



Transfer of Service General Information - Basic Guidelines  
(June 2024)

The Transfer of Service Exemption (Wis. Stat. §121.91(4)(a)) provides that a school district which assumes responsibility for a program or service from another governmental unit may request an exemption to the district revenue limit. This 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. If the service transferred is for a student with Disabilities or a student in need of Limited English Proficiency services, the exemption will be reduced by the estimated amount of categorical aid the district could receive the following year, as determined by DPI.

Eligibility Requirements

A district may request a Transfer of Service exemption for certain students coming into the district, or when another unit of government transfers a responsibility to the district. When considering an individual student TOS request, the district should work through the *Transfer of Service (TOS) Decision Tree* for the 2024-25 school year early in the process.

For Students

Requests for individual students are submitted through the [PI-5000 Transfer of Service application system portal](#) - Part A. The district must increase the services that it provides by adding responsibility for providing a service that is transferred to it from another governmental unit for a student with a disability or a student with limited English proficiency.

To submit a request, the student must meet the following requirements:

- (1) The student transferred to the district from another governmental unit that had responsibility for their education. These are:
  - a. Wisconsin school districts, including:
    - i. 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).
    - ii. A district that places a student with one of the DPI schools (WCVBI or WESP-DHH).
    - iii. District charter school.
      1. (Part A, Question #4. Where did the student transfer from? Authorizing WI school district.)
  - b. Independent (2r or 2x) charter schools.

- c. Wisconsin counties with birth-to-three programs for children with disabilities.
  - d. Facilities run by the State of Wisconsin which are considered LEAs: Lincoln Hills School, and the Winnebago and Mendota Mental Health Institutes.
    - i. (Part A, Question #4. Where did the student transfer from? “Wisconsin-County assigned”)
  - e. Public schools outside Wisconsin, including:
    - i. Schools operated by another state or sub-unit of another state;
    - ii. Schools operated by the federal government; and
    - iii. Schools operated by a foreign country or sub-unit of a foreign country.
- (2) The student is a student with a disability (Wis. Stat. §115.76 (5)) or limited English proficiency (Wis. Stat. §115.955 (7)) who 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.)
- (3) The student is enrolled for the coming year and the district plans to serve them in the fall. (Example: An eligible student is enrolled for the fall of the 2024-25 school year. The district would request a Transfer of Service exemption to its FY 2025 revenue limit.)
- (4) The student will first attend school in the district in the coming year, or they began attending school in the current year. (Example: To be eligible for a Transfer of Service exemption to a district’s FY 2025 revenue limit, a student could have begun attending school no earlier than the fall of the 2023-24 school year, after the PI-5000 was closed.)
- (5) The district has not already received a Transfer of Service exemption for the student.
- (6) The district has evaluated its available resources and determined that the student’s needs, as identified at the time they transferred to the district, cannot be met by its existing programming and services. (A district is not eligible to receive a Transfer of Service exemption for services required by an evaluation or re-evaluation of a student after they transfer into the district.)

If the student came from another Wisconsin school district, that district will be asked to confirm when the student left and what needs they had at the time through the PI-1500 Part B application.