

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

August 2023

MASBO FALL NEW SCHOOL BUSINESS OFFICIAL ACADEMY

We are thrilled to announce the upcoming School Business Official Academy. We will be holding this workshop in two locations. The first will be a daylong session held in Helena on Thursday, September 28th, with webinar- zoom option available. The second will be an in-person only, full day session held in Billings at the Billings Convention Center on Monday, October 2nd. Please see the [professional development](#) page of our MASBO website for more



MASBO VETERAN SCHOOL BUSINESS OFFICIAL WORKSHOP

We are thrilled to announce the return of the Veterans workshop. We will be holding this workshop in two locations. The first will be a daylong session held in Helena on Friday, September 29th, with webinar- zoom option available. The second will be an in-person only, full day session held in Billings at the Billings Convention Center on Monday, October 2nd. Please see the [professional development](#) page of our MASBO website for more information.

MASBO Minutes with Steve and Shelley

MASBO minutes are back!!! Please join Steve and Shelley on Thursday, August 1st at 9:00 am. The goal is to hold this webinar monthly for our members. Steve will continue to discuss newsletter topics for our newest members and time will be held for all members to share thoughts, concerns, ideas, requests, or just say hi. Hope to see you there. No cost to attend. Click the [here](#) for the zoom link.



MASBO TRAINING SURVEY REQUEST

We know you are swamped so this is a SUPER brief questionnaire. MASBO wants to ensure that we are covering all the topic areas you need to support you in your careers. If you can, please take a moment to share your insights with us.

THANK YOU!!! Please click [here](#) to access the survey.



Have You Missed Any MASBO Webinars?

MASBO is offering recordings of prior webinars presented. If you were unable to attend a prior training and would like access to the video recording, please check out the [professional development](#) tab in the MASBO website. Upon registration and payment, we will send you the links for your purchases by email.



MCEL REGISTRATION IS NOW OPEN!

[Click here to register to attend in-person](#)

[Click here to register to attend virtually](#)

Become inspired and improve your skills at the largest gathering of school leaders in Montana.

Join us on October 18-20, 2023, in Billings and learn what's next!

A full agenda will launch in August. All events will take place in the [Alberta Bair Theater](#) and the [DoubleTree by Hilton Hotel](#) in downtown Billings.



P-CARD NEWS-----

MASBO P-CARD PURCHASES REPORT

P-Card purchases for three months of the current rebate year (April - June) totaled over **\$11,238,867** with **186** school districts and special education cooperatives participating in the program. At the same time last year, we had 177 participants. Click [here](#) to see the current year P-Card purchases report.

Need Help? Contact Holly Wallace at **1-815-793-4655** or hwallace@jasbo.org for help or to schedule a webinar on helpful topics.

Prior year P-Card rebate checks have been issued. Please be sure to look for them in the first week of August.

MASBO Board of Directors

President	<u>Belinda Klick</u> , Sun River Valley	Region 1 Director	<u>Lacey Porrovecchio</u> , Bigfork
Vice-President	<u>Rebekah Rhoades</u> , Lewistown	Region 2 Director	<u>Karsen Floerchinger</u> , Cascade
Past President	<u>Rita Huck</u> , Huntley Project	Region 3 Director	<u>Colleen Drury</u> , Scobey
Fiscal Agent	<u>Kim Aarstad</u> , East Helena	Region 4 Director	<u>Shay Baize</u> , Lima
		Region 5 Director	<u>Daniela Walsh</u> , Billings
		Region 6 Director	<u>Stacy Montgomery</u> , Forsyth
Ex-Officio, OPI	<u>Barb Quinn</u> , MT Office of Public Instruction	Ex-Officio, MTSUIP	<u>Jen Mettler</u> , Baker

MASBO STAFF

Marie Roach
Association Services Coordinator
406-461-8804

Steve Hamel
Interim Services/Trainer
406-431-0124

Donnie McVee
Interim Serv/Professional Learning
406- 461-8667

Shelley Turner
Executive Director
406-461-3659

FY24 MASBO MEMBERSHIP

Invoices have been mailed out. Please consider other members of your school business including Superintendents and Board members that will benefit from a MASBO membership. MASBO Members have a wide range of networking and training opportunities throughout the year, including budgeting, school elections, payroll, technology and accounting to name a few. There is also an opportunity to dual enroll in MASBO and ASBO international. Call or email for more information.

To set up a new employee with a MASBO membership, please have them complete an online membership application: [MASBO Membership](#)

Please email [Marie](#) with any membership questions.

MASBO WEBSITE – DID YOU KNOW?

Our Resource Page's Drop-Down Menu Includes:

Presentations	Slides from past MASBO workshops
Calendar	Important dates, deadlines and links
Election	Reminders, news and links
Legislative	News and resources
Links	Various state and federal website links
Software Users	Find software users here
Region Map	Find which counties are in your MASBO region

MASBO MEMBER PROFILES

New custom fields for County, District Enrollment and MHSA Class Size have been added! To assist with negotiations, we also have both salary and benefit fields. Please note that these two fields are hidden and only accessible for salary survey use by MASBO staff.

To update your profile:

Log in to MASBO.com

Your username is your email address

Don't remember your password? Please try the password reset option

Go to your [Profile page](#), then select the [Custom tab](#) to add and update, that's it!

MASBO MEMBER SEARCH

Do you need to find another MASBO Member? We've enhanced this search feature on our website for you:

Under the Membership Page, select the Member Search Drop-Down

You can now search by **School, Software, County, Region, MHSA Size, Last Name or Zip**

Email Marie if you need any assistance: mroach@masbo.com

MASBO Training Calendar Tentative Dates

In an effort to help you with your calendars and budgets, below are the following tentative dates of the upcoming year's training. Additional training will be added to this list as they develop.

Topic	Tentative Date(s)
SEPTEMBER 2023	
Tuesday, 5 th	MASBO Minutes Webinar at 9 am
Thursday, 28 th	New School Business Official Day Long Workshop in Helena at MTSBA headquarters with a webinar option
Friday, 29 th	Veteran School Business Official Day Long Workshop in Helena at MTSBA headquarters with a webinar option.
OCTOBER 2023	
Monday, 2 nd	Veterans Workshop in Billings (in person only)
Monday, 2 nd	New School Business Official Workshop in Billings (in person only)
18 th -20 th	MCEL in Billings
NOVEMBER 2023	
Thursday, 2 nd	MASBO Minutes Webinar at 9 am
Friday, 3 rd	MASBO Seasons of Budget Webinar (day long)
15 th -16 th	MASBO Payroll Workshops- Helena at MTSBA headquarters with a webinar option
28 th -30 th	MASBO Facilities and Bonds Workshops in Helena at the MTSBA headquarters with a webinar option
DECEMBER 2023	
Tuesday, 5 th	MASBO Minutes Webinar at 9 am
JANUARY 2024	
4 th – 5 th	MASBO New School Business Officials Webinar
Wednesday, 10 th	MASBO Budget Webinar Series 1-3 pm
Wednesday, 17 th	MASBO Budget Webinar Series 1-3 pm
Wednesday, 24 th	MASBO Budget Webinar Series 1-3 pm

Wednesday, 31 st	MASBO Budget Webinar Series 1-3 pm
FEBRUARY 2024	
Wednesday, 7 th	MASBO Budget Webinar Series 1-3 pm
Wednesday, 14 th	MASBO Budget Webinar Series 1-3 pm
Wednesday, 21 st	MASBO Budget Webinar Series 1-3 pm
Wednesday, 28 th	MASBO Budget Webinar Series 1-3 pm
MARCH 2024	
Tuesday, 5 th	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
Tuesday, 12 th	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
Tuesday, 19 th	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
APRIL 2024	
4 th -5 th	MASBO New School Business Official Webinars
Tuesday, 9 th	MTSBA/MASBO Hot Topics Webinar 1-3 pm
Tuesday 16 th	MTSBA/MASBO Hot Topics Webinar 1-3 pm
Tuesday 23 rd	MTSBA/MASBO Hot Topics Webinar 1-3 pm
MAY 2024	
Wednesday, 8 th	Technology Workshop
JUNE 2024	
10 th -14 th	MASBO Summer Conference Billings
JULY 2024	
Tuesday, 9 th	MASBO Trustee Financial Summary Webinar
Wednesday, 10 th	MASBO MAEFAIRS Budget Webinar
SEPTEMBER 2024	
18-21 st	ASBO International in Nashville, TN

Has Your District Experienced an Admin or Board Member Change? Remember to Update Your Information with Our Partners

MTSBA: Please be sure to login to [MyMTSBA](#) and update your board members names, contact information and who is serving as Board Chair and Vice. Also, be sure to update any changes to other administrative roles. If you are having issues with this process, please contact [Wendy](#) for assistance. **You will not get important information from MTSBA without updating your information so please make this a priority.**

OPI: Changes to the board chair, clerk/business manager, superintendent, or principal should be reported to [OPI Contacts](#). Instructions for how to make these changes are found here: [Instructions](#). If you have questions about how to complete the updates, please contact: CentralUpdates@mt.gov

OTHER: Consider keeping a list of other memberships and/or logins your admin team holds. These could include School Administrators of Montana, cooperatives, vendors, other government sites, and email list serves that you and your team rely upon.

UPCOMING OPPORTUNITIES & NEWS FROM OPI & OTHER MASBO PARTNERS

Consider MQEC Enrollment

[MQEC](#) was formed in 2001 by K-12 public school superintendents frustrated with the State of Montana's declining financial contributions to

public education and increased property taxes. Over 100 AA, A, B, C and Independent Elementary school districts and six education organizations have joined MQEC in pursuit of adequate funding for public education. We are the largest education advocacy organization in Montana, representing public school districts ranging from large to small, rural to urban, and east to west, as well as the teachers, trustees, and administrators who serve our students.

MQEC continues to successfully advocate for adequate and equitable funding for Montana's K-12 public schools. With additional courtroom success in 2011 and unprecedented collaboration with educational partners in the 2013 legislative session, today each public-school district in Montana receives approximately \$1074 per student in annual, additional funding because of MQEC's efforts.

MQEC membership is open to public school districts, educational organizations, and individuals. Please [contact Doug Reisig](#), MQEC Executive Director, for additional information about MQEC.



Montana Quality Education Coalition

Quality Public Education ... Montana's Constitutional Guarantee

MESSAGE FROM MTSBA: Updating the MTSBA Database

Your member school board trustees' access to the extensive programs and services of the Montana School Boards Association begins with the critical step of updating (adding, deleting, modifying) their contact information in the MTSBA Database.

We rely heavily on school district clerks to update their district's membership roster at least annually to maximize the value of membership. With the completion of this crucial first step in the process, trustees are enabled to access resources that will improve their service and the quality of education available to students in your district.

In short, it is vital to ensure that your district's leadership team (Trustees, District Clerk, Superintendent, Principals, and other central office administrators) is correctly listed in the MTSBA database.

As staff/trustees *leave your district, their records in the database should be immediately inactivated*. This assures that a person who is no longer affiliated with your district cannot post communications or inquire to MTSBA staff as a member of your district.

As new trustees, superintendents, principals, clerks, and others in your district's leadership teams come on board, they should be added to your district's roster as soon as possible to have access to the resources that MTSBA provides our members.

STEPS to update:

[Click](#) here or see the steps below. Only district clerks, board chairs, and superintendents have permission to update a district roster. If you need assistance, please do not hesitate to [email me](#). *Note: Google Chrome is the recommended browser for optimal function.*

Step 1: Log into mtsba.org.

Step 2: Click MyMTSBA in the top right corner of your screen.

Step 3: Click "District Profile" at the bottom of the Personal Snapshot page.

Step 4: Click "Manage Roster" to make any changes to individuals affiliated with your district. You may also update any district contact information on this page.

Step 5: To add a new trustee, administrator, or other district staff click "Add Individual." To make edits to an existing individual listed on your roster, click the red box with the three dots next to that individual's name. Click "Edit Individual" to update any information of an existing individual. To remove the individual click "Remove."

MTSUIP IS SEEKING BOARD NOMINATIONS

If you, or someone you know, would like to take a more active role in the Montana Schools Unemployment Insurance Program, please consider reaching out to [Debra Silk](#) at MTSBA. School Business Officials, preferably from a Class B districts, are encouraged join. You can also reach out to [Jen Mettler](#), our MTSUIP Ex- Officio for more information. Voting will be held at MCEL in October.

Important Egrants Timelines

September 1: Last day to Open/Create an FY2024 Egrant Consolidated Application

September 1: Last day to create an FY2023 Egrant Consolidated Application without OPI approval

September 30: Last day to submit and FY2024 Egrant Consolidated Application

October 31: Last day to have an approved FY2024 Egrant Consolidated Application

The Summer 2023 Egrant tour has been completed for this year. The OPI had record turn out this year with over 140 attendees representing Montana school districts. Also, there will not be a virtual option this year. To view a previous year's presentation and/or to view the 2023 Egrant Power Point, please go to the following link: <https://opi.mt.gov/Leadership/Academic-Success/Federal-Programs/E-grants-Information-and-Videos>.

GASB Updates

GASB 87 - Leases

Guidance for [GASB 87](#) on leases has been provided on the OPI website, the same information is available on the [Local Government Services](#) website. The purpose of this guidance is to help determine if a lease is within the scope of GASB 87 reporting requirements. The Effective Date is for fiscal years beginning after June 15, 2021, and all reporting periods thereafter. For questions or more information in regard to the updates please contact [Kristen Becker](#) 406-444-0701 or email OPISchoolFinance@mt.gov.

GASB 96 – SBITAs

Guidance for [GASB 96](#) on Subscription-Based Information Technology Arrangements (SBITAs) has been provided on the OPI website. The purpose of this guidance is to help determine if a subscription is within the scope of GASB 96 reporting requirements. The Effective Date is for fiscal years beginning after June 15, 2022, and all reporting periods thereafter. For questions or more information in regard to the updates please contact [Autumn Belmont](#) 406-444-9852 or email OPISchoolFinance@mt.gov.

Contact The OPI IEFA Office to Request Fall Professional Development

As you are completing your Fall PD plans and scheduling, consider inviting OPI IEFA staff to provide an in-person presentation to some or all of your staff. Our team is happy to visit your school and community and provide PD and can also tailor our PD to meet the needs of individual schools and teachers.

To request a PD for the upcoming school year, please contact Joan Franke at jfranke@mt.gov or 406-444-3694.

[ESSER II Close out Guidance Video](#)

ESSER Safety Security Reimbursement Request: In compliance with ESSER requirements and in supporting school safety, OPI is making available \$200 reimbursement to schools for performing Safety/Security needs assessments. Compliances of reimbursement are [here](#). If interested in receiving the \$200 assessment reimbursement please submit a request with documentation (certification) into the portal [here](#).

Deadlines for the ESSER Grants:

- ESSER II expires September 30, 2023 - 6 months to spend down the grant
- ESSER III expires September 30, 2024 - 18 months to spend down the grant

ESSER Amendments- Information Provided by OPI

Schools must **create an E-Grants Amendment in ESSER II and ESSER III** so that the updated allocation will populate in the corresponding E-Grants budget pages.

In the amendment description you may use this template language:

- (if the budget description already exists) BUDGET AMOUNT CHANGE ONLY – additional allocation of \$xx to Object Code xx
- (if adding a new budget item) Additional Allocation of \$xx to Object Code xx [for the purpose of xxxxx to prepare, prevent, respond]

To view the additional funds, scroll down to view **Allocation Remaining** at the bottom-right of each E-Grants budget page.

ESSER Templates

These templates are critical to getting your amendments, budgets, and cash requests to move through quickly. Please take a look at these if you have any sitting on hold to see if you can get them approved quicker.

- [E-Grants Amendment Template OPI Dec22](#) (pdf)
- [E-Grants Budget Template OPI Dec22](#) (pdf)
- [E-Grants Cash Request Template OPI Dec22](#) (pdf)

TR1 and TR4 Bus Routes Rollover

Districts can rollover TR1 Bus Routes for FY2024 by going under the Administration tab in the Pupil Transportation System. Please review the [TR1 Bus Route Reporting Instructions](#) or [TR4 Individual Contracts Reporting Instructions](#) if you have questions please contact [Donell Rosenthal](#) at (406) 461-9316.

Bus Driver Certificate TR35

School bus drivers must hold a valid Montana School Bus Driver Certificate (TR35) in order for a district to receive state reimbursement.

Qualifications for bus drivers are prescribed by [20-10-103](#), MCA, and by the Board of Public Education in ARM [10.64.201](#). The bus driver certificate forms are provided and must be maintained electronically in the Pupil Transportation System.

The chair of the board of trustees must sign the certificate which is issued to a driver who is authorized and qualified to drive a school bus pursuant to all applicable rules, regulations and laws. The district must retain a current copy of each bus driver's certificate, provide a copy to the bus service contractor, if applicable, and files a copy with the county superintendent. **The bus driver is required to always carry a current and valid hard copy of the certificate while driving a school bus.**

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If you have questions regarding Bus Driver Qualifications, please contact [Donell Rosenthal](#) at (406) 461-9316.

Updated the **Teach Act Guidance** located on the School Finance Accounting page, under Guidance & Manuals, [Program Guidance](#).

Updated the **Tax Exempt Letter FY 2023** located on the School Finance Accounting page, under Guidance & Manuals, [Other Materials](#).

Updated **Student Count Reports FY 2023 and District Summaries FY 2023** on the School Finance Student Count ANB page, under [Student Count ANB Reports](#).

Updated **FY2024 In District Special Education Permissive Levy Calculator** on the School Finance Tuition and Attendance page, under the [Calculation Spreadsheets](#).

Updated the **MT Advanced Opportunity Aid Guidance** on the School Finance Accounting page under Guidance & Manuals, under the [Program Guidance](#) section.

Updated the **Transformational Learning Aid Guidance** on the School Finance Accounting page under Guidance & Manuals, under the [Program Guidance](#) section.

OPI 2023 LEGISLATIVE SUMMARY



August 8-9, 2023 | Central School | Helena, MT

MARK YOUR CALENDAR



Jeremy Bullock

SAFE SCHOOLS SUMMIT

4TH ANNUAL JEREMY BULLOCK SAFE SCHOOLS SUMMIT

The Jeremy Bullock Memorial Trust is partnering with Helena Public Schools to host the 2023 Safe Schools Summit. Recently renovated Central Elementary School will open their doors and supply a perfect meeting place to discuss best practices and the latest information on creating safer school environments for young people, educators, and school staff.

2023 will be an innovative, interactive, and practical Summit. You will not want to miss this conference! Please visit jeremybullocksafeschools.com to register.

AUGUST 8-9, 2023

The Summit will bring together our community of school safety experts and leaders from across the state and nation. The Summit will consist of keynote addresses, panel discussions, deep-dive breakout sessions and more!

This conference is all about YOU! Are there topics you'd like to see at the Summit? Are you interested in presenting or exhibiting? If so, please reach out to Brenda at (406) 531-5957 or jeremybullockfoundation@gmail.com to learn more.

We can't wait to host you for this important event.



To reserve a room @ nearby DoubleTree by Hilton Helena Downtown call (406) 443-2200. Space is limited so don't wait! Mention Safe Schools Summit to receive discounted rate of \$139/night.



HANDY YEAR-END RESOURCES

OPI Spreadsheets and Other

Resources • Budgeting and Financials

- [School Accounting Manual](#)
- [Chart of Accounts](#)
- [FY 2024 General Fund Budget Spreadsheet](#)
- [Preliminary Title Funding Allocations](#)
- [Technology Fund levy Spreadsheet](#)
- [Projecting General Fund Reserves](#)
- [Building Reserve Fund Guidance Document Revised May 2018](#)
- [Preliminary Budget Data Sheets FY2023](#)
- [School Safety Transfers Guidance](#)
- [Multidistrict Agreement FAQs](#)
- [Miscellaneous Fund Worksheet](#)
- [Reconciling Cash to County Treasurer FY2023](#)
- [Student Activity Fund Worksheet](#)
- [Compensated Absences Worksheet](#)
- [FY 2024 Tuition Rates](#)
- [FY 2024 In District Special Education Permissive Levy Calculator](#)
- [In District Special Education Permissive Levy Checklist](#)
- [FY 2023 In District Special Education Permissive Levy Calculator - For Older Excel Versions](#)
- [CSCT Certification Page](#)



- [E-grants Login](#)
- [MAEFAIRS Link](#)
 - [Budget Instructions](#)
 - [Budget Amendment Packet](#)
 - [TFS Instructions](#)
 - [TFS Revenue/Expenditure Upload Instructions](#)
 - [TFS Expenditure Upload Template](#)
 - [TFS Revenue Upload Template](#)
 - [TFS Additional Expenditure Upload Template](#)
- [Transportation Portal Link](#)
 - [Transportation Budgeting Worksheet](#)
 - [TR1 Bus Route Rollover](#)
 - [TR2 Bus Rider Form](#)
 - [TR4 Rollover Individual Contract Instructions](#)
 - [TR4 Individual Transportation Contract Form](#)
 - [Bus Inspection Form TR13](#)



[FP-14.1 Parent or District Student Attendance Agreement](#)

MASBO ENDORSES THESE PROGRAMS

 <p>MSGIA WORKERS COMPENSATION RISK RETENTION PROGRAM</p>	<p>Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program Shawn Bubb, Director of Insurance Services 406-457-4500 sbubb@mtsba.org http://www.msgia.org/home</p>
 <p>must MONTANA UNIFIED SCHOOL TRUST</p>	<p>Health, Dental, Vision, Life and Long-Term Disability Benefits Andy Holmlund, Chief Executive Officer 406-457-4400 aholmlund@ms-sf.org http://mustbenefits.org/</p>
 <p>MTSUIP Montana Schools Unemployment Insurance Program</p>	<p>Montana Schools Unemployment Insurance Program Laren Carparelli 406-457-4407 lcarparelli@mtsba.org http://www.mtsuip.org/</p>
 <p>MONTANA SCHOOLS PROPERTY & LIABILITY INSURANCE PLAN</p>	<p>Payne West, Inc. Montana Schools Property & Liability Insurance Plan Rody Holman, Program Manager 406-533-1035 RHolman@paynewest.com http://msplip.com/</p>

MASBO EXHIBITOR MEMBERS

Aflac Rob Cook r_cook@us.aflac.com	American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com
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Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com	Milligan School Data Adam Milligan Milliganschooldata@gmail.com	Montana Digital Academy Sarah Marker sarah.marker@montanadigitalacademy.org
Montana Public Employees Retirement Administration Terry Dalton tdalton@mt.gov	MSGIA-WCRRP Shawn Bubbs sbubbs@mstba.org	Montana Schools Unemployment Insurance Program (MTSUIP) Laren Carparelli lcarparelli@mtsba.org
Montana Unified School Trust (MUST) Andy Holmlund aholmlund@ms-sf.org	Payne West, Inc./MSPLIP Rody Holman RHolman@paynewest.com	Pine Cove Consulting Brandan Bassett bbassett@pinecc.com
Red Rover Jim O'Halloran johalloran@redroverk12.com	School Services of Montana Melissa Tovaas mtovaas@mt-schools.org	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com
Wipfli LLP Kim Dare, CPA kdare@wipfli.com		

IMPORTANT DEADLINES – AUGUST 2023

AUGUST 1

1st Semester Bus Inspections must be completed. <i>within 30 days prior to the beginning of the school term</i>	<p>Use form TR-13 Bus Inspection for inspections of yellow school buses.</p> <p>Use form TR-13A Bus Inspection for inspections of Type E buses.</p> <p>The Highway Patrol must inspect (a re-inspect, if needed) the buses prior to the beginning of first semester.</p>	<p>MCA, 20-10-101(4)(a)(i)</p> <p>Regulations & Guidelines for Pupil Transportation Reporting</p> <p>(see page 4)</p> <p>TR13 Instructions</p> <p>TR13 Form-Blank</p> <p>TR13A Form-Blank</p>
Traffic Education Form TE01 due prior to program start	Due August 1 or before TE program begins.	<p>Traffic Education Data & Reporting System</p> <p>Traffic Education Forms list and calendar</p> <p>TE01 Form</p>

AUGUST 7

Taxable valuation is available from Department of Revenue	The Department of Revenue (county assessor) delivers taxable valuation information to the county superintendent of schools.	<p>20-9-122, MCA</p> <p>OPI Budget Timeline</p> <p>(scroll down the page to see chart)</p>
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AUGUST 10

Deadline for publishing a notice of budget meeting	<p>Between July 1 and August 10, the district clerk must publish one notice of the date, time and place of the annual budget meeting in the local or county newspaper that the trustees of the district determine to be the newspaper with the widest circulation in the district. Include the following information in your notice:</p> <ul style="list-style-type: none"> date, time, and place that the trustees will meet for the purpose of considering and adopting the final budget of the district state that the meeting of the trustees may be continued from day to day until the final adoption of the district's budget 	<p>20-9-115, MCA</p> <p>OPI Budget Timeline</p> <p>(scroll down the page to see chart)</p>
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IMPORTANT DEADLINES – AUGUST 2023

	<ul style="list-style-type: none"> stating that any taxpayer in the district may appear at the meeting and be heard for or against any part of the budget 	
Final Expenditure Reports for grants ended June 30, 2023 due	<p>Final Expenditure Reports for the following grants are due by August 10:</p> <ul style="list-style-type: none"> ABLE Extension ABLE, EL Civics State ABLE Carl Perkins and Technical Education Title IV, 21st Century Community Learning Centers Indian Education for All In-State Facilities: Significant Needs Schools Pre-School Development Grant 	<p>OPI State and Federal Grants Handbook</p> <p>State and Federal Grants Handbook</p> <p>Section 400 Accounting and Reporting Procedures</p> <p>(see 400.8 Project Closeouts)</p>
AUGUST 14		
(second Monday in August) County superintendent computes revenue for transportation budget	County superintendent computes revenue available to finance the transportation budget	<p>20-10-144, MCA</p> <p>OPI Budget Timeline</p> <p>(scroll down the page to see chart)</p>
AUGUST 15		
OPI Form FP-8 due	Located and non-located counties exchange information between August 10 and August 15 in order to determine what percentage of the joint district their county supports.	<p>20-9-151, MCA</p> <p>OPI Budget Timeline</p> <p>(scroll down the page to see chart)</p>
Trustees Financial Summary (TFS) due to county superintendent	Trustees report annual financial activities of each fund maintained by the district to the county superintendent.	<p>20-9-213(6), MCA</p> <p>OPI Budget Timeline</p> <p>(scroll down the page to see chart)</p>

IMPORTANT DEADLINES – AUGUST 2023

TFS for joint school districts due to county superintendents	Annual fiscal reports for joint districts must be submitted to the county superintendent of each county in which the part of the joint district is situated.	20-9-213(6), MCA OPI Budget Timeline (scroll down the page to see chart)
Deadline for resident district to notify home district of attendance to Foster or Group Home resulting in Tuition costs	The district of attendance must notify the resident district of any obligation for tuition not later than Aug 15, 2023 The report may be found under Views>Tuition>Foster and Group Home Resident District.	MCA 20-5-324
State Facilities to notify home district of any obligation for tuition no later than August 15th.	Resident districts are responsible for a portion of the education costs for students in state facilities (Shodair, Intermountain, Yellowstone Boys & Girls Ranch). Resident districts may run a report in MAEFAIRS at any time to see claims that have been submitted. The report may be found under Views>Tuition>State Facilities District of Residence.	MCA 20-9-435
AUGUST 20		
(on or before August 20) Annual Final Budget Meeting	Trustees meet to consider all budget information and any attachments required by law.	20-9-131(1), MCA OPI Budget Timeline (scroll down the page to see chart)
AUGUST 25		
(not later than August 25)	Trustees adopt final budget. Trustees of a joint district shall adopt a budget according to school budgeting laws and send a copy to the county superintendent of each county in which a part of the joint district is located.	20-9-131(2), MCA 20-9-151(1), MCA OPI Budget Timeline (scroll down the page to see chart)
Grant cash request due to OPI	Grant cash requests made by this date will be paid on September 10.	OPI State and Federal Grants Handbook

IMPORTANT DEADLINES – AUGUST 2023

AUGUST 28

(within 3 days of final adoption of budget; not later than Aug. 28) Deliver adopted budget to county

Upon final approval of budgets, trustees deliver adopted budget, including amounts to be raised by tax levies, to county superintendent.

[20-9-131\(3\), MCA](#)

[OPI Budget Timeline](#)

(scroll down the page to see chart)

AUGUST 28

OPI makes K-12 BASE aid payments

Direct State Aid

Quality Educator Component

At Risk Component

Indian Education for All

Student Achievement Gap

Data for Achievement

Special Education

Technology

Transportation Prepayment

[FY2024 Schedule](#)

[20-9-344, MCA](#)

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

SEPTEMBER 1

Last day to submit grant amendments

Last day to submit grant amendments (budget or program modifications) for projects that will end September 30, 2023.

- IDEA, Part B
- Regional CSPD
- IDEA, Preschool
- IDEA, Part D: MTSS
- Title I, Part A, Improving Basic Programs
- Title I, Part A, Schoolwide
- Title I, Part C, Migrant Education

[OPI State and Federal Grants Handbook](#)

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

	<ul style="list-style-type: none"> • Title I, Part D, Neglected and Delinquent • Title I, School Support • Title I, Targeted Support & Improvement • Title II, Part A, Improving Teacher Quality • Title II, Part A, Improving Teacher Quality-State Level • Title II, Part B, Math Science Partnerships • Title III, Part A, English Language Acquisition • Title III, Part A, Emergency Immigrant • Title IV-A, Student Support & Academic Enrichment • Title VI, Part B, Rural Low Income • Title X, Part C, McKinney-Vento Homeless Education • Montana Striving Readers Comprehensive Literacy Project (MCLP) • Montana Comprehensive Literacy State Development Project (MCLSDP) • Project AWARE Mental Health • School Improvement: Indian Ed • Elementary and Secondary School Emergency Relief Funds (ESSER) 	
SEPTEMBER 7 (or within 30 calendar days after receiving certified taxable values)		
County superintendent reports levy requirements to the county commissioners	<p>County superintendent reports levy requirements to the county commissioners for the following funds:</p> <ul style="list-style-type: none"> ➤ General ➤ Bus Depreciation ➤ Tuition 	<p>OPI Budget Timeline</p> <p>20-9-141(3), MCA</p> <p>20-10-147(2), MCA</p> <p>20-5-324, MCA</p>

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

	<ul style="list-style-type: none"> ➤ Debt Service ➤ Building Reserve ➤ Non-Operating ➤ Technology ➤ Adult Education ➤ Transportation ➤ County Retirement (county-wide levy) ➤ County Transportation (county-wide levy) ➤ Levies for Joint Districts 	20-9-439(2), MCA 20-9-503(1), MCA 20-9-506(3), MCA 20-9-533(4), MCA 20-7-705(5), MCA 20-10-144(5), MCA 20-9-501(5)(b), MCA 20-10-146(3), MCA 20-9-151(3), MCA
SEPTEMBER 10		
File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due the 10th of each month. Counts are submitted in the Montana Agreement and Payments System (MAPS) for National School Lunch Program (NSLP) or Seamless Summer Option (SSO) reimbursement.</p> <p>See OPI's Back to School Page for more information on SSO and important updates.</p> <p>**Not updated on OPI's page yet. Look for information updates in the Sept Newsletter.</p>	OPI Secure Portal Login School Nutrition Programs Checklist NSLP Reimbursement rates for FY2024 SSO Reimbursement rates FY2024 School Nutrition Payments
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 th of the previous month.	E-Grants System <p>Log in to your district's account, or click on Public Access, then Vendor Payee Details</p>
Birthday cutoff date for 19-year-olds in ANB counts	<p>Students who reach age 19 on or before September 10 of the school year may not be counted for ANB.</p> <p>House Bill 233 amended 20-9-311, MCA to include a pupil with disabilities who is over the age of 19 and has not yet reached 21 years of age by September 10</p>	20-1-101, MCA 20-5-101, MCA

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

	of the school year and who is receiving special education services from a school district under certain circumstances.	HB233 Revise funding for students with disabilities OPI 2021 Legislative Summary (see page 27)
Birthday cutoff date for 5-year-olds entering kindergarten	The trustees of an elementary district shall establish or make available a kindergarten program capable of accommodating, at a minimum, all the children of the district who will be 5 years old on or before September 10 of the school year for which the program is to be conducted or who have been enrolled by special permission of the board of trustees.	20-7-117, MCA
SEPTEMBER 15		
Trustees Financial Summary (TFS) due to OPI	County superintendent submits annual reports to OPI, including the budget form for each district. In MAEFAIRS, both the TFS and Budget are submitted at the same time.	20-9-134, MCA
SEPTEMBER 25		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on October 10.	OPI State and Federal Grants Handbook
SEPTEMBER 26		
OPI makes K-12 BASE aid payments	Direct State Aid Quality Educator Component At Risk Component Indian Education for All Student Achievement Gap Data for Achievement Special Education	FY2024 Schedule 20-9-344, MCA

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

SEPTEMBER 30

Last day to obligate funds for grant projects ending September 30, 2023

- IDEA, Part B
- Regional CSPD
- IDEA, Preschool
- IDEA, Part D: MTSS
- Title I, Part A, Improving Basic Programs
- Title I, Part A, Schoolwide
- Title I, Part C, Migrant Education
- Title I, Part D, Neglected and Delinquent
- Title I, School Support
- Title I, Targeted Support & Improvement
- Title II, Part A, Improving Teacher Quality
- Title II, Part A, Improving Teacher Quality-State Level
- Title II, Part B, Math Science Partnerships
- Title III, Part A, English Language Acquisition
- Title III, Part A, Emergency Immigrant
- Title IV-A, Student Support & Academic Enrichment
- Title VI, Part B, Rural Low Income
- Title X, Part C, McKinney-Vento Homeless Education
- Montana Striving Readers Comprehensive Literacy Project (MCLP)
- Montana Comprehensive Literacy State Development Project (MCLSDP)
- Project AWARE Mental Health
- School Improvement: Indian Ed

[OPI State and Federal Grants Handbook](#)

IMPORTANT DATES & DEADLINES – SEPTEMBER 2023

	<ul style="list-style-type: none"> Elementary and Secondary School Emergency Relief Funds (ESSER) 	
Last day for actual cash transfer to/from Compensated Absences Fund and Litigation Reserve Funds	<p>Actual cash transfers to/from the Compensated Absences Liability Fund that were accrued at fiscal year end must be made by September 30 of the next fiscal year.</p> <p>Actual cash transfers to/from the Litigation Reserve Fund that were accrued at fiscal year end must be made by September 30 of the next fiscal year.</p>	<p>20-9-512, MCA ARM 10.10.312</p> <p>20-9-515, MCA ARM 10.10.315</p>

HSA Deductions	2024	2023
Annual Limitation on HSA Deductions		
Self-Coverage	\$4,150	\$3,850
Family Coverage	\$8,300	\$7,750
HDHP – Self-Only Coverage		
Deductible not less than	\$1,600	\$1,500
Out-of-pocket expenses max	\$8,050	\$7,500
HDHP – Family Coverage		
Deductible not less than	\$3,200	\$3,000
Out-of-pocket expenses max	\$16,100	\$15,000