

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empower School Business Leaders Thru Education
OCTOBER 2018

UPCOMING TRAINING OPPORTUNITIES

DATE	WORKSHOP	LOCATION
November 2	<u>ELECTIONS</u>	Havre Robins Administration Building
November 6	<u>TECHNOLOGY</u>	Billings Billings Hotel & Convention Center
November 7	<u>ELECTIONS</u>	Miles City Sleep Inn & Suites
November 13	<u>TECHNOLOGY</u>	Helena Delta Helena Colonial
November 14	<u>ELECTIONS</u>	
November 15	<u>ELECTIONS</u>	Polson Kwa Taq Nuk Resort
November 16	<u>TECHNOLOGY</u>	

If you haven't done so already, please register for a MASBO Technology and/or Elections workshop near you. The Technology agendas include a list of the topics that will be covered by Black Mountain Software and Tyler Technologies during their respective user group training. For attendees not in those user groups, we'll work in Excel, OPI-GEMS, and trade technology tips and tricks. After lunch, everyone will come together for more training, which varies by location. ***Click on the workshop you're interested in*** and you'll see a link to a detailed agenda for the day.

OPI SCHOOL WELLNESS REGIONAL WORKSHOPS

Learn how a local school wellness policy can fuel students to learn and behave better and support staff in creating healthy school environments. These FREE workshops will review the benefits of a strong wellness policy, USDA requirements for the school wellness policy, and showcase best practices, and assessment and outreach tools. Each workshop is from 1:00 p.m. to 4:30 p.m. Click [here](#) for more information.

- ★ November 1: Miles Community College, 2715 Dickinson, Room 106
- ★ November 7: Kalispell Red Lion Hotel, 20 North Main Street, Lake McDonald Room
- ★ November 29: Butte Quality Inn & Suites, 2100 Cornell Avenue, Big Sky Conference Room

WANT WEBINARS? try these:

TEACHERS RETIREMENT SYSTEM ([TRS](#))

- [Working Retirees Tutorial](#)
- [Termination of Employment Tutorial](#)

MT PUBLIC EMPLOYEES RETIREMENT ADMINISTRATION ([MPERA](#))

- [PERS New Member Plan Choice](#) October 26 - 10:30 a.m.
- [PERS Ready to Retire](#) October 26 - 2:00 p.m.
- [PERS Ready to Retire](#) October 29 - 6:00 p.m.

INTERNAL REVENUE SERVICE ([IRS](#))

- Racing Towards Year End: Employment Tax Updates & Reminders
 - Tuesday, [November 6](#) at 11:00 a.m.
 - Tuesday, [December 4](#) at 11:00 a.m.
- [10 Minutes on Reconciling Forms 941/W-3/W-2 to Gross Payroll](#)

EDUCATION SUPERHIGHWAY ([E-Rate Topics](#))

- [4 Ways to Get More Bandwidth for Your Budget](#)
- [E-rate 101: What's New for 2018-2019](#)

NATIONAL ASSOCIATION for FAMILY, SCHOOL and COMMUNITY ENGAGEMENT ([NAFSCE](#))

- [School Safety Today](#) . . . October 30 at 1:00 p.m.



MASBO Board of Directors

President	Cindy Foley , West Valley Schools	Region 1 Director	Noreen Anderson , Hellgate K-8 School
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MASBO Staff

[Denise Williams](#), Executive Director
406-461-3659

[Marie Roach](#), Administrative Assistant
406-461-8804



2019 MEMBERSHIP DIRECTORY

Click [here](#) to place an online order of the 2019 MASBO Membership Directory. We will mail you a hard copy which includes contact information for all MASBO members. The cost is \$10 per copy (includes shipping).



MASBO LOGO WEAR

Click [here](#) to see the selection of MASBO logo wear available to order online.

Choices include:

- Short sleeve polo
- Long sleeve polo
- Long sleeve cotton crew neck
- Long sleeve easy care dress shirt
- Soft shell vest



P-CARD NEWS

MASBO P-CARD PURCHASES REPORT

P-Card purchases for five months of the rebate year (April – August) totaled over **\$9.8 million** with **130** school districts and special education cooperatives participating in the program. At the same time last year, we had 125 participants with over \$8.8 million in total purchases. Click [here](#) to see the current year P-Card purchases report.

USEFUL SPEND DYNAMICS TUTORIALS

Want to manage your p-Card accounts 24/7 online? It is easy with BMO/Harris's NEW powerful tool –**Spend Dynamics**. Click [here](#) to access tutorials for some of the reports and p-Card management tools that are available. These reports are for the p-Card Administrator or the Cardholder.

Need extra help?

- Use the Help section on Spend Dynamics
- Call Spend Dynamics Client Services – (800) 844-6445
- Schedule a Webinar for your staff or yourself – through IL ASBO (see below)
- Call IL ASBO and ask Holly – (815) 793-4655 or email: hwallace@iasbo.org

NEWS FROM THE OFFICE OF PUBLIC INSTRUCTION

Welcome, Rehanna E Olson

Position at OPI: Financial Specialist

Duties at OPI: Budget Compliance, Data Collection, and Monitoring; Data Analysis and Reporting; State Distributions to Schools; Technical Support and Assistance

Professional background: Communication BS, Classical Studies BS, Theatre Management

Minor; 25+ years in Customer Service, 18 years Administrative Assistant/ Specialist; former Accreditation and Educator Preparation Administrative Specialist at OPI; former Administrator for the Anthropology Department at the University of Montana; former Human Resources Manager and Meal Plan Specialist at UM, University Dining Services; and former Physician Recruiter and Compensation Specialist at Community Medical Center (Missoula, MT).

Personal information: I am Mom to 4 amazing kiddos: 16 years to 18 months (+3 fur babies); a freelance Graphic Designer and Desktop Publisher; a Crafter, Creator, Sewist, and Maker of all things (in my spare time- ha ha ha); a former Costume Designer for Premiere Dance Company; an Alto II with the Helena Symphony Chorale; and an Actress looking for a place to happen.

Contact info: rolson2@mt.gov email address; phone: 406-444-1960



Salary and Compensation Expenditure Report

MAEFAIRS is currently open for the Salary and Compensation Expenditure Report, which requires that certain information for all employees who received a paycheck during the 2017-18 fiscal year be entered into the district's 2017-2018 TOE data. For many districts, the 2017-18 TOE did not include employees hired after the TEAMS application was closed. The missing employees can be entered into the compensation expenditure TOE screen in TEAMS. The Compensation Expenditure Report is due **December 10, 2018**. Contact [Keri Ludwig](#), 406.444.0509 if you have questions.

Changes to the FY2018 Trustees Financial Summary due **December 10, 2018**

Material coding errors on your FY2018 Trustees Financial Summary (TFS) may be corrected by submitting a revision to [Keri Ludwig](#) in the OPI School Finance Division. As provided in [ARM 10.10.504\(6\)](#), changes to the TFS are limited to: 1) coding revisions between revenue and expenditure line items, or 2) revisions in the balance sheet accounts. In both cases, revisions are allowed provided no change occurs in the fund balance of the budgeted funds.

Reporting American Indian Students

Students identified as American Indian in the AIM system at the time the data is imported into the MAEFAIRS fall count (October 1, 2018) will generate funding for the Student Achievement Gap (SAG) payment in the ensuing year (FY2019-20). School district business managers/clerks should verify that the "Students Imported From AIM In SAG Report", which you can access in the MAEFAIRS application, accurately reports the number of American Indian students enrolled in the district. If the report is not correct, please contact [Nica Merala](#) at (406) 444-4401 to make the necessary changes. The deadline to submit changes is **December 31, 2018** (see [ARM 10.21.204](#)).

GEMS – Master Collections Calendar

Check out this special feature in GEMS that lists all of the various data collection systems at the Office of Public Instruction in one place. You can see the name of the collection (e.g. TEAMS Data Collection), a brief descriptions, the date the collection opens, the due date and primary contact information. Click [here](#) and stay on track with data reporting to the OPI.

Emergency Planning & Safety

A plethora of information is located on the OPI website to help you develop and maintain your school's Emergency Operations Plans and emergency management teams. Click [here](#) to access lots of guidance, planning tools, templates, professional developments events and other resources.

MASBO ENDORSES THESE PROGRAMS

	<p>Healthcare Reform Section 125 Services Health Savings Account Services Jacob Bautista, Office Manager 877-589-2544 jacob.bautista@americanfidelity.com http://www.americanfidelity.com/home.aspx</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>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>Montana Schools Unemployment Insurance Program Theresia LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</p>
	<p>Payne West, Inc. Montana Schools Property & Liability Insurance Plan Dave Pillatzke, Program Manager 406-457-4531 dpillatzke@paynewest.com http://msplip.com/</p>

IMPORTANT DATES & DEADLINES - NOVEMBER 2018

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.	Regulations & Guidelines for Pupil Transportation Reporting A.R.M. 10.7.101 (2)(g)
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).	Regulations & Guidelines for Pupil Transportation Reporting A.R.M. 10.7.101 (2)(h)
Final Expenditure Reports for Grants Ended September 30, 2018 due	<p>Final expenditure reports for projects that ended September 30 are due no later than November 10:</p> <ul style="list-style-type: none"> • IDEA, Part B • IDEA, Part B: CSPD • IDEA, Preschool • IDEA, Part D: MTSS, Multi Tier System of Support • Title I, Part A, Improving Basic Programs • Title I, Part A, Schoolwide • Title I, Part C, Migrant Education • Title I, Part D, Neglected and Delinquent • Title I, Part E, MCLP (Striving Readers) • Title I, School Support • Title II, Part A, Supporting Effective Instruction • Title II, Part A, Supporting Effective Instruction— State Level • Title II, Part B, Math Science Partnerships • Title III, Part A, English Language Acquisition • Title IV, Part A, School Support and Academic Enrichment • Title V, Part B, Rural Low Income • Title X, Part C, McKinney-Vento Homeless Education • Project AWARE Mental Health Grant (check with the program administrator or grant accountants for specific deadlines) 	OPI State and Federal Grants Handbook OPI May 21, 2018 Official Email
File monthly meal claims for NSLP 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) reimbursement.	<p>Montana Agreement and Payment System (MAPS) log in page</p> <p>School Nutrition Programs Checklist</p> <p>Reimbursement rates for FY2019</p> <p>FY2019 School Nutrition Payments</p>

IMPORTANT DATES & DEADLINES - NOVEMBER 2018

NOVEMBER 10 (continued)

OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 th of the previous month.	E-Grants System Log in to your district's account, or click on Public Access, then Vendor Payee Details
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NOVEMBER 15

Verification Summary Report is due to OPI	Verification is the process by which schools confirm the eligibility of a sample of approved free 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.	Verification Instructions Verification Collection Report Form
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Deadline to verify CTE Concentrators with OPI	Be sure to verify the list of CTE Concentrators from what your district submitted last spring. Any additions, corrections, or changes to the list of CTE Concentrators must be made no later than November 15, 2018, to be accurately reflected in federal reporting and used to compute Perkins Performance Indicators for your school.	OPI Official Email: Fall 2018 CTE Data Collection BEGINS
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NOVEMBER 25

Grant cash request due to OPI	Grant cash requests made by this date will be paid on December 10.	OPI State and Federal Grants Handbook
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NOVEMBER 30

OPI makes K-12 BASE aid payments	(GTB) Guaranteed Tax Base Aid	FY2019 Payment Schedule (scroll to bottom of page) State School Payments
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DECEMBER 1

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

TYPE "E" SCHOOL BUSES

As of July 1, 2017, schools are allowed to purchase a Type E vehicle to use as a school bus (defined in [20-10-101\(4\), MCA](#)) to transport students. Before making a purchase, be sure to review the general vehicle requirements, recommended guidelines and operational requirements on pages 48-50 in [2018 Montana School Bus Standards](#) posted on the OPI website.

BUS DRIVERS

Thank you to Donnie McVee for passing on the link on the OPI website (click [here](#)) to the form you'll need to obtain consent from your bus drivers to obtain their driving record. And, the link to the MT Department of Justice Motor Vehicle Division Driver History Records Service is <https://app.mt.gov/dojdrs/>.



AFFORDABLE CARE ACT UPDATE

American Fidelity Assurance Company recently posted an article on the 2018 ACA Reporting forms. [Understanding the Changes to the 2018 ACA Reporting Forms](#) outlines certain sections of the form you may want to note if you are responsible for filing and distributing the forms.

Form 1095 employee statements are due on or before January 31, 2019 and filing Form 1094-C, together with copies of all Forms 1095-C, by either February 28, 2019 (paper filings) or April 1, 2019 (electronic filings).

SECURITY CHANGES TO OPI SYSTEMS

If you didn't see the OPI Official Email on October 12, you can access it by clicking [here](#). In the interest of strengthening how they can protect and secure the data you provide, there will be important security changes to all systems you use to report and manage information submitted to the OPI. The following is an excerpt of the message.

"Here's what you can expect as a result of these security changes:

- Passwords will need to meet these criteria:
 - a. At least 12 characters long
 - b. Contain 3 out of the 4 of these: upper-case letter, a lower-case letter, a number, and a special character (~!@#\$()%^&*) or a space
- Systems you access will now also include language on the login page that notifies you of the following:

"This system is the property of the Office of Public Instruction. Unauthorized use is a violation of Montana Code Annotated § 45-6-311. Any and all uses of this system and all files on this system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to authorized personnel. By using this system, the user consents to such. Unauthorized or improper use of this system may result in civil and criminal penalties. By using this system, you indicate your awareness of and consent to these terms and conditions of use. Do not log in if you do not agree to the conditions stated in this warning."


**KEEP
CALM
AND GET
CREATIVE**



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Take Five & Take Charge of Your Stress

Five steps for healthier stress management

Stress is what you feel when you react to pressure. Many things can contribute to stress including work, family or friends, health issues, a death, divorce or moving. Stress is a normal reaction and is caused by your body's instinct to protect itself from emotional or physical pressure, or in extreme situations, from danger.

Stress becomes unhealthy when our bodies react to these events in a negative way. Feeling depressed, laughing or crying for no reason, blaming others for bad things that happen to you, headaches and insomnia are all signs of stress. Here are some things you can do to make positive change.

STEP ONE Make a list of the things that are causing your stress, and accept that you can't control everything on your list.

STEP TWO The advice "take a deep breath" may seem like a cliché, but it holds true when it comes to stress. Sit up in your chair with your feet flat on the floor and hands on top of your knees. Breathe in and out slowly and deeply, concentrating on your lungs as they expand fully in your chest. While shallow breathing causes stress, deep breathing oxygenates your blood, helps center your body, and clears your mind.

STEP THREE Give yourself a break. Remember that you can't make everyone in your life happy, and it's okay to make mistakes.

STEP FOUR Don't commit yourself to things you can't do or don't want to do. If you're already too busy, don't take on more responsibilities.

STEP FIVE Find someone to talk to. Talking to supportive family members and friends can help give you a chance to express your feelings. If you feel you can't talk with a friend or someone in your family, seek outside help.

While you can't avoid stressful events in life, how you deal with them can make all the difference.

Take five now and take stress management to a healthier level.

Stress is a normal reaction and is caused by your body's instinct to protect itself from emotional or physical pressure, or in extreme situations, from danger.

MUST
MONTANA UNIFIED SCHOOL TRUST

Source: American Academy of Family Physicians
45318.0514

mustbenefits.org

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