

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



*Empowering School Business Leaders Through Education*

**November 2023**

## **The Seasons of Budgeting Webinar**

**Friday, November 3<sup>rd</sup>**

Budgeting is a year-long event. We want to give you the tools to help you succeed through every season of the Budgeting process- from the OPI spreadsheets and links available to the end of the budget cycle at your board meeting. This workshop will provide hands-on information, interaction and real-world examples from experienced clerks located around the state. Agenda and a list of items to have on hand during the training, will be located on the [registration page](#). The cost is \$80, and the session will be recorded for future viewing. This presentation is geared toward Business Officials and those in budgeting positions, at all levels of their career. It also ties well with other budget training scheduled later this year.



## **MASBO Payroll Workshops November 15th & 16th**

This two-day workshop will be perfect for any business office personnel who work in payroll or benefits management. A great refresher for those who have already been in the business and a step-by-step process for those who are just getting started. It will be held at the MTSBA office and will be a full two-day event. Live and webinar options available. For more information and registration links, see the MASBO [website](#). The cost is \$200 per person or \$160 for the web option. Guest speakers from MSGIA, UpFort (formerly Paladin), PERS, TRS, and MTSUIP will all be presenting.



## **FACILITIES & BONDS WORKSHOP NOVEMBER 28TH AND 29TH**

We are thrilled to announce the Facilities and Bonds two-day workshop to be held in Helena at the MTSBA office (zoom option available). We are joined by an amazing group of experts in the field and several business managers who have been through the process and share firsthand experience of the building process. Additional information on DEQ lead testing funding, facilities liabilities, bid law and procedures, and much more will be included. Its jam packed with information and open to superintendents, board members and business managers alike. More information and registration details can be found on the MASBO [website](#).



## Steve Hamel is Retiring from MASBO on November 30<sup>th</sup>.

Steve Hamel, an amazing member of the MASBO team, has announced his retirement at the end of November. His incredible ability to share his knowledge and experience will be greatly missed. We are thrilled for him as he sets out on new adventures and wish him the very best. If you would like to share any well wishes, please feel free to send them to [shamel@masbo.com](mailto:shamel@masbo.com) or PO Box 400, East Helena, MT 59635



## MASBO Minutes with Donnie, Shelley, and Steve



This is the last MASBO minutes where Steve will be joining us before he retires. It will take place on Thursday, November 2nd at 9:00 am. We will discuss newsletter topics for our newest members and time will be held for all members to share thoughts, concerns, ideas, requests, or just say hi. Hope to see you there. No cost to attend. Click [here](#) for the zoom link.

## HAVE A SCHOOL FINANCE JOB ANNOUNCEMENT?

Here are two recommendations to get the word out to MASBO Members:

### 1. Marie can post your school finance position on the MASBO Homepage

Job announcements are located under the 'Register for Training' section.

Email Marie ([mroach@masbo.com](mailto:mroach@masbo.com)) your business manager/clerk/assistant clerk/payroll position.

PDF format is preferred. OR email Marie a link to your district's website where the job announcement is posted.

We prefer to have the announcements be school finance related but can post other positions.

### 2. You can post your job announcement on the MASBO Community Discussion Forum

Posting to the forum will send an email alert to all MASBO forum members.

Login to your MASBO.com profile

Click 'FORUMS'

Click 'Job Postings' (located under General Discussion)

Click "Start New Thread" button

Fill in Subject/Message (and attach a document if you'd like)

Submit

Email Marie with any questions or assistance: [mroach@masbo.com](mailto:mroach@masbo.com)

# MASBO MEMBER PROFILES

Please log into [masbo.com](http://masbo.com) and update your profile with current information.

Important new custom fields include:

Salary\*  
Software  
District Enrollment  
MHSA Class Size  
FTE

*\*Salary & Benefits fields can assist with negotiations. 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. Email Marie if you need assistance: [mroach@masbo.com](mailto:mroach@masbo.com)

## Have You Missed Any MASBO Webinars?

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

## MASBO Board of Directors

President	<a href="#">Belinda Klick</a> , Sun River Valley	Region 1 Director	<a href="#">Lacey Porrovecchio</a> , Bigfork
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Ex-Officio, OPI	<a href="#">Barb Quinn</a> , MT Office of Public Instruction		

## MASBO STAFF

<a href="#">Marie Roach</a> Association Services Coordinator 406-461-8804	<a href="#">Steve Hamel</a> Interim Services/Trainer 406-431-0124	<a href="#">Donnie McVee</a> Interim Serv/Professional Learning 406-461-8667
	<a href="#">Shelley Turner</a> Executive Director 406-461-3659	

## PROVIDE MASBO FEEDBACK!

If you have not already done so, please take a moment to answer our training survey. MASBO wants to ensure that we are covering all the topic areas you need to support you in your careers. This feedback will gear our plans for summer conference and spring training. THANK YOU!!!

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

## MASBO Training Calendar Tentative Dates

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

Topic	Tentative Date(s)
<b>NOVEMBER 2023</b>	
Thursday, 2 <sup>nd</sup>	<a href="#">MASBO Minutes Webinar</a> at 9 am
Friday, 3 <sup>rd</sup>	MASBO Seasons of Budget Webinar (day long)
15 <sup>th</sup> -16 <sup>th</sup>	MASBO Payroll Workshops- Helena at MTSBA headquarters with a webinar option
28 <sup>th</sup> -29 <sup>th</sup>	MASBO Facilities and Bonds Workshops in Helena at the MTSBA headquarters with a webinar option
<b>DECEMBER 2023</b>	
Tuesday, 5 <sup>th</sup>	<a href="#">MASBO Minutes Webinar</a> at 9 am
Wednesday, 13 <sup>th</sup>	Elections Webinar (Tentative)
<b>JANUARY 2024</b>	
4 <sup>th</sup> – 5 <sup>th</sup>	MASBO New School Business Officials Webinar
Monday, 8 <sup>th</sup>	<a href="#">P-Card User Meeting Webinar</a> at 11 am
Wednesday, 10 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm

Wednesday, 17 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm
Wednesday, 24 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm
Wednesday, 31 <sup>st</sup>	MASBO Budget Webinar Series 1-3 pm
<b>FEBRUARY 2024</b>	
Wednesday, 7 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm
Wednesday, 14 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm
Wednesday, 21 <sup>st</sup>	MASBO Budget Webinar Series 1-3 pm
Wednesday, 28 <sup>th</sup>	MASBO Budget Webinar Series 1-3 pm
<b>MARCH 2024</b>	
Tuesday, 5 <sup>th</sup>	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
Tuesday, 12 <sup>th</sup>	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
Tuesday, 19 <sup>th</sup>	MTSBA/MASBO Budget Symposium Webinar 1-3 pm
TBA	Region Meetings (March and April)
<b>APRIL 2024</b>	
4 <sup>th</sup> -5 <sup>th</sup>	MASBO New School Business Official Webinars
Monday, 8 <sup>th</sup>	<a href="#">P-Card User Meeting Webinar</a> at 11 am
Tuesday, 9 <sup>th</sup>	MTSBA/MASBO Hot Topics Webinar 1-3 pm
Tuesday 16 <sup>th</sup>	MTSBA/MASBO Hot Topics Webinar 1-3 pm
Tuesday 23 <sup>rd</sup>	MTSBA/MASBO Hot Topics Webinar 1-3 pm

MAY 2024	
Wednesday, 8 <sup>th</sup>	Technology Workshop (tentative)
JUNE 2024	
10 <sup>th</sup> -14 <sup>th</sup>	MASBO Summer Conference Billings
JULY 2024	
Monday, 8 <sup>th</sup>	<a href="#">P-Card User Meeting Webinar</a> at 11 am
Tuesday, 9 <sup>th</sup>	MASBO Trustee Financial Summary Webinar
Wednesday, 10 <sup>th</sup>	MASBO MAEFAIRS Budget Webinar
SEPTEMBER 2024	
18-21 <sup>st</sup>	ASBO International in Nashville, TN

## UPCOMING OPPORTUNITIES and NEWS FROM OPI & OTHERS

### **MTSUIP IS SEEKING BOARD NOMINATIONS**

If you, or someone you know, would like to take a more active role in the Montana Schools Unemployment Insurance Program, please consider reaching out to [Debra Silk](#) at MTSBA. One position remains open for a school business official. You can also reach out to [Jen Mettler](#), our MTSUIP Ex- Officio for more information.

## ESSER SELF ASSESSMENT MONITORING

Closes November 30<sup>th</sup>. This survey is a requirement of ESSER II closeout.  
For questions- ESSER team contacts can be found [here](#).

### ESSER COMPASS LINK

Final Expenditure Reports (FERs) are due by November 10<sup>th</sup>, 2023.

**E-Grants Budget and Cash Request Descriptions** must be reviewed to ensure there is adequate detail provided. For more information and specific guidance, please click here: <https://content.govdelivery.com/accounts/MTOPI/bulletins/310cc35>

- [Amendment](#), Budget Page description questions, please contact Rebecca Brown at [brown@mt.gov](mailto:brown@mt.gov)
- [Cash Request](#) and Final Expenditure Report questions, please contact Steve Morgan at [morgan@mt.gov](mailto:morgan@mt.gov)
- Capital Expenditures and/or larger projects, please contact Wendi Fawns at [fawns@mt.gov](mailto:fawns@mt.gov)

## AIM Data Collections

The [AIM Data Collection Schedule](#) contains a complete list of all AIM data collections occurring throughout the year. The following AIM Data Collections are taking place during the months of November and December and are due as follows:

### ***Fall Teacher Class, due 11/10/2023.***

- Districts must enter course information (NCES Code, Sections Teacher of Record, Roster) for students enrolled from the first day of school through 10/2/2023.

### ***Fall Career and Technical Education (CTE), due 12/31/2023.***

- Enter Date Contacted and Post-Program Status for students identified as CTE Concentrators in the prior year End of Year CTE Collection. These students should be contacted in the second quarter of the 23-24 school year.

### ***Fall Personnel (Terms of Employment), due 12/15/2023.***

- Verify District Employment, District Assignment, Quality Educator Component (QEC), Special Education, Paraprofessional, Contractor, and Coordinator information for all staff employed through 10/2/2023.

Applications for Teacher Incentive must be completed by this date and may be found under State Announcements in Infinite Campus. Eligible districts will receive additional instructions on how to identify those educators within Infinite Campus.

## IEFA Coding for School Budgets

**MOST SCHOOLS HAVE OR WILL RECEIVE A LETTER THAT THEY REPORTED UNDERSPENDING THEIR IEFA DOLLARS IN FY 23 ON THEIR TFS. PLEASE SEE ["REQUESTS FOR CHANGES ON TFS"](#) TO FIX THIS TFS ERROR. FY 25 FUNDING WILL BE AFFECTED IF YOU DO NOT CORRECT THIS ERROR.**

[HB 338](#) has updated the specific guidelines for usage of the IEFA dollars included in public school's general fund budgets.

Be sure to use program code 365 for Indian Ed.

Funds may only be used for (4)(a):

1. curriculum development of an American Indian studies program.
2. providing curriculum and materials to students for the program.
3. and providing training to teachers about the program's curriculum and materials.

Schools will be required to report to OPI the use of all funds in "sufficient detail to ensure that all the funds were properly spent for the purposes under subsection (4)(a)." - Listed Above.

In addition to the expenditure reporting, the report must include detailed descriptions of:

- (i) the instruction provided to certified personnel and students as required under 20-1-503; and (ii) how this instruction was developed cooperatively with the advice and assistance of Montana tribes pursuant to Title 20, chapter 1, part 5.

A school that doesn't file on time and/or doesn't expend part or all funds in an appropriate manner (4)(a), will receive reduced IEFA funding within their BASE budget in the subsequent fiscal year. The amount of the reduction will be based on the amount of the funding that was not spent on the appropriate purposes.

## The OPI IEFA Team Now Offering Monthly Support Webinars

The OPI IEFA team now offers a monthly, one hour, webinars on the first Tuesday of each month at 4:00 p.m. Some dates may be changed due to holidays or other special circumstances. The meetings will start with an overview of some of the new lessons or other resources that the team has developed, explore a special topic of interest, and conclude with some time for Q & A.

Here is the [Zoom link](#) for the monthly webinars.

## Compensation Expenditures Reporting

Compensation Expenditures reporting is a process set up to assist schools with their responsibilities to be transparent with the use of public funds in accordance with 20-7-104, MCA. This report collects information pertaining to all salaries paid to employees in the district in a fiscal year. Compensation Expenditure reports must be submitted by December 10th for the previous fiscal year's data. Districts will be required to complete the compensation expenditures in TEAMS to finalize the fiscal year 2023 process. You will need to log into TEAMS to complete, this will be located at the bottom of the System tab called "Compensation Expenditure TOE." If you do not have access to TEAMS or are having troubles logging in, please contact [OPITEAMS@mt.gov](mailto:OPITEAMS@mt.gov). For questions regarding Compensation Expenditure Reporting within MAEFAIRS please contact: **Alivia Skeslien-Jenkins**, 406-444-1964, **Laci Novark**, 406-444-4401, or contact us by email at [opischoolfinance@mt.gov](mailto:opischoolfinance@mt.gov)

## **Requests for Changes to the TFS- Due Dec 10th**

The following steps must be completed.

**Step 1:** On a photocopy of the originally submitted TFS printout:

- Cross out the amount to be revised
- Legibly write or type in the revised amount above or beside the original amount or submit a detailed Excel worksheet.
- Requestor must sign and date EACH page; and, complete and gather all signatures for the School Data Error Correction form.
- Send the request and form for changes to:

Montana Office of Public Instruction

Attn: Amanda Zigan

PO Box 202501 Helena, MT 59620-2501

Fax: (406) 444-3096

Email: [OPISchoolFinance@mt.gov](mailto:OPISchoolFinance@mt.gov)

Requests for changes can be mailed or scanned and emailed. All completed requests must be received by the OPI no later than December 10. (ARM [10.10.504](#)).

**Step 2:** Email a copy of the corrected TFS to the county superintendent with an explanation of the requested changes.

**Step 3:** After changes have been completed by the OPI, verify that changes have been made accurately and send confirmation to the OPI.

The Office of Public Instruction (OPI) has a form to be completed when changes are made to financial-related data. The [School Data Error Correction Request](#) form can be found on the School Finance website and at the link above. For more information, please contact **Barbara Quinn**, at 406-444-3249 or contact us by email at [opischoolfinance@mt.gov](mailto:opischoolfinance@mt.gov).

## **OPI's Jobs for Teachers Page**

Reminder: When adding job postings to the [Jobs for Teachers](#) page, please add a closing date or remember to log in and delete the posting if the job is filled. This will help better serve our Montana teacher candidates.

## **Significant Needs Grant**

The Office of Public Instruction is making available funding for the costs of students with significant needs served by the public schools. The approval of the funding on each application is specific to the quest and justification for that request. If you would like an application or have questions, please contact Danni McCarthy, in Special Education, 406-444-0452, or e-mail at [dmccarthy@mt.gov](mailto:dmccarthy@mt.gov).

**[Annual Free and Reduced-Price Verification Process Located on the School Nutrition Compass.](#)**

## Transformational Learning and MT Advanced Opportunities FY 2025 Application Window Opens December 4<sup>th</sup>.

The application and annual report window for the fiscal year 2025 cycle opens Monday, December 4th at 8am MST. This process must be completed by Monday, January 8th, 2024, at 5pm for districts to be considered for 2025 funding. Applications, annual reports, and submission links are found on the respective websites: [Transformational Learning](#) and [MT Advanced Opportunities](#).

**There are two more chances this fall to learn about Transformational Learning and MT Advanced Opportunities and receive support for the application and annual report process.**

- **Statewide Collaborative Gathering**
  - Thursday, November 16th at 1pm
  - Zoom Link: <https://mt-gov.zoom.us/j/84311264906?pwd=bC9taDdqQzAycldQOWkvaWIKYzh0UT09>
- **Open Office Hours Q&A**
  - Thursday, November 30th at 1pm
  - Zoom Link: <https://mt-gov.zoom.us/j/85021040402?pwd=SVBqRndiSnN6cm1VakNsRW5OVWRrQT09>

## 2023-24 CTE-Perkins Office Hours

Every Wednesday 7:00am-5:00pm [Join us on ZOOM](#)

Our Office hours are a great place to jump on and ask any question regarding the Perkins process or application. Our Specialists are there to help with one-on-one instruction!

## Carl Perkins Updates

### **FY 24 Carl Perkins Grant Requirement and State Vo-Ed Funding Data and Fiscal Due Dates:**

- Fall Teacher Class Data Collection: October 30-November 10
- Fall CTE Post-program Status Collection: November 1- December 31
- Second quarter cash request due: December 26
- Spring Teacher Class Data Collection: March 4- March 15
- Third quarter cash request due: February 25
- Intent to Apply for Carl Perkins and State Vo-ed fund Acceptance FY25: April-May
- Carl Perkins E-grant opens for 2024-2025 School year: May 1
- Carl Perkins E-grant application must be created by: May 15
- Fourth quarter cash request due: May 25
- CTE End of Year Data Collection: May 13-June 21
- Last day to request budget amendment for FY 24 application: June 1
- Second June cash request due: June 23
- Last day to obligate Carl Perkins FY 24: June 30
- School year 2024-2025 Carl Perkins grant application due: June 30
- Final Expenditure Reports are Due no later than August 10. Districts are encouraged to complete all spending and fiscal reports as early as possible.



# MASBO PREMIER DIAMOND PARTNERS

	<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>Laren Carparelli</b>, Director of MTSUIP 406-431-3274 <a href="mailto:lcarporelli@mtsba.org">lcarporelli@mtsba.org</a> <a href="http://www.mtsuip.org/">http://www.mtsuip.org/</a></p>
	<p>MarshMcLennan Agency Montana Schools Property &amp; Liability Insurance Plan <b>Rody Holman</b>, Program Manager 406-533-1035 <a href="mailto:Rody.Holman@marshmma.com">Rody.Holman@marshmma.com</a> <a href="http://msplip.com/">http://msplip.com/</a></p>

# MASBO PREMIER PARTNERSHIPS

**GOLD**



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**Black Mountain Software**

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**LifeTouch**

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**Wipfli LLP**

Kim Dare, CPA  
[kdare@wipfli.com](mailto:kdare@wipfli.com)

## Exhibiting Members

*"Don't wait until the fourth Thursday in November, to sit with family and friends to give thanks. Make every day a day of Thanksgiving!"*

**Charmaine J. Forde**

**American Fidelity Assurance Company**

Jacob Bautista, Office Manager  
[jacob.Bautista@americanfidelity.com](mailto:jacob.Bautista@americanfidelity.com)

**Anderson, Zurmuehlen & Co.**

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<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>Milligan School Data</b> Adam Milligan <a href="mailto:Milliganschooldata@gmail.com">Milliganschooldata@gmail.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>Pine Cove Consulting</b> Brandan Bassett <a href="mailto:bbassett@pinecc.com">bbassett@pinecc.com</a>
<b>Red Rover</b> Jim O'Halloran <a href="mailto:johalloran@redroverk12.com">johalloran@redroverk12.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>

## IMPORTANT DATES & DEADLINES – NOVEMBER 2023

### NOVEMBER 1

TR-1 Bus Routes (district due date)	By November 1, districts must send one copy of the TR-1 for each bus route to the county superintendent and submit a TR-1 for each bus route electronically to the OPI. Each TR-1 must be signed by the board chair and county superintendent.	<a href="#">Regulations &amp; Guidelines for Pupil Transportation Reporting</a>  <a href="#">A.R.M. 10.7.101 (2)(g)</a>
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### NOVEMBER 10

TR-1 Bus Routes (county due date)	By November 10, the county superintendent must electronically mark each TR-1 submitted by the district as "Received" in OPI's Pupil Transportation online system. If a TR-1 is not marked as received, the district will be unable to submit their Bus Route Claim for Reimbursement (TR-6).	<a href="#">Regulations &amp; Guidelines for Pupil Transportation Reporting</a>  <a href="#">A.R.M. 10.7.101 (2)(h)</a>
Final Liquidation Date for grants ended September 30, 2023, due to the E-Grants system. Expenditures reports must be submitted prior to future year funding approvals.	<ul style="list-style-type: none"> <li>● IDEA, Part B</li> <li>● Regional CSPD</li> <li>● IDEA, Preschool</li> <li>● IDEA, Part D: MTSS</li> <li>● Title I, Part A, Improving Basic Programs</li> <li>● Title I, Part A, Schoolwide</li> <li>● Title I, Part C, Migrant Education</li> <li>● Title I, Part D, Neglected and Delinquent</li> </ul>	<a href="#">OPI State and Federal Grants Handbook</a>

## IMPORTANT DATES & DEADLINES – NOVEMBER 2023

	<ul style="list-style-type: none"> <li>• Title I, School Support</li> <li>• Title I, Targeted Support &amp; Improvement</li> <li>• Title II, Part A, Improving Teacher Quality</li> <li>• Title II, Part A, Improving Teacher Quality-State Level</li> <li>• Title II, Part B, Math Science Partnerships</li> <li>• Title III, Part A, English Language Acquisition</li> <li>• Title III, Part A, Emergency Immigrant</li> <li>• Title IV-A, Student Support &amp; Academic Enrichment</li> <li>• Title VI, Part B, Rural Low Income</li> <li>• Title X, Part C, McKinney-Vento Homeless Education</li> <li>• Montana Striving Readers Comprehensive Literacy Project (MCLP)</li> <li>• Montana Comprehensive Literacy State Development Project (MCLSDP)</li> <li>• Project AWARE Mental Health</li> <li>• School Improvement: Indian Ed</li> <li>• Elementary and Secondary School Emergency Relief Funds (ESSER)</li> </ul>	
<b>NOVEMBER 10</b>		
File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due on 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 FY2024</a></p> <p>SSO <a href="#">Reimbursement rates</a></p> <p><a href="#">FY2024 School Nutrition Payments</a></p>
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>
<b>NOVEMBER 15</b>		
Verification Summary	Verification is the process by which schools confirm the eligibility of a sample of approved free	<a href="#">School Nutrition Programs Checklist</a>

## IMPORTANT DATES & DEADLINES – NOVEMBER 2023

Report is due to OPI.	and reduced-price meal applications. Schools will report the verification results and October eligibility data on the School Food Authority (SFA) Verification Collection Report in MAPS. Please carefully read through the verification instructions to ensure reporting accuracy. Additional instructions can be found in the USDA's Eligibility Manual.	
<b>NOVEMBER 21</b>		
OPI makes K-12 BASE aid payments	<b>Direct State Aid</b>  <b>Quality Educator Component</b>  <b>At Risk Component</b>  <b>Indian Education for All</b>  <b>Student Achievement Gap</b>  <b>Data for Achievement</b>  <b>Special Education</b>  <b>Indian Language Immersion Payment</b>	<a href="#">FY2024 Schedule</a>  <a href="#">20-9-344, MCA</a>
<b>NOVEMBER 25</b>		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on December 10.	<a href="#">OPI State and Federal Grants Handbook</a>
<b>November 30</b>		
Gifted and Talented Report for FY 2021-2023 due	<b>G/T Program Report is now</b> available in E-grants for the 2021-2023 grant cycle. The deadline for this report is <b>November 30, 2023</b> .	Please contact Jackie Ronning, <a href="mailto:jackie.ronning@mt.gov">at jackie.ronning@mt.gov</a> or 406-438-0522 if you need assistance.

## IMPORTANT DATES & DEADLINES – DECEMBER 2023

<b>DECEMBER 1</b>		
Licensed educators and professionals must have registered his or her license with OPI.	Educators without a valid license will not be considered in the FTE for the payment. <b>A license must be current as of December 1</b> of the school year in which the employee is reported to be valid for purposes of the quality educator payment calculation for the following fiscal year. The OPI will provide an opportunity for district officials to review the FTE information	<a href="#">A.R.M 10.21.201(4) and (5)</a>

## IMPORTANT DATES & DEADLINES – DECEMBER 2023

	submitted in TEAMS. Changes to FTE reporting used for the quality educator payment calculation will not be accepted after December 31 except in cases of significant reporting error, as determined by the Superintendent of Public Instruction.	
<b>DECEMBER 4, 2023 – JANUARY 8, 2024</b>		
Montana Advanced Opportunity Application opens at 8:00 a.m.	A school district must apply for the <b>state advanced opportunity aid</b> payment during the application period, which is <b>December 4, 2023, at 8:00 a.m. – January 8, 2024, at 5:00 p.m.</b> for FY2025.	<a href="#">OPI Advanced Opportunity Act</a> information page  <a href="#">Montana Advanced Opportunity Application FY2025</a>
<b>DECEMBER 4 – JANUARY 8, 2024</b>		
Transformational Learning Application opens at 8:00 a.m.	A school district must apply for the <b>state transformational aid</b> payment during the application period, which is <b>December 4 at 8:00 a.m. – January 8, 2024, at 5:00 p.m.</b> for FY2025.	<a href="#">OPI Transformational Learning Application FY2025</a>  OPI <a href="#">Transformational Learning</a> information page
<b>DECEMBER 10<sup>th</sup>, 2023</b>		
Deadline for making changes to FY2023 Trustees Financial Summary	<p><b>Step 1:</b> On a photocopy of the originally submitted TFS printout:</p> <ul style="list-style-type: none"> <li>• Cross out the amount to be revised.</li> <li>• Legibly write or type in the revised amount above or beside the original amount or submit a detailed Excel worksheet.</li> <li>• Requestor must sign and date EACH page; and, complete and gather all signatures for the School Data Error Correction form.</li> <li>• Send the request and form for changes to:</li> </ul> <p>Montana Office of Public Instruction  Attn: Amanda Zigan  PO Box 202501 Helena, MT 59620-2501  Fax: (406) 444-3096  Email: <a href="mailto:OPISchoolFinance@mt.gov">OPISchoolFinance@mt.gov</a></p> <p>Requests for changes can be mailed or scanned and emailed. All completed requests must be received by the OPI no later than December 10. (ARM <a href="#">10.10.504</a>).</p>	<a href="#">A.R.M. 10.10.504(6)</a>  <a href="#">School Data Error Correction Request</a>  Send the request and form for changes to:  Montana Office of Public Instruction Attn: Amanda Zigan PO Box 202501 Helena, MT 59620-2501 Fax: (406) 444-3096 Email: <a href="mailto:OPISchoolFinance@mt.gov">OPISchoolFinance@mt.gov</a>

## IMPORTANT DATES & DEADLINES – DECEMBER 2023

	<p><b>Step 2:</b> Email a copy of the corrected TFS to the county superintendent with an explanation of the requested changes.</p> <p><b>Step 3:</b> After changes have been completed by the OPI, verify that changes have been made accurately and send confirmation to the OPI.</p>	
Salary and Compensation Expenditure Report due	The Salary and Compensation Expenditure Report requires that all employees who received a paycheck during 2022-2023 fiscal year be entered in the district's 2022-23 TOE data.	<p><a href="#">Compensation Expenditures Report Instructions</a></p> <p><a href="mailto:Opischoolfinance@mt.gov">Opischoolfinance@mt.gov</a> Andrea Mohammadi 406-444-1960</p> <p>For questions regarding Compensation Expenditure Reporting within MAEFAIRS please contact: <b>Alivia Skeslien-Jenkins</b>, 406-444-1964, <b>Laci Novark</b>, 406-444-4401, or contact us by email at <a href="mailto:opischoolfinance@mt.gov">opischoolfinance@mt.gov</a></p>
ESSA Per Pupil Expenditure Report due	Please review the per-pupil calculation for your district(s). The calculation may be reviewed in MAEFAIRS, under Data Entry, ESSA PPE Calculation (please scroll to page 2 for the final per-pupil amount).	<a href="#">ESSA Per Pupil Expenditure Reporting</a>
File monthly claims for NSLP or SSO reimbursement	<p>Monthly lunch, breakfast and snack counts are due on 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 FY2024</a></p> <p>SSO <a href="#">Reimbursement rates</a></p> <p><a href="#">FY2024 School Nutrition Payments</a></p>
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>
<b>DECEMBER 15</b>		
OPI makes K-12 BASE aid payments	<p><b>Guaranteed Tax Base Aid for General Fund</b></p> <p><b>State Lands Block Grant</b></p> <p><b>State Coal Mitigation Block Grant</b></p> <p><b>County Retirement</b></p>	<p><a href="#">FY2024 Schedule</a></p> <p><a href="#">20-9-344, MCA</a></p>
<b>DECEMBER 25</b>		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on January 10.	<a href="#">OPI State and Federal Grants Handbook</a>
<b>DECEMBER 31</b>		

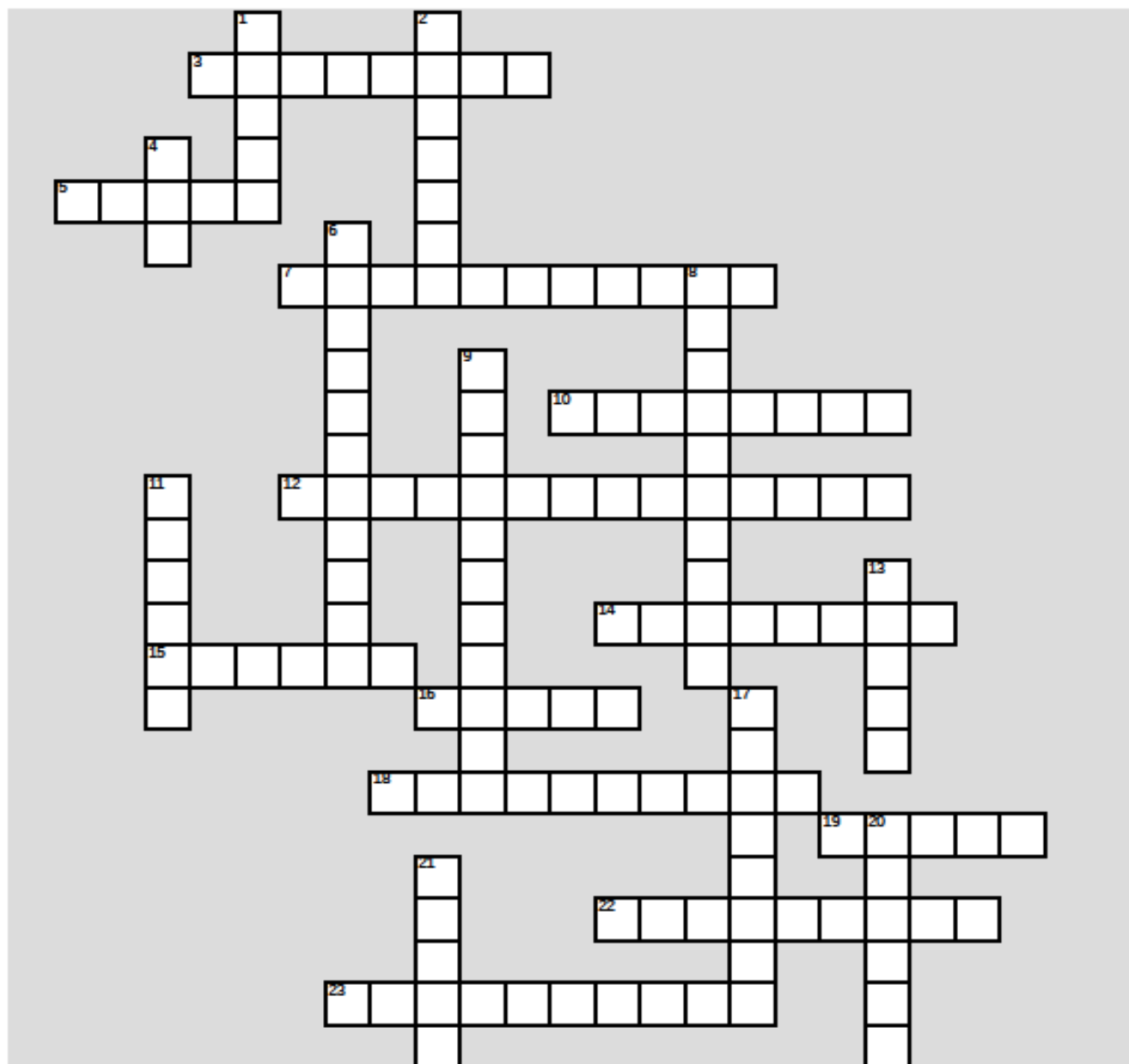
## IMPORTANT DATES & DEADLINES – DECEMBER 2023

End of 4 <sup>th</sup> quarter payroll period	Check with your software vendor to see if a year-end backup is required.	<a href="#">MASBO Payroll Manual</a>
End of calendar year payroll period	After final payroll, reconcile quarterly payroll reports for the calendar year with W-2 totals.	
District of residence pays at least one-half of any tuition and transportation obligation	By December 31 of the school fiscal year following the year of attendance, the district of residence shall pay at least one-half of any tuition and transportation obligation established under subsection (5)(a)(i) out of the money realized to date from the district tuition or transportation fund levy. The remaining tuition and transportation obligation must be paid by June 15 of the school fiscal year following the year of attendance.	<a href="#">20-5-324(5)(a)(ii), MCA</a>  <a href="#">OPI Tuition Handbook</a>
Verify the number of American Indian students reported with the Fall Enrollment Count and make changes/corrections	<p>Students identified as American Indian in the AIM system at the time the data is imported into the MAEFAIRS fall count (October 4, 2021) will generate funding for the Student Achievement Gap (SAG) payment in the ensuing year (FY205).</p> <p>Verify that the “Students Imported from AIM In SAG Report” (access in MAEFAIRS) accurately reports the number of American Indian students enrolled in the district.</p> <p>The deadline to submit changes is <b><u>December 31, 2023</u></b> (see <a href="#">ARM 10.21.204</a>).</p>	<a href="#">20-9-330, MCA</a> <a href="#">ARM 10.21.204</a>  <a href="#">Submit an AIM Help Desk Ticket</a> <b>or call 1-877-424-6681 or 406-444-3800</b>
Fall 2023 CTE Data Collection ENDS	<p>All high schools that received funding from the Carl D. Perkins federal grant program in 2023-2024 are required to complete this fall follow up collection to maintain their eligibility to receive Perkins funding.</p> <p>Students identified as CTE Concentrators last year (2022-2023) and graduated in the spring of 2023 should be contacted between November 15 and December 31 and asked their current post-graduation status. After contact, the appropriate post-graduation status code must be entered into the AIM/Infinite Campus data system for each CTE Concentrator.</p>	<a href="#">AIM Data Collection Calendar</a>



## MSGIA MASBO CHALLENGE

Complete the crossword and email it to Shawn Bubb at [sbubb@mtsba.org](mailto:sbubb@mtsba.org) no later than November 15th. The first business official with the highest percentage of correct answers will win a **\$25 Amazon Gift Card!** Good Luck!





## Across

- 3 Should be properly maintained in winter conditions.
- 5 Wearing proper \_\_\_\_ is your first defense in preventing a fall.
- 7 Should be placed on the first two and last two stairs to help prevent slipping or tripping (2 words)
- 10 A method of moving that helps prevent falling in slippery conditions.
- 12 A way the district can maintain safety between November and March (2 words)
- 14 What to do when you are moving too fast and at risk for an accident (2 words)
- 15 The best sole material to help prevent falls.
- 16 Should be broken up so that they are easier to handle and less heavy.
- 18 The walkways that I should follow to enter and exit the building.
- 19 Largest Self-Insured WC carrier for MT Public Schools
- 22 A description for the evening work schedule for the night custodian (2 words)
- 23 Should be used to reach items on shelves and to put up bulletin board items.

## Down

- 1 The number one injury in the Montana Public Schools
- 2 Needed when working at a height of 6 feet or more.
- 4 Who has control about the choices you make throughout the day?
- 6 A way to warn others of ice, water, and spills.
- 8 The area where most slips and falls happen in a school setting (2 words)
- 9 MSGIA online training modules to help prevent accidents.
- 11 Should never be stood on.
- 13 We should be \_\_\_\_ of our surroundings.
- 17 Devices worn over shoes and ideal on ice.
- 20 Need to be wiped up immediately or marked so that others are aware of there presence
- 21 When should you hold hands with students on ice or other slippery surfaces.



# Risk Management Resources for Schools

## Access to school-related resources

Marsh McLennan Agency's MSPLIP Program is pleased to provide our clients access to risk control resources to help schools maintain a safe and healthy environment for both students and staff.

Resources and tools available to assist your organization with risk mitigation:



Safety newsletters



Montana Department of Labor guidance



Sample policies, plans and procedures



New/current employee safety training



Development of safety committee and accident reporting



Onsite or virtual safety training



Direct access to online risk assessment tools (Brit and SafePupil)



Onsite safety assessments

These tools are meant to complement your current implementation processes to maintain a safe and compliant school environment. If you have any questions or need further information please contact the MSPLIP Program.

## Contacts

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