

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

June 2023

SUMMER CONFERENCE JUNE 12-16

REGISTRATION IS NOW OPEN!

New School Business Officials June 12-14*

Summer Conference June 14-16

Make your room reservations now:

Fairmont Hot Springs Rooms are Full- Room Block Available at [The Forge](#)

Please look at the MASBO.com homepage for other lodging options

Don't hesitate, get registered! This conference is JAM PACKED with presentations, partner discussions, exhibitors, and networking opportunities. Conference is a great time to reconnect, share ideas, and stay updated on legislative and other substantial changes that will matter to your districts in the coming year. **Schedule and Session Descriptions can be found [here](#).** There is something for everyone!

Conference is ALSO a great time to have a little fun! Show off your impressive painting or golfing skills, grab some MASBO swag, and take a little time to **SOAK IT UP** in the pool. We can't wait to see you there!

**New School Business Officials, please join us the whole week if you can!*



SUMMER CONFERENCE SUNSHINE FUND

Each year at the summer conference, MASBO holds a silent auction of member-donated items to raise money for the Sunshine Fund. The Sunshine Fund is a great way to help MASBO members that have incurred extensive medical bills due to illness. Please notify your Region Director or [Shelley](#) if you know of a MASBO member who might need this help. Also, put on your shopping shoes and bring items to use in our silent auction.



Calling all Retirees!

Please let [Marie](#) know if you intend on retiring this year. We would love to honor your years of service at the upcoming summer conference!



FY24 MASBO Membership

Invoices will be emailed at the end of June. If you'd like to be invoiced earlier or add a dual membership to ASBO International, please email [Marie](#) or select membership in your summer conference registration. 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.

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 Minutes with Steve

No MASBO Minutes Meeting in June, it will recommence in future months. Thank you!

NOW 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, 2023, 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 Shelley at sturner@masbo.com, or
2. Nominate the person at your spring regional workshop during the MASBO business meeting or
3. Nominate the person at the 2023 MASBO summer conference opening business meeting.

It is always a good idea to check with the person you wish to nominate to ensure they are willing and able to make a long-term commitment to serve on the MASBO board.

P-Card Participants and Those Interested in the P-Card Program

Mark Your Calendars

P-Card program Manager Holly Wallace will be providing two Webinars related to the P-Card program.

[Thursday, May 18th, 9-10 am- Spend Dynamics](#)

[Thursday, July 13th, 9-10 am – P-Card Q & A](#)

NO COST TO REGISTER- zoom links will be provided to registrants prior to each webinar.

Did You Miss the PAYROLL, BUDGET WEBINARS, or NEW CLERKS MISC FUND TRAINING? Want to Watch it From the Comfort of Your Home or Office?

MASBO is offering the recorded two-day Payroll webinars, the 18 hours of Budget Training webinars, and the 8 hour NEW SBO Miscellaneous Fund webinar, to our members. If you were unable to attend and would like to receive the link to the trainings, please check out the [professional development](#) tab in the MASBO website. Upon registration and payment, we will send you the links for these recordings.

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



NATIONAL HARBOR, MARYLAND | OCTOBER 19-22, 2023

Registration is Open!

UPCOMING OPPORTUNITIES & NEWS FROM OPI & OTHER MASBO PARTNERS

School Finance Compass for June 2023

- [The Preliminary Budget Data Sheets](#)
- [The FY2024 General Fund Budget Excel Spreadsheet and FY2024 General Fund Budget Overview Worksheet](#)
- [FY 2024 Special Education Cooperative reports](#)
 - [GASB 87 Updates](#)
 - [GASB 96 Updates](#)

OPI Summer Institute June 19-23rd Bozeman Montana

CSCT IGT Process Transitioning to DPHHS

The Montana Legislature (HB 872) has transferred the management of the Comprehensive School and Community Treatment (CSCT) Program from the Office of Public Instruction (OPI) to the Department of Public Health and Human Services (DPHHS), **effective July 1, 2023**. According to the [DPHHS-OPI CSCT Monthly IGT timeline](#), the last claims for June will be processed by OPI on June 30, 2023, and the state match will be due back to OPI on Friday, July 14, 2023. It is essential all state match is received by the deadline. School districts will be required to email a PDF of a new signed MOU to the CSCT Medicaid Program Officer at DPHHS to be recorded as received by July 14, 2023. Please see the [transition](#) document for further questions. OPI would like to thank you for your continued commitment to serving our children through mental health services.

Foster and Group Home Tuition Claims – Due June 30th

Per 20-5-324, MCA, foster and group home tuition claims must be submitted to the OPI **no later than June 30, 2023**. Tuition claims are entered directly into the MAEFAIRS system by the district. Claims cannot be entered after the June 30th deadline. The district of attendance must notify the resident district of any obligation for tuition not later than August 15th. Resident districts may view a MAEFAIRS report at any time to see claims that have been submitted. **These should not be viewed as actual bills from the district of attendance, but rather an opportunity to review submitted claims.** The report may be found under Views>Tuition>Foster and Group Home Resident District.

Questions: For information on Tuition, please contact: [Andrea Mohammadi](#), Business Analyst (406) 444-1960, or [Barbara Quinn](#), School Finance Senior Manager, 406-444-3249.

State Facility Tuition Claims

Under [20-9-435.MCA](#) legislation passed in the 2021 Legislative Session, resident districts will now be responsible for a portion of the education costs for students in state facilities (Shodair, Intermountain, Yellowstone Boys & Girls Ranch). The state facility must notify the resident district of any obligation for tuition not later than August 15th. Resident districts may run a report in MAEFAIRS at any time to see claims that have been submitted. **These should not be viewed as actual bills from the facility, but rather an opportunity to review submitted claims.** The report may be found under Views>Tuition>State Facilities District of Residence.

Questions: For information on Tuition, please contact: [Andrea Mohammadi](#), Business Analyst, (406) 444-1960, or [Barbara Quinn](#), School Finance Senior Manager, 406-444-3249.

Budget Amendment Adoption Deadline is June 30th

In accordance with [20-9-162, MCA](#), budget amendments must be adopted prior to the end of the school fiscal year (June 30th). A budget amendment may be adopted only for the purposes outlined in [20-9-161, MCA](#). The budget amendment packet may be found here: [Budgets \(mt.gov\)](#).

Questions: For information on Budget Amendments, please contact: [Laci Novark](#), Budget Analyst, 406-444-4401 or email OPISchoolFinance@mt.gov

Extracurricular Activities Participation for ANB – Due June 30th

Students participating in extracurricular activities in the 2022-2023 school year and who meet the requirements of [20-9-311\(13\), MCA](#) may be included in the district's FY2024 ANB count. The students must be enrolled in AIM and have their participating data entered as part of the End of Year collection. The guide to entering that information in AIM may be found here: [AIM Extracurricular Activities Guide](#). Additionally, two new documents explaining the legislative changes in SB 72 and SB 157 may be found here: [Student Count ANB/Guides & Resources](#).

Questions: For information on Extracurricular Activities Participation, please contact: [Andrea Mohammadi](#), Business Analyst, (406) 444-1960.

MAPT 2023 Bus Driver Conference

Registration is now open for the 2023 Bus Driver Conference that will be held in Great Falls on June 21-23 at the Heritage Inn, 1700 Fox Farm Road. [CLICK HERE](#) to register for the conference. *NO AT-CONFERENCE REGISTRATION WILL BE ALLOWED.* [CLICK HERE](#) for the conference agenda.

Drivers will have the opportunity to fulfill their mandatory 15 hours of training requirements.

For questions about the conference or assistance with registration, please email MAPT at montana.mapt@gmail.com.

Summer E-grants Tour

This summer, the Federal Programs Unit will again be touring the state putting on the Summer Egrants Tour. These trainings will provide districts the opportunity to learn about the Egrant system, work on the grant applications, and get feedback from OPI staff to assist in the Egrant approval process. Below are the dates, times, and locations of the Summer 2023 Egrants Tour:

- **Laurel HS**-July 17, 8:30 AM to 2:00 PM
- **Glendive HS**-July 18, 8:30 AM to 2:00 PM
- **Glasgow HS**-July 19, 8:30 AM to 2:00 PM
- **Lewistown HS**-July 20, 8:30 AM to 2:00 PM
- **Glacier HS** (Kalispell)-July 25, 8:30 AM to 2:00 PM
- **Missoula** (Professional Learning Lab Rm 119, 909 South Ave)-July 26, 8:30 AM to 2:00 PM

TEAMS Conversion Involving AIM and AIM JUNE 30th Deadline Items

[June 30th -Deadline Items for AIM](#)

The OPI will be transitioning many components from the TEAMS system to AIM in the Fall of 2023. Please stay tuned for more details. In the meantime, it would be helpful if districts entered the SEID number for all staff members currently in AIM into the State Staff ID field. There are many duplicates across the state, and this step would help us to match and clean up those records.

More information will be on provided at Summer Conference and in the next few months.

Please be sure to check the [AIM monthly compass](#) for updates on important report deadlines that will affect ANB and other areas of school budgets.

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- No claims will be processed or paid in the Month of July

[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](#).

Just a reminder that **OPI ESSER Team will be reviewing School Plans during June 2023**. Information was emailed to Authorized Representatives and Business Clerks on May 10th with guidance. If you did not receive this contact Jessika Bol (Jessika.bol@mt.gov).

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)

[ESSER Monthly School Reports](#)

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

FY 2023 REAP Master Eligibility Spreadsheet now available for review

An updated version of the FY 2023 REAP Master Eligibility Spreadsheet (MES) is now available for your review. This version of the MES is updated as of 1/23/2023 and includes SEA-submitted State-derived poverty data and requested changes. The FY 2023 will also be posted on the [REAP website](#) and shared with **eligible LEAs** for review. We will ask LEAs to work with their RLIS State Coordinators if there is a need to update any of the information. We encourage you to also reach out to LEAs in your State to verify the accuracy of this data. More information regarding REAP/SRSA is available in the [Title & Federal Programs Compass](#).

SRSA Drawdown Report pdf [here](#).

- Please note that the **deadline to obligate (binding commitment to spend)** FY 2021 SRSA funds is September 30, 2023. The deadline to obligate FY 2022 SRSA funds is next year: September 30, 2024.
- LEAs have until **January 30, 2024 to liquidate** (draw down funds from G5) their FY 2021 funds. LEAs have until January 30, 2025 to liquidate their FY 2022 funds.

SAM.GOV is a free site and you should never have to pay for registration or assistance. If you receive emails, please be address is .GOV



On **April 4, 2022**, the unique entity identifier used across the federal government changed from the DUNS Number to the Unique Entity ID (generated by SAM.gov).

The Unique Entity ID is a 12-character alphanumeric ID assigned to an entity by SAM.gov.

As part of this transition, the DUNS Number has been removed from SAM.gov.

Entity registration, searching, and data entry in SAM.gov now require use of the new Unique Entity ID.

Existing registered entities can find their Unique Entity ID by following the steps [here](#).

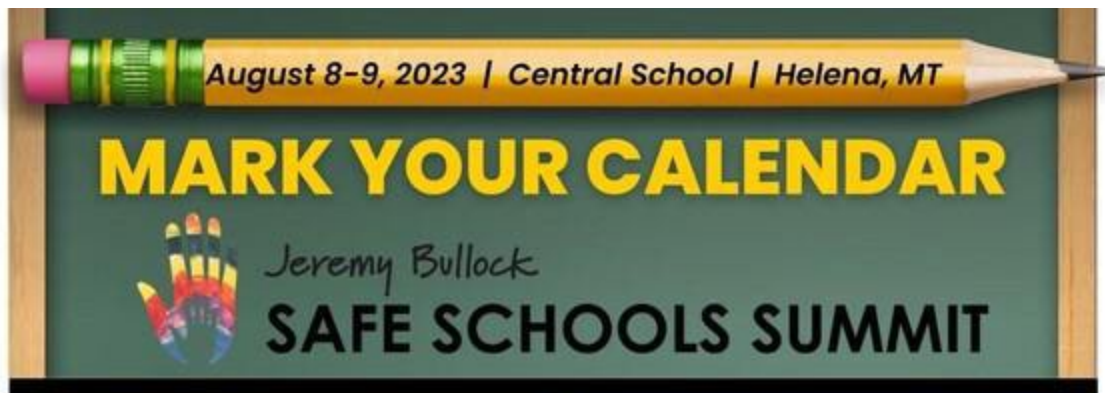
New entities can get their Unique Entity ID at SAM.gov and, if required, complete an entity registration.



Montana Quality Education Coalition

Quality Public Education ... Montana's Constitutional Guarantee

Please consider joining MQEC to support the important work this organization provides in support of Montana's youth. For more information, please contact Doug Reisig dreisig@mqec.org or (406) 544-4335



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.



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>MT\$UIP 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
Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com	Bruco, Inc. Adam Uselman, V.P.-C.O.O. adamu@bruco.com	C & C School Accounting David Bardwell Help@CandCSchoolAccounting.com
D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	Fatbeam Graham Taylor graham@fatbeam.com	Felt Martin, PC Jeffrey Weldon JWeldon@feltmartinlaw.com
Fisher's Technology Amanda Byrne info@fisherstech.com	FlowForms Tate Mitchell Tate@flowforms.io	Gwyn Andersen Consulting Gwyn Andersen gwynma@gmail.com
Horace Mann Aaron Moyer association.relations@horacemann.com	Iconergy Carl Hurst churst@iconergyco.com	Infinite Campus Bob Gits robert.gits@InfiniteCampus.com
Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com	K12 Montana Jeffrey Patterson jeffp@k12mt.com	Kalmbach Consulting Cathy Kalmbach cathymkal@gmail.com
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 Bubb sbubb@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		

Attention MASBO Members

PROPOSED BY-LAW CHANGES TO ARTICLE II Membership Sections 2-6 and subsequent changes thereof.

The MASBO Board voted to bring the following amendments to a vote of the organization. Active MASBO members will vote on these amendments at Summer Conference Thursday June 15:

SECTION 2. ASSOCIATE MEMBERSHIP School trustees and school district employees not directly connected with business administration of schools in the state of Montana. ~~Faculty members of the various schools of education in the greater university system of the State of Montana who are particularly interested in the business administration of Montana public schools.~~ Officials and employees of the Office of the State Superintendent of Public Instruction and County Superintendents of Schools and County Treasurers who are particularly involved with the business administration of schools. (1995) Students who are actively engaged in graduate studies in the field of school business administration.

SECTION 3. ~~VENDOR~~ EXHIBITOR MEMBERSHIP Individuals and/or organizations actively engaged in supplying school district needs or rendering professional services to school districts. (1991)

SECTION 4. ~~EMERITUS~~ INDIVIDUAL MEMBERSHIP An ~~Emeritus~~ Individual member shall have been an Active or Life Member at the time of retirement ~~member at the time they leave or retire~~ from the field of school business management and not currently employed in any area of school management or related endeavors.

SECTION 5. LIFE MEMBERSHIP A Life Member shall be one who has served as an active member for a minimum of ten (10) years, and who at the time of application is actively employed in the field of school business administration. A Past President of MASBO, upon retirement from active employment, shall be awarded a Life Membership and not pay membership dues thereafter. (1989) Life memberships are non-transferable. (1991) ~~Honorary Life Membership for outstanding service may be conferred by action of the Board of Directors.~~

SECTION 6. ~~HONORARY MEMBERSHIP~~ ~~Honorary Membership may be conferred by the Board of Directors to any former officer of this Association and to such other persons who, by their act or position, have shown an outstanding interest in this Association and have contributed to its betterment. Honorary Life Membership for outstanding service may be conferred by action of the Board of Directors.~~

IMPORTANT DATES & DEADLINES – JUNE 2023

JUNE 1

Deadline for trustees to request county election administrator to conduct school elections for next fiscal year	The school district clerk/election administrator is designated the election administrator for school elections. However, the trustees of any district may request the county election administrator (EA) to become the election administrator for school elections. The request must be made by a resolution of the board of trustees. If the county EA accepts, then he/she must perform all the duties the school clerk would have. The school district must assume all costs of the election.	MCA 20-20-417 Trustee Resolution – Request for County to Conduct Elections
Last day to amend grants	Last day to request grant amendments (budget and program modifications) for projects that will end June 30.	OPI State and Federal Grants Handbook
Last day to file OPI Form PAA-3 Application for Additional ANB	Trustees must submit form PAA-3 (Application of Additional ANB) to the Superintendent of Public Instruction for opening a new school, creating a new 7-8 grade accredited program, or opening a new kindergarten.	MCA 20-9-313 MCA 20-9-314 Form PAA-3
County Superintendent electronically authorizes second semester transportation claims	County Superintendent electronically authorizes second semester transportation claims (consisting of one copy of each district claim).	MCA 20-10-146(5) A.R.M. 10-7-104(1)(b)

JUNE 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 FY2023 SSO Reimbursement rates FY2023 School Nutrition Payments E-Grants System
OPI pays grant cash requests	OPI pays grant cash requests submitted from April 26 – May 25	Log in to your district's account, or click on Public Access, then Vendor Payee Details

JUNE 17

Grant cash request due to OPI for payment on June 20	Grant cash requests submitted from May 26 through June 17 will be processed and paid on June 20 . There are no payments in the month of July. The next grant payment will be made on August 10.	OPI State and Federal Grants Handbook
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IMPORTANT DATES & DEADLINES – JUNE 2023

JUNE 27

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 Transportation	FY2023 Schedule (scroll to bottom of page)
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JUNE 30

Last day of fiscal year	<p>End of school fiscal year. All budget appropriations lapse except appropriations for “uncompleted improvements in progress on construction” and properly authorized obligations to purchase personal property in manner prescribed by the Superintendent of Public Instruction.</p> <p>The district may encumber current year appropriations for valid obligations existing as of June 30. Encumbrances outstanding at year end shall be added to current expenditures to arrive at the budgetary basis expenditures for the year.</p>	MCA 20-1-301 MCA 20-9-209 A.R.M. 10.10.101
Last day to obligate funds for projects ending June 30	Last day to obligate funds for projects ending June 30.	OPI State and Federal Grants Handbook
FY 2022 regular audits are due to OPI For more information, contact Kristen Becker at 406-444-0701 Please remit audit reports and correspondence to OPIAuditReports@mt.gov .	FY 2022 “Yellow Book” audits are due to OPI by June 30, 2023, for entities with federal expenditures less than \$750,000 and revenues greater than \$750,000. Entities that had revenues less than \$750,000 are required to have a Financial Review once every four years. If your district is required to have a Financial Review for FY2022, the report is due to OPI by June 30, 2022.	MCA 2-7-503 State of Montana Single Audit Act A.R.M. 2-4-410 OPI School Finance Division website – Auditing
Last day trustees may adopt a budget amendment	Board of Trustees may adopt a resolution for a budget amendment due to causes other than an unusual enrollment increase.	MCA 20-9-162 A.R.M. 10.22.201(4) Budget Amendment Packet
Last day to add any extracurricular students to ANB count	Students participating in extracurricular activities in the 2022-2023 school year and who meet the requirements of 20-9-311(13) , MCA may be included in the district’s FY2025 ANB count. The students must be enrolled in AIM and have their participating data entered as part of the End of Year collection.	AIM Extracurricular Activities Guide
Foster and Group Home Tuition Claims Submitted to OPI	Per 20-5-324, MCA, foster and group home tuition claims must be submitted to the OPI no later than June 30, 2023 . Tuition claims are entered directly into the MAEFAIRS system by the district. Claims cannot be entered after the June 30 th deadline. The	MCA 20-5-324

IMPORTANT DATES & DEADLINES – JUNE 2023

	district of attendance must notify the resident district of any obligation for tuition not later than August 15 th . Resident districts may view a MAEFAIRS report at any time to see claims that have been submitted. These should not be viewed as actual bills from the district of attendance, but rather an opportunity to review submitted claims. The report may be found under Views>Tuition>Foster and Group Home Resident District.	
Impact Aid Application Amendments for FY24 due.	Amendments to FY2024 Impact Aid applications will be accepted through June 30, 2023. If your district needs to make corrections to the FY2024 application, complete an application amendment through the IAGS system .	IAGS System Instructions for Amendments

IMPORTANT DATES & DEADLINES - JULY 2023

JULY 1

First day of fiscal year	The school fiscal year begins on July 1 and ends on June 30	MCA 20-1-301
First day to advertise budget meeting	Between July 1 and August 10 of each year, the clerk of each district shall publish a notice of the annual budget meeting.	MCA 20-9-115 OPI Budget Timeline (scroll down the page to see chart) Not currently updated on OPI site.
Individual transportation contracts (TR-4) are due to the County Superintendent and to the Office of Public Instruction	A school district must complete and sign a TR-4 Individual Transportation Contract (3 copies) for the ensuing year. Send to the county superintendent and submit electronically to the OPI.	MCA 20-10-121 MCA 20-10-124 A.R.M. 10-7-101(2)(b) Regulations & Guidelines for Pupil Transportation Reporting
Last day to send bus contracts to the county superintendent	By July 1, a district must send copies of all completed school bus contracts to the county superintendent.	MCA 20-10-125 A.R.M. 10.7.101(2)(a)

JULY 10

Traffic Education TE06 Year-End Reports due to OPI.	<p>TE06 Year-End Reports are due before July 10 for traffic education courses that ended between July 1, 2023 and June 30, 2024.</p> <p>Reimbursements for eligible students will be paid in August. The estimated payment is \$100 per student, but this number is dependent on the total number of students being reimbursed statewide and the percentage of driver license fees received by the OPI for disbursement to school districts. We won't know the exact amount until late July and will send out an email to school district staff with the final payment information when the reimbursements have been processed.</p>	Form TE06 OPI Traffic Education Forms and Reports
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IMPORTANT DATES & DEADLINES - JULY 2023

	If you need assistance to complete and submit your TE06, send an email to Dwight.Nelson@mt.gov or call at 406-444-4396.	
JULY 14		
CSCT payment for June Claims due to OPI no later than July 14 th .	CSCT funds submitted to OPI within window of 10 business days from receipt of match amount due.	CSCT Certification Form- Access.gov CSCT IGT Timeline CSCT Access.gov Manual A.R.M. 37.87.1803 Accounting Guidance
CSCT MOU signed and received by the CSCT Medicaid Program Officer at DPHHS	New MOU: With the transition of the IGT process to DPHHS, a new signed MOU between DPHHS and the school district will be necessary for claims to be released once the match has been met in full by the due date. The MOU is a CMS requirement.	Transition Document
JULY 20		
County treasurer provides statement of cash balances and bond information	County treasurer provides bond, endowment fund and cash balances for school trustees' financial summary (TFS) and cash balances for county school funds supported by countywide levies.	MCA 20-9-121 MCA 20-9-604(5) OPI Budget Timeline (scroll down the page to see chart)
JULY 25		
County transportation committee must meet to approve bus routes and additional payments on individual transportation contracts by the fourth Monday in July	A county transportation committee (CTC) must act to approve or not approve all bus routes established by districts. The CTC must also act on all applications for increased individual payments due to isolation. Approval of board of trustees for increased payments is required prior to CTC action.	MCA 20-10-132 A.R.M. 10.7.101(2)(c)
JULY 25		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on August 10.	OPI State and Federal Grants Handbook
JULY 31		
Form 941 for Quarter 2 is due	Form 941 payroll report for Quarter 2 (April, May, June) is due.	Form 941 Form 941 Instructions
Last day to liquidate funds for grants that ended June 30	Last day to liquidate funds for grants that ended June 30: <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 	OPI State and Federal Grants Handbook

	<ul style="list-style-type: none"> Pre-School Development Grant 	
At least 30 days prior to first semester of the new school year		
1st 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 (a re-inspect, if needed) the buses prior to the beginning of first semester.</p>	MCA, 20-10-101(4)(a)(i) Regulations & Guidelines for Pupil Transportation Reporting (see page 4) TR13 Instructions TR13 Form-Blank TR13A Form-Blank

	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