

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

The Transfer of Service Portal has been renovated to provide you with a practical process to submit the *PI-5000 Transfer of Service (TOS) on-line application* related to your district.

The School Financial Services team is upgrading the department's on-line security system. The 2016 Year TOS on-line application security will be processed through the *Application User Management* system. The 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. 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://apps4.dpi.wi.gov/CMM/> (new). (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 on 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 and or then click **SAVE**. The staff member will use the same user ID and password to access to 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 on **Edit** to the right of the person's name. Then click **Reset Password**. The

CMM 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.

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 left-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

Status Summary screen: A row of eight tabs are located just below the bar and the “**Status**” tab is white, while the others are green. In the left-hand 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.

- The center 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.
- On the right side of the chart 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 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 are 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 enter this school year in that 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.

NOTE: 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 Portal will not proceed and often an indicator will appear on the webpage.

- 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.
- Use your **mouse** to advance to the next entry point.
- Regardless of the type of request, you will need to provide specific information regarding the individual student.
 - Below the title “Grade” is a button with the following descriptor: *use unique capitalization as shown above (otherwise standard capitalization will be applied)*. Please select this button if the student’s name will be modified using standard capitalization.
 - At the bottom of this screen are questions **1, 2** and **3** and the district must answer, either “**Yes**” or “**No**” to each question.
 - The Portal will not save any of the information, if you click on the “**Back**” button prior to providing all of the information and clicking the “**Next**” button.
- For the rest of **Part A**, this information will be found above the specific question be asked. This feature is intended to minimize any incorrect data entries where multiple applications are to be submitted.
- Question **4** “**Where did the student transfer from?**” is on the next screen and you will need to provide a two part answer.
 - **A. From another Wisconsin public school district**
 - Use the drop-down list to select the district.
 - **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.
- “**What date did this student enroll in your district?**” Is question **5** and it is on the next screen. You will have two options for entering the date.
 - Enter the number numerically (mm/dd/yy) or use the calendar button.
 - Please note that a date range is provided from June 1st of the previous year through September 9th of the current year. It is not logical to enter a date into the future.

- Question 6 will be on the next screen. **“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 eleven (11) check boxes, each a separate defined disability, are provided.
 - The LEP application will have a “Yes” or “No” question be answered.
- Question 7 is on the next screen. **Did this transfer cause your district to incur new costs?**
 - Select either “Yes” or “No”.
- The next screen, 8 **“Instructions:”** will be the location where financial information and supporting statements are entered by the district to support the answer to question 6 on the previous screen.
 - Take a few minutes and review the seven bulleted statements.
 - 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 the **“Calculate Totals”** in the lower left-hand corner of the screen.
 - Please note that the Portal will automatically calculate **“J. Amount of Categorical Aid”**.
- The next screen, 9 **“Please review the following summary, and answer the certification question below.”** Contains a series of statements regarding this TOS application.
 - Select either “Yes” or “No”.
- **“Part A of the transfer of service request for this student has been completed.”** is the next screen you will see.
 - The top half of the screen includes this statement and the contact information of who received this notice. **“Note that an email is only sent the first time you certify this student's request.”**
 - **“Next Steps”** give you two choices.
 - **“Back”** to the pervious 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.