If standard capitalization is not applicable for the student you are entering, you should check the box with the following statement: ***use unique capitalization as shown above (otherwise standard capitalization will be applied)***. This check box is located under the Grade field.

- As you navigate throughout the application, clicking the **Next** button will **save** data you entered. If you enter information and then select the **Back** button your data will not be saved. You may go back and make changes to saved data at any point before the application due date.
- **Question 4: Where did the student transfer from?** There are two parts to this; identifying the type of organization they came from (i.e., Wisconsin school district) and then identifying the exact organization by name (i.e., Milwaukee Public Schools). Choose one per student.
 - A. From another Wisconsin public school district
 - Use the drop-down list to select the district.
 - NOTE: Enter the school district where the student was a resident in the previous school year. Check the student records your district received to determine the Wisconsin school district where the student lived. 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.
 - B. From a school operated by a governmental unit in another state
 - Use the drop-down list to select the state.
 - C. From a school operated by a governmental unit in another country
 - Use the drop-down list to select the country.
 - If you do not see the appropriate country, please contact a SFS Consultant.
 - D. From a county Birth-to-3 Program
 - Use the drop box to select the Wisconsin County.
 - E. From a Wisconsin-County Assigned
 - Use this option for a student who had been placed in a facility run by the State of Wisconsin.
 - Click **Next** button to continue to question 5.
- **Question 5: What date did this student enroll in your district?** You will have two options for entering the date.
 - Enter the number numerically (mm/dd/yyyy) or use the calendar button.
 - Please note that a date range is provided from June 1st of the previous year through September 20th of the current year. It is not logical to enter a date into the future.
 - Click **Next** button to continue to question 6.

- **Question 6: The transfer request must be for a child that came to your district with a previously identified disability, as defined in s.115.76(5)(a) and (b) Wis. Stats. Please check all that apply:**
 - The SPED application will have 11 check boxes, each a separate defined disability, are provided.
 - The LEP application will have a **Yes** or **No** question be answered.
 - Click **Next** button to continue to question 7.
- **Question 7: Did this transfer cause your district to incur new costs in the Fiscal Year Listed above?**
 - Select either **Yes** or **No**.
 - Click **Next** button to continue to next screen.
- **Question 8** is collecting financial information and supporting statements. The information provided here should support your answer to question 6.
 - Take a few minutes and review the dot points in this section.
 - Use the **Tab** key on your computer or your **mouse** to advance to the next entry point.
 - **Two separate dialog boxes** are provided to allow the district to provide additional information that will support the application.
 - After all of the values have been entered, use your mouse click **Calculate Totals** in the lower left-hand corner of the screen.
 - Please note that the application will automatically calculate **Part J. Amount of Categorical Aid**.
 - Click **Next** button to continue to next screen.
- **Please review the following summary and answer the certification question below.** Contains a series of statements regarding this TOS application. When the selection is made, please certify the information entered is true to the best of your knowledge.
 - Select either **Yes** or **No**.
- **You should receive confirmation: Part A of the transfer of service request for this student has been completed.**
 - The top half of the screen includes this statement and the contact information of who received this notice. **Note: an email is only sent the first time you certify this student's request.**
 - **Next Steps** give you two choices.
 - **Back** to the previous screen.

- **Go to Part A Master List** from this screen you could start a second application. *Remember a student who is **Both LEP and SPED** will require a separate second application.*

At this point, unless you have other students to enter or are prepared to start Part C of the Transfer of Service application, you can logout. You should receive an email when the Wisconsin school district completes Part B; however, it is also recommended that someone from your district check the **PI-5000** Transfer of Service Portal on a regular basis to monitor if the **Part B** has been completed by the respective Wisconsin school district.

INSTRUCTIONS – Using the On-Line TOS Wizard (Part B)

Your district received an email with notification that another Wisconsin school district had completed a Transfer of Service Part A and indicated the student transferred from your school district. The Transfer of Service Portal provides you with a practical process to respond to the [**PI-5000 Transfer of Service \(TOS\) on-line application**](#) related to your district.

If you do not have access to the TOS Portal, please follow the directions for [**Assigning Transfer of Service Access to School District Staff Member**](#)

To access the TOS Portal, go to [**School Financial Services**](#) home page.

On the right-hand column, under Reporting Portals click **Transfer of Service** link.

- Click on the [**PI-5000 On-line Application**](#) near the top of the page.
- At this screen you will be asked to login using your ID and Password and click on the green **Login** button. *Please remember due to the identification of specific students, security is of high importance in this process.*
- This is the Status Summary screen.

Status Summary screen: A row of eight tabs is located just below the bar and the **Status** tab is white, while the others are green. In the left navigation bar you will find links to the same screens. This feature provides you with options when moving between screens. The system will have preset the **Fiscal Year** as it should reflect the school year in which the revenue limit calculation would be impacted.



As shared earlier, if your district has received an email notification regarding a Transfer of Service application submitted by another Wisconsin school district this document is designed to guide you through **Part B** of the process.

- In the center of the screen, below the **Fiscal Year**, you will find a chart that gives you a quick status report of any applications that have been filed in the fiscal year selected.
- In the last line of the chart, you see ⚠ and the following statement: “**Who’s Waiting For Me to Finish a Part B**”
- On the right side of the chart, you will see the four (4) steps in the TOS process. Additional information is available to you by clicking on the links provided or scrolling down the screen.

To start the process, select the **Part B** tab and you will be taken to the **Part B Requests from Other Districts** screen. On this screen you should check the **Fiscal Year** for accuracy.

- The bottom half of the screen will provide you with a list of the current applications and each one with this symbol 🟢 under **Status** needs your attention. The ✓ symbol indicates that **Part B** has been completed.
- Please use the **Edit** to the right of the 🟢 symbol to proceed.
- You will be asked a series of questions over the next several screens. The answers you choose determine the questions that will follow. If the **Next** button is selected and not all of the required information has been provided, the application will not proceed.
- Contact [Kathy Fry](#) or [DPIFIN](#) if you have any questions as you work through this process.
- **Question 1: Is verifying if this student was ever enrolled in your school district.** Note later question 3 will ask for the date the student withdrew. There are four possible answers, please read each option carefully before making your selection.
 - A. The student was a resident of our school district and attended a school or program in our school district.
 - If you choose option A and click **Next** button, you will advance to the next screen and question 2.
 - B. The student was a resident of our school district but attended a different school district under an open enrollment option or a tuition agreement.
 - If you choose option B and click **Next** button, you will advance to the next screen and question 2.
 - C. The student may or may not have been a resident of our district but *was not enrolled in our school district AND our district was not responsible for their tuition payment to another district.*
 - If you choose option C and click **Next** button, your work on **Part B** is now complete and the next screen will confirm this status.
 - D. The student was a non-resident attending a school or program in our district under an open enrollment option or tuition agreement.
 - If you choose option D you are asked to identify the district **the student lived in (i.e. what school district did the student open enroll from).**
 - Click **Next** button; your work on **Part B** is now complete and the next screen will confirm this status.

- **Question 2: Is confirming the status of the student's residency.** There are three possible answers, please read each option carefully before making your selection.
 - A. The student is no longer a resident of our school district.
 - If you choose option A and click **Next** button, you will advance to Question 3 on the next screen will need to provide a date for when the student withdrew.
 - B. There is no B option to select.
 - C. The student is in the process of moving out of our district.
 - If you choose option C and click **Next** button, you will advance to Question 3 on the next screen, and you will need to provide an estimated date for when the student plans to withdraw.
 - D. The student was a resident AND continues to be our resident.
 - If you choose option D the student is still with your district and your district retains fiscal responsibility.
- **Question 3: What date did they withdraw from your district?** This screen recaps your answers from questions 1 and 2 and related information on this screen.
 - Enter the number numerically (mm/dd/yyyy) or use the calendar button and click **Next** button to advance to the next question.
 - The application requires a date to be entered.
 - It is possible this student withdrew over the summer before the current school year began and your answer needs to reflect that information.
 - For example, June 8, 2023 would be appropriate for a TOS request made for the 2023-2024 school year.
- **Question 4:**
 - **(SPED): Prior to __/__/__ (the withdrawal date you reported), did the student have an IEP developed (it might be implemented or was schedule to start in the future) or was in place due to the disabilities listed above?**
 - Your choice of answers: **Yes** or **No**, then click **Next** button.
 - Selecting **No** and **Next** will end Part B.
 - **(LEP) Prior to --/--/---- (the withdrawal date you reported), was the student identified with a Limited English Proficient (LEP) classification of 1 through 5 per Wis. Stat. sec 115.955(7)?**
 - Your choice of answers: **Yes** or **No**, then click **Next** button.
 - Selecting **No** and **Next** will end Part B.
- **Question 5: Did your district reduce its costs as a result of this transfer?**
 - Your choice of answers: **Yes** or **No**, then click **Next** button.
 - Selecting **Yes** will take you to question 6 for financial information.
 - Selecting **No** will take you to summary of your responses and a certification question.

- **Question 6** is collecting financial information and supporting statements. The information provided here should support your answer to question 5.
 - Use the **mouse** to advance to the next entry point.
 - A **dialog box** is provided to allow the district to provide additional information that will support **Other Savings – Specify**.
 - After all of the values have been entered click **Calculate Totals** in the lower left-hand corner of the screen.
- **Please review the following summary and answer the certification question below.** Contains a series of statements regarding this TOS application. When the selection is made, please certify the information entered is true to the best of your knowledge.
 - Select either **Yes** or **No**.
- Note: “A school board that transfers responsibility for providing a service under this subdivision shall provide the state superintendent with an estimate of the reduction in cost attributable to the transfer, even if that estimate is zero.” ([Wis. Stat. § 121.91\(4\)\(a\)3](#))
This reduction in costs will have no impact on the district's revenue limit calculations.
- **You should receive confirmation: Part B of the transfer of service request for this student has been completed. No further action is needed on your part for this student.**
 - By selecting the **Go to Part B Master List** button, you return to one of the earlier screens and now the  symbol under **Status** has been replaced by the  symbol indicates that **Part B** for this application has been completed.
 - At this point the Transfer of Service application Part B has been submitted. You may wish to print this screen for your records.

[INSTRUCTIONS – Using the On-Line TOS Wizard \(Part C\)](#)

Your district submitted **Part A** of one or more applications in the recent days and you are now waiting for the other Wisconsin school district to complete **Part B** for each application. Your district received an email with notification that another Wisconsin school district had completed *Transfer of Service Part B* in response to the TOS Part A your district entered in the Portal. It is also recommended that someone from your district check the **PI-5000** Transfer of Service Portal on a regular basis to monitor if the **Part B** has been completed by the respective Wisconsin school district.

To access the TOS Portal, go to [School Financial Services](#) home page.

On the right-hand column, under Reporting Portals click **Transfer of Service** link.

- Click on the **PI-5000 On-line Application** near the top of the page.
- At this screen you will be asked to login using your ID and Password and click on the green **Login** button. *Please remember due to the identification of specific students, security is of high importance in this process.*
- This is the Status Summary screen.

Status Summary screen: A row of eight tabs is located just below the bar and the **Status** tab is white, while the others are green. In the left navigation bar, you will find links to the same screens. This feature provides you with options when moving between screens. The system will have preset the **Fiscal Year** as it should reflect the school year in which the revenue limit calculation would be impacted.

Review the following:

- In the center of the screen, below the **Fiscal Year**, you will find a chart that gives you a quick status report of any applications that have been filed in the fiscal year selected.
- Verify the other districts have completed Part B.
- Verify if any other districts **denied** Part B. If so, contact [Kathy Fry](#) or [DPIFIN](#) if you have questions.
- If your Part B requests have been approved, it is time to complete Part C.

To start the process, select the **Part C Submit to DPI** tab and you will be taken to the **Part C: Submit Transfer of Service Request to DPI** screen. On this screen you should check the **Fiscal Year** for accuracy, it should be the year the revenue limit calculation will be impacted.

- Verify again that the other districts have completed Part B by checking the right two columns: Incomplete Part A and Incomplete Part B. These columns should be “0” if all parts are completed.
- Please select appropriate green tab in the center of the screen; Part C SPED or Part C LEP. If you have students entered in both SPED and LEP, you will need to complete Part C for each one.
- After your selection has been made, take a few minutes and review the dot points in this section.

The next step is completing the financial table.

- In the **Sum of Part, A** column is the total of all claims under this tab that have been completed to this point.
 - The values under **Sum of Part A** column do not indicate the final transfer amount being requested.

- If you agree with the values under Sum of Part A, you will need to enter the values in the **New Costs** column to match those values.
- The values entered by the district under the **New Costs** will be the actual transfer amount being requested by the school district.
- If you believe a different total should be submitted, you may enter it in the same manner. 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. *The SFS team reserves the right to request justification for the difference between the “Sum of Part A” and “New Cost” values entered by the school district.*
- The district should also complete the **New FTE** column for each line with a cost indicated.
- After completing these steps, click on the “Save and Submit” button under the narrative box.
 - The district should make a good faith effort to review Part C for accuracy in early October before the PI-5000 is closed.
 - If for some reason your district determines that a student request in Part A will be deleted, after that student’s costs have been entered in Part C, the district will need to update Part C accordingly.

After you have completed and submitted Part C you may wish to print this screen for your records. Remember if you have students entered in both SPED and LEP, you will need to complete Part C for each one.

Note: It is important that the district has made a determined effort to review the district’s historical TOS records regarding previously approved Transfer of Service requests. The total revenue limit increases granted for either SPED requests and/or LEP requests should not exceed what the district has received over a period of several years using the TOS process.