

# MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS OCTOBER 2014

*MASBO is dedicated to training and supporting the people responsible for business operations in Montana schools. Our goal is to enable members to manage the business in order to support education for Montana children.*



## **MASBO Staff**

Denise Williams, Executive Director  
406-461-3659 or [dwilliams@masbo.com](mailto:dwilliams@masbo.com)  
Marie Roach, Administrative Assistant  
406-461-8804 or [mroach@masbo.com](mailto:mroach@masbo.com)

## **TRAINING OPPORTUNITIES - check out upcoming workshops in October & November!**

The **TECHNOLOGY WORKSHOP** agenda includes:

- Opening Session – Bridging the IT Gap between Administration and Tech Staff
- Mini-sessions on Paperless Board Meetings, GoogleTools Overview, Cloud 101, Office 365 Overview
- DIG DEEP stations (booths) where you can practice skills in GoogleDocs, GoogleForms, EverNote, Excel, Choosing the Right Device, Managing Multiple Devices
- Closing Session/Q&A/Reception – What’s Next in Technology

The **ELECTIONS WORKSHOP** agenda includes:

- Election Calendar for 2015
- Candidates for Trustee
- Voters
- Ballots
- Election Procedures and Election Judges
- Post-Election Procedures

The **NEW CLERK ACADEMY** agenda includes:

- Clerk and Superintendent Responsibilities
- Payroll, TRS, PERS, Unempl. and workers comp
- School District Funds
- Board Meetings and Minutes
- Grants, Coding and Claims



### **Technology & Elections Workshops— BILLINGS**

#### **Technology Workshop**

October 27, 2014; 10:00 a.m. – 6:00 p.m.  
Billings Hotel & Convention Center  
Cost is \$80

Click here to register:

<http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=91>

#### **Elections Workshop**

October 28, 2014; 8:30 a.m. – 4:00 p.m.  
Billings Hotel & Convention Center  
Cost is \$80

Click here to register:

<http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=93>

### **Technology, Elections and New Clerks Workshops — MISSOULA**

#### **Technology Workshop**

November 18, 2014; 10:00 a.m. – 6:00 p.m.  
Hilton Garden Inn  
Cost is \$80

Click here to register:

<http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=92>

#### **Elections Workshop**

November 19, 2014; 8:30 a.m. – 4:00 p.m.  
Hilton Garden Inn  
Cost is \$80

Click here to register:

<http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=94>

#### **New Clerk Academy**

November 20 – 21, 2014  
Hilton Garden Inn  
Cost is \$200

Click here to register:

<http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=95>

## **MONTANA CONFERENCE OF EDUCATION LEADERSHIP (MCEL)**

“Celebrating Montana’s GREAT Public Schools for over 150 Years”.

**G**overned by Elected Trustees  
**R**esponsive to the Needs of each Community  
**E**xcellent, Efficient, Equitable and Empowered  
**A**dvancing Student Achievement for Each Child  
**T**rusteed through Transparency and Openness

Registration: [www.mcel.org](http://www.mcel.org)  
Dates: October 15 - 17  
Place: Holiday Inn Grand & Billings Hotel  
Fee: Registrations received Oct. 1, 2014, up through the end of the conference will be \$275.00 member; \$375 non-member.

Sessions that may be of interest to MASBO members include:

Procurement card idea sharing	TRS’ new Wage and Contribution online system
Funding school district facilities projects	TEAMS system
Collective bargaining	Early Edge Montana
Common core standards	PERS retirement Q&A
Transfers between funds	Emerging legal issues in Montana’s public schools
Risk management	Using social media to tell the story of your district
GASB 68 panel discussion	Bus driver qualifications and certification requirements

For a full list of clinic descriptions, click on this link:

<http://www.mcel.org/Portals/0/Docs/Clinic%20session%20descriptions%20for%20program.pdf>

## **MASBO WEBSITE NEWS [WWW.MASBO.COM](http://WWW.MASBO.COM)**

### **2015 MEMBERSHIP DIRECTORY**

MASBO members may order a copy of the 2015 MASBO Directory online at <http://www.masbo.com/i4a/ams/conference/conference.cfm?conferenceID=96>.

The cost is **\$10 per copy**, which includes shipping.

You can also access membership information online by clicking on Membership (left side of the page), then Membership Directory. You can search for a particular person or you can click on “View All Records” for a complete listing.

### **MASBO CALENDAR**

The MASBO Calendar shows important deadlines and reminders for each month. Click on Resources, then Calendar.

### **LOG IN ON THE MASBO WEBSITE**

All current MASBO members are set up with a user name and password. If you need your sign in information or have questions about the website, please contact Marie at [mroach@masbo.com](mailto:mroach@masbo.com) or 406-461-8804.

How to post a question or comment to the MASBO Discussion Forum:

- 1) Sign in
- 2) Go to Discussion forum
- 3) Select applicable forum/category
- 4) Click +New Thread
- 5) Type your subject & message (to attach a file, select “Browse” to upload)
- 6) Post

That’s it ☺



## MASBO Board of Directors

President	Mike Arnold, Havre Schools	Region 1 Director	Cindy Foley, West Valley Schools
Vice-President	Tammy Tulberg, Target Range Schools	Region 2 Director	Lucinda Woodland, Cascade Schools
Past President	Jacki Young, Fairview Schools	Region 3 Director	Rhonda Opp, Medicine Lake Schools
Fiscal Agent	Kim Aarstad, East Helena Schools	Region 4 Director	Lorie Carey, Jefferson Co. High School
Ex-Officio, MSUIP	Denise Williams	Region 5 Director	Rita Huck, Huntley Project Schools
Ex-Officio, OPI	Janelle Mickelson	Region 6 Director	Jen Mettler, Baker Schools

## MONTANA PUBLIC EDUCATION CENTER (MT-PEC)

### The K-12 Vision Group — A vision for public education in Montana

First formed in 2011 by key education advocacy groups, including MASBO, MEA-MFT, MQEC, MREA, MTSBA and SAM, the K-12 Vision Group is comprised of teachers, elected trustees, superintendents, principals and school business officials

representing all school classification categories from across the state. Once the group identified its core purpose and core values, it then developed vivid descriptions of the future of Montana's K-12 public schools and its students out to 2025. This envisioned future drives the work of the K-12 Vision Group in establishing priorities in the 2013 legislative session and in the upcoming 2015 Legislature. The adopted priorities for 2015 are:

- Protection of full phase in of Senate Bill 175, 2013 Legislative Session
- Funding of inflation as calculated in law for all general fund elements
- Supporting early childhood education through successful implementation of Governor Bullock's Early Edge Proposal. The K-12 Vision Group has specified its intent that funding for Early Edge be in addition to existing categorical funding under Section E of House Bill 2 as adopted by the 2013 Legislature and in addition to funding necessary to accomplish priorities A and B above
- Active involvement in the Legislature's decennial study of the Basic System of Free Quality Schools
- Addressing teacher pay disparities documented through the Office of Public Instruction's TEAMS Data Collection process
- Opposition to school privatization efforts

More information about the K-12 Vision Group can be found on the MT-PEC website at [www.mt-pec.org](http://www.mt-pec.org).

## A TIP FROM THE FIELD

### OPI Compensation Expenditure (CE) Reporting

If you haven't done your 2013-14 Compensation Expenditure (CE) report in MAEFAIRS yet, you need to follow these steps:

1. Do your **2014-15** Terms of Employment (TOE) report in TEAMS first, so the superintendent and principal(s) can do the accreditation portion of TEAMS.
2. Try your 2013-14 CE Report in MAEFAIRS. If you added new employees between February and June, you will probably have missing TOE records and will need to add them in 2013-14 TOE in TEAMS.
3. If you need access to 2013-14 TOE records in TEAMS, contact [OPITeams@mt.gov](mailto:OPITeams@mt.gov) and ask them to roll your records back to 2013-14. You won't be able to add missing 2013-14 TOE records in TEAMS until you receive notification from OPI.

First priority is to complete 2014-15 TOE records in TEAMS. Then work on your 2013-14 CE report in MAEFAIRS. Call Steve Hamel at OPI at 444-0783 if you have questions about the 2013-14 CE Report.

*Many thanks to Teresa Cornell from Harlem Schools for sharing this information!*



[www.mt-pec.org](http://www.mt-pec.org)

## PAYROLL REMINDERS

### QUARTER 3 PAYROLL REPORTS DUE OCTOBER 31

Quarter 3 (July – September) Payroll Reports are due October 31, 2014.

**Form 941** (form) <http://www.irs.gov/pub/irs-pdf/f941.pdf> and (instructions) <http://www.irs.gov/pub/irs-pdf/i941.pdf>

Also, check out quarterly reporting requirements for unemployment insurance and workers' comp insurance.

### HANDY WEBSITE REFERENCES

Montana Department of Labor & Industry Wage & Hour FAQs

<http://erd.dli.mt.gov/labor-standards/wage-and-hour-payment-act/wage-and-hour-fags>

### WHAT TO DO IF YOU GET A NOTICE FROM THE IRS

(From IRS Summertime Tax Tip 2014-01, July 2, 2014)

1. Don't ignore it. You can respond to most IRS notices quickly and easily. And it's important that you reply promptly.
2. IRS notices usually deal with a specific issue about your tax return or tax account. For example, it may say the IRS has corrected an error on your tax return. Or it may ask you for more information.
3. Read it carefully and follow the instructions about what you need to do.
4. If it says that the IRS corrected your tax return, review the information in the notice and compare it to your tax return.

If you agree, you don't need to reply unless a payment is due.

If you don't agree, it's important that you respond to the IRS. Write a letter that explains why you don't agree. Make sure to include information and any documents you want the IRS to consider. Include the bottom tear-off portion of the notice with your letter. Mail your reply to the IRS at the address shown in the lower left part of the notice. Allow at least 30 days for a response from the IRS.

5. You can handle most notices without calling or visiting the IRS. If you do have questions, call the phone number in the upper right corner of the notice. Make sure you have a copy of your tax return and the notice with you when you call.
6. Keep copies of any notices you get from the IRS.
7. Don't fall for phone and phishing email scams that use the IRS as a lure. The IRS first contacts people about unpaid taxes by mail – not by phone. The IRS does not contact taxpayers by email, text or social media about their tax return or tax account.

For more on this topic visit IRS.gov. Click on 'Responding to a Notice' at the bottom left of the home page. Also see Publication 594, The IRS Collection Process. You can get it on IRS.gov or call 800-TAX-FORM (800-829-3676) to get it by mail.



### **RETIRING IN OCTOBER**

MARILYN KINGSTON  
Butte Public Schools  
Congratulations!

## MASBO ENDORSES THESE PROGRAMS



<http://msplip.com/>

Property & Liability Insurance Plan

**Dave Pillatzke**, Program Manager

406-457-4531

[dpillatzke@paynewest.com](mailto:dpillatzke@paynewest.com)



Montana School Unemployment Insurance Program  
<http://mtsba.org/InsuranceServices/tabid/98/Default.aspx>

**Theresa LeSueur**

Director

406-457-4407

[tlsueur@mtsba.org](mailto:tlsueur@mtsba.org)



<http://www.americanfidelity.com/home.aspx>

Healthcare Reform, Section 125 and Health Savings Account Services

**Debbie Braden**

Fringe Benefit Consultant

866-576-0201, ext. 26

[Debbie.Braden@americanfidelity.com](mailto:Debbie.Braden@americanfidelity.com)



<http://msgia.org/Home.aspx>

Montana School Group Insurance Authority  
Workers Compensation Insurance

**Shawn Bubb**

Director of Insurance Services

406-457-4500

[sbubb@mtsba.org](mailto:sbubb@mtsba.org)

## WORTH REPEATING — PUPIL TRANSPORTATION NEWS

### **BUS DRIVER CERTIFICATION REQUIREMENTS FOR REIMBURSEMENT**

One of the criteria for eligibility for state transportation reimbursement is that school bus drivers must hold a valid Montana school bus driver certificate in order for a school district to receive state reimbursement for that driver's bus routes. The Bus Driver Certification Requirements for Reimbursement (see Administrative Rule 10.7.111 at <http://www.opi.mt.gov/pdf/ARM/10-7-11pro-arm.pdf>) was changed to clarify the process for obtaining bus driver certification.

First, school bus drivers must be **qualified**. Qualifications are found in 20-10-103, MCA (<http://leg.mt.gov/bills/mca/20/10/20-10-103.htm>) and ARM 10.64.201 (<http://www.opi.mt.gov/pdf/ARM/10-64-201pro-arm.pdf>). A driver of a school bus is qualified to drive a school bus if the driver meets the following:

#### **20-10-103, MCA**

- 1) Is not less than 18 years of age;
- 2) Is of good moral character;
- 3) Is the holder of a commercial driver's license (CDL);
- 4) Has filed with the district a satisfactory medical examination report;
- 5) Has completed a basic first aid course and holds a valid basic first aid certificate or has approval from the Office of Public Instruction to suspend this requirement for a reasonable period of time;
- 6) Has complied with any other qualifications established by the board of public education (BPE), and
- 7) Has filed a certificate from the board of trustees of the school district for which the school bus is to be driven with the county superintendent of schools.

#### **ARM 10.64.201 (BPE rule)**

School bus drivers must submit proof of the following:

- 1) A minimum of five (5) years of licensed driving experience;
- 2) No record of criminal offenses indicated they may be dangerous to children, as evidenced by a criminal background check provided to and approved by the school district prior to initial employment;
- 3) A satisfactory report of a physical examination;
- 4) A current first aid certificate meeting the requirements of ARM 10.7.111, which specifies that certification in CPR is included in the requirements for obtaining a first aid certificate. The first aid certificate must be signed by a certified instructor, and be received after an initial in-person training of at least four hours with annual renewals;
- 5) A properly endorsed CDL with continuing compliance with all the requirement associated with a CDL;
- 6) A safe driving record, which may not have evidence of any of the following:
  - a. More than one moving traffic violation within any 12-month period of the preceding 36 months;
  - b. Any conviction for driving under the influence of alcohol or drugs within the preceding 36 months; or
  - c. A conviction resulting in mandatory revocation or suspension of a driver's license in the previous five years.

**(NOTE:** The sections highlighted in yellow are new or amended requirements.)

The school district issues the bus driver certificate to a driver who is authorized and qualified to drive a school bus pursuant to all applicable rules, regulations and laws. The chairman of the board of trustees signs the certificate. The bus driver is given a hard copy which must be carried at all times while driving a school bus. The school district retains a copy, provides a copy to the bus contractor, if applicable, and gives a copy to the county superintendent.

The amendments to ARM 10.7.111 and 10.64.201 are effective August 8, 2014 and apply to school bus drivers employed by a school district or bus contractor. OPI has granted an extension for compliance with the rules to October 31, 2014.

The contact at OPI is Donell Rosenthal, Pupil Transportation Director, at (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov).





## MASBO EXHIBITOR MEMBERS

<b>CHMS, P.C.</b> Doris Leader, CPA <a href="mailto:doris@chmspc.com">doris@chmspc.com</a>	<b>MSGIA-WCRP</b> Shawn Bubb <a href="mailto:sbubb@mstba.org">sbubb@mstba.org</a>	<b>Black Mountain Software</b> Teresa Van Buren <a href="mailto:teresav@blackmountainsoftware.com">teresav@blackmountainsoftware.com</a>
<b>Western States School Program</b> Dave Pillatzke <a href="mailto:dpillatzke@paynewest.com">dpillatzke@paynewest.com</a>	<b>Foxie Lady Computers, Inc.</b> David Bardwell <a href="mailto:foxieladyc@aol.com">foxieladyc@aol.com</a>	<b>Galusha, Higgins &amp; Galusha</b> Kim Dare, CPA <a href="mailto:Kimberly@ghg-cpa.com">Kimberly@ghg-cpa.com</a>
<b>Montana Schools Unified Insurance Program</b> Theresia LeSueur <a href="mailto:tlesueur@mtsba.com">tlesueur@mtsba.com</a>	<b>Anderson, Zurmuehlen &amp; Co.</b> Stefeni Freese, CPA <a href="mailto:sfreese@azworld.com">sfreese@azworld.com</a>	<b>Ron Foltz CPA firm</b> Ron Foltz, CPA <a href="mailto:Ron.foltz@ronfoltzcpa.com">Ron.foltz@ronfoltzcpa.com</a>
<b>D.A. Davidson &amp; Co.</b> Bridget Ekstrom <a href="mailto:Bekstrom@dadco.com">Bekstrom@dadco.com</a>	<b>RESA4U/Southwest MT School Services</b> Bruce Grubbs <a href="mailto:bgrubbs@resa4u.org">bgrubbs@resa4u.org</a>	<b>TCPN (The Cooperative Purchasing Network)</b> Derek Anderson <a href="mailto:danderson@tcpn.org">danderson@tcpn.org</a>
<b>Horace Mann</b> Keith Jorgensen <a href="mailto:keith.jorgensen@horacemann.com">keith.jorgensen@horacemann.com</a>	<b>Pine Cove Consulting</b> Brandon VanCleeve <a href="mailto:bvanclleeve@pinecc.com">bvanclleeve@pinecc.com</a>	<b>American Fidelity Assurance Company</b> Debbie Braden <a href="mailto:Debbie.Braden@americanfidelity.com">Debbie.Braden@americanfidelity.com</a>
<b>Rudd &amp; Company, PLLC</b> Julie Kostelecky, CPA, CVA <a href="mailto:jkostelecky@ruddco.com">jkostelecky@ruddco.com</a>	<b>Tyler Technologies</b> Jeff Melugin <a href="mailto:Jeff.melugin@tylertech.com">Jeff.melugin@tylertech.com</a>	<b>Klimas Financial Services, Inc.</b> Charles Klimas <a href="mailto:Charles.klimas@securitiesamerica.com">Charles.klimas@securitiesamerica.com</a>
<b>United Pension Administration</b> Elizabeth Harris <a href="mailto:upahelp@msn.com">upahelp@msn.com</a>	<b>VALIC</b> John Wing <a href="mailto:John.wing@valic.com">John.wing@valic.com</a>	<b>Fellon Insurance Services</b> Dale Fellon <a href="mailto:fellonins@msn.com">fellonins@msn.com</a>
<b>Eddie Barnard</b> Eddie Barnard <a href="mailto:Eddie.barnard56@gmail.com">Eddie.barnard56@gmail.com</a>	<b>Aesop Substitute Placement Service</b> Jim O'Halloran <a href="mailto:jim@ohalloran.cc">jim@ohalloran.cc</a>	<b>Stifel Nicolaus</b> Bryan Stelmack <a href="mailto:yroybal@stifel.com">yroybal@stifel.com</a>
<b>Infinite Campus</b> Stephanie Sondrol <a href="mailto:Stephanie.sondrol@infinitecampus.com">Stephanie.sondrol@infinitecampus.com</a>	<b>MT Schools Health &amp; Welfare Plan (MSHWP)</b> Tammy Compton <a href="mailto:Tammy-compton@leavitt.com">Tammy-compton@leavitt.com</a>	<b>Todd Watkins Consulting Services</b> Todd Watkins <a href="mailto:Toddwatkinsconsulting101@gmail.com">Toddwatkinsconsulting101@gmail.com</a>