

WASBO New School Administrator & Support Staff Conference

September 8, 2021

Counting Children: Third Friday Count; Summer/Interim Membership

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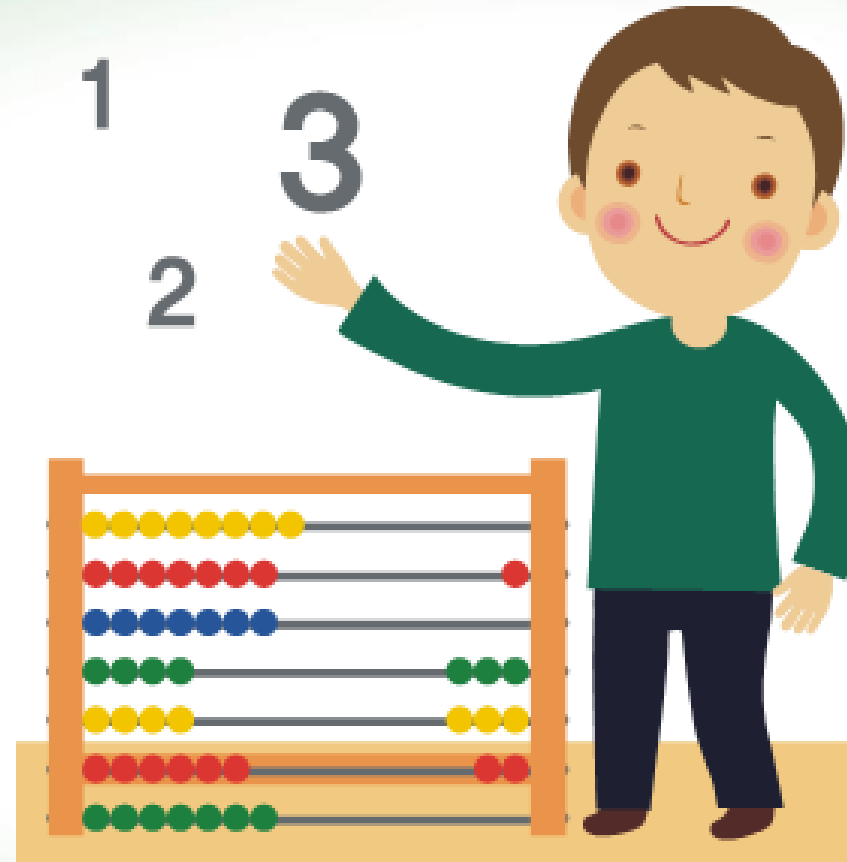
WISCONSIN DEPARTMENT OF
Public Instruction
Jill K. Underly, PhD, State Superintendent

PI-1563 Pupil Count and PI-1804 Summer Membership-Things to Know

- When are students counted?
- Residency – which students are residents?
- COVID-19 Regulatory Flexibility Framework
- Membership – which residents may be counted?
- How are residents counted?
 - Early Learners, Kindergarten, Summer Membership
- Part-time attendance – how are resident and non-resident students counted?
- How is this data reported to DPI?



Accurate Pupil Counts provide opportunities to maximize the resources available to support the education of children in your district.



Your role in completing the PI-1563 is important in the lives of children.



Pupil Count - Words to Know

Full time

Challenge Academy

Pre-School-Special Education

Minutes

Withdrawal

Summer ADM Equivalent

Resident

Age Requirements

Part-time

Pupil

Head Count

Receiving Instruction

4 year old Kindergarten

Enrollment

Thayer

Membership

Open Enrollment

Student

3-year Programs

Hours

Revenue Limit Membership

Attendance

Count Date

Present

Non-Resident

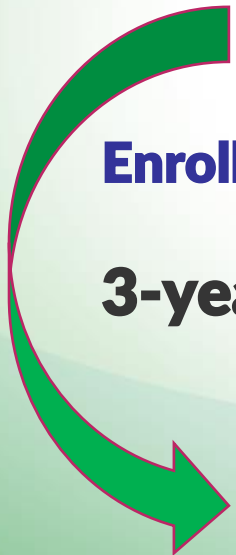
Full Time Equivalency (FTE)

5 year old Kindergarten

General Aid Membership

Special Education

State Schools



Pupil Count Dates for determining Membership Reporting Purposes (PI-1563)

- 3rd Friday in September (PI-1563)
 - Used to determine *Revenue Limit, Per Pupil Aid and State Equalization Aid*
- 2nd Friday in January (PI-1563)
 - Used to determine *state equalization aid*
- Summer/Interim Membership FTE (W1804)/(PI-1563)
 - Included when reporting the September Count
 - FTE valued at 100% for Equalization Aid and 40% for Revenue Limit
- Challenge Academy (PI-1563 YCA)
 - Completed September and March



Residency and Membership



Which student FTEs are included in your Revenue Limit and/or Aid Membership?

A key source of guidance is our “Membership Information and Reporting” <https://dpi.wi.gov/sfs/children/enrollment/membership-info-reporting> webpage.



Residents Who May Be Included in Membership (Revenue Limit, Equalization Aid, or Both)

- **Four (4) Criteria:** (For students enrolled in a public school)
 - 1. Resident of an eligible age**
 - A child that lives in the District
 - Between the ages of four by September 1 and twenty when enrolling in the *regular* education program
 - Between the ages of three and twenty prior to the first day of class when receiving *special education services*
 - 2. Financial Responsibility**
 - A child whose instruction is either provided or paid for by the District



Residents Who May Be Included in Membership (Revenue Limit, Equalization Aid, or Both)

- **Four (4) Criteria:** (For students enrolled in a public school)
 - 3. Attending on the Count Date**
 - A child that is receiving instruction
 - A child, did not receive instruction on count date, did receive instruction the before and after rule
 - 4. Certain limited non-residents**
 - Part-time pupils – Homebased
 - Certain Summer Online Course – Open Enrollment



Determining Who is a Resident

- Not defined in statute
- Up to the local school district
- Case law – Thayer Ruling
 - A minor may have, for school purposes, a residence other than that of his parents if the school district was incidental to the child's reason for living in the district.
- Identify where the child lives (address information)
 - It is important to keep accurate and up to date enrollment records and address information for all resident children – especially with the level of Open Enrollment activity.
- Identify the district where property taxes are paid (municipal clerk records or county data base)



Financial Responsibility

- Resident pupils in your seats, taught by your teachers and meeting the age limitations. (Slide #7)
- Full-time resident pupils in attendance elsewhere, but your district is paying for their education.
 - Open Enrollment
 - Tuition Agreements
 - Cooperative Programs
 - CESA programs
 - Tuition Waivers (caution: check the details of the situation)



COVID-19 Regulatory Flexibility Framework Provisions

- Under existing law and DPI guidance, a student may be included in a school district's September headcount for aid and revenue limit membership purposes if:
 1. The student is enrolled and in attendance on the third Friday in September.
 2. The student is enrolled and in attendance for the school year on any day before the third Friday in September, and any day after that date, with no change in residency or enrollment during that period.

In either case, the student may be counted regardless of the specific setting in which they are receiving instruction.



COVID-19 Regulatory Flexibility Framework Provisions

If a district implements policies on how teachers will take and record attendance in their student information system (SIS) for in-person, virtual, or blended instruction, then it should conduct its third Friday count process as usual.

Otherwise, the district will need to define its attendance policies for the instructional settings that may be in use this year, and then determine alternative method(s) for documenting attendance used in the third Friday membership count.

Districts selected for membership audits, as required by law, will need to make their attendance policies and documentation used for their headcounts available to auditors, but DPI is not prescribing that policies or documentation must be in any particular format.



Counting 3 Year-Old Students Attending Programs in Your District

When a school district provides educational services to resident children who are 3 years old as of September 1st or reach the age of 3 years old during the current school year, if the individual program allows. That child can be counted in the PI-1563 report in one program only, the choices are:

- Preschool-Special Education – Included in count
- Title One Funded Preschool - Not included in count
- School-Operated Head Start – Not included in count
- 3 Year-Old Programs – these non-special education students will not be included in the pupil count and not impact the district's revenue limit calculations and related aid calculations. However, costs in Fund 10 associated with 3-Year-Old Programs will reduce the district's shared cost in the General Equalization aid calculation.



Counting Non-residents When Completing the PI-1563

- **Completing the PI 1563 is a process, not just a matter of counting residents, it also includes non-resident students attending your schools**
 - **You include non-resident students in seats in your district**
 - **Subtract non-residents in those seats**
 - **Adjust for Part-time students**
 - **The non-resident students will not be in adjusted head count used to calculate the district's membership FTEs.**



September Pupil Count

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Home Families & Students Schools & Educators Libraries Data & Media Search site

SFS Home » School Financial Services

School Financial Services

Accounting, Auditing & Financial Management

State & Federal Aid

Counting Children

Reporting to SFS

Revenue Limits

Calendars & Communications

Statistical

Presentations & Tutorials

Welcome to School Financial Services

What We Do

The School Finance Team provides information and support to district administrators and fiscal staff, CESA/CCDEB administrators, legislators, public interest groups, taxpayers, researchers and media.

Reporting Portals

- SFS Reporting Portals
- PI 1500 District Contacts Rpt
- PI 1500 Instructions
- Transfer of Service

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Home Families & Students Schools & Educators Libraries Data & Media Search site

SFS Home » Reporting to SFS » School Finance Reporting Portals

School Finance Reporting Portals

Annual Reports

PI-1504 Budget Report

Entering Long Term Debt into SAFR

Referendum Information

Reporting Census Data Instructions

Transportation Data Reporting

Additional Reporting Instructions

Chapter 220 Membership Reporting

School Calendar - Days and Hours of Instruction

SFS/DPI-1500 District Contacts Report

Portal User Group Login Links

[Log In to View or Submit Data](#)

This link will allow the user to view or to enter and submit data to the department. After entering the new ID and Password, district staff can proceed to the reports for which they have been authorized to file data. Navigation to the district reports is the same as before. Just click "Continue."

As a note, the 2008-09 ID and Password will no longer allow district staff to enter data.

[Public View Submitted District Data](#)

This link will allow the user to view any district data that has been officially submitted to the department. It looks very much like the current portal screen except that the user cannot access areas which require a password.

[Auditors Log In to Submit Data](#)

District auditors will use their previously assigned SAFR ID and Password to enter and submit data to the department.

Start by clicking on the "SFS Reporting Portals"

Login from here. Do not bookmark any portal pages beyond this one.

School Finance Reporting Portal



Go To

- [District Home](#)
- [Financial Data](#)
- **Non-Financial Data**
- [Change District](#)

People

- [PI-1500 Contacts](#)
- [Contact History](#)

Alma (0084)

Non-Financial Data Home

Non-financial data, such as **headcounts** or the **number of students**, are collected in the following categories:

- [Pupil Count - Summer](#) (PI-1804)
- [Pupil Count - September](#) (PI-1563)
- [Pupil Count - January](#) (PI-1563)
- [Challenge Academy - September](#) (PI-1563-CA)
- [Challenge Academy - January](#) (PI-1563-CA)
- [Pupil Transportation](#) (PI-1547)
- [Pupil Transportation Summer](#) (PI-1547-SS)
- [School Calendar](#) (PI-1505-Calendar) **!**
- [School Census](#) (PI-1505-Census)

Under “Non-Financial Data Home” you will find a link to the “Pupil Count September” portal.



Pupil Count (PI-1563) - September

This report collects the pupil count as determined on the third Friday in September. The count is converted to a full-time equivalency and used in the calculation of a district's revenue limit and equalization aid.

This is first page inside the PI-1563 portal, and it will provide the user with updated general information that needs to be review and considered before this report is completed.



5 Steps where data is entered in the PI-1563 portal

Step 1: Head Count – (Record all Resident and Non-Resident students to whom the district is directly providing educational services)

Step 2: Non-Resident Reductions- (Record students in your seats that are residents of another district)

Step 3: Resident Reductions- (Record resident students who are included in the head count but are not eligible to be counted full-time for state aid purposes)

Step 4: Resident Additions – (Record residents students your district is financially responsible for that attend another school)

Step 5: Part time Home-Schooled (Record Non-Resident Home-Schooled students attending your school)



PI-1563 Pupil Count Process, Step 1.1 Physically Present and Step 1.2 Absentees (same as shown below)

Identify all Resident and Non-Resident students to whom the district is directly providing educational services. (Non-resident public school students taking 1 or 2 courses under PTOE are included here in Step 1, and then backed out in Step 2.) Excluding:

- 1: A resident student who is Open Enrolled out on a full - time basis, and returns to take 1 or 2 courses under Wis. Stat. [§118.52](#) Part-time Open Enrollment (PTOE) is excluded from Step 1, as that student can only be counted in Step 4.
- 2: Do not count any Non-resident home school pupils taking courses in a school in your district under Wis. Stat. [§118.53](#) in Step 1. Each will be reported in Step 5.

NOTE: These students must have been PHYSICALLY PRESENT on the count date.

The SFS team will be continue to collect the counting of 9th graders for the "Personal Electronic Computing Devices Grant" as required by Wis. Stat. 115.438(4)(a)1.

Preschool - Special Education <i>i</i>	<input type="text"/>
4 year-old kindergarten (437 hours) <i>i</i>	<input type="text"/>
4 year-old kindergarten (524.5 hours) <i>i</i>	<input type="text"/>
5 year-old kindergarten (1/2 day) <i>i</i>	<input type="text"/>
5 year-old kindergarten (3 full days) <i>i</i>	<input type="text"/>
5 year-old kindergarten (4 full days) <i>i</i>	<input type="text"/>
5 year-old kindergarten (5 full days) <i>i</i>	<input type="text"/>
5 year-old kindergarten (blended) <i>i</i>	<input type="text"/>
Grades 1 - 12 <i>i</i>	<input type="text"/>

Special Education for birth through age 2	<input type="text"/>
Title I Funded Preschool	<input type="text"/>
School-Operated Head Start	<input type="text"/>
Other	<input type="text"/>
3 year-old programs <i>i</i>	<input type="text"/>

The number of 9th graders included in Grades 1-12:

9th Graders	<input type="text"/>
-------------	----------------------



Step 1 – Head Count - Identify all Resident and Non-Resident students to whom the district is directly providing educational services.

PI-1563 Pupil Count Process

Step 2 Summary

Category	Open Enrollment	Tuition Waivers	Section 66.0301	CESA Program	Tuition	9-18 Weeks S. Tuition	Outside Aid Eligibility	Chapter 220	CCDEB	Incarcerated / Hospital	Total
Preschool Special Education											0
4 YK - 437 Hours											0
4 YK - 524.5 Hours											0
5 YK - Half Day											0
5 YK - 3 Full Days											0
5 YK - 4 Full Days											0
5 YK - 5 Full Days											0
5 YK - Blended											0
Grades 1 - 12											0
Subtotal:	0	0	0	0	0	0	0	0	0	0	0
9th Graders in Step 2:											0



Step 2 – Non-Resident Reductions- (Students in your seats that are residents of another district)

PI-1563 Pupil Count Process - Part-time Resident (Step 3 – Reductions)

Resident student - less than Full-Time Enrollment attends:


- any grade in a public school in the district under [s. 118.53](#) is eligible for state aid up to a [maximum of two courses](#) per pupil per semester.
- high school in the district under [s. 118.145\(4\)](#) is eligible for state aid up to a [maximum of two courses](#) per pupil per semester.
- the district less than full-time as defined by [s. 118.15\(1\)](#). *Private school* students who attend grades other than high school are included in this area.
 - Student attends another district through Open Enrollment, but returns to resident district for [up to two classes](#) under [s. 118.25](#) – where not to be counted in Step 1 as they will be added in Step 4.
- See <https://dpi.wi.gov/sfs/children/enrollment/pi-1563-program-def#NR%20Reduct>





PI-1563 Pupil Count Process - Part-time Resident (Step 3 – Reductions)


FY 2020-2021 Pupil Count - September


Step 3.1: Resident Reduction - Part-Time - Home Schooled


4 year-old kindergarten (437 hours) - Residents 


4 year-old kindergarten (524.5 hours) - Residents 


5 year-old kindergarten (1/2 day) - Residents 

5 year-old kindergarten (3 full days) - Residents 

5 year-old kindergarten (4 full days) - Residents 

5 year-old kindergarten (5 full days) - Residents 

5 year-old kindergarten (blended) - Residents 

Grades 1 - 12 - Residents 

FY 2020-2021 Pupil Count - September

Step 3.2.1: Part-Time 9th Graders - Private School - 9th Grade

How many Resident 9th graders are attending part-time from a private school?

How many **total hours of instruction** during the first semester are scheduled for the 9th graders identified in the question above? This is an aggregate of all minutes converted to hours. Use a maximum of two classes for each student in the calculation.

After this screen, for each grade, a follow up screen will need to be completed, with same basic questions seen for the 9th graders shown to the right.

When entering Part-Time – Private School students, a different screen will be provided for 9th, 10th, 11th and 12th grades.

The more students in the 1st box, the higher the value needed in the 2nd box.



PI-1563 Pupil Count Process

Summary of Step 3: Resident Reductions

Category	<u>Part-Time Home School</u>	<u>Part-Time Private School</u>	<u>Outside Age Eligibility</u>	Total
Preschool Special Ed	0		0	0
4 YK - 437 Hours	0		0	0
4 YK - 524.5 Hours	0		0	0
5 YK - Half Day	0		0	0
5 YK - 3 Full Days	0		0	0
5 YK - 4 Full Days	0		0	0
5 YK - 5 Full Days	0		0	0
5 YK - Blended	0		0	0
Grades 1 - 12	0	0	0	0
Totals:	0	0	0	0
9th Graders in Step 3:	0	0	N/A	0

Step 3 – Resident Reductions- (Resident students who are included in the head count but are not eligible to be counted full-time for state aid purposes)



PI-1563 Pupil Count Process

Step 4 Summary

Category	Open Enrollment	Tuition Waivers	Section 66.0301	CESA Program	Tuition	Chapter 220	E. C. C. P.	Youth Apprentice	\$118.15 Contracts	Partnership School	Residential Treatment	Total
Preschool Special Education												0
4 YK - 437 Hours												0
4 YK - 524.5 Hours												0
5 YK - Half Day												0
5 YK - 3 Full Days												0
5 YK - 4 Full Days												0
5 YK - 5 Full Days												0
5 YK - Blended												0
Grades 1 - 12												0
Subtotal:	0	0	0	0	0	0	0	0	0	0	0	0
9th Graders in Step 4:												0



Step 4 – Resident Additions – (Residents your district is financially responsible for that attend another school)

PI-1563 Pupil Count Process

Summary of All Steps

Final Summary

Category	<u>Step 1: Starting Count</u>	<u>Step 2: Less Non-Resident Reductions</u>	<u>Step 3: Less Resident Reductions</u>	<u>Step 4: Plus Resident Additions</u>	Total
Preschool Special Education	0	0	0	0	0
4 YK - 437 Hours	0	0	0	0	0
4 YK - 524.5 Hours	0	0	0	0	0
5 YK - Half Day	0	0	0	0	0
5 YK - 3 Full Days	0	0	0	0	0
5 YK - 4 Full Days	0	0	0	0	0
5 YK - 5 Full Days	0	0	0	0	0
5 YK - Blended	0	0	0	0	0
Grades 1 - 12	0	0	0	0	0
Totals:	0	0	0	0	0
9th Graders:	0	0	0	0	0

Final Summary – Review Data

Provides a Summary of Pupils by Steps 1 - 4



PI-1563 Pupil Count Process - (Step 5, Non-Resident Additions)

Part Time Home-Schooled, Non-Resident Pupils

A school district can count, for **General Aid (but not Revenue Limit) purposes**, a non-resident, home-school pupil (but not a non-resident private-, parochial- or tribal-school pupil) taking courses in the district under [§118.53](#), in an amount equal to 0.25 FTE per course, up to two courses per semester (i.e., district could count a maximum of 0.50 FTE per non-resident, home-school pupil). [[see §121.004\(7\)\(em\)](#)]








Part time Home-Schooled, Non-Resident Pupils are collected in Step 5 of the PI-1563 wizard.



PI-1563 Pupil Count Process - (Step 5, Non-Resident Additions)

Step 5.1: Non-Resident Additions

Please distribute the pupils enrolled in a home-based private educational program taking either 1 or 2 courses.

	1 Course	2 Courses		1 Course	2 Courses
4 year-old kindergarten (437 hours) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 1 - Non-Residents	<input type="text"/>	<input type="text"/>
4 year-old kindergarten (524.5 hours) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 2 - Non-Residents	<input type="text"/>	<input type="text"/>
5 year-old kindergarten (1/2 day) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 3 - Non-Residents	<input type="text"/>	<input type="text"/>
5 year-old kindergarten (3 full days) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 4 - Non-Residents	<input type="text"/>	<input type="text"/>
5 year-old kindergarten (4 full days) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 5 - Non-Residents	<input type="text"/>	<input type="text"/>
5 year-old kindergarten (5 full days) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 6 - Non-Residents	<input type="text"/>	<input type="text"/>
5 year-old kindergarten (blended) - Non-Residents 	<input type="text"/>	<input type="text"/>	Grade 7 - Non-Residents	<input type="text"/>	<input type="text"/>
			Grade 8 - Non-Residents	<input type="text"/>	<input type="text"/>
			Grade 9 - Non-Residents	<input type="text"/>	<input type="text"/>
			Grade 10 - Non-Residents	<input type="text"/>	<input type="text"/>
			Grade 11 - Non-Residents	<input type="text"/>	<input type="text"/>
			Grade 12 - Non-Residents	<input type="text"/>	<input type="text"/>



PI-1563 Pupil Count Process

[Review Your Answer](#)

Comparison to Prior Data

Comparison Summary				
Category	Adjusted Count Sept	Last Year Sept	Change from Last Year	Percent Difference
Preschool Special Education	6	1	+5	500%
4 YK - 437 Hours	0	0		N/A
4 YK - 524.5 Hours	16	11	+5	45.45%
5 YK - Half Day	0	0		N/A
5 YK - 3 Full Days	0	0		N/A
5 YK - 4 Full Days	0	0		N/A
5 YK - 5 Full Days	16	15	+1	6.67%
5 YK - Blended	0	0		N/A
Grades 1 - 12	175	182	-7	-3.85%
Totals:	213	209	+4	1.91%

Back

Next

Review Resident Student Count Data

Compare Current Year Data to Prior Year Data



Review Your Answers

Helpful Links

Help

- [How to Use this Wizard](#)
- [Program Definitions](#)
- [Student Categories](#)
- [Examples](#)

Review Answers

- [Step 1 - Headcount](#)
- [Step 2 - Non-Resident Reductions](#)
- [Step 3 - Resident Reductions](#)
- [Step 4 - Resident Additions](#)
- [Step 5 - Non-Resident Additions](#)

Submit

- [Submit to DPI](#)
- [Certification / Signature Page](#)

Summaries

- [Summary of Step 1 - Headcount](#)
- [Summary of Step 2 - Non-Resident Reductions](#)
- [Summary of Step 3 - Resident Reductions](#)
- [Summary of Step 4 - Resident Additions](#)

- [Summary of Preschool-Special Education](#)
- [Summary of 4 YK \(437 Hours\)](#)
- [Summary of 4 YK \(524.5 Hours\)](#)

- [Final Summary](#)
- [Comparison to Prior Data](#)

Auditing

- [Audit Trail: All](#)
- [Auditor Changes: Summary](#)
- [Auditor Changes: Detail](#)

Links on this screen help you move around in the PI-1563 to review the data (Step 6) and Locating Help Information



PI-1563 Pupil Count Process

Ready to Submit to DPI?

There is one remaining step...

If the data has been completely entered and you have reviewed it for correctness and completeness, please click on the 'Submit to DPI' button below. This will signal DPI that they may start reviewing the data. You may still return and change the data, but you will need to return here after your changes and indicate again that you are done.

When you click the button, we'll make one last check on the data to ensure its accuracy.

Pupil Count - September	
Category	September Count
Preschool Special Education	6
4 YK - 437 Hours	0
4 YK - 524.5 Hours	16
5 YK - Half Day	0
5 YK - 3 Full Days	0
5 YK - 4 Full Days	0
5 YK - 5 Full Days	16
5 YK - Blended	0
Grades 1 - 12	175
Totals:	213

(Adjusted) HEAD
COUNT

Submit to DPI

Step 7 – Submit Completed Report

Full Time Equivalency (FTE)

- **FTE** - The result of a computation that divides the amount of time for a less than full - time activity by the amount of time normally required in a corresponding full - time activity.
- **Membership** - Resident enrollment adjusted for full time equivalency (FTE) as noted in the following groups:
 - Pre - School - Special Education = .5 FTE
 - 4 - Year Old Kindergarten = .5 or .6 FTE
 - 5 - Year Old Kindergarten = .5 - 1 FTE
 - Summer ADM Equivalent = FTE Calculated by taking the total minutes of instruction divided by 48,600.



Online FTE Reports

- [Introduction](#)
A note from the Director
- [Status & Due Dates](#) ! ■ ■ ■ ■ ■
Information on district data entry and upcoming deadlines
- [Financial Data Home](#)
Includes the PI-1505 Full Financial Report
- [Non-Financial Data Home](#)
Pupil Count (Summer, September, January), Pupil Transportation, School Calendar, School Census, Challenge Academy
- [FTE Reports](#)
- [PI-1500 Contacts Report](#)
Identify specific district staff for report submission authorization
- [District Contact History](#)
Report Submission History
- [Auditor](#)
Information on the auditor and audit firm of the district
Special Education Licensure information for auditors

 Shows the resident adjusted FTE that will be used for for Membership

Online FTE Reports

FTE Reports

Effective September 18, 2020: The information provided on this SAFR webpage has a "new" look. When you click on a link for 2016-17, 2017-18, 2018-19 or 2019-20 or 2020-21 school year and moving forward, you will see more information.

Pop-up screens can be accessed to show how the value in that location was determined. These upgrades are designed to assist the viewer in understanding how pupil count information is converted to Full Time Equivalency (FTEs).

The equalization aid and revenue limit calculations use district submitted pupil count data that is then converted to full time equivalency (FTE). A district's calculated FTE is referred to as membership. Below are links to the district's memberships for the equalization aid and revenue limit calculations.

Because of auditing and timing issues, these memberships may not be final. However, they are designed to assist school district staff acquire an understanding of how the district's pupil count is converted to membership. Questions should be directed to [school finance consultant](#) staff.

- [FY 2020-2021 Aid Calc FTE](#) - Data used to calculate aid paid in the 2021-2022 fiscal year
- [FY 2020-2021 FTE Conversion for 2020-2021 Revenue Limit Calculation](#)
- [FY 2019-2020 Aid Calc FTE](#) - Data used to calculate aid paid in the 2020-2021 fiscal year
- [FY 2019-2020 FTE Conversion for 2019-2020 Revenue Limit Calculation](#)

Shows the FTE that will be used for Revenue Limit Membership and Equalization Membership purposes



Full Time Equivalency (FTE)

September								
PI-1563 Base Data	Step 1 Summary	Step 2	Step 3	Step 4	September Summary	Conversion to FTE		
	Physically Present or Absent & Returned	Summary Non-Resident Reductions	Summary Resident Reductions	Summary Resident Additions		Weight	Prorated	Round Within Age
Category	Total	Total	Total	Total	Total			
Preschool Special Education	0	0	0	1	1	0.5	0.50	1
4 YK - 437 Hours	0	0	0	0	0	0.5	0.00	8
4 YK - 524.5 Hours	19	5	0	0	14	0.6	8.40	
5 YK - Half Day	0	0	0	0	0	0.5	0.00	13
5 YK - 3 Full Days	0	0	0	0	0	0.6	0.00	
5 YK - 4 Full Days	0	0	0	0	0	0.8	0.00	
5 YK - 5 Full Days	15	2	0	0	13	1	13.00	
5 YK - Blended	0	0	0	0	0	0	0.00	
Grades 1 - 12	216	40	0	16	192	1	192.00	192
Subtotal:	250	47	0	17	220	214		

When you click on the highlighted value, within the FTE portal, a popup screen will provided a breakdown of that total.



FTE for Revenue Limit Purposes

- FTE generated from the PI-1563 pupil count report from **September** Count only.
- FTE generated from the **September** Challenge Academy Report.
- **40%** of FTE identified in the Summer/ Interim Membership FTE report.



FTE for Equalization Aid that will be used for the following school year

- **FTE generated from the PI-1563 pupil count report from September & January pupil count reports.**
- **FTE generated from the September & January Challenge Academy Reports.**
- **100% of the FTE identified in the Summer Membership FTE report.**
- **Adjustment for Part-time Private or Home-based Students.(Step 3)**
- **Adjustment for Part-time Private non-resident Students.(Step 5)**
- **Adjustment for certain foster/group home students.**
- **Adjustment for Private School Voucher students.**



Summer Membership Reporting Fees

Fees

Complete The Excel Workbook

Fees

Report Totals Using On-line Reporting

Fees

Fees



Summer Membership Reporting-W1804

- Summer and Interim Sessions start and end during break periods outside of the school year
(for membership purposes only, not the fiscal year)
- An Excel worksheet (PI-1804/PI-1804-1805) is available to calculate minutes used for your Summer FTE.
- The data on the 1804 W2 Summary Sheet of the Excel worksheet is reported to DPI on-line at the conclusion of summer school and is due in September.
- Keep the complete Excel workbook for your auditor to review the information used to calculate your summer school FTE.



Summer School Reporting-W1804

- The data on the 1804 W2 Summary Sheet of the Excel worksheet is reported to DPI on-line at the conclusion of summer school and is due October 1, 2021.
- The summer school report is one of the few reports that asks you to calculate the FTE count as opposed to a head count.
- Keep the Excel spreadsheet, as your auditor will review the information used to calculate your summer membership FTE and fee reconciliation.
- Milwaukee and the suburban districts use a special workbook (W1804-1805) that counts ITP students (Chapter 220)



Summer and Interim Session Fees

- Fees for the resident student or parent may be charged for individual use supplies (towels, gym clothes, band instruments, notebooks, pencils), textbooks, or similar items (workbooks) if the district claims the members for State General Aid under ss. 121.14.
- Fees may be charged for social, recreational, or extracurricular summer classes and programs which are neither credited toward graduation nor eligible for State General Aid [s. 118.04(4)].
- <https://dpi.wi.gov/sfs/finances/budgeting/school-fees>



Summer and interim Session Fees

- The fee must fund an item that is legally permitted and actually purchased for summer school use**
- The fee may not be used to subsidize the cost of any other classes, students or administration**
- The fee must be based upon the actual cost of the applicable item(s) the student received**
- If your district is required to have a membership audit, the auditor will also review your summer school FTE and any associated summer school fees**



Membership Audits



Who, What, When



District Selection Process

- The state superintendent is required annually to select at least 25 percent of school districts to have membership audits.
 - Random Selection
 - From a "four-year cycle" pool
 - From an "annual selection" pool
 - District audited in the prior year having a net error rate in excess of 1% from the reported membership, for either count date.
 - Pupil Count report was not received on time.
- Districts announced in February and due May 1st



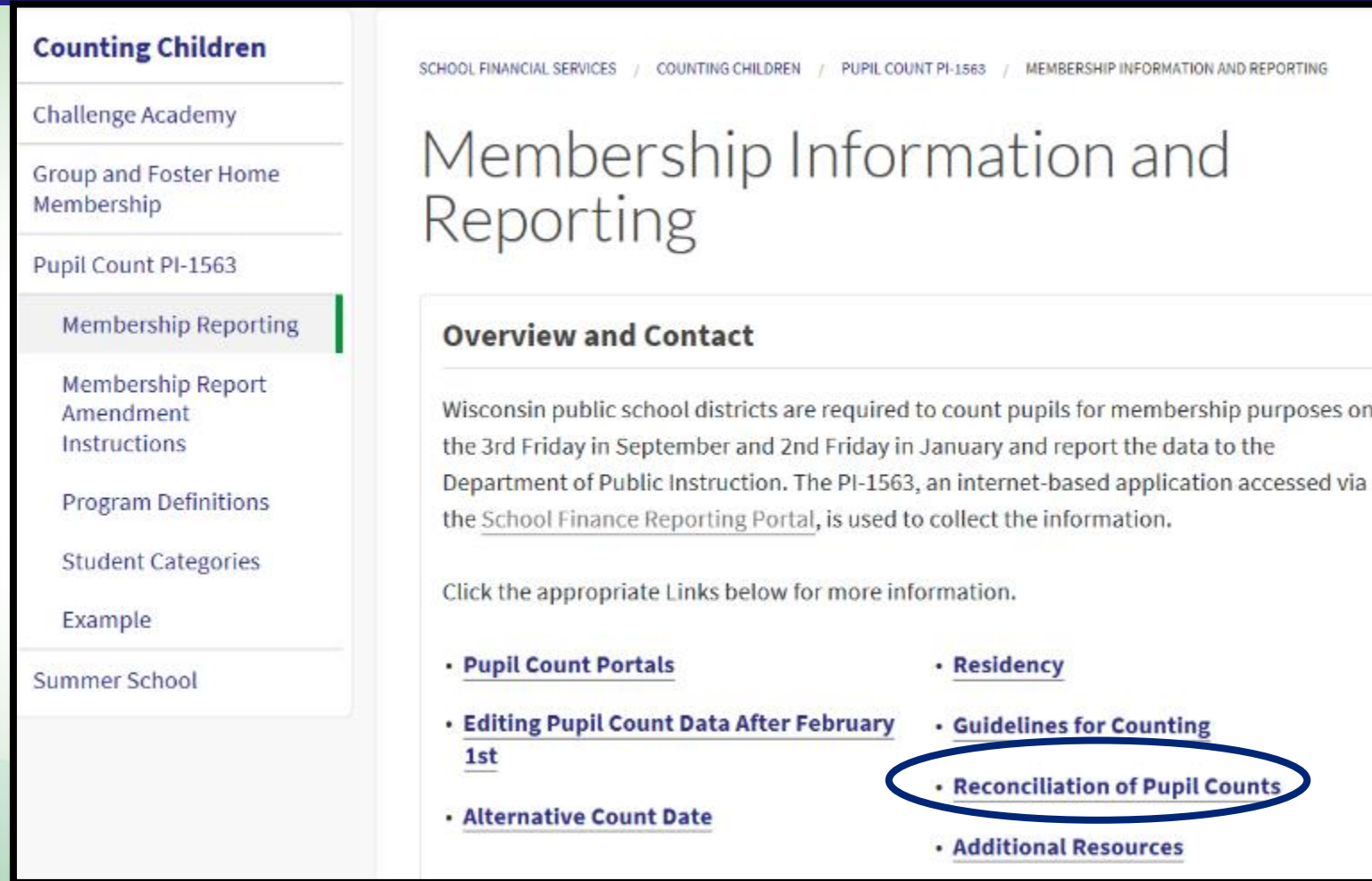
Reconciliation Worksheet

RECONCILIATION OF SEPTEMBER COUNT TO JANUARY COUNT

- ❑ All districts are required to explain (reconcile) membership changes that occur between the September and January counts.
- ❑ The process involves identifying and documenting the specific membership additions and subtractions that have happened in each category (ex. 4YK - 524.5 hours) between the 2 count dates.
- ❑ *The completed reconciliation is to be kept on file at the district office and available for DPI and your independent auditor upon request.*
- ❑ Supporting documentation should also be kept on file and available upon request.



Reconciliation Worksheet



Counting Children

SCHOOL FINANCIAL SERVICES / COUNTING CHILDREN / PUPIL COUNT PI-1563 / MEMBERSHIP INFORMATION AND REPORTING

Membership Information and Reporting

Overview and Contact

Wisconsin public school districts are required to count pupils for membership purposes on the 3rd Friday in September and 2nd Friday in January and report the data to the Department of Public Instruction. The PI-1563, an internet-based application accessed via the [School Finance Reporting Portal](#), is used to collect the information.

Click the appropriate Links below for more information.

- [Pupil Count Portals](#)
- [Residency](#)
- [Editing Pupil Count Data After February 1st](#)
- [Guidelines for Counting](#)
- [Reconciliation of Pupil Counts](#)
- [Alternative Count Date](#)
- [Additional Resources](#)

Left sidebar menu items: Challenge Academy, Group and Foster Home Membership, Pupil Count PI-1563, Membership Reporting (highlighted), Membership Report Amendment Instructions, Program Definitions, Student Categories, Example, Summer School.

All districts are required to explain (reconcile) membership changes that occur between the September and January counts.



Reconciliation Worksheet

District Number	Alma					
	84					
RECONCILIATION OF SEPTEMBER COUNT TO JANUARY COUNT						
Fiscal Year 2020-21						
<p>IMPORTANT: You might see a Security Warning above this worksheet just under the toolbar. Click on "Enable this Content". This will refresh your data pulling in the most recent pupil counts from the live district SAFR PI-1563 pupil counts. (Both September and January)</p>						
	<i>Column 1</i>	<i>Column 2</i>	<i>Column 3</i>	<i>Column 4</i>	<i>Column 5</i>	<i>Column 6</i>
	<i>Pupil Count</i>				<i>Pupil Count</i>	
	<i>September, 2019</i>			<i>Adjusted</i>	<i>January, 2020</i>	
	<i>Total</i>	<i>Additions</i>	<i>Subtractions</i>	<i>Total</i>	<i>Total</i>	<i>Difference</i>
Preschool Special Education	1	0	0	1	1	0
4YK - 437 hours	0	0	0	0	0	0
4YK - 524.5 hours	10	0	0	10	10	0
5YK - half day	0	0	0	0	0	0
5YK - 3 full days	0	0	0	0	0	0
5YK - 4 full days	0	0	0	0	0	0
5YK - 5 full days	21	0	0	21	23	2
5YK - blended	0	0	0	0	0	0
Grades 1-12	191	0	0	191	189	(2)
Totals	223	0	0	223	223	0
<p>- <i>Columns 1 and 5</i>: The data in these 2 columns is pulled live from the "Total" column in the "Summary of All Steps" for each district's PI 1563 Pupil Count Report on file with DPI.</p>						



Summer Membership - Audit

- Review of Fees for summer school are part of this auditing process.
 - Review DPI Guidance on this issue.
 - Review proposed fees to make sure they are appropriate.
 - At the close of the summer class, complete the fee reconciliation in the PI 1804 - You may need to refund the overcharge.
 - Invoices used to confirm actual cost of eligible supplies and support the amount of the fee.
 - To avoid the consequences of overcharging, adequate refunds must be made before the October 1st.
- Enrollment and Withdrawal Records (ADM)
- Attendance Records (ADM)
- Course Descriptions
- Board Policy Regarding Attendance and Enrollment Status



Heads Up !

**Things to know
about . . .**

**Things to watch
for when . . .**



Non-Public Part-time Attendance

Home-based Private Education

§118.53

§ 121.004(7)(em)

Non-Parochial, Parochial, Tribal

§ 118.145(4)

§121.004(7)(e)

Resident

- ✓ Any Grade (K-12)
- ✓ Up to 2 Courses Per Semester
- ✓ Can Count - FTE Computed on Hours Attended

Non-Resident

- ✓ Any Grade (K-12)
- ✓ Up to 2 Courses Per Semester
- ✓ Can Count - .25 FTE for Each Course, .50 FTE Max

- ✓ Grades 9-12
- ✓ Residents Only
- ✓ Up to 2 Courses Per Semester
- ✓ Can Count - FTE Computed on Hours Attended

---> Only for General Aid Purposes, NOT Revenue Limit <---



Early Learners; Preschool, 4K

- New 4K programs need to be approved by DPI.
- 4-Year-Old Kindergarten must be universal and open to all age eligible children in the district.
- Pupil must be at least 4 years old by Sept 1st.
- Preschool and Special Education
 - If pupils are enrolled in both 4K and Preschool Special Education, count in 4K. Do not count in more than one category/program.



Membership and 3, 4, and 5-Year Olds

Takeaways

- Have to be public school students in order to count for membership.**
- Non-Special Education 3-Year Olds participating in district programs are counted separately in PI-1563 Step 1.1 and Step 1.2. from Special Education 3-Year Olds students you serve**
- Count children in the program they are attending.**



Membership and 3 Year Olds

- Please see the session handout provided in these links:
- [Student Membership three, four or five year-olds](#)
- https://dpi.wi.gov/sites/default/files/imce/sfs/xls/Revised-Student-Membership-3-4_or-5-Year-Olds5.xlsx
- This document will be a good recourse when working with determining the assignment of students being served under the age of six.



Special Education

- **Begins at age three.**
- **For three- and four-year-old children not in a 4k program, count as .50 FTE regardless of the special education program time in attendance.**
 - **Speech and Language**
 - **Early Childhood (Pre-School)**
 - **Other Services**
- **Students who turned 20, prior to the first day of class, may enroll any time during the year.**



Counting Students Who Are 20 and 21 Years Old

- If a special education student is 20 prior to the first day of classes according to the school calendar, the student can enroll any time during the year, even after turning 21, and the district must provide services and can count the student.
- If a regular education student is 20 when he/she enrolls and receives instruction, the district must provide services and can count the student. If a student turns 21 prior to enrolling and receiving instruction, the district is not required to provide services and cannot count the student. If a student enrolls prior to turning 21, but turns 21 before attending classes, the district is not required to provide services and the student cannot be counted.



Part-time Attendance and FTE

- Residents attending Private School
 - Calculated based on hours
- Residents - Home Based
 - Calculated based on hours
- Non-Residents Home Based
 - .25 FTE per Course
- Follow the directions/steps as given in the report process or reporting form



Counting Part-time Pupils

- District of *attendance* may count non-resident, home-based pupils enrolled part-time
- Different method to count resident vs. non-resident part-time pupils

Pupil comes from:	RESIDENT	NON-RESIDENT
Home School [All grades]	# PT Pupil Hours / FT Hours for Grade = FTE	0.25 FTE per course (max of 2 courses)
Private School [Grade 9-12]	# PT Pupil Hours / FT Hours for Grade = FTE	Cannot be counted



Challenge Academy

- **Separate report used to account for cadets.**
- **National Guard determines residency.**
- **Both fall and spring reports must be completed.**
- **If student is in the Fall CA count, do not count in PI-1563**
- **By answering questions regarding the regular pupil count data, the Spring report will determine how to count the pupil.**



Other

- **Tuition Waivers**

- **These situations involve children moving out/in of a district mid-year. Sometimes, you still can count a pupil in the year they have moved out of your district....and, sometimes you can't count a new pupil that recently moved in.**



DPI School Financial Service Team

General Contact Information:

- Website <https://dpi.wi.gov/sfs>
- SFS Team Staff Directory
<https://dpi.wi.gov/sfs/communications/staff-directory>
- (608) 267-9114 (phone)
- dpifin@dpi.wi.gov (email)

[DPI COVID-19 Resource](#)

