

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



*Empowering School Business Leaders Through Education*

**JANUARY 2021**



## UPCOMING TRAINING OPPORTUNITIES

### MTSUIP/MTSBA ANNUAL HR SYMPOSIUM

[Register](#) for the HR (Employment) Symposium virtual series offered by MTSBA and sponsored by MTSUIP. All sessions take place on the following Tuesdays in February from 1:00 – 3:00 p.m.

- Feb. 9 During this session, the MTSBA legal and labor staff will focus on collective bargaining and pending matters that are impacting collective bargaining and district operations, including but not limited to MOA's and legislation that could impact collective bargaining in Montana.
- Feb. 16 The focus of this session will be on the hiring process, the application of the Wrongful Discharge Act to schools, and necessity of employment contract language that provides protections for the district. We will also discuss current challenges in HR matters relating to COVID-19.
- Feb. 23 This session will focus on the employment relationship from start to finish, including establishing expectations through job descriptions, effective evaluation procedures, discipline pitfalls and termination of employment. We will also include guidance on the non-renewal of non-tenured teachers.

**FREE** to MTSUIP member school districts and ***no limit on the # of attendees from the same member district.***  
Non-member districts may also attend for a fee.

### 2021 ELECTION CHECK-IN MEETINGS

Join Nicole Thuotte (OPI) and MASBO for the following bi-weekly one-hour Zoom meetings. All meetings will be from **9:00 a.m. – 10:00 a.m.** No registration required – just show up with your election questions.

- February 12: Election Resolution, Trustee Candidates
- February 26: Mail Ballot Elections
- March 12: Election Judges, Notices
- March 26: Ballot Certification
- April 9: Absentee/Mail Ballots
- April 23: Preparing for the Election, Provisional Ballots
- May 7: Election Wrap Up

### 2021 MTSBA/MASBO SCHOOL FINANCE AND BUDGET SYMPOSIUM

[Register](#) for the following sessions which take place on Tuesdays in March from 1:00 – 3:00 p.m.

- March 9 Overview of the history of school finance in Montana and the advancements in funding Montana's public schools over several legislative sessions, and an overview of MTSBA's and MASBO's 2021 Legislative Priorities and the status of those priorities.
- March 16 Focus will be on the budgeting process, including an overview of the budgeted and non-budgeted funds, including allowable uses and restrictions. Concepts such as budget authority vs. cash, allowable reserves, General Fund budget formula and appropriate uses of federal COVID funds.
- March 23 Focus on the flexibilities and efficiencies to maximize district resources and enhance personalized learning. We will focus on the policies and procedures to implement these changes in district operations.

## MASBO Board of Directors

President	<u>Lorie Carey</u> , Jefferson Co. High School	Region 1 Director	<u>Lacey Porrovecchio</u> , Bigfork
Vice-President	<u>Rita Huck</u> , Huntley Project K-12	Region 2 Director	<u>Belinda Klick</u> , Sun River Valley
Past President	<u>Jacki Young</u> , Fairview	Region 3 Director	<u>Colleen Drury</u> , Scobey
Fiscal Agent	<u>Kim Aarstad</u> , East Helena	Region 4 Director	<u>Kevin Patrick</u> , Butte
Ex-Officio, MTSUIP	<u>Jen Mettler</u> , Baker K-12	Region 5 Director	<u>Rebekah Rhoades</u> , Lewistown
Ex-Officio, OPI	<u>Renee Richter</u> , Financial Specialist	Region 6 Director	<u>Stacy Montgomery</u> , Forsyth

## MASBO Staff

Denise Williams  
Executive Director  
406-461-3659

Marie Roach  
Association Services Coordinator  
406-461-8804

Steve Hamel  
Interim Services/Trainer  
406-431-0124

## MEET YOUR MASBO BOARD OF DIRECTORS LACEY PORROVECCHIO, BIGFORK SCHOOLS

For those of you who don't know me, my name is Lacey Porrovecchio and I am the Business Manager/Clerk at Bigfork School District. I have been at the school since 2010. I was Accounts Payable/Assistant Business Manager my first 4 years and Business Manager since then. I now recognize how crazy lucky I was to work with Eda Taylor, the prior Business Manager/Clerk, for 4 years! When she retired, we still met once a month for pizza and to go over my questions, which ranged from "where is that file?" to "how do I run a bond?". It was great!



I grew up in Hungry Horse and graduated from Columbia Falls High School. For fun I like to hike, boat, workout, read and watch my children's activities. My husband graduated from Bigfork High School and has worked for the district for 17 years. He has been many things over the years but is currently our Special Education Director/Athletic Director. We have 3 boys/young men- Andrew, Dylan and Cooper. Life has gotten easier, and scarier, now that Andrew can drive. And more expensive! They are all in sports and good at school and it's awesome we all get to be on the same campus.

I am honored to step in for Noreen Anderson as Region 1 Director for the next few months. Congratulations to Noreen on her retirement!

## ACCEPTING NOMINATIONS FOR MASBO VICE-PRESIDENT

The MASBO Board of Directors is now accepting nominations for Vice-President. This office is elected at large for a 2-year term beginning July 1, 2021 and shall automatically succeed to the office of President, also for a 2-year term. The office of President automatically succeeds to the office of Past-President for another 2-year term. The total time commitment for this level of leadership is 6 years.

You may nominate someone for Vice-President by doing one of the following:

1. Send an email to Denise at [dwilliams@masbo.com](mailto:dwilliams@masbo.com), or
2. Nominate the person at your spring regional workshop during the MASBO business meeting, or
3. Nominate the person at the 2021 MASBO summer conference opening business meeting.

## REGION DIRECTOR ELECTIONS TO BE HELD AT SPRING REGIONAL WORKSHOPS

Elections for Region Director will be held at the following spring workshops:

### ➤ Region 1

- Noreen Anderson was elected to serve the current term, which ends on June 30, 2021.
- With Noreen's retirement as of December 31, the MASBO Board of Directors appointed Lacey Porrovecchio to serve for the remainder of the term.
- ***Need an election for director for the new term: July 1, 2021 – June 30, 2024.***

### ➤ Region 2

- Belinda was elected to serve the current term, which ends on June 30, 2021.
- ***Need an election for director for new term: July 1, 2021 - June 30, 2024.***

### ➤ Region 6

- On October 28, 2020, Stacy Montgomery was appointed to serve the term vacated by Nicole Buerkle until an election can be held at the spring regional workshop.
- ***Need an election for director for the remainder of the term: July 1, 2021 - June 30, 2023.***

Nominations may be made:

- via email to Denise Williams or the applicable Region Director prior to the spring workshop, or
- from the floor during the business portion of the spring workshop.

***Note: Please visit with the person you intend to nominate for Vice-President or Region Director so that they have a chance to consider the time commitment and discuss it with their family, superintendent and/or board before accepting the nomination.***

## In Memoriam

We have learned of the recent passing of two MASBO members:

**Dean Bloundt**, District Clerk/Business Manager at Frazer School District, passed on December 31, 2020. His obituary is posted online (click [here](#)). Dean was a member of MASBO for 30 years. Please keep Dean's family, the Frazer School District staff and students and community in your thoughts and prayers.

**Fay Dear**, passed on January 26, 2021. Fay was the District Clerk/Business Manager at the Glendive School District from July 1984 – December 2008 and had prior experience at Opheim Schools. Faye was an avid member of MASBO for 33½ years, serving as Region 6 Director, then President (1989), awarded Outstanding Business Official (1994). She mentored many new and veteran clerks. Please keep Fay's family in your thoughts and prayers.



## P-CARD NEWS

P-card purchases for the nine months of the current rebate year (April – December) totaled over **\$21 million** with **163** school districts and special education cooperatives participating in the program. At the same time last year, we had 147 participants with over \$20 million in total purchases. Click [here](#) to see the current year P-card purchases report.

## P-Card NEWS!

### Consider making your p-card monthly payment electronically

ACH Pull or ACH Push or "Pay Now" in Spend Dynamics

Contact Holly Wallace for help with the 'Pay Now' feature or to schedule a webinar:  
1-815-793-4655 or hwallace@iasbo.org

*If you pay by check, make sure to show your FO# to avoid delays.*

*Mailing address: BMO Harris Bank N.A, P.O. Box 5732, Carol Stream, IL 60197-5732*

*Overnight Courier: BMO Harris Bank, Attn: Lockbox #5732, 270 Remington Blvd, Suite B,  
Bolingbrook, IL 60440*

*Payments mailed to BMO post 5 - 7 days after the check is received.*

### To receive your annual rebate

"Rate of payment" means the number days from your statement date to your payment posting date.  
To receive an annual rebate, the average rate of payment must be less than 27 days.

## SCHOOL ELECTIONS

The regular school election day is May 4, 2021. Click [here](#) to see the School Election Calendar, which has been updated to reflect the various deadlines. The calendar also shows the forms related to each task.

- Candidates for a trustee election may file a **Declaration of Intent and Oath of Candidacy** (click [here](#) to access the form) between **December 10, 2020 and March 25, 2021**. The candidate for trustee must be registered to vote at the time the Oath is filed.
- County superintendents: please log into the County application and complete/verify district classification and board compositions for the 2021 school election season. Click [here](#) to see the Quick Reference Guide: County District Classification Collection.
- Trustees must **call for an election** no later than **Tuesday, February 23** (70 days prior to election day).
- **File the election resolution with the county election administrator** 3 days after the trustees adopt it (no later than **Friday, February 26**).
- Running a mail ballot election? Make sure the Secretary of State's office receives your **written plan, including timetable and sample instructions**, no later than **Friday, March 5**.

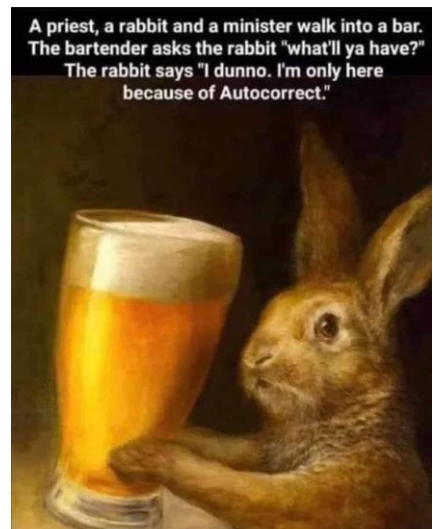
The [School Election Handbook](#) is posted on the OPI website.

Click [here](#) to see the **Elections Resources page**.

Click [here](#) to see the power point presentation used at the Elections workshop in December.

### ArcGIS Online Map of Montana

Click [here](#) to see an interactive map of Montana public and non-public school district boundaries (elementary, high school and K-12). You can input an address in the search box in the upper right-hand corner; then zoom out to see the school district for that location.



## 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>Theresa LeSueur</b>, Director 406-457-4407 <a href="mailto:tlesueur@mtsba.org">tlesueur@mtsba.org</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>




## IMPORTANT DATES & DEADLINES – FEBRUARY 2021

### December 10, 2020 – March 25, 2021

Candidates for trustee election on May 4, 2021 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. <b>No candidate may appear on the ballot unless the candidate files between <i>Thursday, December 10, 2020 and Thursday, March 25, 2021</i>.</b> The candidate for trustee must be registered to vote at the time the Oath is filed.	<a href="#">Declaration of Intent and Oath of Candidacy</a>  <a href="#">2021 School Election Calendar</a> <a href="#">2021 School Election Handbook</a>
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### FEBRUARY 1

<p>Spring Enrollment Count Date</p> 	<p>The official count day for the 2021 Spring Enrollment &amp; Aggregate Hours Collection begins <b>Monday, February 1</b>. Districts will report spring count date aggregate hours for all students enrolled on 2/1/2021, 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 5, 2021.</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</a>  <a href="#">Step-by-Step Student Count for ANB Instructions</a></p> <p><a href="#">AIM User Guide:</a>  AIM &amp; MAEFAIRS Verification</p> <p><a href="#">A.R.M. 10.20.102(11)</a></p>
Self-Review of Meal Counting and Claiming System due	Complete the annual self-review of the meal counting and claiming system sometime during the school year <b>before February 1</b> . Each school site must be reviewed where meals are served to students and counted for reimbursement. Maintain this documentation on file.	<a href="#">School Nutrition Programs Checklist</a> <a href="#">School Nutrition Programs Administrative Update</a> (see page 18)
2 <sup>nd</sup> Afterschool Snack Program Review due	The School Food Authority must review each Afterschool Snack Program two times a year. The first review must be conducted during the first four weeks that the school is in operation each school year. <b>The second review should be completed prior to February 1st.</b> The reviews will be maintained on file at the School Food Authority.	<a href="#">Afterschool Snack Self Review Form</a> <a href="#">Afterschool Snack Program Packet</a>

## IMPORTANT DATES & DEADLINES – FEBRUARY 2021

### FEBRUARY 10

File monthly meal claims for NSLP 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) reimbursement.	Montana Agreement and Payment System ( <a href="#">MAPS</a> ) log in page <a href="#">School Nutrition Programs Checklist</a> <a href="#">Reimbursement rates for FY2021</a> <a href="#">FY2021 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

### FEBRUARY 15

First Semester Transportation Claims due	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. <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>
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### FEBRUARY 22

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>
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### FEBRUARY 23

Trustees call for an election	At least 70 days prior to Election Day (May 4, 2021), the trustees must pass a resolution stating: <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="#">2021 School Election Calendar</a> <a href="#">2021 School Election Handbook</a> (see page 6)
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="#">FY2021 Payment Schedule</a> (scroll to bottom of page)

## IMPORTANT DATES & DEADLINES – FEBRUARY 2021

### FEBRUARY 25

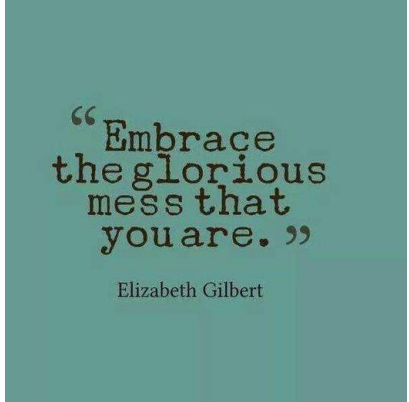
Grant cash request due to OPI	Grant cash requests made by this date will be paid on March 10.	<a href="#">OPI State and Federal Grants Handbook</a>
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### FEBRUARY 26

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="#">2021 School Election Calendar</a> <a href="#">2021 School Election Handbook</a>
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### MARCH 1

Tax forms under Sections 6055 and 6056 of the Internal Revenue Code are due (Affordable Care Act)	<p><b>SECTION 6055 FORMS:</b> Insurers and employers that sponsor self-insured health plans will use IRS Forms 1094-B and 1095-B to report on individuals enrolled in minimum essential coverage.</p> <p><a href="#">Form 1095-B Health Coverage</a> Due to “responsible individual” by <b>March 2, 2021</b></p> <p><a href="#">Form 1094-B Transmittal of Health Coverage Information Returns.</a> Due to IRS by <b>March 1, 2021</b> for the 2020 tax year (paper forms) and <b>March 31, 2021</b> (electronic forms).</p>	<a href="#">Instructions for Forms 1094-B and 1095-B</a>
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An employer with 50 or more full-time employees during the prior calendar year would file Form 1095-C and Form 1094-C.	<p><b>SECTION 6056 FORMS:</b> Large employers will use IRS Forms 1094-C and 1095-C to report on offers of health coverage and enrollment in employer-provided plans. Employers that sponsor self-insured plans and that are also applicable large employers will use Forms 1094-C and 1095-C to file a combined report under both section 6055 and 6056.</p> <p><a href="#">Form 1095-C Employer-Provided Health Insurance Offer and Coverage</a> Due to employees by <b>March 2, 2021</b> for the 2020 tax year.</p> <p><a href="#">Form 1094-C Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns</a> Due to IRS by <b>March 1, 2021</b> for the 2020 tax year (paper forms) and <b>March 31, 2021</b> (electronic forms).</p>	<p><a href="#">Instructions for Forms 1094-C and 1095-C</a></p> 
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## MASBO EXHIBITOR MEMBERS

<b>AIG RETIREMENT SERVICES</b> Michael Hart <a href="mailto:michael.hart@valic.com">michael.hart@valic.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>Fisher's Technology</b> Amanda Byrne <a href="mailto:info@fisherstech.com">info@fisherstech.com</a>
<b>Frontline Education</b> Lisa Sierra <a href="mailto:lsierra@frontlineed.com">lsierra@frontlineed.com</a>	<b>Horace Mann</b> Keith Jorgensen <a href="mailto:keith.jorgensen@horacemann.com">keith.jorgensen@horacemann.com</a>	<b>Iconergy</b> Carl Hurst <a href="mailto:churst@iconergyco.com">churst@iconergyco.com</a>
<b>Infinite Campus</b> Stephanie Sondrol <a href="mailto:Stephanie.sondrol@infinitecampus.com">Stephanie.sondrol@infinitecampus.com</a>	<b>Insurance Management Services of Montana</b> John R Boyer <a href="mailto:john@imsvest.com">john@imsvest.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>Klimas Financial Services, Inc.</b> Charles Klimas <a href="mailto:cklimas@gwnsecurities.com">cklimas@gwnsecurities.com</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> Theresia LeSueur <a href="mailto:tlesueur@mtsba.com">tlesueur@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@pinecc.com">bbassett@pinecc.com</a>	<b>School Services of Montana</b> Thomas Franta <a href="mailto:tfranta@mt-schools.org">tfranta@mt-schools.org</a>
<b>Teachers On Call</b> Maya Burnaugh <a href="mailto:mburnaugh@teachersoncall.com">mburnaugh@teachersoncall.com</a>	<b>Tyler Technologies</b> Carrie Hughes <a href="mailto:carrie.hughes@tylertech.com">carrie.hughes@tylertech.com</a>	<b>Todd Watkins Consulting Services</b> Todd Watkins <a href="mailto:Toddwatkinsconsulting101@gmail.com">Toddwatkinsconsulting101@gmail.com</a>
<b>Felt Martin, PC</b> Jeffrey Weldon <a href="mailto:JWeldon@feltmartinlaw.com">JWeldon@feltmartinlaw.com</a>	<b>Wipfli LLP</b> Kim Dare, CPA <a href="mailto:kdare@wipfli.com">kdare@wipfli.com</a>	

# MENTAL HEALTH TIPS FOR PARENTS DURING COVID-19



**CHILDREN look to adults for guidance.** Keeping your stress in check can help manage kids' worries and anxiety.



**ENCOURAGE children to ask questions and talk about their fears.** This provides parents the chance to give age-appropriate information.



**TEACH children prevention strategies** such as hand-washing and covering coughs. This reduces the risk of infection and gives children a sense of control, which can reduce anxiety.



**ROUTINE and structure are your friends.** Involve children in creating their daily or weekly routine that includes: hygiene, learning, reading, exercise, play, mindfulness, and nutrition.



**STAY CONNECTED.** Help kids address isolation and social distancing by writing cards and letters, making crafts, and calling or FaceTiming friends and loved ones.



**FAMILY TIME.** Play board games, cards, checkers, and trivia games. This can help kids feel secure while keeping them connected. Involve kids in sanitizing these items after use.



**USE THE WEB RESPONSIBLY.** Monitor use of social media. There are many online resources for kids to learn. Plan which websites are appropriate for your children.



**SELF CARE.** Teach children about wellness. Build time daily for rest and mindfulness activities such as yoga or meditation. Model relaxation techniques like reading a book or watching a movie.



**BE ACCESSIBLE.** Children need reassurance as the crisis progresses. Be honest and manage expectations. Let them know you are there and will help keep yourself and family well.



**DON'T PANIC.** The community's response to COVID-19 is evolving daily. Know where to get help and information to help maintain the mental wellness of your children and family.

Source: [www.examiner.org](http://www.examiner.org)