

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

DECEMBER 2021

BIG NEWS

Innovative Educational Program Tax Credit

House Bill 279 ([HB279](#)) was passed by the 2021 Legislature and is effective January 1, 2022. The bill includes changes to the Innovative Education Program (IEP) Tax Credit. School districts will receive donations directly, enter the information in the Department of Revenue's Donations Portal, deposit the funds in Fund X15 Miscellaneous Programs and spend on their innovative educational program as defined in [15-30-3102 \(4\), MCA](#). Use revenue source code 1925; expenditure program code 192 (see [OPI Chart of Accounts](#), page 33).

The nonrefundable tax credit is equal to the amount of the donor's donation, up to \$200,000 per individual or corporation, and can be carried forward by a donor for up to 3 years. Note: be wary about giving out tax advice. It's a good idea to tell donors to consult with a tax professional about the impact on their tax return rather than fielding those questions yourselves.

The DOR's Education Donations Portal is at <https://svc.mt.gov/dor/educationdonations/>. A designated administrative user for the school district must sign up for an account. The district must be registered in the system before accepting donations eligible for the IEP Tax Credit. A link to an instructional webinar is posted on their website (click [here](#)).

TRAINING OPPORTUNITIES

ELECTION CHECK-IN with Nicole Thuotte

Join Nicole Thuotte and MASBO every other Friday, beginning January 28 for the school election topic of the day followed by Q & A. All meetings will be held 9:00 a.m. – 10:00 a.m. No need to register – just zoom in!

- January 28 – ES&S Demonstration
- February 11 – Preparing for an Election
- February 25 – Mail Ballot Plans
- March 11 – General Q & A
- March 25 – Ballot Certification; Late Registration
- April 8 – Election Notices; Early Voting
- April 22 – Preparing for Election Day
- May 6 – Election Wrap Up

MTSBA HR VIRTUAL SYMPOSIUM – mark your calendar

MTSBA's annual HR Symposium is sponsored by MTSUIP and there is no fee to attend. The virtual trainings will be held on **Tuesdays** in **February: 8, 15 and 22** from **1:00 p.m. – 3:00 p.m.** If you're unable to attend, each session will be recorded and available to you a few days afterward. An agenda will be posted on their website soon.

MASBO 2022 SUMMER CONFERENCE & NEW CLERK ACADEMY – mark your calendar

Plan to join us in **Butte** at the [Copper King Hotel & Convention Center](#) for our annual New Clerk Academy (**June 13 – 15**) and the Summer Conference (**June 15 – 17**). Registration will open in late April 2022, but you can make your sleeping room reservations now. Just call **406-533-6960** and mention the MASBO block.

MASBO Board of Directors

President	<u>Rita Huck</u> , Huntley Project K-12	Region 1 Director	<u>Lacey Porrovecchio</u> , Bigfork
Vice-President	<u>Belinda Klick</u> , Sun River Valley	Region 2 Director	<u>Karsen Drury</u> , Cascade
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P-CARD NEWS-----

MASBO P-CARD PURCHASES REPORT

P-Card purchases for seven months of the current rebate year (April - October) totaled over **\$21.5 million** with **170** school districts and special education cooperatives participating in the program. At the same time last year, we had 160 participants with over \$16 million in total purchases. Click [here](#) to see the current year P-Card purchases report.

TIPS FOR ACTIVATING YOUR BMO CARD

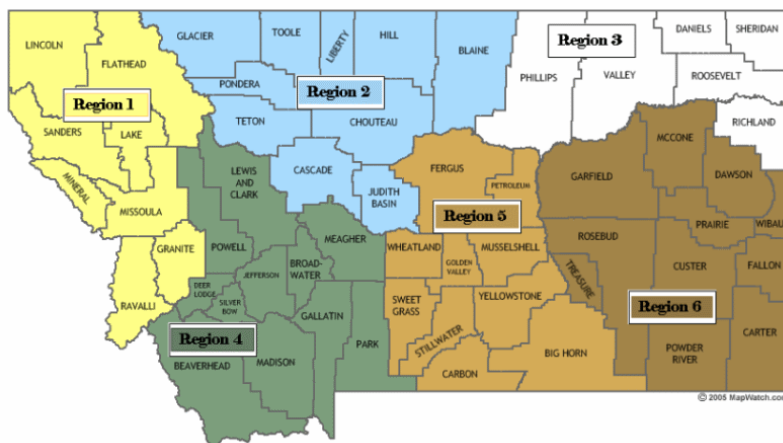
- Make sure accounts have the card holder's correct birthdate, phone and email address.
- Keep BMO Harris Bank and the Spend Dynamics system updated with correct Admin information.
- Order cards through Spend Dynamics.
- *Best Practice: set up Activation Passwords for all cards not shipped to the business office.*
- Follow instructions that come with new card:
 - Activate online, OR
 - Call the phone number on the sticker on the face of the card. Make sure you call from the phone number BMO has on file for the card.

Contact Holly Wallace for help or to schedule a webinar on helpful topics:

1-815-793-4655 or hwallace@iasbo.org

GREAT IDEAS NEEDED!

Each Region Director develops the agenda for their annual spring region workshop. *If you have a great idea or would like a particular topic covered, please don't hesitate to contact your Region Director.* Click on the name shown at the top of this page to link to their email address. Call or write soon, so they can plan accordingly!



MASBO ENDORSES THESE PROGRAMS

	<p>Healthcare Reform Section 125 Services Health Savings Account Services Jacob Bautista, Office Manager 877-589-2544 jacob.bautista@americanfidelity.com http://www.americanfidelity.com/home.aspx</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>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>Montana Schools Unemployment Insurance Program Theresa LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</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>

IMPORTANT DATES & DEADLINES – JANUARY 2022

DECEMBER 9, 2021 – MARCH 24, 2022

Candidates for trustee election on May 3, 2022 may file a Declaration of Intent and Oath of Candidacy	Trustee candidates file for election. A Declaration of Intent and Oath of Candidacy must be filed with the election administrator. No candidate may appear on the ballot unless the candidate files between <i>Thursday, December 9, 2021 and Thursday, March 24, 2022</i>. The candidate for trustee must be registered to vote at the time the Oath is filed. County superintendents should log into the County application and complete/verify their district classification and board compositions for the 2022 school election season.	Declaration of Intent and Oath of Candidacy School Election Calendar 2022 Quick Reference Guide: County District Classification Collection
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JANUARY 3 – JANUARY 10

Transformational Learning Application opens at 8:00 a.m.	A school district must apply for the state transformational aid payment during the application period, which is <i>January 3 at 8:00 a.m. – January 10, 2022 at 5:00 p.m.</i> for FY2023.	OPI Transformational Learning Application FY2023 OPI Transformational Learning information page
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JANUARY 10

File monthly claims for NSLP or SSO reimbursement	Monthly lunch, breakfast and snack counts are due the 10 th 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. See OPI's Back to School Page for more information on SSO and important updates.	Montana Agreement and Payment System (MAPS) log in page School Nutrition Programs Checklist NSLP Reimbursement rates for FY2022 SSO Reimbursement rates FY2022 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 Log in to your district's account, or click on Public Access, then Vendor Payee Details

JANUARY 15

WCRRP (workers comp) and MTSUIP (unemployment insurance) reports due	If your district is a member of WCRRP, the workers comp report for 4th quarter payroll (October, November, December) is due January 25 . Due date for other carriers is January 15. If your district is a member of MTSUIP, the unemployment insurance report for 4th quarter payroll is due.	http://www.msgia.org/home http://www.mtsuip.org/
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JANUARY 25

Grant cash request due to OPI	Grant cash request due to OPI	OPI State and Federal Grants Handbook
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IMPORTANT DATES & DEADLINES – JANUARY 2022

JANUARY 26

OPI makes K-12 BASE aid payments	Direct State Aid Quality Educator Component At Risk Student Component Indian Education for All Student Achievement Gap Data for Achievement (SPED) State Special Education Payments	FY2022 Payment Schedule (scroll to bottom of page)
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JANUARY 31


Form 941 for Quarter 4 payroll is due.	Form 941 payroll report for Quarter 4 (October, November, December) is due.	Form 941 (form) Form 941 (instructions)
Annual tax forms due 	2021 Form W-2 Wage & Tax Statement to employees by January 31, 2022 Federal copies of 2021 Form W-2 (with Form W-3 transmittal) are due to the Social Security Administration by January 31, 2022 whether you are filing paper forms or electronically. 2021 Form 1099-NEC Non-Employee Compensation to recipients and to the IRS (with Form 1096 transmittal) by January 31, 2022 . 2021 Form 1099-MISC Miscellaneous Income to recipients by January 31, 2022 . Federal copies of 2021 Form 1099-MISC (with Form 1096 transmittal) are due to the IRS by February 28, 2022 .	2021 General Instructions for Forms W-2 and W-3 Employer W-2 Filing Instructions & Information About Form 1099-NEC, Nonemployee Compensation About Form 1099-MISC, Miscellaneous Income Instructions for Forms 1099-MISC and 1099-NEC General Instructions for Certain Information Returns
Last day to file state form MW-3 and copies of 2021 Form W-2 and Form 1099 with state withholding	On or before January 31 of each year, you are required to file the following with the Montana Department of Revenue: <ul style="list-style-type: none"> • Montana Annual Wage Withholding Tax Reconciliation form (MW-3) supporting the withholding reported on the Forms W-2 and 1099. • Wage and Tax statement (W-2) for each employee Montana wages were paid to, with or without withholding. • Forms 1099 with Montana state withholding. 	Montana Department of Revenue Filing Withholding Returns webpage Form MW-3 Montana Withholding Tax Guide (see page 5 for annual filing requirements)

IMPORTANT DATES & DEADLINES – JANUARY 2022

JANUARY 31 (continued)

<p>2nd Semester Bus Inspections must be completed</p>	<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 the buses prior to January 31.</p>	<p>MCA, 20-10-101(4)(a)(i) ARM 10.7.110 Regulations & Guidelines for Pupil Transportation Reporting (see page 4)</p>
<p>2023 Impact Aid applications are due at 9:59 MST</p>	<p>Applications must be submitted to the U.S. Department of Education (DOE) by the deadline to avoid a reduction in payments generated from the FY 2023 application.</p> <p>Late applications (applications received up to 60 days after the deadline) will result in payment reductions of 10 percent. The DOE will not accept applications received after the 60-day late window (April 1, 2022).</p> <p>Districts waiting for additional information as of the application deadline should go ahead and submit their applications. Submitted applications may be amended through June 30, 2022.</p>	<p>Watch for more information from the Office of Public Instruction:</p> <ul style="list-style-type: none"> ➤ Impact Aid Application Information ➤ Impact Aid Application Data (click on link to 2023 Preliminary Data Sheets)

FEBRUARY 7

<p>Spring Enrollment Count Date</p> <p>me sinking into the void between christmas & new year</p> 	<p>The official count day for the 2022 Spring Enrollment & Aggregate Hours Collection begins Monday, February 7. Districts will report spring count date aggregate hours for all students enrolled on 2/7/2022, or the first school day that follows the count date if the official count date is not a school day.</p> <p>After verifying student enrollment and aggregate hours in AIM, submit the data to MAEFAIRS. MAEFAIRS Student Count for ANB must be submitted no later than Friday, February 11, 2022.</p> <p>Extenuating circumstances for students who will be gone 10 days prior to the count date, but which would support a variance should be submitted to the OPI prior to the official enrollment count date for consideration of inclusion of the student in the enrollment count for ANB purposes beyond the 10th day of absence.</p>	<p>A.R.M. 10.20.102 Reporting Instructions Fall Enrollment, Aggregate Hours & Count Date Absence Collection</p> <p>A.R.M. 10.20.102(11) OPI Contact: Barb Quinn 444-3249</p>
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IRS ANNOUNCES MILEAGE RATE for 2022 (click [here](#))

Effective January 1, 2022, the standard mileage rates for the use of a car (also vans, pickups or panel trucks) will be:

- 58.5 cents per mile driven for business use, up 2.5 cents from the rate for 2021,
- 18 cents per mile driven for medical or moving purposes, up 2 cents from the rate for 2021, and
- 14 cents per mile driven in service of charitable organizations.



MONTANA MINIMUM WAGE FOR 2022

Montana's minimum wage will be **\$9.20** per hour **effective January 1, 2022**. You can download the 2022 Montana Wage & Hour poster by clicking [here](#).

INTERCAP Program News

The Montana Board of Investments is modernizing the INTERCAP Loan Program to reduce costs and lower rates. What can school districts expect?

- Immediately available is the new simplified loan application to fill out and submit online. <https://investmentmt.com/INTERCAP/>
- Effective January 25, 2022:
 - BOI will be funding loans and receiving repayments directly.
 - Notices with the new repayment instructions have been mailed out in December to borrowers with loans outstanding including ACH auto debit authorization forms.
 - ACH auto debit repayment initiated by BOI will be mandatory for loans closed after January 25th.
 - New vehicle/equipment loans will no longer require collateral liens.

PRESIDENTIAL AWARDS for EXCELLENCE in MATHEMATICS and SCIENCE TEACHING

Do you know a great Montana science or math teacher, teaching in grades K-6, with 5 or more years of professional teaching experience? Do you think that person should get some special recognition for their expertise and dedication to student learning? Would that person mind receiving a \$10,000 award from the National Science Foundation, along with an expenses-paid trip to DC to meet with other awardees and attend math and science professional development opportunities?

Please consider taking a few minutes to nominate that person for the **2022 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST)**. Also, please share this important nomination information with your staff and colleagues and encourage them to make nominations as well. To nominate a teacher for the award simply go to the [PAEMST website](#) and fill out the short form. Click on the "About the Awards" tab.

Those nominated will be contacted and asked to submit a formal application. Remember, regardless of whether a teacher pursues the award or not, it is always a nice recognition in and of itself to be nominated.

Questions? Contact [Diane Fladmo](#), Montana Professional Teaching Foundation, 406-447-1462.

OFFICE OF PUBLIC INSTRUCTION NEWS

Enrollment Increases under House Bill 630

[House Bill 630](#), passed in the 2021 legislative session, included provisions to temporarily suspend the process for unusual enrollment increases for FY2022 and FY2023 and amended 20-9-166 (2), MCA to provide additional financial support to school districts with increases in actual enrollment, measured using the October enrollment counts. The OPI sent an “ESSER Bulletin” email on November 23 that included links to a [guidance](#) document and a “[preliminary payment chart](#)”. Check it out. I recommend you contact the following OPI staff if you have questions:

- [Jeff Kirksey](#), ESSER Program Manager, 406-444-0783
- [Barb Quinn](#), OPI Financial Manager, 406-444-3249
- [Paul Taylor](#), OPI Budget Analyst, 406-444-1257

Comprehensive School and Community Treatment Program (CSCT)

[House Bill 671](#), passed by the 2021 Legislature, includes provisions for a change in the process that school districts must follow for obtaining federal Medicaid reimbursement funds for CSCT services. Codified in [20-9-240, MCA](#) note in subsection (1) the Office of Public Instruction (OPI) and the Montana Department of Public Health and Human Services (DPHHS) must “collaborate to facilitate school districts in securing federal reimbursements” and specifies legislative intent that *“this collaboration minimizes to the greatest extent possible the administrative burden on school districts”*. Subsection (2) describes the technical support that DPHHS must provide to the OPI, such as training, establishment of provider rates and coordination with CMS to ensure federal reimbursement for eligible services. Subsection (3) outlines the technical support OPI must provide to school districts, which includes training, accounting guidance and collaboration with DPHHS in communicating with school districts. The legislature approved approximately \$2.2 million to be used as “bridge funding” while the OPI and DPHHS work on a solution.

The OPI has held several zoom meetings and has created some guidance documents and tools for the new process. Click [here](#). Scroll down to Past CSCT Meeting information and give a listen to the December 16 meetings – one with superintendents and one with clerks. OPI has pulled the Accounting Guidance document and hopes to have an update by the end of next week. I recommend you contact the following OPI staff if you have questions:

- [Jay Phillips](#), OPI Senior Manager of Centralized Services, 406-444-4523
- [Sharyl Allen](#), OPI Deputy Superintendent, 406-444-5658

OPI Communications – Read the Compass

Don’t forget to read the OPI Compass for December 2021, especially the entries for School Finance. Here’s how to find it:

1. Click [here](#) to access the December 3, 2021 OPI Compass (or go to OPI Home/Leadership/OPI Communications/OPI Monthly Compass/December 2021)
2. Scroll down to the section “Info & Updates from the OPI's Units”
3. Click on the School Finance link or other links to other departments of interest

Remember, this is pretty much your only communication from the OPI about important topics, so make sure you access and read it when it’s published, which they’ve said is the first Friday of each month.

Educator Licensure

The Montana State Educator Information System (MSEIS) is undergoing some changes. Click [here](#) to see the details and please share with the educators in your district.

MASBO EXHIBITOR MEMBERS

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Wipfli LLP Kim Dare, CPA kdare@wipfli.com	<p style="text-align: center;"><i>Stay Humble</i></p> <p style="text-align: center;"><i>Work Hard</i></p> <p style="text-align: center;"><i>Be Kind</i></p>	

Boost Your Energy Levels

A quick guide to fight fatigue from Montana Unified School Trust

In these darker winter months, it's not uncommon to feel worn out and weary at the end of the day.

If you find yourself feeling sluggish, having difficulty staying awake, or pounding cups of coffee just to make it to lunchtime, you're not alone.

Fortunately there are plenty of healthy actions you can take to reduce fatigue and boost your energy levels. By making a few small changes to your daily routine, you can significantly affect how energetic you feel, along with many other aspects of your health.

GET MORE SLEEP

This may seem like a no-brainer, but not getting enough shut-eye drains your energy levels and affects your overall health.

- The amount of sleep a person needs can vary (usually 7 to 9 hours) and roughly 1 in 3 adults fall below these numbers.
- If you have trouble sleeping, you may benefit from setting a regular sleep schedule and winding down at the end of the night by taking a bubble bath, reading a book, or listening to relaxing music.
- If you have racing thoughts before bed time, try addressing your stressors and writing them down to release your worries from your mind and let your brain know it can take a break.

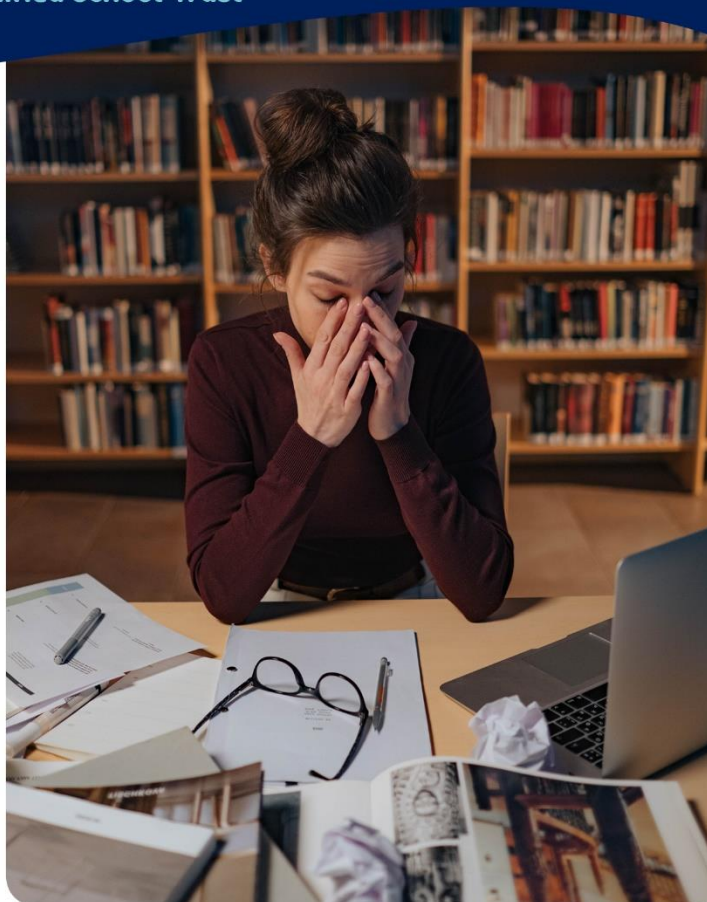
MOVE MORE

Research suggests that adding more physical activity to your routine could fight fatigue and increase your energy levels. It can be challenging to find motivation to begin, so start small.

- Incorporate exercise into your day by going for a walk on your lunch break, taking the stairs instead of the elevator, or walking or biking to work or school.
- It helps to find a gym culture that is right for you. Try out some classes at different gyms to see what kind of activities and people inspire you to keep moving!



406.457.4400
mustbenefits.org
[@mustbenefits](https://twitter.com/mustbenefits)



CONNECT WITH PEOPLE

Even the most introverted people need social connection. It's proven that social isolation can cause low mood and tiredness.

If you're feeling tired or in low spirits, it can be helpful to try socializing with friends to get out of your own head and gain fresh insights.

Need ways to connect with people?

- Volunteer in the community
- Join a gym
- Take your dog to the park
- Go to a trivia night
- Take a class
- Shop local

THE BOTTOM LINE

If you feel tired, it's worth taking a look at your lifestyle to see which healthy changes you can make to boost your energy levels and help you feel your best.