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 start the process, you will need to login to the TOS Portal. From the **School Financial Services** home page **(http://sfs.dpi.wi.gov/**) the primary access point is as follows:

1. On the right-hand column, under "Reporting Portals" click on the "**Transfer of Service**" link.
   a. Click on the **PI-5000 On-line Application** near the top of the page.
   b. At this screen you will be asked to login using your "ID" and "Password" and click on the green "Login" button.
      i. *Please remember due to the identification of specific students, security is of high importance in this process.*
   c. This is the "Status Summary" screen

The left side of the screen, below the "**Fiscal Year**", you will find a chart that give you a quick status report of any applications that have been filed in the fiscal year selected.

- The chart is divided into three sections and at this point in the process you are interested in the following statements and the values in the columns to the right of the statement:
  - " **Part A done, but waiting for Part B to be finished:**"
    - This data tells you how many of your applications are waiting for another Wisconsin school district to complete **Part B**.
  - "**Parts A and B are done, but denied due to Part B:**"
    - This data tells you if any of your applications have been **denied**.
      - You may contact a ***Bruce Anderson** or **DPIFIN*** if you have any questions.
  - " **Requests ready for submission:**"
    - This data tells you how many of your applications you can submit by completing **Part C**.
- On the right side of the screen you will see the four (4) steps in the TOS process. "**Explanations**" or additional information is available to you by clicking on the links provided or scrolling down the screen.

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.

- Below the Fiscal Year is a chart that summarizes the requests submitted by your district. If values are found in the two columns to the right, those students will not be included in Part C.

- Please select appropriate green tab in the center of the screen.
  - **Part C - SPED**
    - **An additional chart will indicate the disabilities and governmental unit the students had previously attended.**
  - **Part C – LEP**
- After your selection has been made, scroll down the screen and complete the financial table.
  - Take a few minutes and review the seven bulleted statements
- 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.
    - For **Part C - SPED**, it will serve the district well to provide a narrative in the box at the bottom of the screen below this statement. "**Explain any new costs identified as ineligible for categorical aid. All new costs are assumed to be eligible unless an explanation is provided:**"
    - **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.**
- As additional Transfer of Service requests are submitted in **Part A** and approved the values in the "**Sum of Part A**" column will reflect **new** total of those values.
  - The district should make a good faith effort to review Part C for accuracy in early October before the PI-5000 is closed.
- If the District has submitted under line **A** or line **B**, then the District must enter a value in 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.
  - **If for some reason your district determines that a student request in Part A will be "Delete(d)", after that student's costs have been entered in Part C, the district will need to update Part C accordingly.**

At this point the SPED Transfer of Service application Part C has been submitted. You may wish to print this screen for your records.

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 a SPED requests and/or LEP requests should not exceed what the district has received over a period of several years using the TOS process.