WISEgrants 101

Jessica Bartelt

WISEgrants Technical Support

July 2025

WISCONSIN DEPARTMENT OF
Public Instruction
Jill K. Underly, PhD, State Superintendent

Agenda

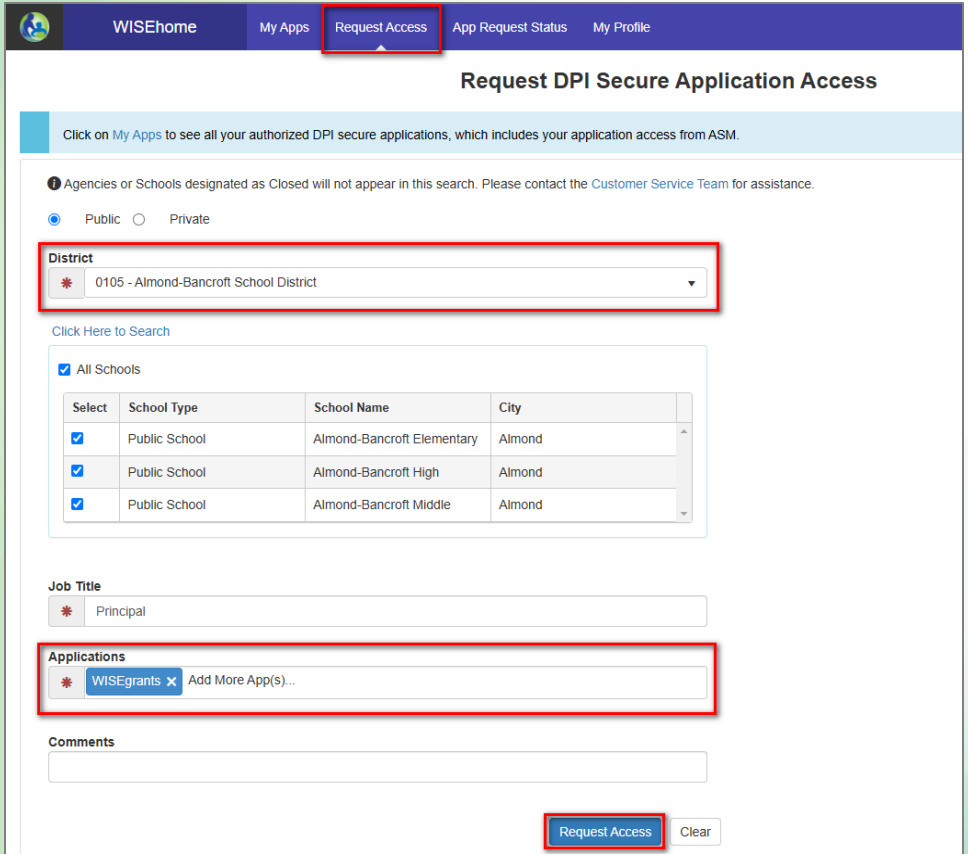
After this session, I hope you will understand:

- User access and management
- Landing Page summative grant information
- General workflow of grant management and standard application screens across all grants
- Message Board purpose and functionality
- How to get help

Adding/Removing Users

WISE
Wisconsin Information System for Education

Requesting Access



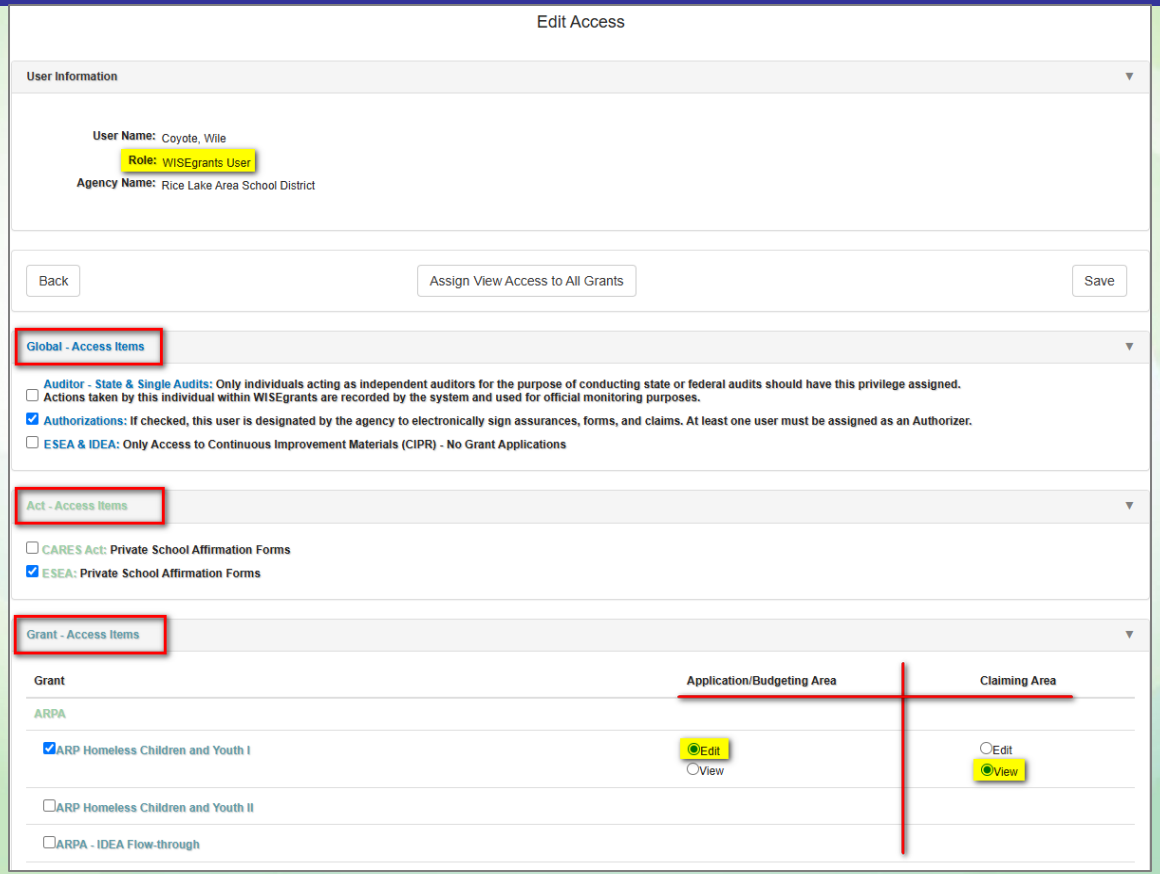
- Log into WISEhome using your WAMS ID or your Enterprise Google account.
- Follow steps 1-4.
- WISEgrants roles are only assigned at the LEA level, not individual schools.

Difference Between Roles

There are two roles that can be assigned by DSAs for local users of WISEgrants:

- **WISEgrants Administrator**
  - Has edit access rights to all grant applications and claims by default.
  - Manages all access rights for WISEgrants Users and can add or remove the Authorizations privilege for themselves or other WISEgrants Administrators.
- **WISEgrants User**
  - Starts out as a blank slate to allow it to be fully customizable.
  - After your role is assigned in WISEsecure, a local WISEgrants Administrator *must log into WISEgrants* to activate "view only" or "edit" access to the grants and features you need.

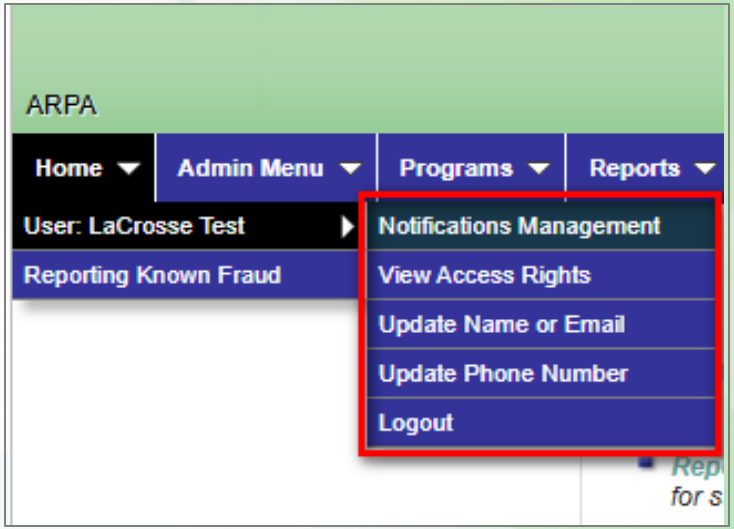
Managing Privileges



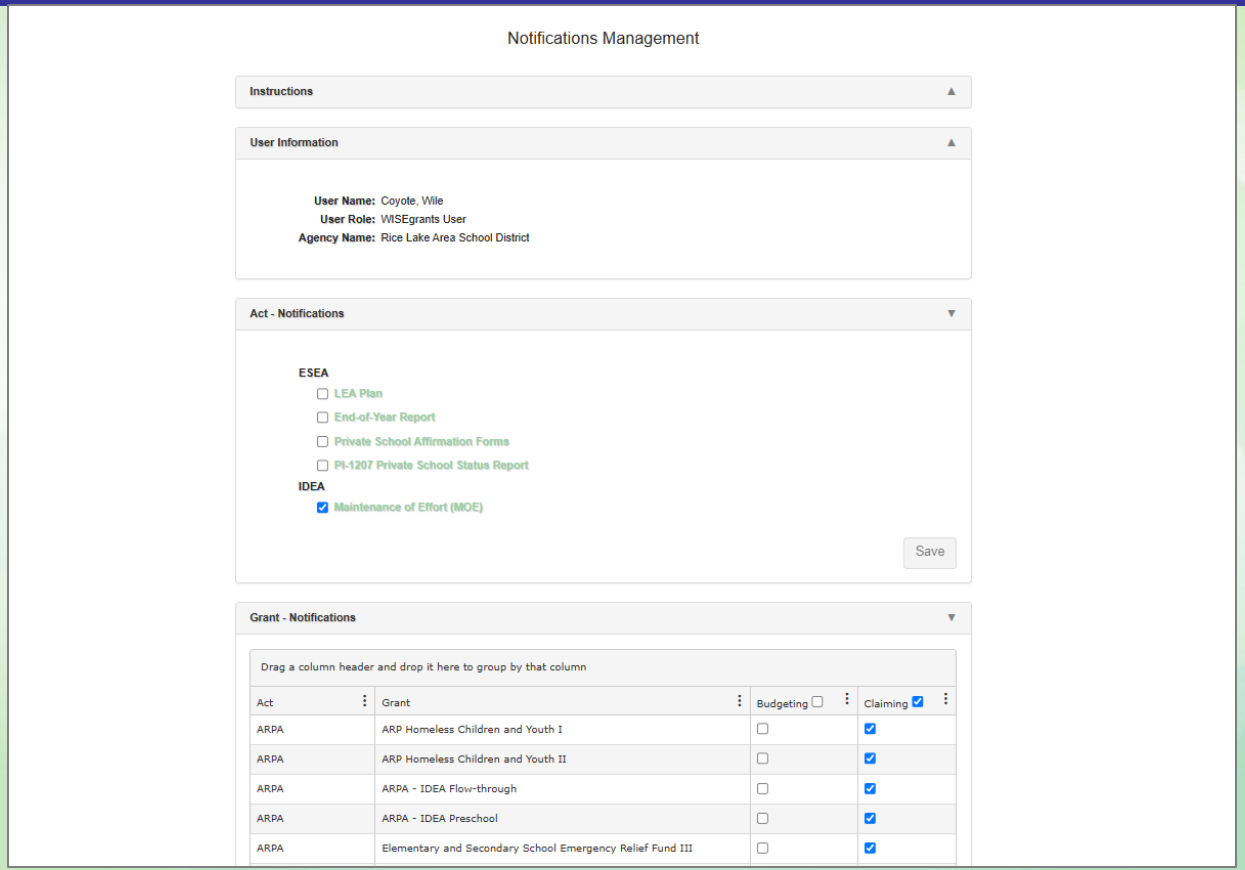
Managing Your Profile

Home > User: [your name]

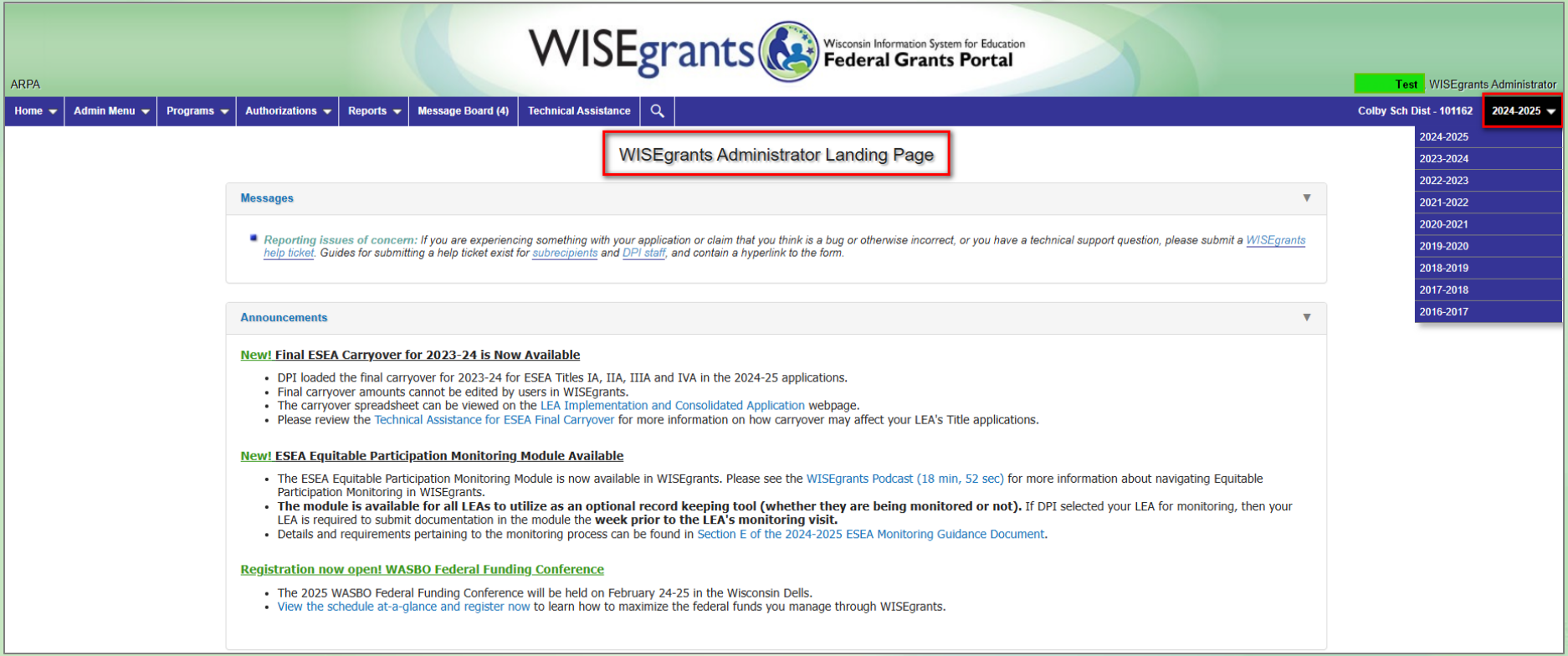
- Check/update your Notifications settings.
- View your access rights.
  - *If you are a WISEgrants User, contact your local WISEgrants Administrator to request changes.*
- Update your contact information.
- Logout link.
  - *In the footer of every screen.*



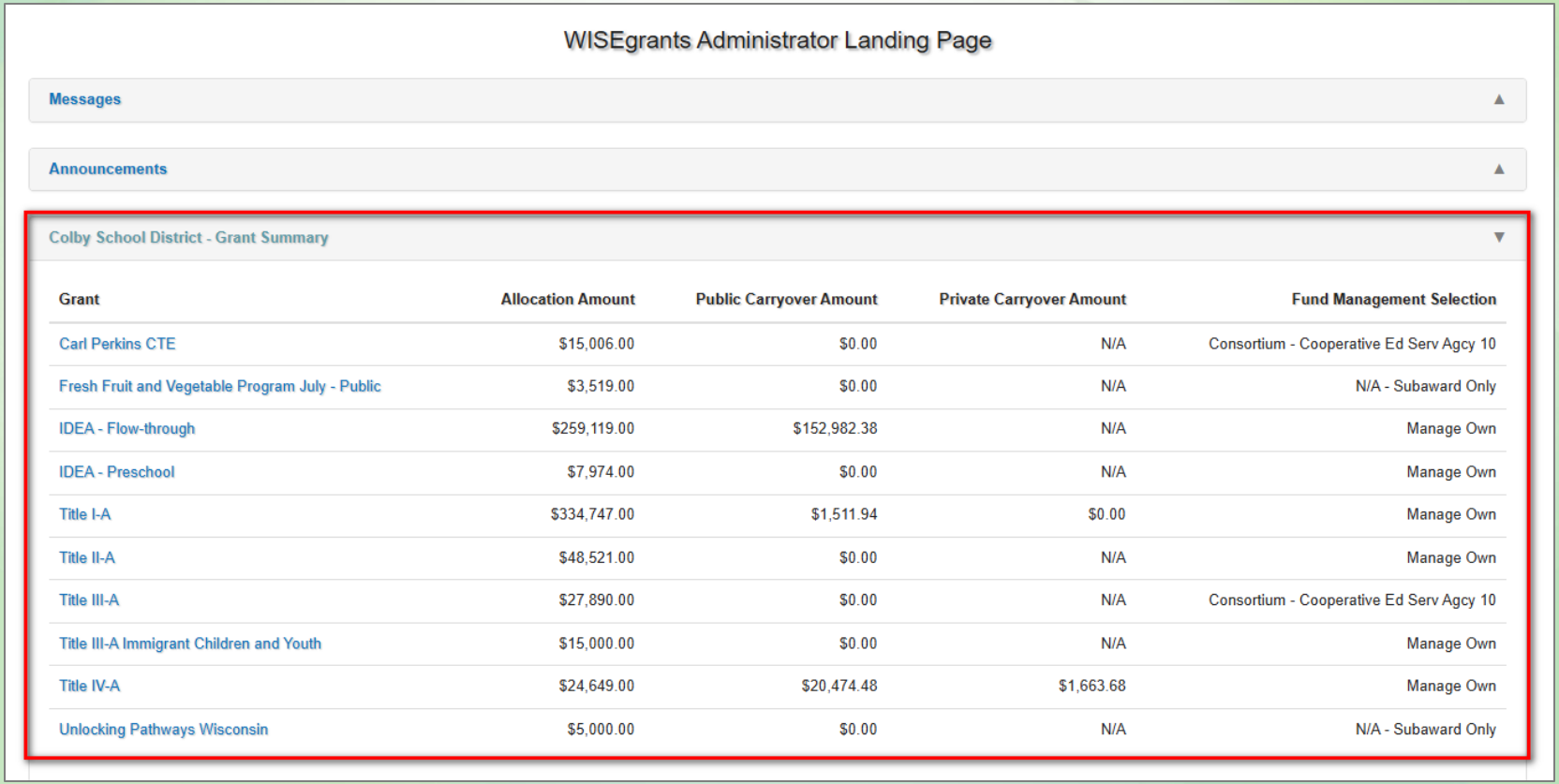
Notifications Management



Landing Page: Menu Navigation



Landing Page: Grant Summary Panel



Grant	Allocation Amount	Public Carryover Amount	Private Carryover Amount	Fund Management Selection
Carl Perkins CTE	$15,006.00	$0.00	N/A	Consortium - Cooperative Ed Serv Agcy 10
Fresh Fruit and Vegetable Program July - Public	$3,519.00	$0.00	N/A	N/A - Subaward Only
IDEA - Flow-through	$259,119.00	$152,982.38	N/A	Manage Own
IDEA - Preschool	$7,974.00	$0.00	N/A	Manage Own
Title I-A	$334,747.00	$1,511.94	$0.00	Manage Own
Title II-A	$48,521.00	$0.00	N/A	Manage Own
Title III-A	$27,890.00	$0.00	N/A	Consortium - Cooperative Ed Serv Agcy 10
Title III-A Immigrant Children and Youth	$15,000.00	$0.00	N/A	Manage Own
Title IV-A	$24,649.00	$20,474.48	$1,663.68	Manage Own
Unlocking Pathways Wisconsin	$5,000.00	$0.00	N/A	N/A - Subaward Only

Landing Page: Application Status Panel

Alma School District - Grant Summary

Alma School District - Application Status

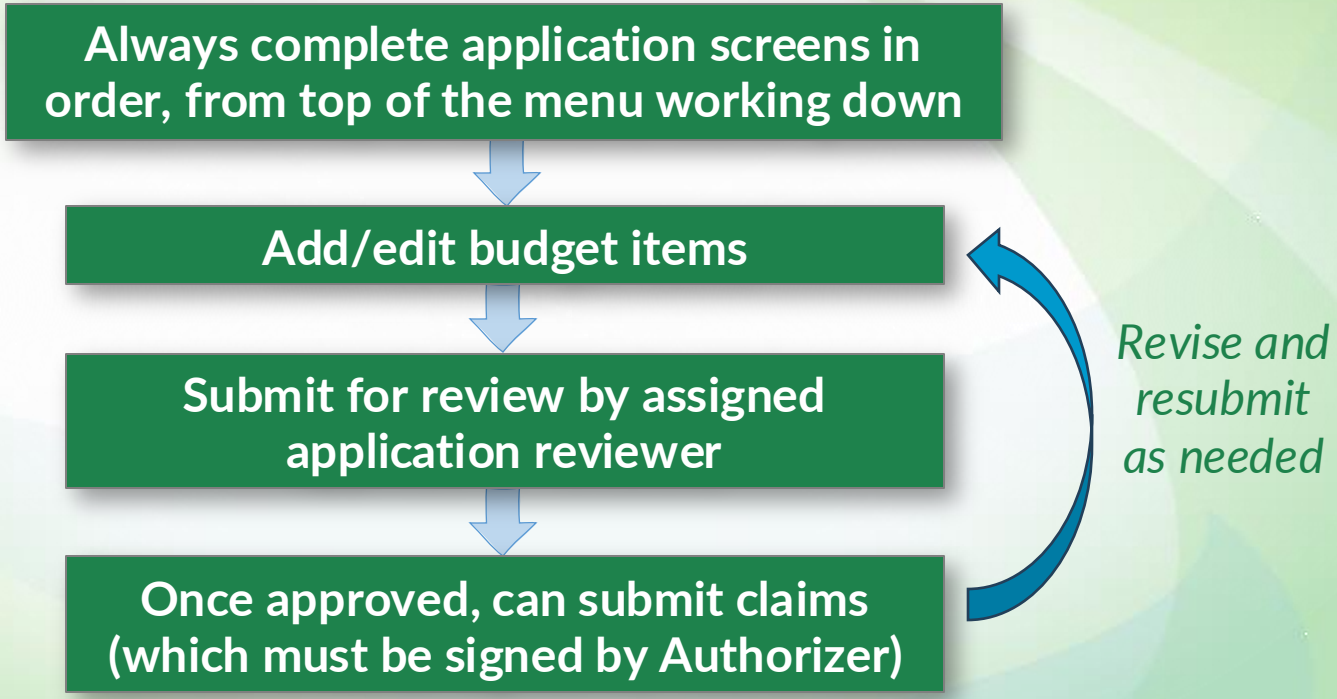
Application		Budget Last Status	Budget Status Date	Budget Revisions	Claim Last Status	Claim Status Date	Claimed to Date
Title I-A	Public	Approved	10/14/2024	No revisions made	Partial - Approved	01/21/2025	$12,228.80
	Private				Partial - Approved	01/21/2025	$1,807.72
Title II-A	Public	Approved	10/31/2024	No revisions made			$0.00
	Private						$0.00
	REAP-AFUA Public	Unlocked	07/23/2024	No revisions made			$0.00
	REAP-AFUA Private						$0.00
Title IV-A	Public	Approved	09/24/2024	No revisions made	Partial - Submitted to DPI	01/20/2025	$8,773.89
	Private						$0.00
	REAP-AFUA Public	Unlocked	07/23/2024	No revisions made			$0.00
	REAP-AFUA Private						$0.00
IDEA - Flow-through		Returned	12/23/2024	No revisions made	Partial - Approved	01/24/2025	$12,644.35
IDEA - Flow-through - Title I Schoolwide		Approved	11/18/2024	No revisions made	Partial - Approved	01/24/2025	$19,648.30
IDEA - Preschool		Approved	11/18/2024	No revisions made	Partial - Approved	01/24/2025	$1,671.74

Prerequisites to Grant Applications

- New fiscal year: always start with Assurances being signed by your Authorizer by July 1 (criteria for "substantially approvable form").
- Elementary and Secondary Education Act (ESEA):
  - Private School Affirmation forms – All must be submitted and reviewed/accepted.
  - ESEA Centralized Enrollment – Verify school configurations, determine whether to use TFS counts, enter private enrollment, certify.

- Grants with narratives or data that need to be submitted and approved before you can get into grant application/budgeting:
  - Perkins CTE
  - CSI/ATSI
  - IDEA CCEIS

Grant Application Workflow



Note: Budgets and claims are locked when either is submitted and awaiting review

Activating a Grant Application

Grant Application Menu

Title I-A Grant Application

- Grant Contacts
- Fund Management
- Private Schools Outside of LEA
- Grant Funding
- Private Enrollment
- Proportional Share for Equitable Participation
- Plan Reservations
- Verify Title I-A Services for Homeless Students
- TI Public Schools Eligibility
- TI Private Schools Eligibility
- LEA Plan Title I-A Questions
- Public School Eligibility Exceptions
- Budget
  - Public
  - Private
- Application Submission History
  - Title I-A Public
- Title I A Comparability
- Claims
  - Title I-A Public
  - Title I-A Private
- Reports
  - Private School Equitable Participation Summary Report
  - Enrollment Data by Public School Attendance Area Report
  - ESEA Program Plan

IDEA - Flow-through Grant Application

- Grant Contacts
- Fund Management
- Grant Funding
- Model Policies & Procedures / Sample Forms
- Private School Students with Disabilities Enrollment
- Title I Schoolwide Students with Disabilities Enrollment (Optional)
- Plan Reservations
- Budget
  - Flow-through
  - Title I Schoolwide
  - Comprehensive CEIS (CCEIS)
- Application Submission History
  - Flow-through
  - Title I Schoolwide
  - CCEIS
- Claims
  - Flow-through
  - Title I Schoolwide
  - CCEIS
- Reports
  - CEIS Student Count

Grant Application: Fund Management

Fund Management

Fund Management Selection

For all grants, an initial step of the application process involves identifying how the funds will be managed. Until this step is completed, the user cannot move on to the other application sections. The following fund management options are available for Title I-A:

- If your agency plans to manage its own funds, select "Manage Own Funds."
- If your agency is contracting with a CESA / CCDEB for administrative management of the grant, select "Third Party Grant Administrator" and then select the CESA / CCDEB from the dropdown choices. If a CESA / CCDEB is acting as a Third Party Grant Administrator for your agency, your District Security Administrator (DSA) will need to provide access to your WISEgrants applications through WISEsecure.
- If your agency chooses to decline the grant funds, and not participate in the federal program, select "Decline Funds."

For the allocation amount of $175,866.00, the subrecipient chooses to:

○ Manage Own Funds

○ Select Third Party Grant Administrator Select Third Party Grant Administr…

○ Decline Funds

Options available depend on the grant.

Submit Selection

Grant Application: Grant Funding

Grant Funding

Funding Overview

The amounts displayed below have been awarded by DPI to the subrecipient. Depending on the grant, the subrecipient may receive a preliminary allocation before receiving the final grant award. Subrecipients can submit budgets under a preliminary allocation but cannot claim funds until the allocation is final. Once a "Final Allocation" is displayed, the user can hover over the amount to display previous preliminary allocation amounts (if applicable).

This grant may allow for carryover of unspent funds from the prior year's grant. Preliminary carryover is not entered by DPI. The subrecipient may choose to add their own preliminary carryover amounts for budgeting purposes prior to DPI establishing a final carryover amount. The subrecipient can only claim up to the final allocation amount until final carryover is added by DPI. Preliminary carryover amounts are entered by the user in the "Preliminary Carryover Calculation" panel below. Final carryover amounts entered by DPI override any user saved preliminary carryover amounts.

The total listed for funds available is the sum of the allocation and any carryover amount.

Title I-A (*ESEA*)

Final Allocation: $912,945.00 | **Preliminary Public Carryover: $51,632.00** | **Preliminary Private Carryover: $39,743.70** | **Total Title I-A Funds: $1,004,320.70**

Carryover

Preliminary Carryover Calculation

Final carryover from the prior year's grant is entered by DPI. Until that time, the subrecipient may choose to add their own preliminary carryover funds for budgeting purposes. Please note:

- The "Carryover Available 07/01/2025 through 9/30/2025 (Tydings)" column is the current amount, based on the last approved claim, which the subrecipient must either claim for FY 2024-2025 or obligate in FY 2025-2026 by September 30, 2025 and claim by November 22, 2025.
- Be aware that subsequent approved FY 2024-2025 claims may alter the preliminary carryover amount available.

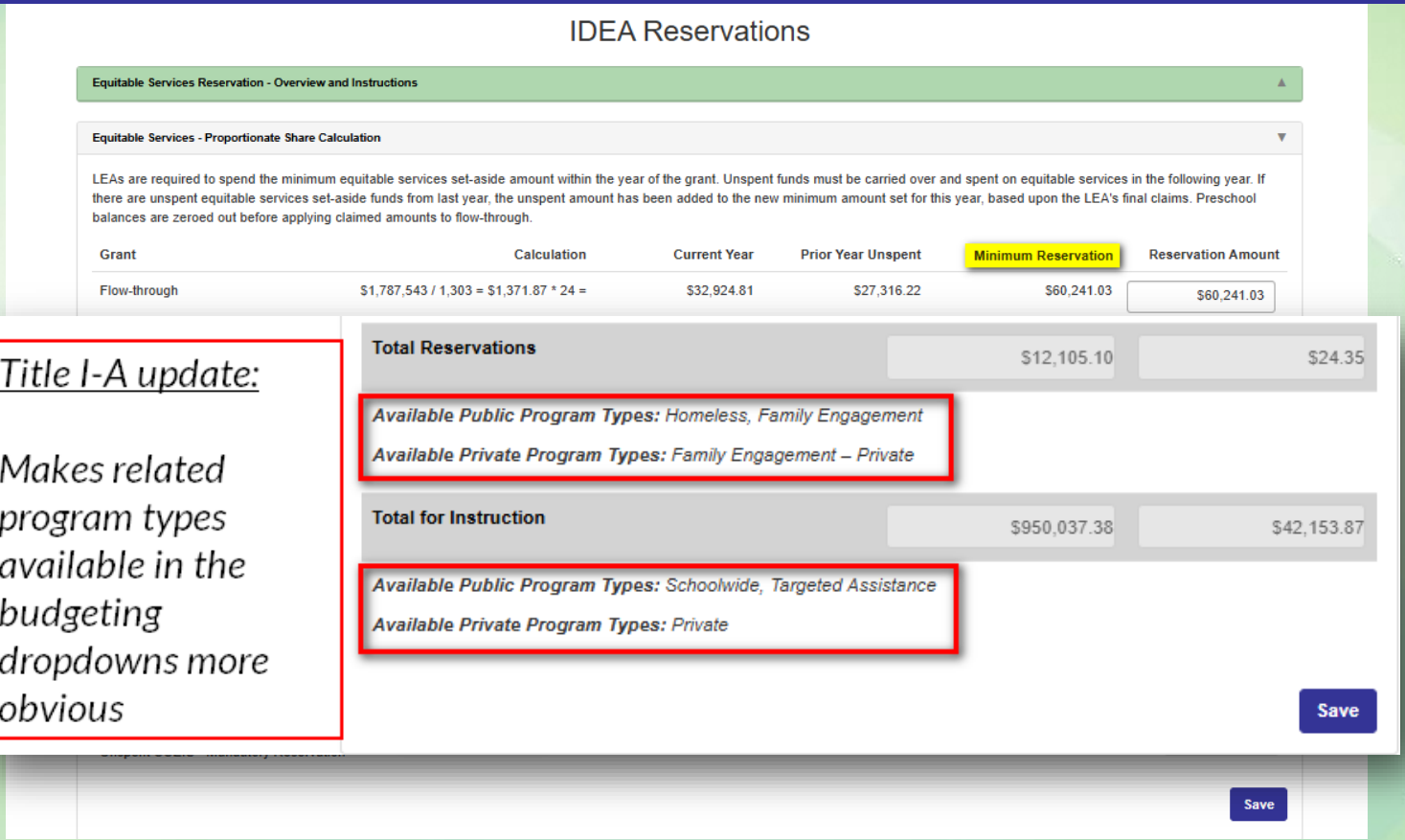
The subrecipient can adjust preliminary carryover amounts as often as necessary. Error messages will warn the subrecipient when there is a reconciliation issue between the saved preliminary carryover amount and the current carryover amount available.

The carryover amount is displayed in the "Available Preliminary Carryover" column. To add preliminary carryover to the current budget, the user may keep the default figure listed in the "Enter Carryover Amount" column, or edit the field to lower the carryover amount - and then click on the blue "Add Preliminary Carryover' button.

Sub-Budget	Carryover from 2023-2024	Share of 2024-2025 Allocation	2024-2025 Available	2024-2025 Claimed to Date	2024-2025 Claim Type	Carryover amount available 7/1/2025 through 9/30/2025 (Tydings)	Carryover amount available 7/1/2025 through 9/30/2026	Available Preliminary Carryover	Enter Carryover Amount
Public	$157,956.14	$872,090.30	$1,030,046.44	$293,823.99	Partial	*All FY 2023-2024 Funds Claimed*	$736,222.45	$736,222.45	*$51,632.00*
Private	$6,589.27	$39,743.70	$46,332.97	$0.00	No Approved Claims	**$6,589.27**	$39,743.70	$46,332.97	*$39,743.70*

Update Preliminary Carryover Amounts

Grant Application: Plan Reservations



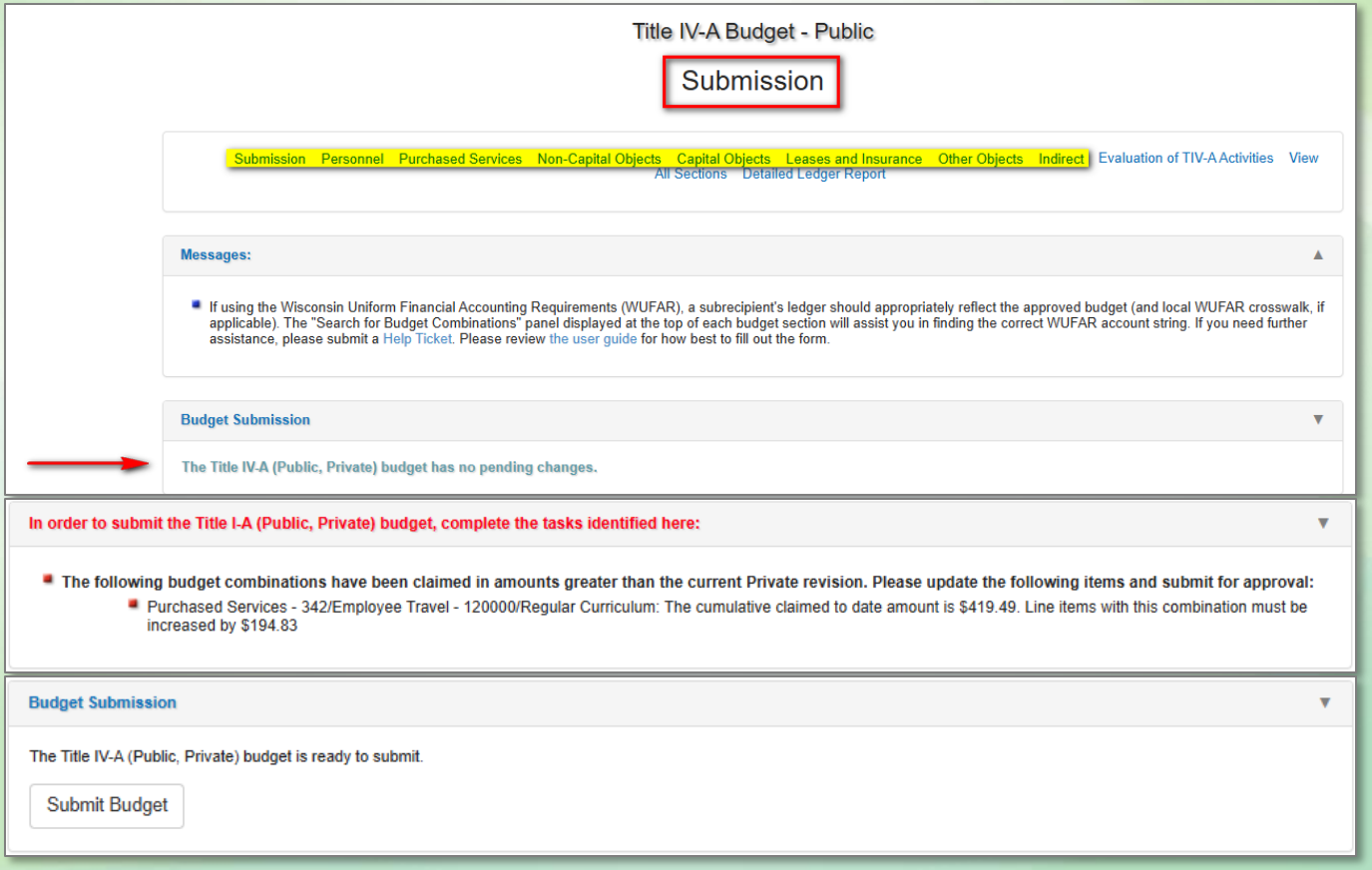
Title I-A update:

Makes related program types available in the budgeting dropdowns more obvious

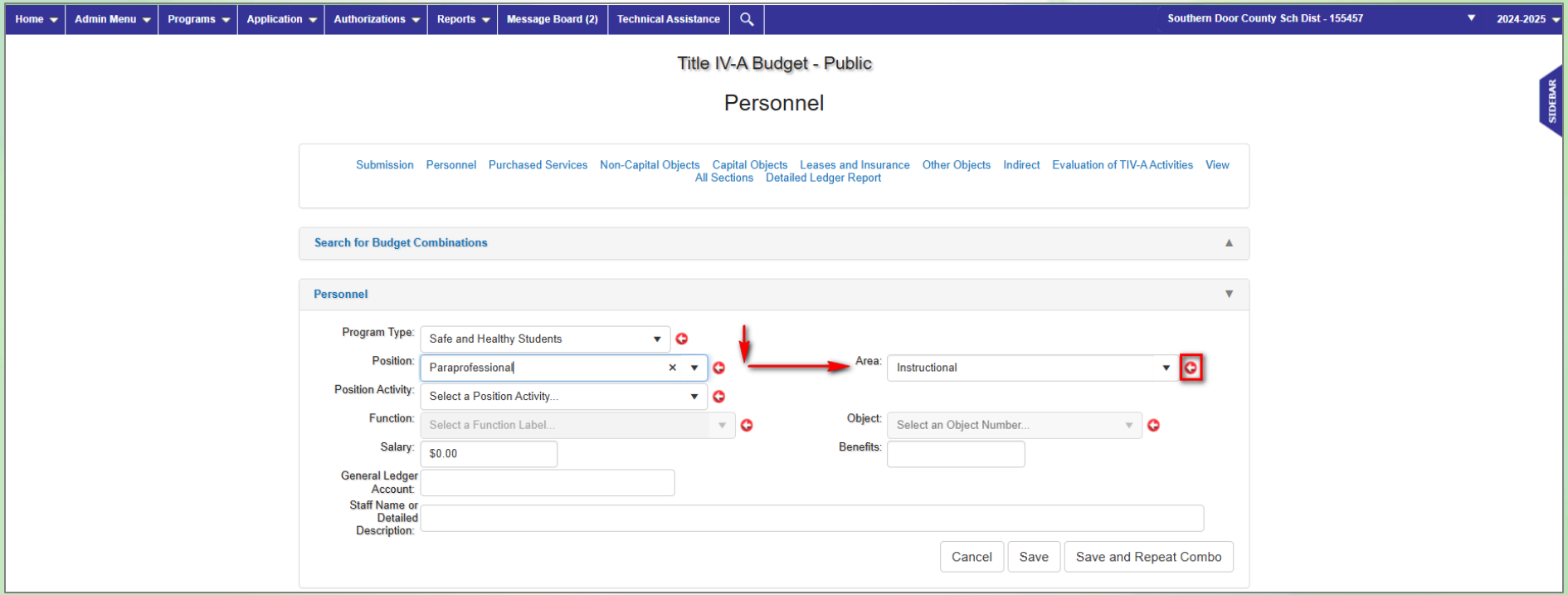
A Word about WUFAR

- All grant funds budgeted and claimed must be aligned with the Wisconsin Uniform Financial Accounting Requirements (WUFAR) manual as required by Wis. Stats. § 115.28(13).
- Each grant may have different allowable cost options.
- We discourage the use of budget item "placeholders," budget known costs at the time of submission. You can always submit revisions with additional items later.
- If you notice a missing allowable cost, you can submit a WISEgrants help ticket for program area approval and WUFAR vetting team review.
- A subrecipient's ledger should match what is claimed through WISEgrants. Increasingly, there will be checks to ensure claims in WISEgrants align with what is reported to WISEdata Finance.

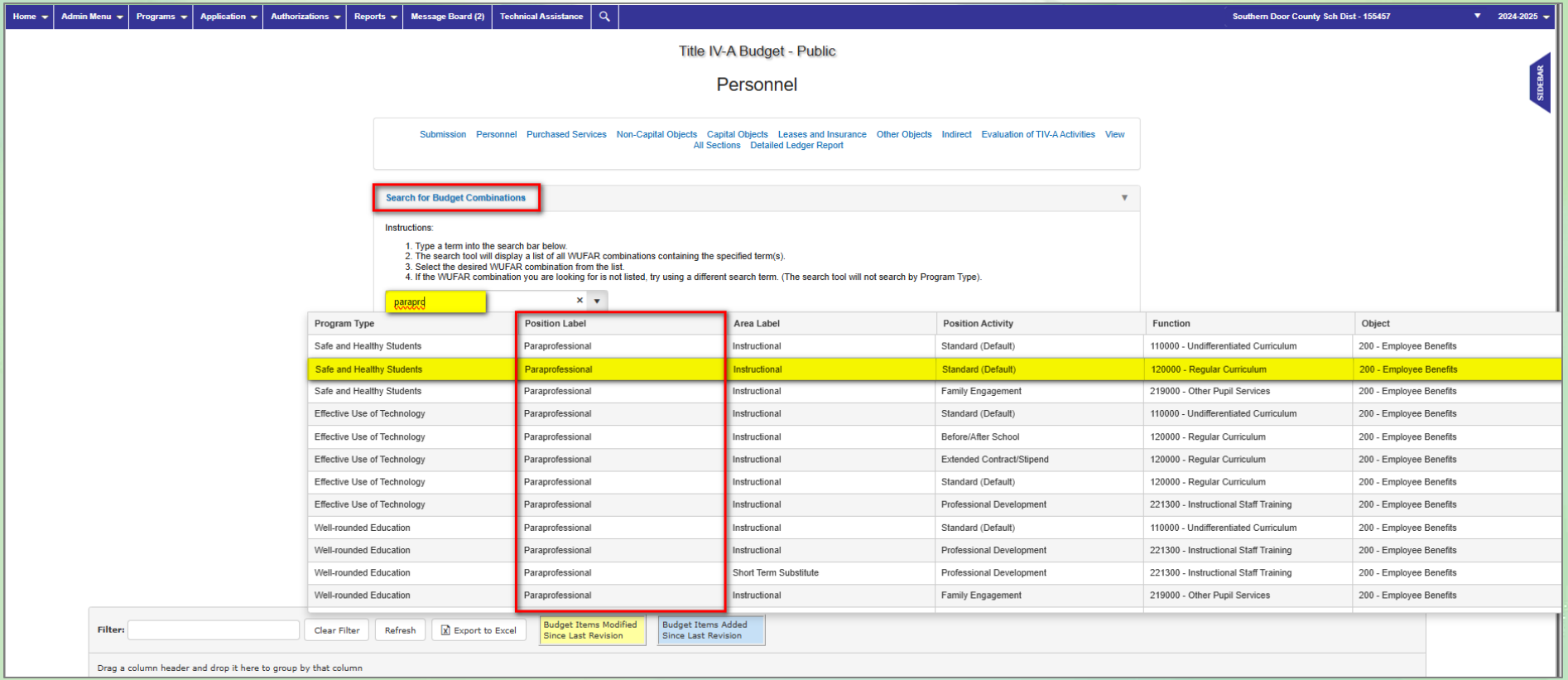
Grant Application: Budget



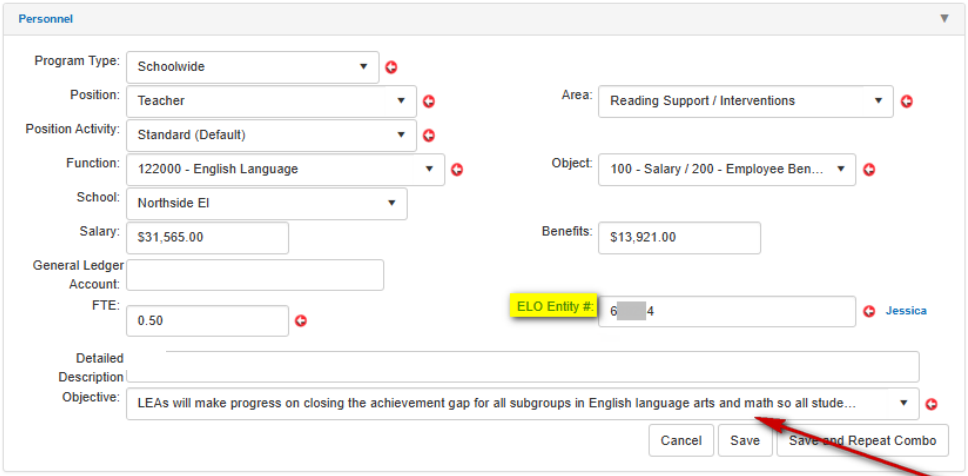
Adding Budget Items Old School



Adding Budget Items Using Search



Editing Existing Budget Items



2 options:

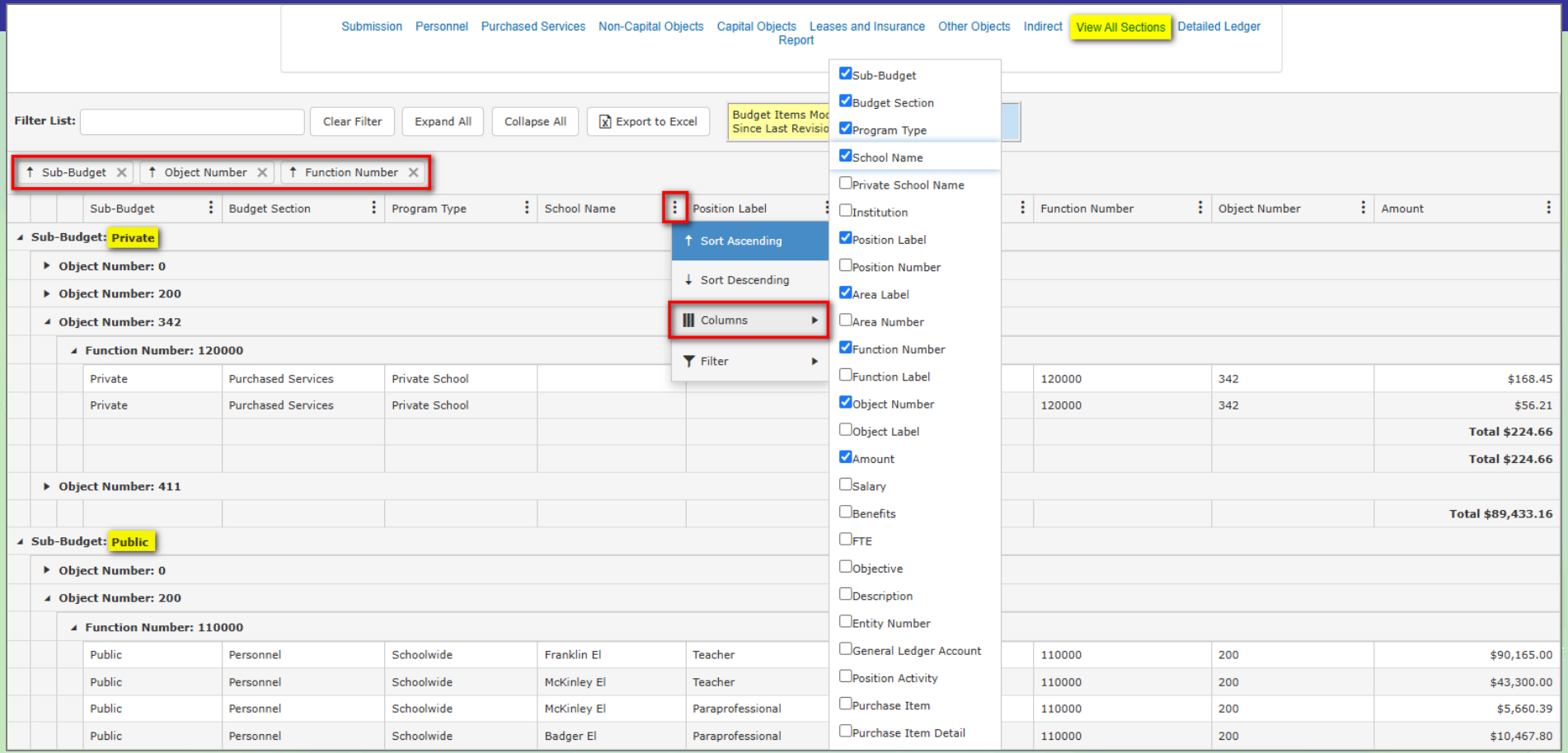
1) Line item edit
2) In-line edit

Filter: Clear Filter | Refresh | Export to Excel | Budget Items Modified Since Last Revision | Budget Items Added Since Last Revision | Save

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

Program Type	School Name	Institution	Position Label	Area Label	Position Activity	Function Number	Function Label	Salary	Benefits	FTE	Edit	Delete
Schoolwide	Northside El		Paraprofessional	Instructional	Behavioral Interventions	120000	Regular Curriculum	$33,812.00	6801			
Schoolwide	C H Bird El		Paraprofessional	Instructional	Behavioral Interventions	120000	Regular Curriculum	$32,012.00	$7,094.00			
Schoolwide	Westside El		Paraprofessional	Instructional	Behavioral Interventions	120000	Regular Curriculum	$30,831.00	$11,480.00			
Schoolwide	Creekside El		Paraprofessional	Instructional	Behavioral Interventions	120000	Regular Curriculum	$32,689.00	$21,926.00			
Schoolwide	Northside El		Teacher	Reading Support / Interventions	Standard (Default)	122000	English Language	$31,565.00	$13,921.00	0.5		

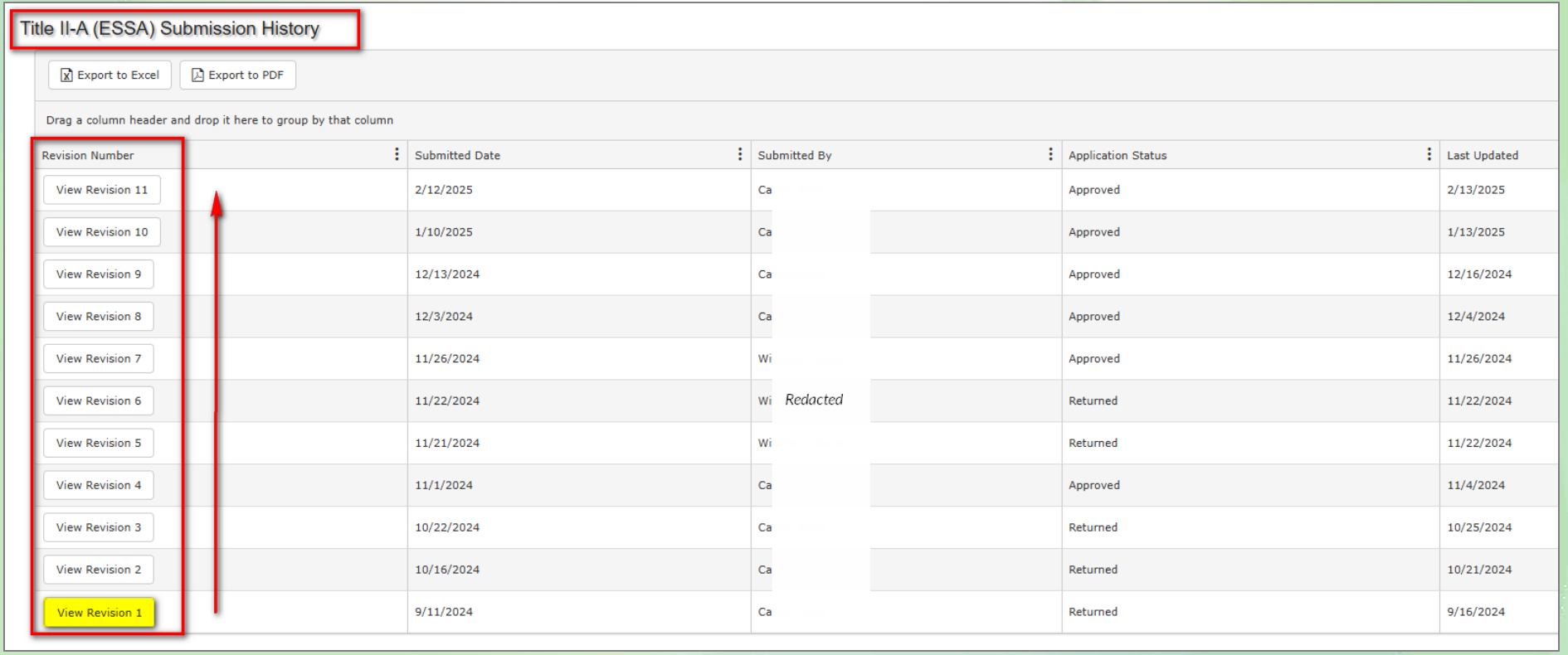
View All Sections & Kendo Grids



DPI Application Review

- **Assigned DPI reviewers may take the following actions on submitted applications:**
  - Approve: Claim screen will update with last approved budget amounts, application is unlocked for next revision.
  - Return: Found either an unallowed cost, or something that needs to be changed. *Check the message board for details*. Application is unlocked for revision.
  - Under DPI Review: Your application may be approvable as is, but they need to ask a clarifying question. *Check the message board for details and respond in the appropriate thread*. The application is still locked and cannot be edited.
- **You will receive an automated email alert of the action taken if your Notifications are toggled on for the applicable grant/component.**

Grant Application: Submission History



Title II-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	Application Status	Last Updated
View Revision 11		2/12/2025	Ca	Approved	2/13/2025
View Revision 10		1/10/2025	Ca	Approved	1/13/2025
View Revision 9		12/13/2024	Ca	Approved	12/16/2024
View Revision 8		12/3/2024	Ca	Approved	12/4/2024
View Revision 7		11/26/2024	Wi	Approved	11/26/2024
View Revision 6		11/22/2024	Wi	Returned	11/22/2024
View Revision 5		11/21/2024	Wi	Returned	11/22/2024
View Revision 4		11/1/2024	Ca	Approved	11/4/2024
View Revision 3		10/22/2024	Ca	Returned	10/25/2024
View Revision 2		10/16/2024	Ca	Returned	10/21/2024
View Revision 1		9/11/2024	Ca	Returned	9/16/2024

Redacted

Claims Screen

Prepare and Submit Claims - Title I-A Public

Messages

- Claims cannot be submitted while the current Title I-A Public budget revision is still in a Submitted state.

Overview and Instructions

Upload Fiscal Monitoring Supporting Documentation *(Only some agencies will see this section)*

For this federal grant claim, a PDF report of the LEA's detailed general ledger that ties to the claim must be uploaded using the button below. Be sure to provide enough information that the accountant reviewing the ledger report will be able to recognize the accounts that tie to the line item on the claim for reimbursement. As a reminder, expenditures must be directly coded to the appropriate federal grant project code when recorded in the general ledger.

After selecting the file, click on the "Upload" button to attach the report to the claim. The uploaded document is viewable by selecting the "View Ledger Report" button below the claim.

Note: Every time a supporting document is uploaded, the previous document is deleted and replaced with the new file.

Select files...

Upload

Upload Title I-A Public - Claim

Messages

- **Edits to this claim can be saved but not submitted unless it is a claim amendment and the amount requested remains $0. The Title II-A Public budget has validations that must be resolved prior to claim submission. To see a list of required corrections, visit the budget landing page.**

Drafting a Claim

Title IV-A Public - Claim

Report Period Ending Date: 01/31/2025

◉ Partial Claim ○ Final Claim

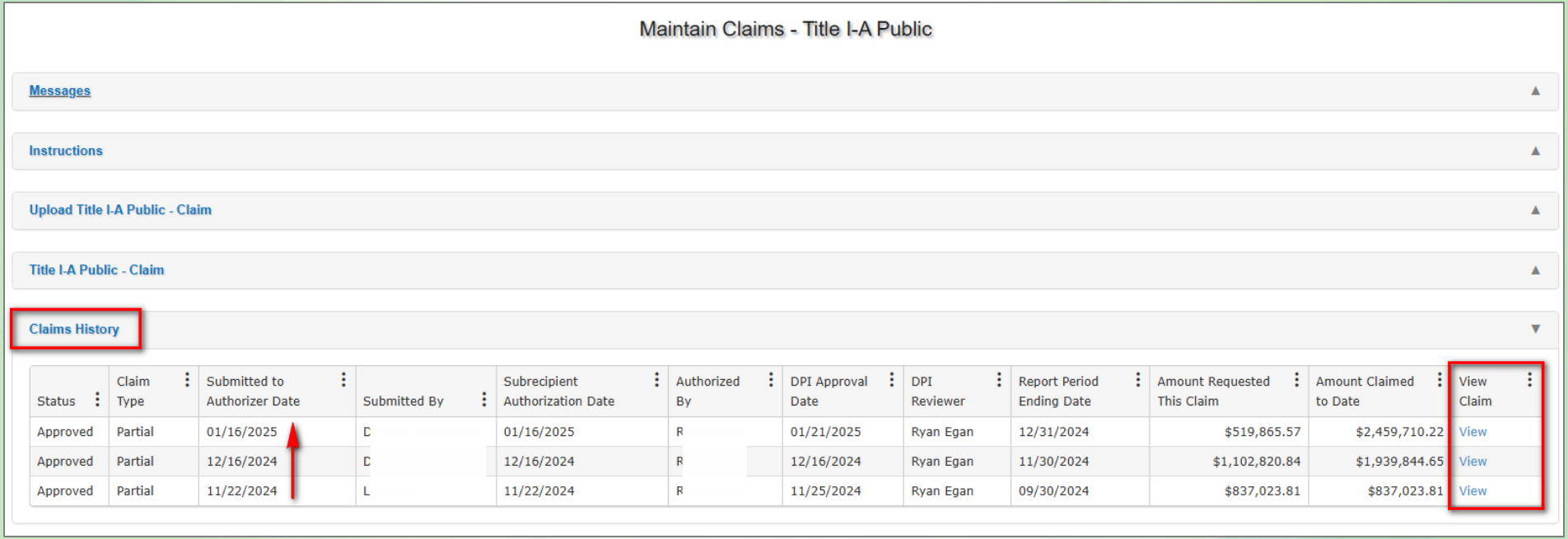
Filter: Clear Filter | Sort by Function | Sort by Object

Program Type	Account	Object Name	Function Name	Approved Budget Amount	Total Amount Claimed to Date	Enter Obligations	Enter Amount Requested this Claim	Amount Remaining	Cumulative Claimed to Date
Well-rounded Education	10-100-215200-381	Salaries	School Psychology	$68,850.00	$28,687.50	$0.00	$12,345.00	$40,162.50	$28,687.50
Well-rounded Education	10-200-215200-381	Employee Benefits	School Psychology	$33,120.37	$13,724.01	$0.00	0	$19,396.36	$13,724.01
Safe and Healthy Students	10-100-214200-381	Salaries	School Nursing	$26,450.00	$11,020.89	$0.00	$0.00	$15,429.11	$11,020.89
Safe and Healthy Students	10-200-214200-381	Employee Benefits	School Nursing	$16,591.37	$6,895.98	$0.00	$0.00	$9,695.39	$6,895.98
Effective Use of Technology	10-342-221300-381	Employee Travel	Instructional Staff Training	$2,000.00	$2,000.00	$0.00	$0.00	$0.00	$2,000.00
			Subtotal	$147,011.74	$62,328.38	$0.00	$0.00	$84,683.36	$62,328.38
			Indirect	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
			Running Total	$147,011.74	$62,328.38	$0.00	$0.00	$84,683.36	$62,328.38

Restricted Indirect Rate: 3.66%
Effective Indirect Rate: 0.00%
Amount available to claim for indirect: $0.00
Amount of indirect claimed to date: $0.00

☐ For bookkeeping only | Save | Submit | View PI-1086

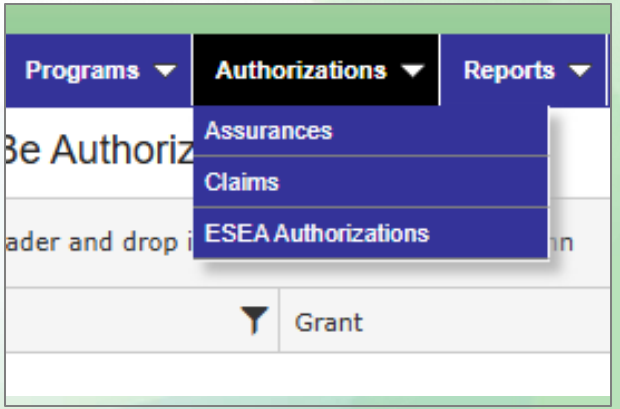
Claim History



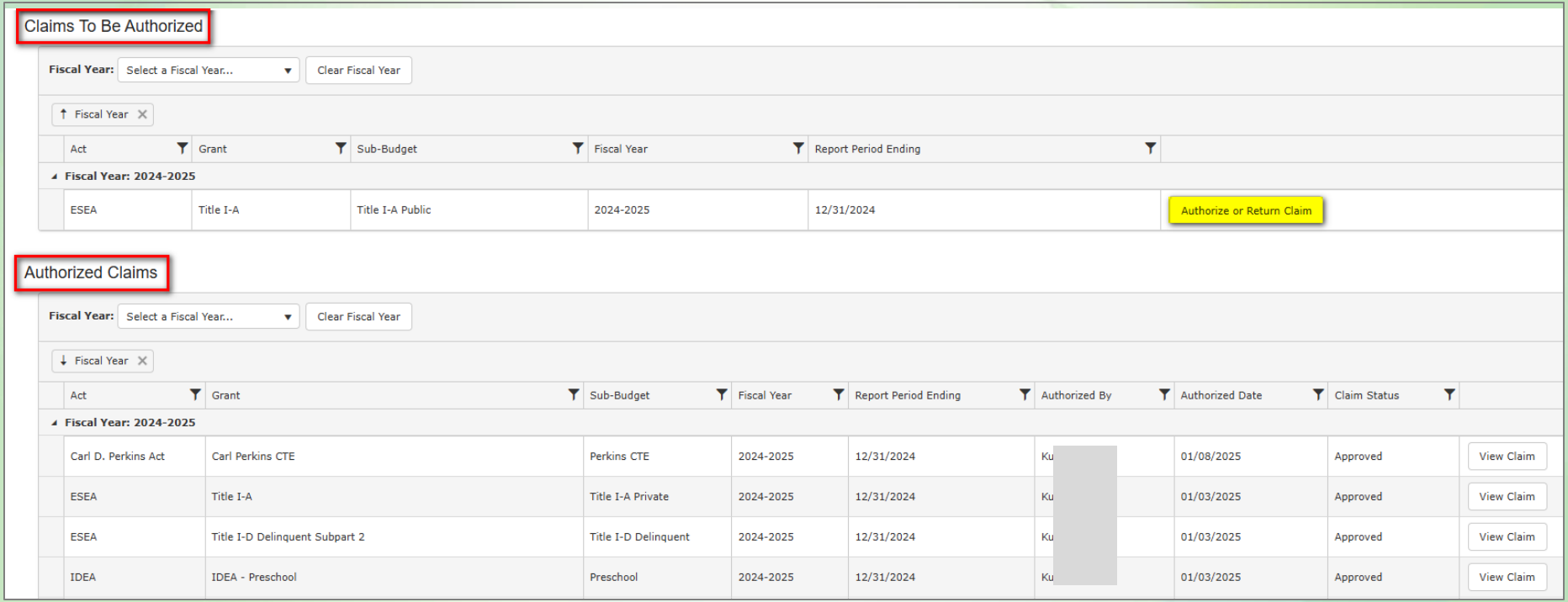
Authorizations Menu

- **Menu only visible to users with Authorizations privilege (as added by agency's WISEgrants Administrator).**

- **Items that require digital signature of authority:**
  - Act and grant level assurances.
  - Consortium Verification forms.
  - Every claim prior to review by DPI.
  - Transfer of funds between ESEA formula grants.



Authorizations Example: Claims



Claims To Be Authorized

Fiscal Year: Select a Fiscal Year... Clear Fiscal Year

Fiscal Year

Act	Grant	Sub-Budget	Fiscal Year	Report Period Ending	
Fiscal Year: 2024-2025					
ESEA	Title I-A	Title I-A Public	2024-2025	12/31/2024	Authorize or Return Claim

Authorized Claims

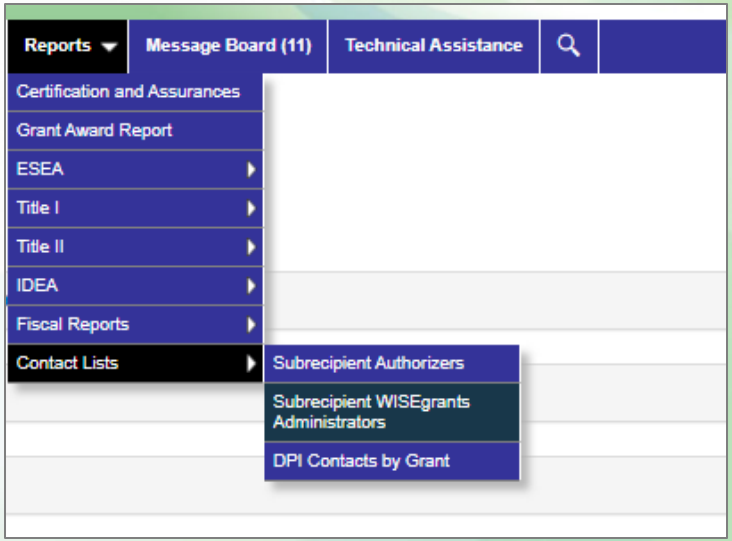
Fiscal Year: Select a Fiscal Year... Clear Fiscal Year

Fiscal Year

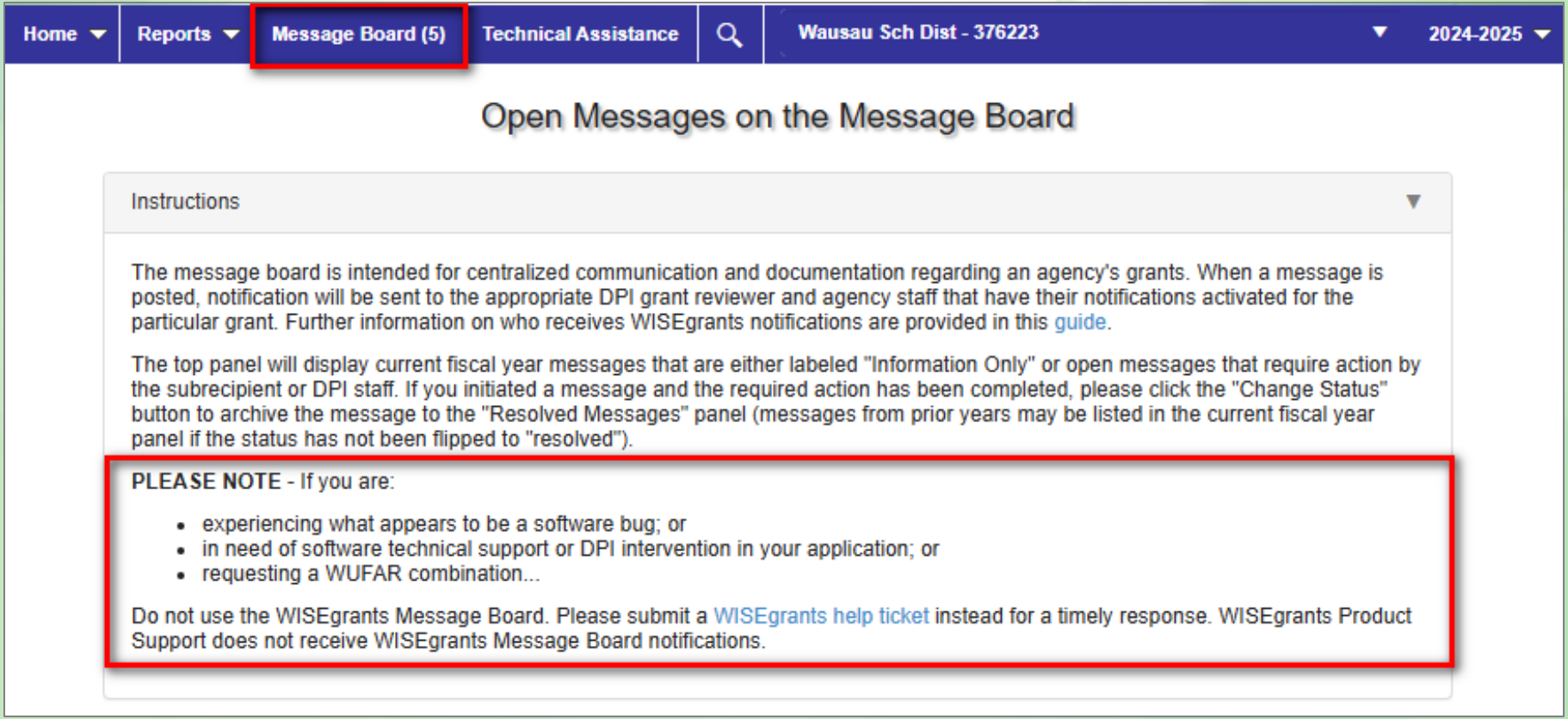
Act	Grant	Sub-Budget	Fiscal Year	Report Period Ending	Authorized By	Authorized Date	Claim Status	
Fiscal Year: 2024-2025								
Carl D. Perkins Act	Carl Perkins CTE	Perkins CTE	2024-2025	12/31/2024	Ku	01/08/2025	Approved	View Claim
ESEA	Title I-A	Title I-A Private	2024-2025	12/31/2024	Ku	01/03/2025	Approved	View Claim
ESEA	Title I-D Delinquent Subpart 2	Title I-D Delinquent	2024-2025	12/31/2024	Ku	01/03/2025	Approved	View Claim
IDEA	IDEA - Preschool	Preschool	2024-2025	12/31/2024	Ku	01/03/2025	Approved	View Claim

Reports Menu

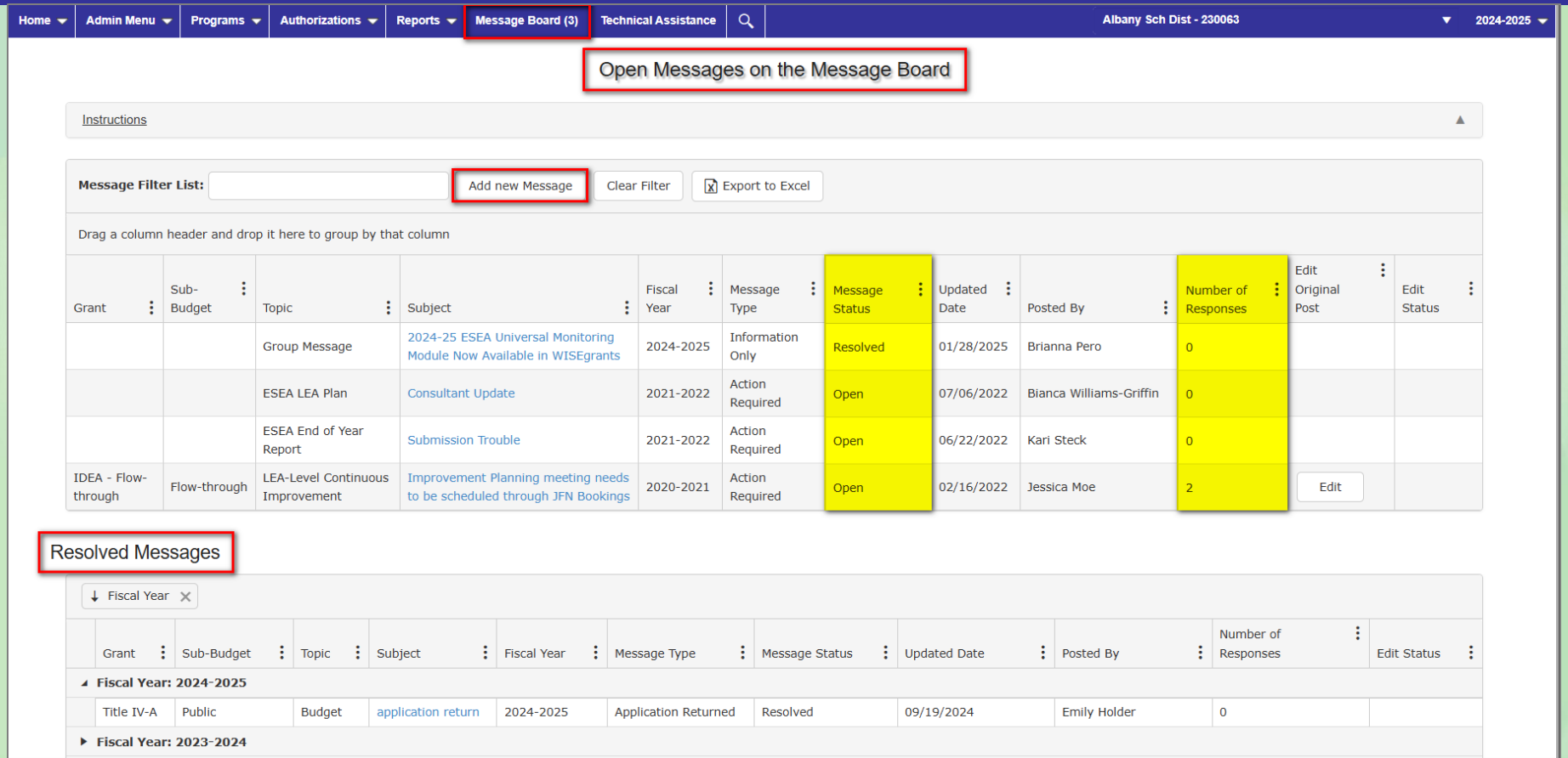
- **Viewable by all users.**
- **Displays view-only reports with LEA-specific information.**
- **Includes reports to view:**
  - Completed assurances.
  - All Grant Subawards.
  - Compilated ESSA LEA Plan.
  - Budget summary by grant sub-budget.
  - Available WUFAR combinations by grant.
  - Agency users with Authorizer access.
  - Agency WISEgrants Administrators.



Message Board Overview



Message Board: Open/Resolved



Technical Assistance (TA)

- **User guides for grants or features are prolific:**
  - Landing page Announcements panel page usually contains links to guides for newly opened features.
  - Instruction panels on screens also may contain hyperlinks.
  - Technical Assistance Tab on the blue menu bar contains growing library (*see next slide*).
  - DPI website, the WISEgrants TA page has a section for program area links.

Technical Assistance Library

WISEgrants Training

- Subscribe to the WISEgrants Podcast to learn about the latest updates to the software and federal grant-related information. Bring your questions to ask and be answered live in the session.
- Some program areas provide grant-specific webinars as well, like the Title I-A Lunch n' Learn series or the How to Use Title II-A Funds webinar.
- Attend the annual WASBO Federal Funding Conference in February (and/or review materials from previous conferences).
- Book a session with your assigned application reviewer for a specific grant. Many staff use Bookings links where you can schedule a virtual meeting to work directly with staff, check the Federal Grants Bookings List.
- Schedule a one-on-one general WISEgrants training session or technical support virtual meeting.

Submit a WISEgrants Help Ticket

- **A hyperlink to the help ticket form is in the footer of every screen in WISEgrants.**
- **You can also go directly to the [WISEgrants section] of the DPI website.**