WISEdata Finance & Pupil Count Membership PI-1563

WISEdata Conference 2022

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WISCONSIN DEPARTMENT OF
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WISEdata Finance (WDF)

PI-1504 Budget and PI-1505 Actual*

District Level Budget and Actual Reports Existed in **SAFR**

- **PI-1504 Budget retired after 2020-21**
  - **Completed**

- **PI-1505 Actual planned retirement after 2020-21**
  - **Revised Implementation - 2021-22**
  - **Parallel Reporting in WDF and SAFR**

* Includes five reports: PI-1505, PI-1505 SE, PI-1505 AC, PI-1506 AC, and PI-1506 FB

In 2016 DPI changed how student

data was reported…

ISES → WISEdata
Wisconsin Information System for Education
Student

Background

...In 2022 we're are doing the same

for financial data

SAFR → **WISEdata**
Wisconsin Information System for Education
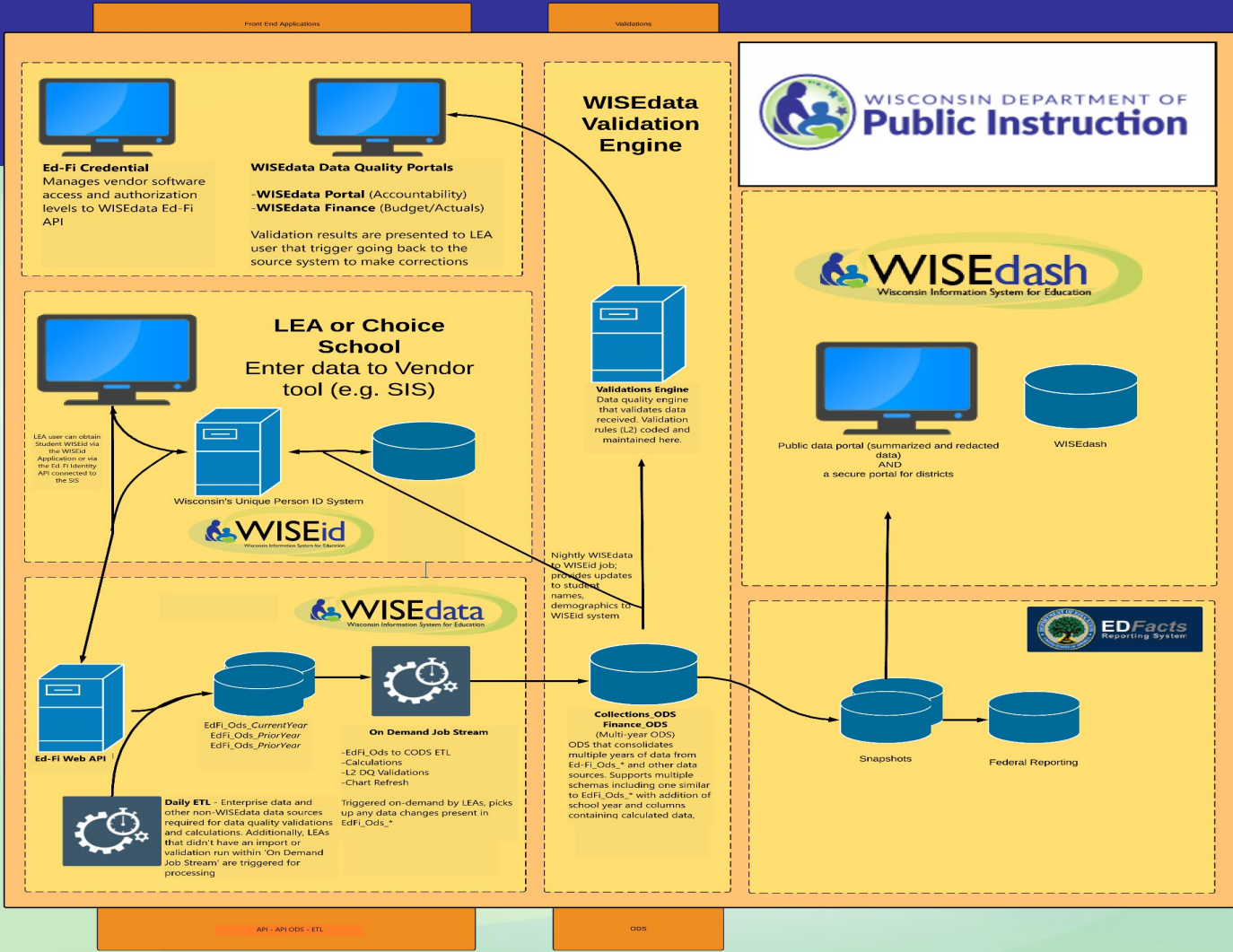**Finance**

What is WISEdata Finance?

- Extension of the Ed-Fi API for robust financial data collection

- New financial data reporting system for Wisconsin LEAs (districts and independent charter schools)

What is WISEdata Finance?

Financial data is sent directly to DPI via the WISEdata Ed-Fi API from your financial system, just as student data is sent directly from your SIS

Why WISEdata Finance?

- Eliminate the manual part of financial reporting

- Better consistency with DPI and local accounts side by side

- Improved accuracy

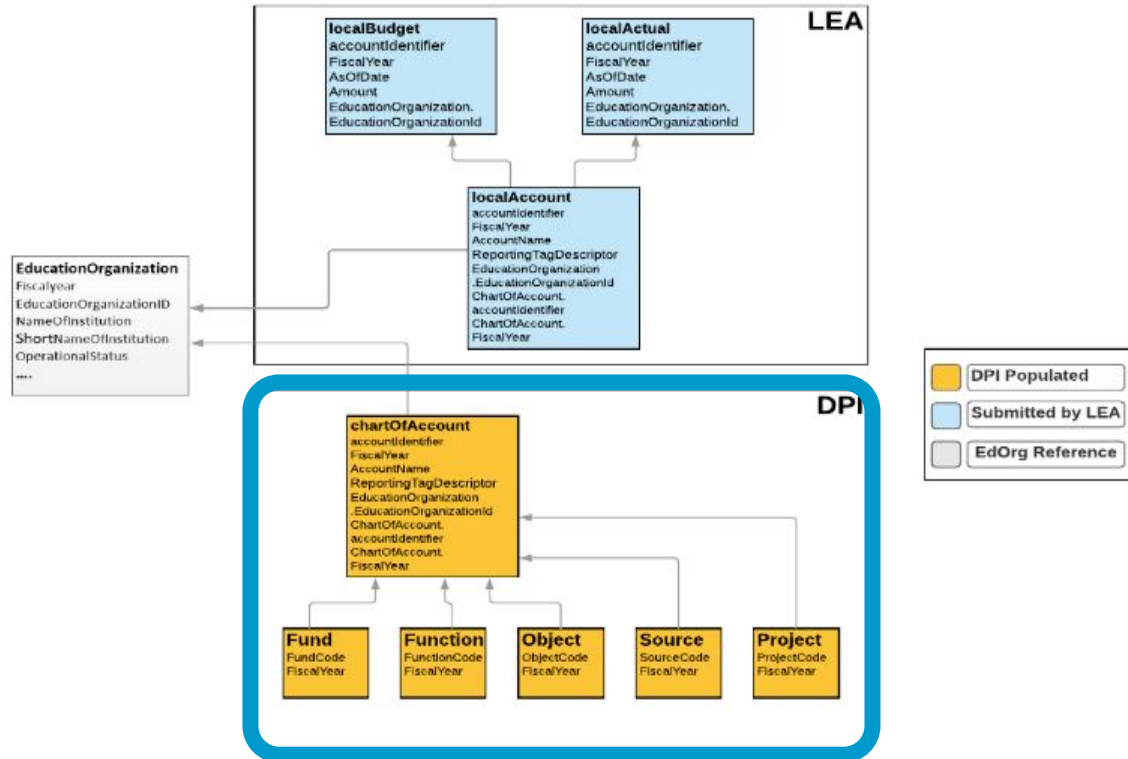- Easier reporting compliance (ESSA School Level Report, PI-1504 Budget, PI-1505 Actual, etc.)

WISEdata Validation Engine

WISCONSIN DEPARTMENT OF Public Instruction

Ed-Fi Credential
Manages vendor software access and authorization levels to WISEdata Ed-Fi API

WISEdata Data Quality Portals

-**WISEdata Portal** (Accountability)
-**WISEdata Finance** (Budget/Actuals)

Validation results are presented to LEA user that trigger going back to the source system to make corrections

LEA or Choice School
Enter data to Vendor tool (e.g. SIS)

LEA user can obtain Student WISEid via the WISEid Application or via the Ed-Fi Identity API connected to the SIS

Wisconsin's Unique Person ID System

WISEid
Wisconsin Information System for Education

Validations Engine
Data quality engine that validates data received. Validation rules (L2) coded and maintained here.

WISEdash
Wisconsin Information System for Education

Public data portal (summarized and redacted data)
AND
a secure portal for districts

WISEdash

Nightly WISEdata to WISEid job; provides updates to student names, demographics to WISEid system

WISEdata
Wisconsin Information System for Education

Ed-Fi Web API

EdFi_Ods_*CurrentYear*
EdFi_Ods_*PriorYear*
EdFi_Ods_*PriorYear*

On Demand Job Stream

-EdFi_Ods to CODS ETL
-Calculations
-L2 DQ Validations
-Chart Refresh

Triggered on-demand by LEAs, picks up any data changes present in EdFi_Ods_*

Daily ETL - Enterprise data and other non-WISEdata data sources required for data quality validations and calculations. Additionally, LEAs that didn't have an import or validation run within 'On Demand Job Stream' are triggered for processing

Collections_ODS Finance_ODS
(Multi-year ODS)
ODS that consolidates multiple years of data from Ed-Fi_Ods_* and other data sources. Supports multiple schemas including one similar to EdFi_Ods_* with addition of school year and columns containing calculated data,

EDFacts Reporting System

Snapshots

Federal Reporting

WISEdata Finance Ed-Fi API

- **Accounting system data available from DPI via the API**
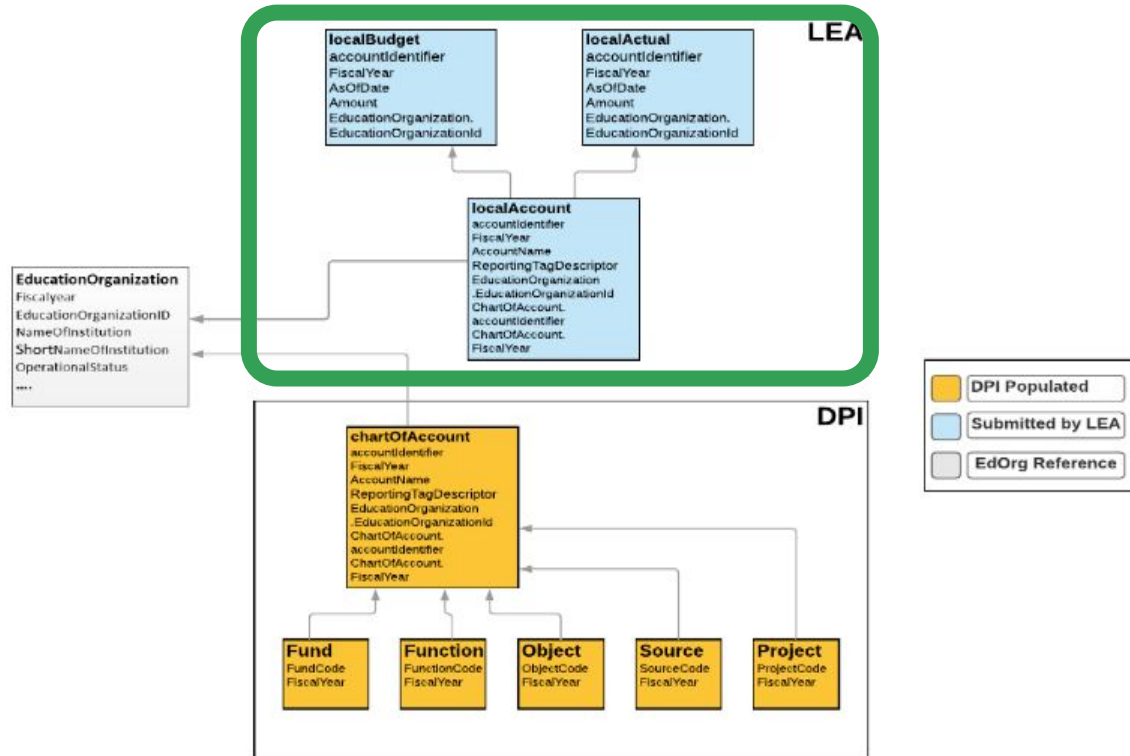

FINANCE ENDPOINT OVERVIEW

WISEdata Finance Ed-Fi API

- **Financial budget & actual data submitted by account using the API**

FINANCE ENDPOINT OVERVIEW

What Does This Mean For You?

- **Financial ledger (your local "books") must be consistent with WUFAR accounting and your DPI reports to avoid WISEdata Finance reporting quality issues**

Every Student Succeeds Act

- **Your responsibility**: Report per-pupil federal & non-federal expenditures by school to DPI

- **Our responsibility**: Collect this data and report it to the U.S. Department of Education

Why School Level Reporting?

- **Goal**: Financial transparency of resource allocation on a per student basis

- **Idea**: Use data to drive improvements and promote greater fairness and equity for all students

Breaking News

For 2021-22 Actual Financial Data Reporting

- **Parallel submission** will occur via **WISEdata Finance** and **SAFR**

- **Data quality issues should be addressed in source system** (Financial software) and data should be resubmitted to WISEdata Finance and SAFR

WISEdata Finance Pupil Count Membership PI-1563

WISEdata Pipeline Extension & New Pupil Count Membership Application

Pupil Count Membership PI-1563

Public Only

Vendor: Pilot

LEAs: Pilot

– **Pilot project in 2022-23 SY.** The official PI-1563 report will be collected via the State Aid Financial Reporting (SAFR) portal.

– **LEA advisors will guide design, provide feedback and perform parallel testing** with data they are familiar with

Pupil Count Membership PI-1563

Public Only

Vendor: Pilot

LEAs: Pilot

Key features for initial pilot release:

- **WISEdata Data Pipeline Integration:**
  - Leverage data from SIS vendors that push to WISEdata API today + additional new data properties from SIS and calculations
  - Provides the necessary data to flow to Pupil Count for Membership

Pupil Count Membership PI-1563

- <u>New</u> **Pupil Count for Membership Application**

- **Majority of aggregate counts will be pre-populated** and allow **drill down** to obtain student detail

- **Ability to stage and preview data** prior to committing to Pupil Count 'Current'

- **OPAL Application WISEid integration**
  - Will allow for data quality and **validation between open enrollment system and Pupil Count Membership**

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Data Flow from SIS to Pupil Count 1563

SIS → **WISEdata** → **Pupil Count 1563 Application**

SIS

Integrated data elements in the SIS

New data elements in the SIS that need to be integrated with WISEdata API

WISEdata

WISEdata calculations for membership pupil count

WISEdata pre-populate pupil counts for membership

Pupil Count 1563 Application

Before publishing to Pupil Count 1563 application, data is staged

LEA previews the staged data

LEA publishes the data which becomes the current data

LEA → **Pupil Count 1563 Application**

LEA

Data not in SIS or not in WISEdata Portal

Pupil Count 1563 Application

LEA enters data manually in Pupil Count 1563 application

The 'Home' screen is still raw and not close to a final product, however, the goal is to provide data count metrics, indicate if new data is available for review and provide a method to review new data and push to 'current'.

--- Pupil Count - 3rd Friday September Data ---

Data Loaded 2/7/2022 2:42:49 PM

🗙 Export to Excel

First Name	Last Name ↑	School Name	Entry Date	Exit Withdraw Date	Grade Level	Resident Lea Name	Residency Status	Pupil Count Type	Pupil Count Category ↑	Pupil Count Inclusion Tfs	Part Time Instructional Minutes
6975.011	6975.01	Horizon Elementary	07/01/2021	12/16/2021	06	Sun Prairie Area School District		F	R-HC	false	
PUPILSM	AGradeoneP	C H Bird Elementary	07/01/2021		01	Sun Prairie Area School District		F	R-HC	true	
Ora	Allison	Cardinal Heights Upper Middle	07/01/2021	06/05/2022	12	Sun Prairie Area School District		F	R-HC	true	
A7150.01	B7150.01	Sun Prairie High	07/01/2021		12	Sun Prairie Area School District		F	R-HC	true	
A7150.02	B7150.02	Sun Prairie High	07/01/2021	12/31/2021	12	Sun Prairie Area School District		F	R-HC	true	
A7150.05	B7150.05	Sun Prairie High	07/01/2021	12/31/2021	12	Sun Prairie Area School District		F	R-HC	true	

'Current' data view with ability to sort and filter on columns. Export to Excel built in.

--- Pupil Count - 3rd Friday September Preview ---

Stage Data

Data Staged 2/14/2022 2:46:33 PM

Category	Current Resident	Staged Resident	(+/-)	Current Non resident	Staged Non resident	(+/-)
R-HC	130	130		0	0	
R-HOME	2	2		0	0	
R-PRIVATE	8	8		0	0	
NR-66.03	0	0		2	2	
NR-CESA	0	0		2	2	
NR-OE	0	0		1	1	
NR-TW	0	0		2	2	
Total	140	140		7	7	

View Changes   Save Staged Data

'Preview' page to view what is in 'Current' versus what is in 'Stage' (data not pushed into 'Current'). This page is raw and needs some work on terminology and UI flow, but the concept is to allow LEA user to preview data changes coming from WISEdata prior to pushing into Membership Pupil Count PI-1563.

'View Changes' page that provides differences between what is in 'Staged' data and 'Current'. This page is raw and needs some work on terminology and UI flow, but the concept is to allow users to easily see differences prior to committing to pushing staged data to current.

Welcome John! | 2021-2022 ▾ | | Sun Prairie Area School District   ▾ | log off

Pupil Count Module

Home   LEA   TFS ▾   SFJ ▾   Admin ▾

--- Pupil Count - 3rd Friday September ---

The counts under this section are prefilled by DPI based on the membership data that comes through SIS which flows into WISEdata and published to this new Pupil Count application. Students shown here qualify the membership attendance requirement. Part 1 shows all the students counted for PI 1563 and Part 2 shows not counted students. For total head count we add up all the students under Part 1.

⊕ **Expand All** ⊖ **Collapse All**

| Pre school Special Education |
| 4 yr old K4 - XXX hrs |
| 5 yr old KG (1/2 day) |
| 5 yr old KG (3 full days) |
| 5 yr old KG (4 full days) |
| 5 yr old KG (5 full days) |
| Grades 1-12 |

This is a view of the Pupil Count - 3rd Friday September page. Each category 'panel' is collapsed by default. 2nd Friday January will have functionality replicated.

This is a drill down on the 'Grades 1-12' category. The drill down separates the category into 'Part 1 - Students I am Counting' and 'Part 2 - Students I am not Counting'.

The aggregate count (87) is a live link that allows a drill down to see the specific students. Additional data columns can be added if needed and export capability might make sense. Columns can be filtered and sorted.

Part 2 - Students I am not counting	
Resident enrolled out - Not Counted for PI 1563 ⓘ - Collection process has changed. Please review the information icon	**Not Counted**
9-18 weeks special tuition	0
Tuition by parent	0
Non Resident enrolled in - Not Counted under your district ⓘ - Collection process has changed. Please review the information icon	**Not Counted**
66.03	1
CCDEB	0
CESA	1
Open enrolled	1
Tuition	0
Tuition waiver	1
Non Resident enrolled in - Not Counted for PI 1563 ⓘ - Collection process has changed. Please review the information icon	**Not Counted**
9-18 weeks special tuition	0

This is 'Part 2 - Students I am not counting'. The drill down on the aggregate student count is still present.

Some Pupil Count Membership students don't flow thru the SIS to WISEdata. For these scenario, WISEids or Local Person Id will need to be assigned and then entered into new 'Additions' page (next slide).

Pupil Count Module

--- Pupil Count - 3rd Friday September - Manual Entry ---

Enter 3 yr old Program - Resident Head count Students

Student ID Type

◉ WISEid ○ Local Person Id

Student IDs

Enter or paste a list of WISEid's separated by commas (e.g. 9999999999,1111111111,2222222222)

[Submit]

Student Id Type	Student Id ↑	Wise Id Already Counted	Manual Duplicate	↑
		No records returned		

|◀ ◀ [0] ▶ ▶| 100 ▼ items per page   No items to display

For questions about this information, contact dpifin@dpi.wi.gov (608) 267-9114

Manual entry of list of WISEids and/or Local Person Id. On 'Submit' results are refreshed in grid below. Validation occurs on submit.

Pupil Count Membership PI-1563

Public Only

Vendor: Pilot

LEAs: Pilot

- **We still have a lot of work to come including:**

  - Summary page similar to what is seen following Step 5 in the current system

  - Data quality validation (L2) checks (including checks against OPAL)

  - Visual metrics and other indicators to compare 'Current' to prior snapshots

  - Significant UI/UX improvements to ensure high usability and navigation

  - Full system QA - compare of SAFR

  - SIS vendor integration development / testing

  - Pilot group determination/training

Questions? Comments?