

Transferability in WISEgrants

Last Updated 11/25/2019

Introduction

Under the Elementary and Secondary Education Act (ESEA), Local Education Agencies (LEAs) may transfer funds they receive by formula under certain programs to other programs to better address state and local needs.

This guidance is specifically designed to aid LEAs in using WISEgrants to transfer these funds. This document does not provide a detailed explanation of the rules and regulations regarding transferability. Please visit the [transferability web page](#) for further information regarding the transferability policy.

Transfers in WISEgrants

Before logging into WISEgrants, an LEA needs to identify the source grant (the Title in which funds will be transferred from) and target grant (the Title in which the funds will be transferred to). A user who has “Edit Access” to the source grant in WISEgrants can then initiate the transfer. The LEA must wait 30 days after initiating the transfer before entering the amount to transfer in WISEgrants and having a District Authorizer officially authorize the transfer. Once the transfer is authorized, a user who has “Edit Access” rights to the target grant may submit a budget for transferred funds.

How to Initiate a Transfer of Funds

NOTE: WISEgrants users who have “Edit Access” to the source grant can complete the following steps.

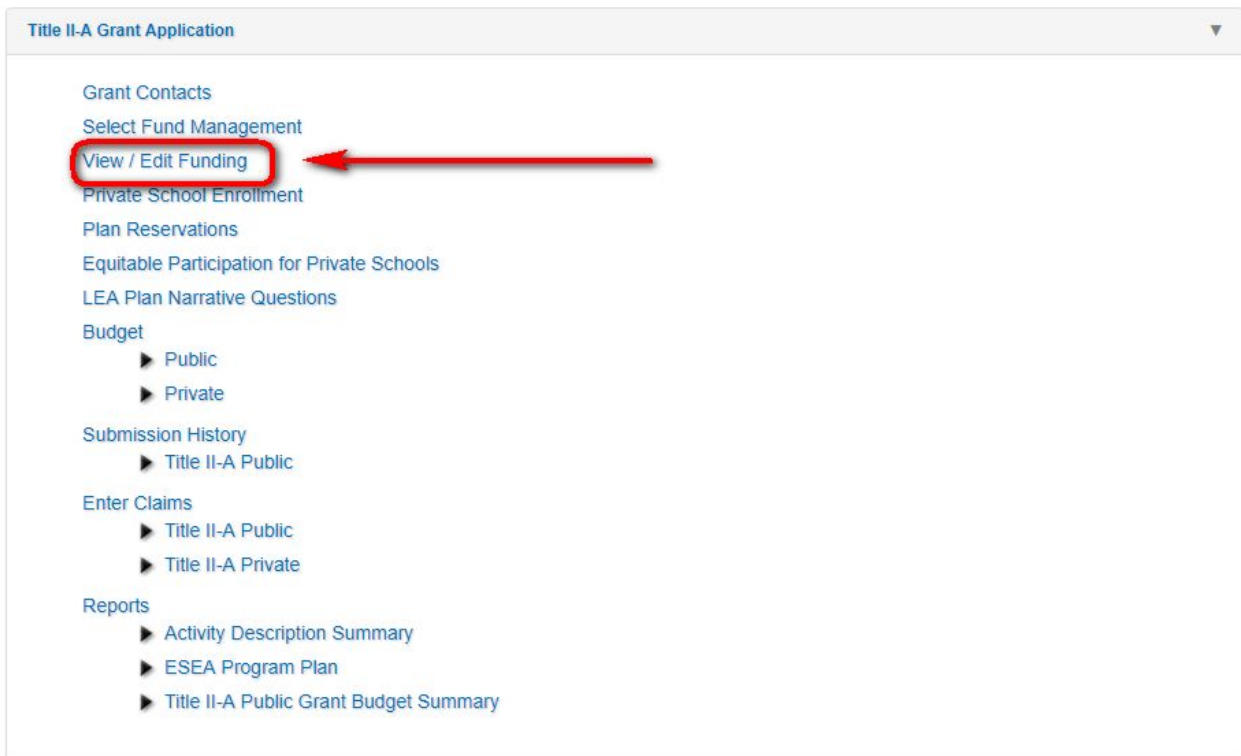
1. Select “**Programs**” from the blue drop-down menu. Select “**ESEA**” and then select the source grant (**Title II-A** or **Title IV-A**).



The screenshot shows the WISEgrants Federal Grants Portal interface. The top navigation bar includes a blue drop-down menu with the following options: Home, Admin Menu, Programs, Authorizations, Reports, and Message Board (10). The 'Programs' menu is open, showing a list of programs including ESEA, IDEA, Continuous Improvement Performance Reporting (CIPR), and Additional CIPR LEA Plan Questions DPI Tracking Report. The 'ESEA' program is selected, and a sub-menu is open showing options for ESSA LEA Plan Narrative, ESSA LEA Plan Narrative Review List, Private School Affirmation Forms, Education for Homeless Children and Youth, Title I-A, Title I-D Delinquent, Title II-A, Title III-A, Title IV-A, and End-of-Year Report. The 'Title II-A' and 'Title IV-A' options are highlighted with red boxes. The main content area displays a table of grants with columns for Grant, Allocation Amount, Public Carryover Amount, Private Carryover Amount, and Fund Management Selection. The table lists several grants, including Carl Perkins CTE, Education for Homeless Children and Youth, Fresh Fruit and Vegetable Program July - Public, and IDEA - Flow-through.

Grant	Allocation Amount	Public Carryover Amount	Private Carryover Amount	Fund Management Selection
Carl Perkins CTE	\$272,358.00	\$0.00	N/A	Manage Own
Education for Homeless Children and Youth	\$75,000.00	\$0.00	N/A	Manage Own
Fresh Fruit and Vegetable Program July - Public	\$24,223.00	\$0.00	N/A	N/A - Subaward Only
IDEA - Flow-through	\$6,089,156.00	\$0.00	N/A	Manage Own

2. After selecting the source grant, WISEgrants will direct the LEA to the grant's main landing page. Select the "**View/Edit Funding**" link from the panel.



3. The “View/Edit Funding” screen contains the “Transfers” panel. In the “Transferring Funds” section, click “Initiate Transfer”.

Current Funding

Title II-A - Final Allocation: \$380,147.00

Title II-A - Final Public Carryover: \$10,000.00

Title II-A - Final Private Carryover: \$10,000.00

Save

Current Preliminary Carryover

Preliminary carry over amounts displayed below are based on the submission of final and revised final FY 2018-2019 claims. These amounts will update if additional claims are submitted. Preliminary carry over amounts can be entered and saved by the user in the Current Funding panel above. Final carry over amounts will be loaded by DPI later in the fiscal year.

Sub Budget Name	2018-2019 Total Available Amount	2018-2019 Approved Claimed to Date	Claim Type	Current Preliminary Carryover Available
Title II-A Public	\$548,808.40	\$327,294.45	Final	\$221,513.95
Title II-A Private	\$86,267.63	\$48,970.63	Final	\$37,297.00

Title II-A Tydings Table

Transfers

Transferring Funds

Subrecipients must notify DPI of their intent to transfer 30 days before a transfer is made. Please click the "Initiate Transfer" button if you wish to transfer a portion of this grant in 30 days, you will be prompted to select a target grant for which funding will transfer.

Initiate Transfer

4. After clicking “Initiate Transfer”, WISEgrants will prompt the LEA to select the target grant (the grant the LEA wishes to transfer funds into). Select the correct target grant and amount type from the drop-down menus and click “Save” in the lower right corner.

NOTE: The “Public Carryover” and “Private Carryover” amount types will not be available until final carryover has been loaded.



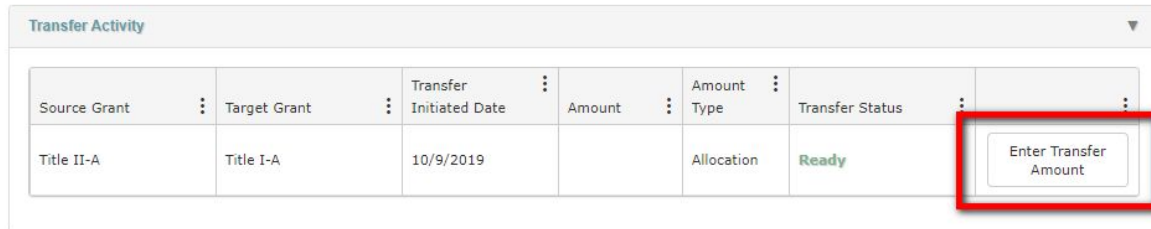
The “Transfer Activity” panel will display the LEAs intent to transfer funds.

Source Grant	Target Grant	Transfer Initiated Date	Amount	Amount Type	Transfer Status	
Title II-A	Title I-A	11/18/2019		Allocation	Within 30 Days	DPI was notified of your intent to transfer funds to Title I-A on Monday, November 18, 2019. Return to this screen after Wednesday, December 18, 2019 to complete the transfer of funds to Title I-A.

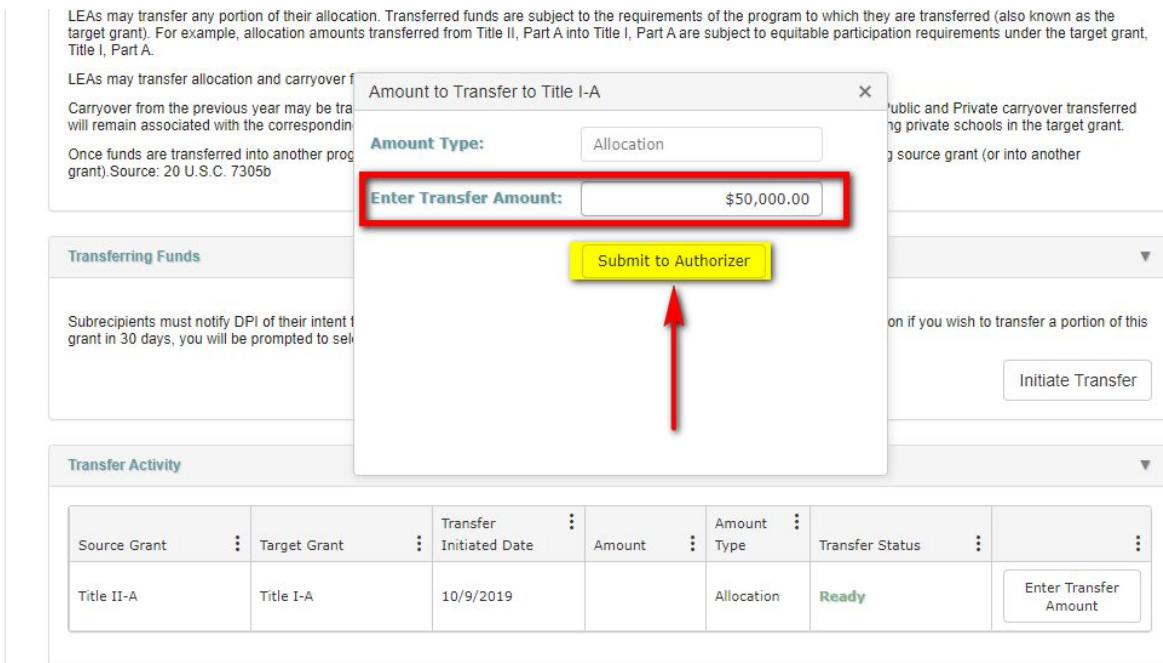
The “Transfer Activity” panel will confirm the source grant, target grant, and amount type chosen; and the message in the right column will indicate the date the LEA can determine the transfer amount and authorize the transfer.

NOTE: The “Amount” column is initially blank. LEAs enter the desired amount they wish to transfer at the end of the 30-day waiting period.

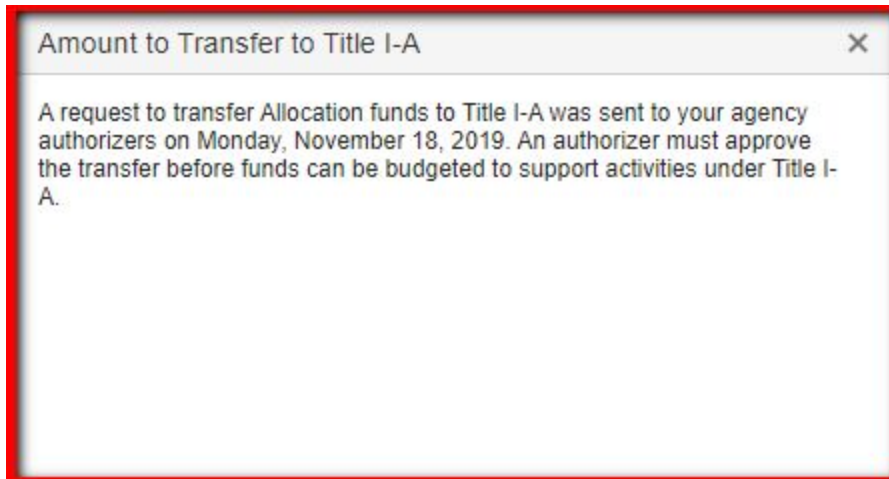
6. Return to the “View/Edit Funding” screen at the end of the 30-day waiting period. The “Transfer Activity” panel will contain an “Enter Transfer Amount” button, and the “Transfer Status” should read “Ready”. Click the “Enter Transfer Amount” button.



7. WISEgrants will prompt the user to enter the desired amount of funds to be transferred. Enter this amount and click “Submit to Authorizer”.



8. WISEgrants will display the following message for the district authorizer.



WISEgrants will display the updated status of the transfer request in the "Transfer Activity" panel.

Source Grant	Target Grant	Transfer Initiated Date	Amount	Amount Type	Transfer Status	
Title II-A	Title I-A	10/9/2019	\$50,000.00	Allocation	Pending Authorization	A request to transfer Allocation funds to Title I-A was sent to your agency authorizers on Monday, November 18, 2019. An authorizer must approve the transfer before funds can be budgeted to support activities under Title I-A.

How to Authorize the Transfer

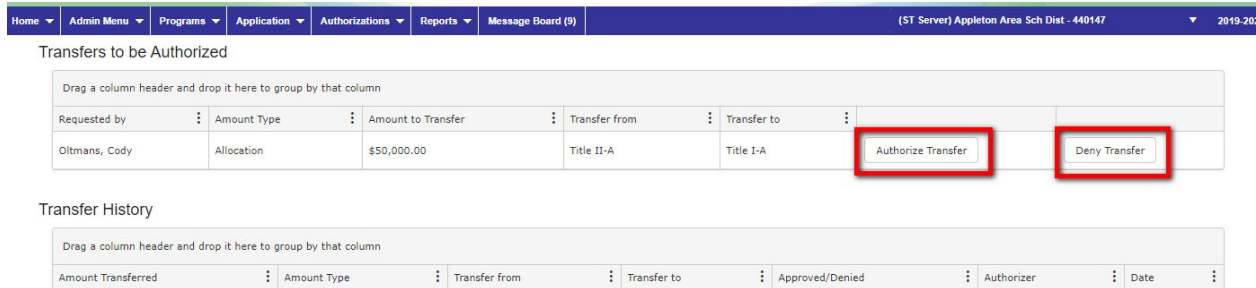
NOTE: Only WISEgrants users with “Authorization” permission can complete the following steps.

1. Select “Authorizations” from the blue drop-down menu. Select “Transfer Funds.”



2. The “Authorizations” screen will display the transfer in question. The District Authorizer should confirm that the source grant, target grant, amount type, and transfer amount are correct. If so, the District Authorizer can authorize the transfer by clicking the “Authorize Transfer” button.

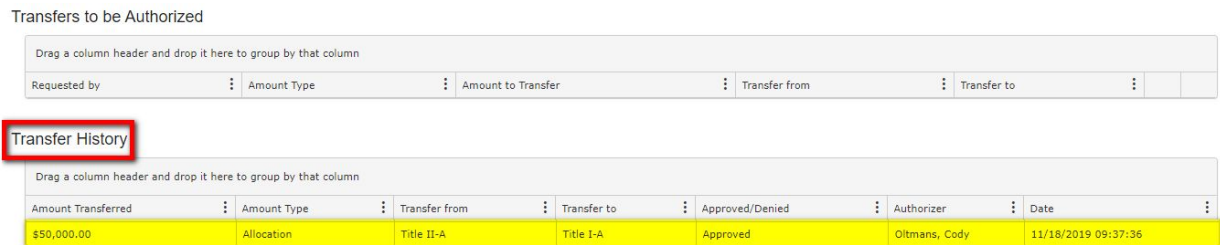
To cancel the transfer, click the “Deny Transfer” button.



WISEgrants will prompt the user to confirm the authorization. Click “OK.”



3. The “Transfer History” panel (shown below) confirms the completed transfer. The LEA may now use the transferred funds accordingly.



Troubleshooting

The View/Edit Funding Screen Does not Appear

The “View/Edit Funding” will not appear in the “Title II-A Grant Application” or “Title IV-A Grant Application” panel (as seen below) until the LEA has selected the fund management for each grant in question. To select the method of fund management, click the “**Select Fund Management**” link in the grant application panel.

The screenshot displays two panels from a web application. The top panel, titled "Announcements", contains a sub-section for "ESEA" with two bullet points: "Title III-A: The 2018-19 application for Title III-A, is now available in WISEgrants. The application deadline for LEAs is October 31, 2018. Additional information, along with a frequently asked questions document is available [here](#)." and "Important information regarding ESEA formula grants was shared in a recent email to district administrators, including that [the due date for most formula grant applications and the ESEA End-of-Year Report is September 30, 2018.](#)". The bottom panel, titled "Title IV-A Grant Application", contains two links: "Grant Contacts" and "Select Fund Management".

Announcements ▼

ESEA

- Title III-A: The 2018-19 application for Title III-A, is now available in WISEgrants. The application deadline for LEAs is October 31, 2018. Additional information, along with a frequently asked questions document is available [here](#).
- Important information regarding ESEA formula grants was shared in a recent email to district administrators, including that [the due date for most formula grant applications and the ESEA End-of-Year Report is September 30, 2018.](#)

Title IV-A Grant Application ▼

Grant Contacts
Select Fund Management

WISEgrants is Preventing the Transfer

WISEgrants will produce an error message if an LEA attempts to transfer funds into a target grant for which they have not yet selected their fund management.

The screenshot shows the WISEgrants interface with a navigation bar at the top containing 'Change Act Here', 'Application', 'Authorizations', 'Reports', 'Message Board (7)', '(ST Server) 4620 - Racine Unified Sch Dist', and '2018-2019'. A red error message box is displayed, stating: 'Error: Agencies cannot transfer funds into a grant where no fund management selection has been made. To initiate a transfer make a fund management selection for Title IV-A.' Below the error message, the 'Title II-A - Final Allocation' section shows a value of '\$1,071,187.00'. To the right, there are two rows for 'Title II-A - Preliminary Public Carryover' and 'Title II-A - Preliminary Private Carryover', both with '\$0.00' values. A 'Save' button is located at the bottom right. Two red arrows point from the error message to the carryover input fields.

An LEA that chooses the “**Select a Consortium Leader**” option on the Fund Management screen will not be able to transfer funds into or out of the corresponding grant. An LEA attempting to transfer funds into a target grant where they have joined a consortium will receive the following error message.



The screenshot shows the WISEgrants interface with a navigation bar at the top containing 'Reports', 'Message Board (7)', '(ST Server) 4620 - Racine Unified Sch Dist', and '2018-2019'. A red error message box is displayed, stating: 'Error: Agencies cannot transfer funds into a grant where they have joined a consortium.' Below the error message, the 'View / Edit Funding' section shows a value of '\$1,071,187.00'. To the right, there are two rows for 'Title II-A - Preliminary Public Carryover' and 'Title II-A - Preliminary Private Carryover', both with '\$0.00' values. A 'Save' button is located at the bottom right. A red arrow points from the 'View / Edit Funding' text to the error message.

An LEA may not transfer funds back and forth, multiple times, between the two source grants (Title II-A and Title IV-A). If an LEA transfers funds from Title II-A into Title IV-A, it cannot transfer funds back from Title IV-A into Title II-A. Likewise, if an LEA transfers funds from Title IV-A into Title II-A, it cannot transfer funds back from Title II-A into Title IV-A. WISEgrants will generate the following error message if an LEA attempts to initiate a cyclical transfer.

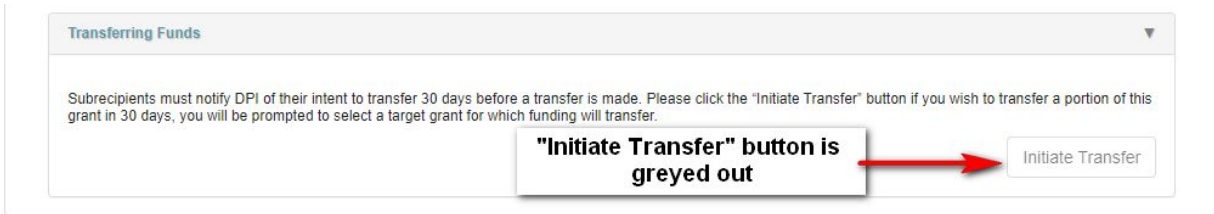
Authorizations ▾ Reports ▾ Message Board (7) (ST Server) 4620 - Racine Unified Sch Dist 2018-2019

Error: ✕

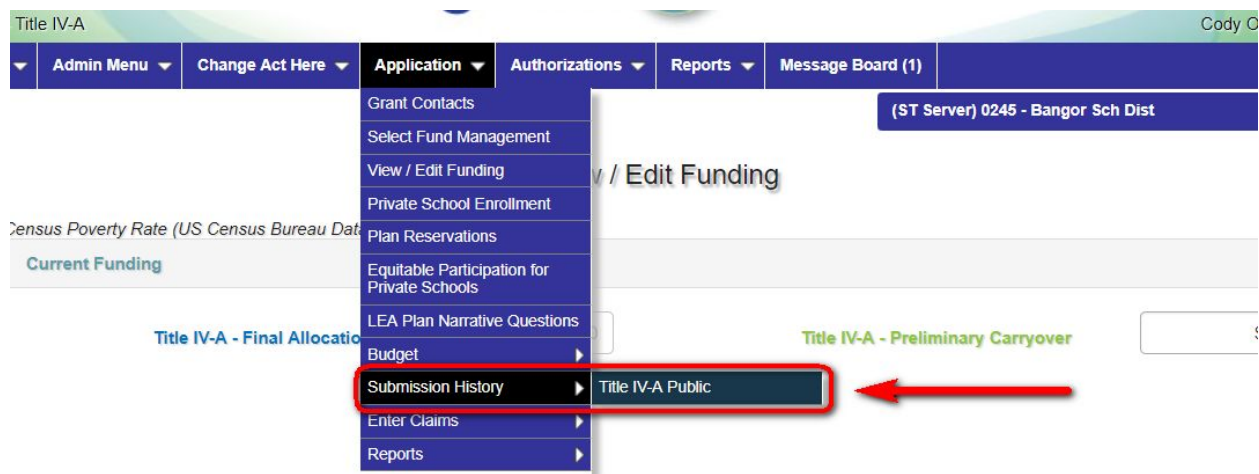
- There is already a transfer occurring between these grants. You cannot transfer back to where the money originated.

\$443,424.00	Title IV-A - Preliminary Carryover	\$0.00	
			
		<input type="button" value="Save"/>	

An LEA may not initiate a transfer from a source grant when the source grant budget is in a submitted state. If this is the case, the “Notify DPI” button on the “Transferring Funds” panel will be grayed out. The LEA may initiate a transfer once the budget is either approved or returned.



LEAs can check their submission status by selecting “Submission History” from the “Application” drop-down menu.



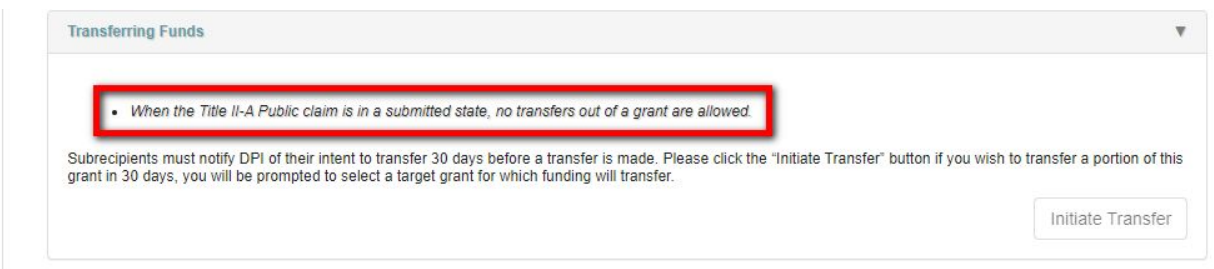
Title IV-A (ESSA) Submission History

Export to Excel Export to PDF

Drag a column header and drop it here to group by that column

Revision Number	Submitted Date	Submitted By	Submitter's E-mail	Submitter's Phone	Application Status	Last Updated
View Revision 1	9/17/2018				Submitted	9/17/2018

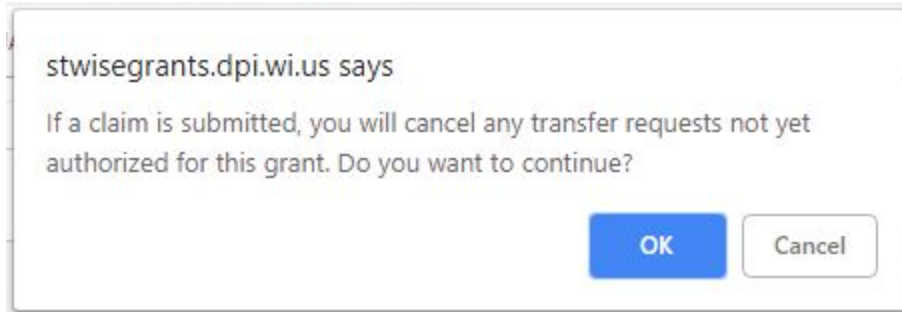
WISEgrants will not allow an LEA to initiate a transfer into or out of a grant that currently has a claim in a submitted state. In this case, the “Notify DPI” button will be grayed out and WISEgrants will display the following message on the “Transferring Funds” panel:



The LEA must wait for the claim to be approved before it can initiate the transfer.

The Transfer was Canceled or Denied

Submitting a claim for the source grant during the transfer notification period will result in the transfer being canceled. An LEA that attempts to submit a claim during the transfer notification period will receive the following message:



If the claim is submitted, the “Transfer History” panel in the “View/Edit Funding” screen will display the cancellation. The transfer status will read “Denied.”

Transfer Activity				
Source Grant	Target Grant	Amount	Transfer Status	
Title II-A	Title IV-A	\$200.00	Accepted	The request to transfer funds from Title II-A to Title IV-A was approved by Cody Oltmans on Monday, October 29, 2018.
Title IV-A	Title III-A	\$0.00	Denied	The request to transfer funds from Title IV-A to Title III-A was denied by Cody Oltmans on Monday, October 29, 2018.