

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



*Empowering School Business Leaders Through Education*

**JANUARY 2023**

## Calculating the District Fund Budget Webinar Series

**January 18 – March 8, 2023, 1:00pm - 3:00pm**

**Sixteen Hours of Training in Eight 2-hour training webinars**

Gwyn Andersen and Betty Brumwell will present budget workshops that will begin with the calculation of ANB and how that drives your general fund budget, all the way through the required Notice of Increase in Non-Voted Levies. You will learn to calculate the general fund budget using your district's information, utilizing various OPI tools.

The instruction will be offered on ZOOM in eight - 2 hour segments beginning on Wednesday, January 18 and ending on Wednesday, March 8. The first session be an overview of all funds, their purpose, revenues and appropriate expenditures and each session will build on the previous session with time allowed for questions. Betty and Gwyn will also be available between sessions for discussion about the specifics or your district or questions that might arise.

**Registration is for all 16 hours of training/8 webinars with no partial registration options:**

**\$200 for one attendee to attend any/all webinars for 8 weeks**

**\$300 for any/all members of your district to attend any/all 8 weeks - (Marie will get a list of your district attendee emails from the first registered attendee)**

**Registered attendees will receive zoom link(s) prior to webinars.**

### **AGENDA:**

#### **Week 1 – January 18**

Overview of All Funds (purpose, revenue, valid expenditures, reserve)

#### **Week 2 – January 25**

ANB (Average Number Belonging)  
Separate Budget Units  
Basic Entitlement and PER-ANB Entitlement

#### **Week 3 – February 1**

Additional Funding Components  
Quality Educator, Indian Education for All, At-Risk Student, Data for Achievement, & Achievement Gap  
Special Education Funding (including Maintenance of Effort)

#### **Week 4 – February 8**

Establishing the Base and Maximum General Fund Budget and voting limits

#### **Week 5 – February 15**

Funding the General Fund Budget  
Non Levy Revenues and Guaranteed Tax Base Aid (GTB)  
Operating Reserve and Excess Reserves  
Budget Authority and Voter Approval  
Distribution of State Aid

#### **Week 6 – February 22**

Levies & Calculating General Fund Levies  
OPI General Fund Budget Spreadsheet, "The Silver Bullet"  
Guest Appearance, Paul Taylor, OPI

#### **Week 7 – March 1**

Review Preliminary Budget Data Sheets  
Expenditure Budgets  
Budget Amendments

#### **Week 8 – March 8**

Other Budgeted Funds and their Respective Levies  
Estimating & Noticing of Tax Impact of School District Levies

## Elections Check-In Webinars

Don't miss out! Nicole Thuotte, OPI will be providing additional election check-ins leading up to Election Day. Bi-weekly meetings will begin January 13<sup>th</sup>. At these webinars, Nicole will hit on pertinent topics and allot time for questions and answers. Please check the OPI website for more information.



### Election Webinars FY 2023 Elections



Day/Date	Time	Topic
Friday, Dec 16, 2022	10:00 AM	Candidates and Legislative Updates
Friday, Jan 13, 2023	10:00 AM	Preparing for an Election
Friday, Jan 27, 2023	10:00 AM	Election Accessibility
Friday, Feb 10, 2023	10:00 AM	Election Resolutions
Friday, Feb 24, 2023	10:00 AM	Mail Ballot Plans
Friday, Mar 10, 2023	10:00 AM	Election Notices
Friday, Mar 24, 2023	10:00 AM	Ballot Certification
*Thursday, Apr 6, 2023	10:00 AM	Mailing Ballots/Signature Verification
Friday, Apr 21, 2023	10:00 AM	Preparing for the Election
Friday, May 5, 2023	10:00 AM	Post-Election Procedures
Friday, May 19, 2023	10:00 AM	Election Wrap-Up

## MT STATE TAX WITHHOLDINGS TABLES CHANGE

Montana State Department of Revenue has issued new guidance regarding a change to tax tables effective January 1<sup>st</sup>, 2023. The Guide can be found [here](#). Please be sure to update your payroll software prior to any January runs. Check with your software vendor for more information.

### IRS MILEAGE REIMBURSEMENT RATE CHANGES FOR 2023

Beginning January 1<sup>st</sup>, 2023, the mileage reimbursement rate will be raised to 65.5 cents per mile, and 14 cents per mile for mileage driven for charitable organizations. Official information regarding this rate change can be found on the IRS [website](#).

## 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.

We'd appreciate everyone updating their profiles this month:

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!

## MEMBER SEARCH

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

Under the Membership Tab, select Member Search

You can now search by School, Software, County, Last Name or Zip

Email Marie if you need any assistance: [mroach@masbo.com](mailto:mroach@masbo.com)



## P-CARD NEWS



### MASBO P-CARD PURCHASES REPORT

P-Card purchases for six months of the current rebate year (April - October) totaled over **\$23,482,204.00** with **179** school districts and special education cooperatives participating in the program. At the same time last year, we had 169 participants with just over \$21.5 million in total purchases. Click [here](#) to see the current year P-Card purchases report.

**Need Help?** Contact Holly Wallace at **1-815-793-4655** or [hwallace@iasbo.org](mailto:hwallace@iasbo.org) for help or to schedule a webinar on helpful topics.

### MASBO Board of Directors

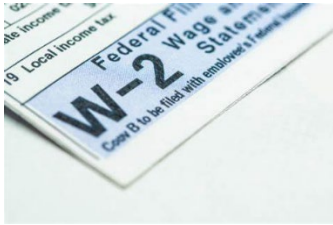
President	<a href="#">Rita Huck</a> , Huntley Project	Region 1 Director	<a href="#">Lacey Porrovecchio</a> , Bigfork
Vice-President	<a href="#">Belinda Klick</a> , Sun River Valley	Region 2 Director	<a href="#">Karsen Floerchinger</a> , Cascade
Past President	<a href="#">Lorie Carey</a> , Jefferson Co. H.S.	Region 3 Director	<a href="#">Colleen Drury</a> , Scobey
Fiscal Agent	<a href="#">Kim Aarstad</a> , East Helena	Region 4 Director	<a href="#">Shay Baize</a> , Lima
Ex-Officio, MTSUIP	<a href="#">Jen Mettler</a> , Baker	Region 5 Director	<a href="#">Rebekah Rhoades</a> , Lewistown
Ex-Officio, OPI	<a href="#">Barb Quinn</a> , MT Office of Public Instruction	Region 6 Director	<a href="#">Stacy Montgomery</a> , Forsyth

### MASBO Staff

[Shelley Turner](#)  
Executive Director  
406-461-3659

[Marie Roach](#)  
Association Services Coordinator  
406-461-8804

[Steve Hamel](#)  
Interim Services/Trainer  
406-431-0124



## W2 and 1099 Filing Reminders

Just quick reminder to prepare yourself for W2 and 1099 Processing. Do not wait until the last minute to ensure you have enough forms ordered or ready for use. Most software providers have a link or resource list of the best forms for your software system. Additionally, most software providers

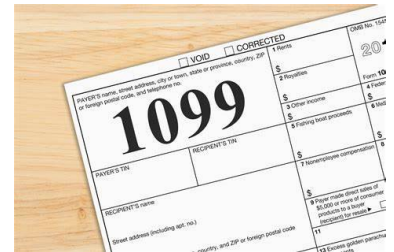
will provide you procedures information and/or training if you've not been through the process in the past.

In 2021, the IRS changed updated the 1099 forms, utilizing 1099-MISC and 1099-NEC (non employee compensation) forms. Instructions regarding these forms can be found on the IRS [website](#). If you are e-filing 1099's to the IRS you will need access to the Filing Information Returns Electronically ([FIRE](#)) system.

For electronically filing W2/3's you will need access to the Business Services Office ([BSO](#)).

All state filing of 1099 and W2/W3s can be made at with the Montana Department of Revenue [website](#).

Don't hesitate to set up logins if you don't already have one; the BSO site can take several weeks to mail you the registration information.



## 2023 Summer Conference Sleeping Rooms

Fairmont Hot Springs the week of June 12-16



Do you have a sleeping room you won't need after all?

Please email Marie at [mroach@masbo.com](mailto:mroach@masbo.com)

MASBO has a waiting list and we would like to get any extra room(s) assigned to our members.



The MASBO Board and Staff wish you and your family a fantastic and joyous New Year. We are hoping the new year turns the page on a new chapter of prosperity, kindness, learning and achieving for the students and staff of Montana Public Schools.

MASBO MEMBERS:

**MARK YOUR CALENDARS: JANUARY 25<sup>TH</sup> DAY OF ADVACACY.** EDUCATION LEADERS WILL GATHER IN HELENA. MORE INFORMATION WILL BE SHARED BY EMAIL SOON. BE SURE TO CHECK OUT THE MASBO LEGISLATIVE [PAGE](#) AND WATCH YOUR EMAIL REGARDING ALL IMPORTANT LEGISLATIVE UPDATES AS THEY DEVELOP, AS WELL AS CONTACT INFORMATION FOR YOUR LEGISLATIVE LEADERS.

## UPCOMING OPPORTUNITIES & NEWS FROM OPI AND OTHER MASBO PARTNERS

### **OPI Indirect Cost Rate Applications for FY24 Now Available**

OPI has released the FY24 applications forms for indirect cost rate certification. These forms are due by April 30<sup>th</sup>. Information regarding this can be found on the OPI [website](#).

### Safe Return and LEA ARP Plans are Due Every Six Months

**Safe Return and LEA ARP Plan** (ESSER fund use) are required to be updated at least twice a year. OPI will review the plans in December and June. **If you completed the ARP ESSER LEA Plan, you do not need to complete the Continuous School Improvement Plan (CSIP) for 2022-2023 (which is typically due November 1<sup>st</sup>).** Districts have been notified of the need to review and update plans including requirement to engage the community. Instructions were issued out on the 2<sup>nd</sup> week of May but several districts are past the compliance deadline. If you did not receive the instructions or need assistance, please reach out to [Wendi Fawns](#) at OPI and she will assist you in reaching compliance. Updates require notice of plan update on the Board agenda, allowing for public comment and stakeholder engagement.

### **OPI ESSER AFTERSCHOOL AND SUMMER ENRICHMENT GRANTS**

The **Afterschool** and **Summer Enrichment grants** for School Year 2022-23 will be reopening this fall under the updated name **ESSER Extended and Expanded Learning Opportunity (EELO)**. These grants will focus on Math and Reading programming efforts, combined with best practices promoting Social/Emotional Learning. To help prepare for these grants, we encourage applicants to actively explore local partnerships to best leverage these funds and improve student outcomes. View our site [HERE](#) for more information.

### [ESSER Monthly School Reports](#)





DPHHS is excited to announce that we are partnering with Medify Air and Grainger to offer **free HEPA air purifiers to Montana K-12 schools** through June 2023. Medify Air is a top-rated air purifier manufacturer that provides high quality HEPA air purifier systems and replacement filters. Grainger is a government contractor that has an established partnership with DPHHS to offer a variety of services. DPHHS is utilizing ELC School Reopening federal funds to support this partnership with the focus of improving indoor air quality in schools. In addition to reducing the transmission risk of COVID-19

and other communicable diseases, these HEPA air purifier systems will provide an added benefit of helping schools maintain clean air during wildfire smoke events.

## How it Works

In the coming weeks and months, school administrators (primarily district superintendents) will be contacted by a Medify Air or Grainger representative.

- A brief survey and order form must be completed indicating the desired number of HEPA systems needed in each school. This information will be submitted directly to Grainger and Medify.
  - The Medify Air or Grainger representative can help administrators determine the number and size of HEPA systems needed in each school. There are a variety of HEPA systems for different size rooms ranging from 165 square feet to 1,875 square feet.
  - Up to three years' worth of replacement HEPA filters for each HEPA system will be included with the initial order.
- Medify Air will ship the requested HEPA systems directly to schools and submit invoices to DPHHS.
  - Prior to shipment, DPHHS will work with Grainger and Medify to review and approve orders. If DPHHS has any questions or concerns regarding order details, they may contact the school or district administrator.
  - Educational material and set-up services will be provided by Medify Air and/or Grainger upon request. For this additional support, you will simply contact the Medify Air or Grainger representative who initially contacted your school. Basic set-up information is include with each individual HEPA system.
  - HEPA systems will be available on a first come first serve basis, as funding permits.

School/school districts **do not need to apply** for ELC funding to obtain HEPA systems through this Medify Air partnership. There are **no** reporting requirements attached to this opportunity, though DPHHS may work with Grainger and Medify Air to ask follow-up questions regarding the use of the HEPA systems in schools.

Please send questions regarding this opportunity to [schoolhealth@mt.gov](mailto:schoolhealth@mt.gov).

## Impact Aid Applications - due January 31<sup>st</sup> at 11:59 pm Eastern Time

(from OPI Compass)

Log in to the [Impact Aid Grant System \[impactaid.ed.gov\]](https://impactaid.ed.gov) to start your application. Helpful tools available on at [IAGS Training \[iimpactaid.ed.gov\]](https://impactaid.ed.gov) and [Resources \[iimpactaid.ed.gov\]](https://impactaid.ed.gov). If you need a refresher on IAGS account set up and how to complete an application, see our new slide deck, [A Guide to Submitting a 7003 Application in the IAGS \[iimpactaid.ed.gov\]](https://impactaid.ed.gov). Applications submitted after the deadline, but before 4/1/2023 incur a 10 percent payment reduction penalty.

Data sheets to assist with the completion of the application may be found here: [Impact Aid Questions](#): For Impact Aid questions please contact: Laci Novark, Budget Analyst at 406-444-4401.

[OPI School Finance December Compass Link](#)

## TRANSFORMATIONAL LEARNING AND ADVANCED OPPORTUNITIES GRANT

Application and Annual Report Window Opens December 5th at 8am and Closes January 9th at 5pm

- [Transformational Learning](#) funding is determined by a lottery system held after the window closes.
- [MT Advanced Opportunity](#) funding is first come, first served.

### IEFA GRANT FUNDING AVAILABLE

(information from the OPI December Compass)

The Indian Education for All Unit will be offering grant awards to districts that would like to compensate their staff for completing IEFA PD modules or facilitate an exchange program between Native and Non-Native schools and students. Exchanges between schools on different reservations will be considered as well. The PD modules would be specific to the Essential Understandings Regarding Montana Indians or the IEFA Implementation Framework hub course. Grant awards would be determined based on the size of the school district and the estimated number of staff participating. Districts would also be required to provide some IEFA ANB funds for match. Interested schools and districts should contact Jennifer Stadum or Zach Hawkins in the OPI IEFA office.

Jennifer Stadum: [jstadum@mt.gov](mailto:jstadum@mt.gov) or 444-0725 Zach Hawkins: [zachariah.hawkins@mt.gov](mailto:zachariah.hawkins@mt.gov) or 444-0708

### Has Your District Experienced a Staffing or Board Member Change?

**MASBO:** If you are new to your position as business manager and/or clerk, or you anticipate changes please let the staff at MASBO know so we can also update your information. Please feel free to reach out to [Shelley](#) or [Marie](#) for assistance.

**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.

**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](mailto:CentralUpdates@mt.gov)

**School Nutrition:** If you need to request access to MAPS, complete the MAPS User Access Form and contact Katie Felde at (406) 444-250

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

## MASBO ENDORSES THESE PROGRAMS

	<p>Healthcare Reform Section 125 Services Health Savings Account Services <b>Jacob Bautista</b>, Office Manager 877-589-2544 <a href="mailto:jacob.bautista@americanfidelity.com">jacob.bautista@americanfidelity.com</a> <a href="http://www.americanfidelity.com/home.aspx">http://www.americanfidelity.com/home.aspx</a></p>
	<p>Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program <b>Shawn Bubb</b>, Director of Insurance Services 406-457-4500 <a href="mailto:sbubb@mtsba.org">sbubb@mtsba.org</a> <a href="http://www.msgia.org/home">http://www.msgia.org/home</a></p>
	<p>Health, Dental, Vision, Life and Long-Term Disability Benefits <b>Andy Holmlund</b>, Chief Executive Officer 406-457-4400 <a href="mailto:aholmlund@ms-sf.org">aholmlund@ms-sf.org</a> <a href="http://mustbenefits.org/">http://mustbenefits.org/</a></p>
	<p>Montana Schools Unemployment Insurance Program <b>Lisa Gowen</b> 406-457-4407 <a href="mailto:lgowen@mtsba.com">lgowen@mtsba.com</a> <a href="http://www.mtsuip.org/">http://www.mtsuip.org/</a></p>
	<p>Payne West, Inc. Montana Schools Property &amp; Liability Insurance Plan <b>Rody Holman</b>, Program Manager 406-533-1035 <a href="mailto:RHolman@paynewest.com">RHolman@paynewest.com</a> <a href="http://msplip.com/">http://msplip.com/</a></p>



## MASBO EXHIBITOR MEMBERS

<b>Aflac</b> Rob Cook <a href="mailto:r_cook@us.aflac.com">r_cook@us.aflac.com</a>	<b>American Fidelity Assurance Company</b> Jacob Bautista, Office Manager <a href="mailto:jacob.Bautista@americanfidelity.com">jacob.Bautista@americanfidelity.com</a>	<b>Anderson, Zurmuehlen &amp; Co.</b> Stefeni Freese, CPA <a href="mailto:sfreese@azworld.com">sfreese@azworld.com</a>
<b>Black Mountain Software</b> Teresa Van Buren <a href="mailto:teresav@blackmountainsoftware.com">teresav@blackmountainsoftware.com</a>	<b>Bruco, Inc.</b> Adam Uselman, V.P.-C.O.O. <a href="mailto:adamu@bruco.com">adamu@bruco.com</a>	<b>C &amp; C School Accounting</b> David Bardwell <a href="mailto:Help@CandCSchoolAccounting.com">Help@CandCSchoolAccounting.com</a>
<b>D.A. Davidson &amp; Co.</b> Bridget Ekstrom <a href="mailto:Bekstrom@dadco.com">Bekstrom@dadco.com</a>	<b>Fatbeam</b> Graham Taylor <a href="mailto:graham@fatbeam.com">graham@fatbeam.com</a>	<b>Felt Martin, PC</b> Jeffrey Weldon <a href="mailto:JWeldon@feltmartinlaw.com">JWeldon@feltmartinlaw.com</a>
<b>Fisher's Technology</b> Amanda Byrne <a href="mailto:info@fisherstech.com">info@fisherstech.com</a>	<b>Gwyn Andersen Consulting</b> Gwyn Andersen <a href="mailto:gwynma@gmail.com">gwynma@gmail.com</a>	<b>Horace Mann</b> Aaron Moyer <a href="mailto:association.relations@horacemann.com">association.relations@horacemann.com</a>
<b>Iconergy</b> Carl Hurst <a href="mailto:churst@iconergyco.com">churst@iconergyco.com</a>	<b>Infinite Campus</b> Bob Gits <a href="mailto:robert.gits@InfiniteCampus.com">robert.gits@InfiniteCampus.com</a>	<b>Joint Powers Trust</b> Cyndy Maxwell <a href="mailto:cyndy@jointpowerstrust.com">cyndy@jointpowerstrust.com</a>
<b>K12 Montana</b> Jeffrey Patterson <a href="mailto:jeffp@k12mt.com">jeffp@k12mt.com</a>	<b>Kalmbach Consulting</b> Cathy Kalmbach <a href="mailto:cathymkal@gmail.com">cathymkal@gmail.com</a>	<b>Klimas Financial Services, Inc.</b> Charles Klimas <a href="mailto:cklimas@gwnsecurities.com">cklimas@gwnsecurities.com</a>
<b>Montana Digital Academy</b> Sarah Marker <a href="mailto:sarah.marker@montanadigitalacademy.org">sarah.marker@montanadigitalacademy.org</a>	<b>Montana Public Employees Retirement Administration</b> Terry Dalton <a href="mailto:tdalton@mt.gov">tdalton@mt.gov</a>	<b>MSGIA-WCRRP</b> Shawn Bubb <a href="mailto:sbubb@mstba.org">sbubb@mstba.org</a>
<b>Montana Schools Unemployment Insurance Program (MTSUIP)</b> Lisa Gowen <a href="mailto:lgowen@mtsba.com">lgowen@mtsba.com</a>	<b>Montana Unified School Trust (MUST)</b> Andy Holmlund <a href="mailto:aholmlund@ms-sf.org">aholmlund@ms-sf.org</a>	<b>Payne West, Inc./MSPLIP</b> Rody Holman <a href="mailto:RHolman@paynewest.com">RHolman@paynewest.com</a>
<b>Pine Cove Consulting</b> Brandan Bassett <a href="mailto:bbassett@pineecc.com">bbassett@pineecc.com</a>	<b>School Services of Montana</b> Melissa Tovaas <a href="mailto:mtovaas@mt-schools.org">mtovaas@mt-schools.org</a>	<b>Tyler Technologies</b> Carrie Hughes <a href="mailto:carrie.hughes@tylertech.com">carrie.hughes@tylertech.com</a>
<b>Wipfli LLP</b> Kim Dare, CPA <a href="mailto:kdare@wipfli.com">kdare@wipfli.com</a>		

## IMPORTANT DATES & DEADLINES – JANUARY 2023

### DECEMBER 5 – JANUARY 9

Transformational Learning Application closes January 9 <sup>th</sup> at 5pm.	A school district must apply for the <b>state transformational aid</b> payment during the application period, which is <b>December 5 at 8:00 a.m. – January 9, 2023 at 5:00 p.m.</b> for FY2023.	<a href="#">OPI Transformational Learning Application FY2024</a>  OPI <a href="#">Transformational Learning</a> information page
Montana Advanced Opportunity Application closes January 9 <sup>th</sup> at 5pm.	A school district must apply for the <b>state advanced opportunity aid</b> payment during the application period, which is <b>December 5, 2022 at 8:00 a.m. – January 9, 2023 at 5:00 p.m.</b> for FY2024.	<a href="#">OPI Advanced Opportunity Act</a> information page  <a href="#">Montana Advanced Opportunity Application FY2024</a>

### JANUARY 10

File monthly claims for NSLP or SSO reimbursement	Monthly lunch, breakfast and snack counts are due the 10 <sup>th</sup> 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 <a href="#">Back to School Page</a> for more information on SSO and important updates.	Montana Agreement and Payment System ( <a href="#">MAPS</a> ) log in page <a href="#">School Nutrition Programs Checklist</a> NSLP <a href="#">Reimbursement rates for FY2023</a> SSO <a href="#">Reimbursement rates</a>  <a href="#">FY2023 School Nutrition Payments</a>
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 <sup>th</sup> of the previous month.	<a href="#">E-Grants System</a> 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 <b>January 25</b> . Due date for other carriers is October 15.  If your district is a member of MTSUIP, the unemployment insurance report for 4th quarter payroll is due.	<a href="http://www.msgia.org/home">http://www.msgia.org/home</a>  <a href="http://www.mtsuip.org/">http://www.mtsuip.org/</a>
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### JANUARY 25

Grant cash request due to OPI	Grant cash request due to OPI	<a href="#">OPI State and Federal Grants Handbook</a>
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### JANUARY 26

OPI makes K-12 BASE aid payments	<b>Direct State Aid</b> <b>Quality Educator Component</b> <b>At Risk Student Component</b> <b>Indian Education for All</b> <b>Student Achievement Gap</b> <b>Data for Achievement</b> <b>(SPED) State Special Education Payments</b>	<a href="#">FY2023 Schedule</a> (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.	<a href="#">Form 941 (form)</a> <a href="#">Form 941 (instructions)</a>
Annual tax forms due	<p><a href="#">2022 Form W-2</a> Wage &amp; Tax Statement to employees by <b>January 31, 2023</b></p> <p>Federal copies of 2022 Form W-2 (with <a href="#">Form W-3</a> transmittal) are due to the Social Security Administration by <b>January 31, 2023</b> whether you are filing paper forms or electronically.</p> <p><a href="#">2022 Form 1099-NEC</a> Non-Employee Compensation to recipients <b>and</b> to the IRS (with <a href="#">Form 1096</a> transmittal) by <b>January 31, 2023</b>.</p> <p><a href="#">2022 Form 1099-MISC</a> Miscellaneous Income to recipients by <b>January 31, 2023</b>.</p> <p>Federal copies of 2022 Form 1099-MISC (with Form 1096 transmittal) are due to the IRS by <b>February 28, 2023</b>.</p>	<p><a href="#">2022 General Instructions for Forms W-2 and W-3</a></p> <p><a href="#">Employer W-2 Filing Instructions &amp; Information</a></p> <p><a href="#">About Form 1099-NEC, Nonemployee Compensation</a></p> <p><a href="#">About Form 1099-MISC, Miscellaneous Income</a></p> <p><a href="#">Instructions for Forms 1099-MISC and 1099-NEC</a></p> <p><a href="#">General Instructions for Certain Information Returns</a></p>
Last day to file state form MW-3 and copies of 2022 Form W-2 and Form 1099 with state withholding	<p>On or before <b>January 31</b> of each year, you are required to file the following with the Montana Department of Revenue:</p> <ul style="list-style-type: none"> <li>• Montana Annual Wage Withholding Tax Reconciliation form (MW-3) supporting the withholding reported on the Forms W-2 and 1099.</li> <li>• Wage and Tax statement (W-2) for each employee Montana wages were paid to, with or without withholding.</li> <li>• Forms 1099 with Montana state withholding.</li> </ul>	<p>Montana Department of Revenue <a href="#">Filing Withholding Returns</a> webpage</p> <p><a href="#">Form MW-3</a></p> <p><a href="#">Montana Withholding Tax Guide</a> (see page 8 for annual filing requirements)</p>
2 <sup>nd</sup> Semester Bus Inspections must be completed	<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><a href="#">MCA, 20-10-101(4)(a)(i)</a> <a href="#">ARM 10.7.110</a> <a href="#">Regulations &amp; Guidelines for Pupil Transportation Reporting</a> (see page 4)</p>
2024 Impact Aid applications are due at 9:59 MST	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 2024 application. 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	<p><b>Watch for more information from the Office of Public Instruction:</b></p> <ul style="list-style-type: none"> <li>➤ Impact Aid Application Information</li> <li>➤ Impact Aid Application Data (click on link to 2024 Preliminary Data Sheets)</li> </ul>

	received after the 60-day late window (April 1, 2023). 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, 2023.	
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## IMPORTANT DATES & DEADLINES – FEBRUARY 2023

### FEBRUARY 6

Spring Enrollment Count Date	<p>The official count day for the 2023 Spring Enrollment &amp; Aggregate Hours Collection begins <b>Monday, February 6</b>. Districts will report spring count date aggregate hours for all students enrolled on 2/6/2023, 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. <b>MAEFAIRS Student Count for ANB must be submitted no later than Friday, February 14, 2023.</b></p> <p>Extenuating circumstances for students who will be gone 10 days prior to the count date, but which would support a variance <b>should be submitted to the OPI prior to the official enrollment count date</b> for consideration of inclusion of the student in the enrollment count for ANB purposes beyond the 10th day of absence.</p>	<p><a href="#">A.R.M. 10.20.102 Reporting Instructions Fall Enrollment, Aggregate Hours &amp; Count Date Absence Collection</a></p> <p><a href="#">AIM Spring Count User Guide</a></p> <p><a href="#">AIM Data Collection Schedule</a></p> <p><a href="#">A.R.M. 10.20.102(11)</a></p> <p><a href="#">Submit an AIM Help Desk Ticket</a></p> <p>or call 1-877-424-6681 or 406-444-3800</p>
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### FEBRUARY 10

File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due the 10<sup>th</sup> 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 <a href="#">Back to School Page</a> for more information on SSO and important updates.</p>	<p>Montana Agreement and Payment System (<a href="#">MAPS</a>) log in page</p> <p><a href="#">School Nutrition Programs Checklist</a></p> <p>NSLP <a href="#">Reimbursement rates for FY2023</a></p> <p>SSO <a href="#">Reimbursement rates</a></p> <p><a href="#">FY2023 School Nutrition Payments</a></p>
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### FEBRUARY 10 (continued)

OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 <sup>th</sup> of the previous month.	<p><a href="#">E-Grants System</a></p> <p>Log in to your district's account, or click on Public Access, then Vendor Payee Details</p>
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<b>FEBRUARY 15</b>		
First Semester Transportation Claims due	<p>Submit first semester transportation claims online to the Superintendent of Public Instruction and transmit one copy of each claim to the County Superintendent of Schools.</p> <ul style="list-style-type: none"> <li>• <b>TR-5</b> Claim for State Reimbursement for Individual and Isolated Transportation</li> <li>• <b>TR-6</b> Claim for Reimbursement for School Bus Transportation</li> </ul>	<a href="#">MCA 20-10-145(2)</a> <a href="#">A.R.M. 10-7-104(1)(a)</a> <a href="#">Regulations &amp; Guidelines for Pupil Transportation Reporting</a>
<b>FEBRUARY 21</b>		
Trustees call for an election	<p>At least 70 days prior to Election Day (May 2, 2023), the trustees must pass a resolution stating:</p> <ol style="list-style-type: none"> <li>1) the date of the election;</li> <li>2) the purpose of the election;</li> <li>3) whether the election will be by mail or poll;</li> <li>4) the voting locations and boundaries for each location, if there are multiple locations within a district (if changed from a previous school election the new locations must be specifically noted); and</li> <li>5) the time the polls will open, if before noon.</li> </ol>	<a href="#">MCA 20-20-201</a> <a href="#">MCA 20-20-203</a>  <a href="#">School Election Calendar 2023</a> <a href="#">2023 School Election Handbook</a> (see page 6)  <a href="#">Trustees Resolution Calling for an Election</a>
<b>FEBRUARY 22</b>		
County Superintendent electronically authorizes first semester transportation claims	County Superintendent electronically authorizes first semester transportation claims (consisting of one copy of each district claim).	<a href="#">MCA 20-10-145(2)</a> <a href="#">A.R.M. 10-7-104(1)(b)</a>
<b>FEBRUARY 23</b>		
OPI makes K-12 BASE aid payments	<b>Direct State Aid</b> <b>Quality Educator Component</b> <b>At Risk Student Component</b> <b>Indian Education for All</b> <b>Student Achievement Gap</b> <b>Data for Achievement</b> <b>(SPED) State Special Education Payments</b>	<a href="#">FY2023 Schedule</a> (scroll to bottom of page)
<b>FEBRUARY 24</b>		
Last day to file election resolution with the county election administrator	At least 67 days before (and within 3 days of passage of the election resolution), file the school election resolution with the county election administrator.	<a href="#">MCA 20-20-201(2)(a)</a> <a href="#">School Election Calendar 2023</a> <a href="#">2023 School Election Handbook</a>
<b>FEBRUARY 25</b>		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on March 10.	<a href="#">OPI State and Federal Grants Handbook</a>





**MQEC: Montana Quality Education Coalition:**

# 5 Key Potential Bills

**MQEC/CAMPS (Coalition of Advocates for Montana's Public Schools) is providing strategic guidance to improve potential legislation**

## **LC 1257: Charter Schools**

An act authorizing the establishment of public charter schools as a means of providing additional high quality educational opportunities; authorizing constitutionally empowered elected trustees to establish, oversee and otherwise provide personalized learning programs for pupils in Montana's public schools through charter schools or programs.

## **HB 15: Implement K-12 Inflation Adjustment**

An act applying inflationary adjustments to school funding formula components; amending section 20-9-306, MCA; and providing an effective date and an applicability date.

## **LC 732: Open Enrollment and School Choice**

An act generally revising education laws related to out-of-district attendance; revising out-of-district and tuition laws to increase educational choice and improve taxpayer equity.

## **LC 1351: Early Literacy Program**

An act establishing early literacy targeted interventions; providing legislative findings, purpose, and intent; providing definitions; providing duties for the board of public education and superintendent of public instruction and authority for school board trustees; providing funding mechanisms and reporting requirements.

## **LC 1917: Expanding Personalized Opportunities for Student Learning**

An act expanding personalized opportunities for students to accelerate their career and college readiness and reduce out-of-pocket costs for families; empowering students to actively engage in forming successful postsecondary pathways.