

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empower School Business Leaders Through Education

SEPTEMBER 2018

UPCOMING TRAINING OPPORTUNITIES

MONTANA CONFERENCE OF EDUCATION LEADERSHIP (MCEL)

"Climb, Lead, Inspire, Motivate, Believe -- Be an Agent of Change"

October 17 - 19 in Missoula

It's not too late to sign up for the 2018 MCEL Conference! The conference program is posted on the MCEL website (click [here](#)).

Look for information on the keynote speaker and [session descriptions](#) for several **topics important to you as a school business official**, such as:



- Advocating for Education in the 2019 Legislative Session*
- Transformational Professional Learning Opportunities for Montana Education Leaders*
- Recruitment and Retention of Quality Educators for Montana*
- Flexibility and Efficiency Options for Montana's Public Schools*
- Building Reserve Funds – Permissive Levies*
- Drug Testing for Students and Staff*
- MTSBA Legal Track
- Introduction to Procurement Cards
- Small and Rural School Leader Roundtable Discussion
- MTSBA Strategic Governance Policy Series
- Current Topics from OPI
- Increasing Efficiency in School Purchasing
- Wage & Hour (offered twice)
- School Safety Measures in Montana*
- Intelligent Unemployment
- ESSA Expenditure Reporting
- A Pathway to Change – School Infrastructure Improvement Projects*
- Receiving and Processing Complaints in Montana School Districts
- Legal Ethics for Trustees
- Save Your School Thousands \$\$
- Making Cents of Wellness
- Spend Dynamics Q&A
- Excel Spreadsheets
- Safety Supervisory Skills
- MASBO Roundtable Discussions: Multi-district Agreements; Protested Taxes; INTERCAP loans; Small Schools Issues; Clerk/Superintendent Duties; MASBO Mentor Program
- MT Digital Academy Access Initiatives
- Federal Update
- We Need a New School . . . Now What?
- Top 5 Ways to Get in Special Education Trouble and How to Avoid Them
- Effective School District Communications and Community Engagement
- A Guide to ADA Transition Plans
- Stay Back from the Cliff: Teaching Staff About Professional Boundaries

Click [here](#) to register for
MCEL now
(in person and video
options available).

*virtual track

MASBO Board of Directors

President	Cindy Foley , West Valley Schools	Region 1 Director	Noreen Anderson , Hellgate K-8 School
Vice-President	Lorie Carey , Jefferson Co. High School	Region 2 Director	Belinda Klick , Sun River Valley Schools
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Ex-Officio, OPI	Kara Sperle	Region 6 Director	Jen Mettler , Baker Schools

MASBO Staff

Denise Williams , Executive Director 406-461-3659	Marie Roach , Administrative Assistant 406-461-8804
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Registration is open for our **Technology** and **Elections** workshops. These are 2 separate trainings, but you may want to combine them.

Agendas are coming soon.

The Technology workshops will include software user training, electronic board meetings, excel spreadsheet skills and mining data from the OPI GEMS data warehouse. Click on the name of the workshop underlined in blue for the location you wish to attend. Please contact Marie Roach at 406-461-8804 or mroach@masbo.com if you need help.

DATE	WORKSHOP	LOCATION
November 6	TECHNOLOGY	Billings Billings Hotel & Convention Center
November 7	ELECTIONS	Miles City Sleep Inn & Suites
November 13	TECHNOLOGY	Helena Delta Helena Colonial
November 14	ELECTIONS	
November 15	ELECTIONS	Polson Kwa Taq Nuk Resort
November 16	TECHNOLOGY	

IMPORTANT MESSAGE FROM OUR FRIENDS AT MTSBA

We need your help! We're moving to a new database and we want to transfer the most current information possible. Please take a moment and look at your people list in the MTSBA database (see below for instructions). *We're finding many trustees have not been removed after they have either retired or lost an election.*

We rely on business managers/clerks to help us keep the MTSBA members up-to-date. You can use the instructions below to make changes or just contact us and we'll make your updates.

To make changes in MTSBA's current database:

Log into [mtsba.org](https://ams.embr.mobi/index.aspx?C=ZgfON), you'll find the link to eMembership on the top menu bar.

Quick link: <https://ams.embr.mobi/index.aspx?C=ZgfON>

- After logging in, you'll be taken to your district's main page.
- Click on people.
- To delete a person, click on the trash can next to the name.
- To edit, click on edit.
- You can go through the other tabs as well, making sure your district's information is correct.
- **It's important to make changes immediately if someone from your district quits or is terminated.** Mark the member inactive in the database immediately – especially if they have administrative access.

We appreciate your time with these updates! If you have questions, please don't hesitate to contact the MTSBA Communications Team - **Wendy** at wbrenden@mtsba.org or **Emily** at edean@mtsba.org or call (406) 442-2180.

THANK YOU for your commitment to Montana's students!

OFFICE OF PUBLIC INSTRUCTION

OCTOBER 1 STUDENT ENROLLMENT COUNT

[FY2019 Student Count for ANB Reporting](#) contains important information about the fall (October 1, 2018) and spring (February 4, 2019) enrollment counts. **Read the entire memo.** Some important items to note:

- ✓ Ensure that student enrollment, attendance on official count dates, aggregate hours, and student demographic information is accurate and up-to-date in the AIM system. You may need to coordinate with others in your district to make this happen.
- ✓ In MAEFAIRS, you will import the minimum enrollment information from the AIM system necessary to determine your district's Average Number Belonging (ANB) for the 2019-20 budget year.
- ✓ An explanation of the "10-day rule" is on page 4. If you need to request approval of a variance to the 10-day rule, you must submit your request to the OPI **prior to the count date.**
- ✓ Run a report that shows the American Indian students submitted in the fall enrollment count and review it for accuracy. The deadline to correct information is December 31, 2018.
- ✓ Click [here](#) to access the Reporting Instructions.

The Fall Enrollment count is due October 12, 2018.

TERMS OF EMPLOYMENT, ACCREDITATION AND MASTER SCHEDULE (TEAMS)

The annual TEAMS report consists of three collections:

- **Terms of Employment** - employment status of each employee of the district, including [position code](#), FTE portion, employment start and end dates, and full-time/part-time status.
- **Accreditation** - includes questions regarding compliance with the Montana School Accreditation Standards
- **Master Schedule** - includes the Teacher-Class data collection, which contains information on course catalog, and teaching assignments at the class level.

TEAMS HELP videos and other helpful links are found on OPI's [TEAMS webpage](#).

OPI TEAMS WORK SESSIONS - The TEAMS work sessions promise to help with every aspect of TEAMS from uploading, hand-entering or rolling over TOE and Teacher-Class records. The sessions are from 9:00 a.m. to 3:00 p.m. at various locations around the state in September and October. Click [here](#) to register (the list of dates and locations are found by clicking on the down arrow next to the word "Choose").

The Teams report is due November 1, 2018.



Broadband for Montana Schools

[House Bill 390](#) was passed in the 2017 Legislative Session and included an amendment to 20-9-534, MCA that directs \$1 million in each year of the biennium to the Montana Department of Commerce (\$2 million total) for funding to schools to use as a match for FCC E-rate program funds. The Broadband in Montana Schools Program enables schools to upgrade their broadband, boosting access to high-speed internet and providing students with more digital learning tools. The Broadband for Montana Schools Program matching funds are available for all Montana K-12 schools, including elementary schools, high schools, K-12 school districts, and consortiums of K-12 schools, as those entities are defined in Title 20, Chapter 6, MCA. **Applications will be accepted on a continuous basis until beginning August 1, 2017 and until May 1, 2019.** Click [here](#) to see the DOC's webpage, and contact them at DOCBroadband@mt.gov or call 406-841-2770 if you have any questions about the Broadband for Montana Schools Program.

PUPIL TRANSPORTATION

State and county reimbursement for pupil transportation to and from home and school is obtained by following a whole lot of rules and submitting the appropriate forms by the designated dues dates. Take note of the following information and resources that will help you maximize state and county funding for your district's program:

[Montana School Bus Standards](#) – contains just about everything you need to know to ensure that Montana's school buses remain the safest mode for transporting K-12 students to and from school, school activities, functions, and field trips every day.

Bus Inspections (Form TR-13)

First semester bus inspections should have been done and approved 30 days prior to the start of the semester. Ensure that a **Form TR-13 Bus Inspection** for each bus being driven on a route shows the date of inspection and approval box checked in the OPI Pupil Transportation system. Signed paper copies of Form TR-13 must be kept on file to verify inspection dates and approvals. Click [here](#) to see instructions for Form TR-13.

Bus Driver Qualifications - A driver of a school bus must have the following:

- ✓ is not less than 18 years of age;
- ✓ is of good moral character;
- ✓ is the holder of a commercial driver's license (CDL). A (CDL) with an School Bus "S" and Passenger "P" endorsement is required when a person who drives a school bus, or who transports pre-primary, primary, or secondary school students for school-related activity trips, field trips, and operating on an approved route, in a commercial motor vehicle. The "S" endorsement is required for any school bus, including 16 passengers and less, and 16 passengers and more. Drivers of school bus type E are not required to have a CDL license or endorsement.
- ✓ has filed with the district a satisfactory medical examination report, on a form approved by the U.S. Dept. of Transportation, signed by any physician licensed in the United States or, if acceptable to an insurance carrier, any licensed physician;
- ✓ has completed a basic first aid and CPR course, and holds a valid basic first aid and CPR certificate from an authorized instructor;
- ✓ has complied with any other qualifications established by the Board of Public Education, including [A.R.M. 10.64.201](#):
 - Have a minimum of five years of licensed driving experience;
 - no record of criminal offenses indicating 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;
 - a safe driving record, which may not have evidence of any of the following:
 - more than one moving traffic violation within any 12-month period of the preceding 36 months;
 - any conviction for driving under the influence of alcohol or drugs within the preceding 36 months; or a conviction resulting in mandatory revocation or suspension of a driver's license in the previous five years
- ✓ has filed with the County Superintendent a certificate from the Trustees of the district for which the school bus is to be driven, certifying compliance with the driver qualifications requirements (see Form [TR-35](#) instructions).

NOTE: A school bus driver TR-35 certificate remains valid until the earliest expiration date of the commercial vehicle operator's endorsement, the first-aid certificate, and physical examination. A new TR-35 certificate must be issued to the driver when any of the above items expires and is renewed. **File Form TR-35 electronically via the OPI Pupil Transportation system for each driver.**

Bus Routes (Form TR-1)

A TR-1 form must be completed by the board of trustees for each approved bus route in the district.

By November 1, send one copy of a TR-1 for each route to the county superintendent and submit the information for each route electronically to the OPI via the Pupil Transportation system. Click [here](#) to see instructions for Form TR-1, including how to rollover the previous year's routes into the new year. **By November 10**, the county superintendent must electronically approve each TR-1 form.

Individual Transportation Contracts (Form TR-4)

A TR-4 form must be completed by the board of trustees for each approved individual transportation contract (ITC) in the district. **By July 1**, one copy of a TR-4 for each ITC should have been sent to the county superintendent and electronically submitted to the OPI via the Pupil Transportation system. **By October 1**, the county superintendent must electronically approve each TR-4 form. For individual contracts needed after the start of the school year, process the TR-4 forms (approval by trustees, copy to county superintendent and electronically submit via the OPI Pupil Transportation system) as soon as possible.

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 Theresa 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 – OCTOBER 2018

OCTOBER 1

TR-4 Individual Transportation Contracts	By October 1, or as received from the district, the county superintendent must electronically verify the County Transportation Committee's receipt of each transportation contract to the Superintendent of Public Instruction.	Regulations & Guidelines for Pupil Transportation Reporting A.R.M. 10.7.106 (13)
Fall Enrollment Count Date	<p>The official fall count day is Monday, October 1, 2018. <i>MAEFAIRS Student Count for ANB must be submitted <u>no later than October 12, 2018.</u></i></p> <p>Extenuating circumstances for students who will be gone 10 days prior to the count date, but which would support a variance <i>should be submitted to the OPI prior to the official enrollment count date</i> for consideration of inclusion of the student in the enrollment count for ANB purposes beyond the 10th day of absence.</p> <p>Students identified as American Indian in the AIM system at the time the data is imported into the MAEFAIRS fall count will generate funding for the Student Achievement Gap (SAG) payment in the ensuing year. <u>Deadline for changes/corrections is December 31.</u></p>	<p>A.R.M. 10.20.102 ANB Memo Reporting Instructions Step-by-Step Student Count for ANB Instructions</p> <p>A.R.M. 10.20.102(10)</p> <p>A.R.M. 10.21.204</p>

OCTOBER 10

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.	Montana Agreement and Payment System (MAPS) log in page School Nutrition Programs Checklist Reimbursement rates for FY2019 FY2019 School Nutrition Payments
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

OCTOBER 15

<p>Workers' comp and unemployment insurance reports are due for 3rd quarter payroll</p>	<p>If your district is a member of WCRRP, the workers comp report for 3rd quarter payroll (July, August, September) is due on October 25. If your district uses a different carrier for workers' comp, check with the carrier for the report due date.</p> <p>If your district is a member of MTSUIP, the unemployment insurance report for 3rd quarter payroll is due.</p>	<p>http://www.msgia.org/home</p> <p>http://www.mtsuip.org/</p>
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IMPORTANT DATES & DEADLINES – OCTOBER 2018

OCTOBER 20

Last day to liquidate funds for Project AWARE grant and Final Expenditure Report is due

Last day to liquidate funds for Project AWARE Mental Health grant. Cash requests and final expenditure reports is also due.

[OPI Email 5/21/2018 Grant Deadlines](#)

OCTOBER 25

Grant cash request due to OPI

Grant cash requests made by this date will be paid on November 10.

[OPI State and Federal Grants Handbook](#)

OCTOBER 26

OPI makes K-12 BASE aid payments

Direct State Aid
Quality Educator Component
At Risk Student Component
Indian Education for All
Student Achievement Gap
(SPED) State Special Education Payments
~~*(TECHF) Technology Funding~~
~~** (D4A) Data for Achievement~~
~~*** (NRD) Natural Resource Development~~

[FY2019 Payment Schedule](#) (scroll to bottom of page
[State School Payments](#)

~~* Redirected as per HB390~~
~~** Eliminated for FY2019 per SB261~~
~~*** Redirected as per HB647~~

OCTOBER 31

Last day to liquidate funds for grant projects ending September 30, 2018

Last day to liquidate funds for projects that end September 30.

- 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](#)



"Here's your problem—it looks like you're paying attention to what's going on."

IMPORTANT DATES & DEADLINES – OCTOBER 2018

OCTOBER 31 (continued)

Form 941 for Quarter 3 payroll is due.	Form 941 payroll report for Quarter 3 (July, August, September) is due.	Form 941 (form) Form 941 (instructions)
Perkins grant applications due	Obtain final OPI approval of your district's initial Perkins application in E-Grants by October 31.	CTE Calendar for FY2019

RESOURCES TO SHARE WITH YOUR EMPLOYEES

2018 MFPE Pre-retirement Workshops

No matter where you are in your career — just starting out, mid-career, or nearing retirement — you need to understand your retirement system plan, benefits, and options. The earlier you begin, the better! Here's a perfect place to start:

- MFPE members and spouses are invited, including those in the Montana Public Employees' Retirement System (PERS) and Teachers' Retirement System (TRS).
- Get easy-to-digest information on your PERS and TRS plan. Learn about the status of your guaranteed annual benefit adjustment (GABA).
- Representatives from TRS and PERS will give overviews of your retirement benefits and procedures and answer your questions.
- MFPE staff will facilitate the workshops and provide a brief introduction to the MFPE Retired program and NEA and AFT+ Plus Member Benefits programs.
- 1 OPI Renewal Unit available. Light snacks provided.

Questions? E-mail Diane Fladmo of MFPE: dlfadmo@mfpe.org

Workshop schedule - (All sessions take place 4:30 – 6:30 p.m., except the Billings session, see MFPE Educator Conference for times and location.)

- September 27 Havre High School Auditorium (TRS Only)
- October 4 Helena Middle School Auditorium
- October 9 Butte High School Commons
- October 10 Corvallis High School Library
- October 19 Billings – MFPE Educator Conference
- November 7 Poplar High School Auditorium

Tax Cuts and Jobs Act (TCJA)

As the IRS implements this major tax legislation, check [this page](#) for updates and resources to learn how the Tax Cuts and Jobs Act (TCJA) affects individual taxpayers.



The new tax law could affect how much your employer should withhold from your paycheck. Visiting the IRS Withholding Calculator now will help prevent you having too little or too much withheld from your paycheck.

www.irs.gov/withholding

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
Edie Barnard Edie.barnard56@gmail.com	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com	Bruco, Inc. Adam Uselman, V.P.-C.O.O. adambruco@gmail.com
D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	Fellon Insurance Services Dale Fellon fellonins@msn.com	Foxie Lady Computers, Inc. David Bardwell foxieladycomputers@gmail.com
Frontline Technologies Peter Lane plane@frontlineed.com	Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com
Insurance Management Services of MT John R Boyer john@imsvest.com	Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com	Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com
Montana Public Employees Retirement Administration Jenny Weigand jweigand@mt.gov	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org	Montana Schools Unemployment Insurance Program (MTSUIP) Theresia LeSueur tlesueur@mtsba.com
Montana Unified School Trust Andy Holmlund aholmlund@ms-sf.org	National IPA and TCPN Shelley Andrews shelley.andrews@nationalipa.org	New Hope Technology Foundation John Hughes, Senior Consultant john@newhopetech.org
Payne West, Inc./MSPLIP Dave Pillatzke dpillatzke@paynewest.com	Pine Cove Consulting Brandan Bassett bbassett@pinecc.com	Rudd & Company, PLLC Julie Kostecky, CPA, CVA jkostecky@ruddco.com
Schoolhouse IT Jeffrey Patterson jeffp@schoolhouseit.com	Southwest MT School Services Thomas Franta tfranta@swmss.coop	Stifel Nicolaus Bryan Stelmack yroybal@stifel.com
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Be Sure of the Cure

How to steer clear of mistakes

Most of us take some type of medicine, whether prescribed by a doctor or bought over-the-counter (OTC). Drugs can help us live more comfortably with pain. They can also help ease the signs of short-term and ongoing sickness. But medicine can become a problem if not taken the right way. Mistakes with drugs can happen at home, your doctor's office, the drugstore or the hospital.

An Unhealthy Dose

Unplanned problems caused by taking medicine the wrong way are on the rise. Reports show that drug overdose, mostly from certain pain medications ordered by doctors, cause 93 percent of unintended poisoning deaths. To stay safe when taking medicine, consider these tips:

- Know what you take and keep a list of the names and the doses. Write down drugs that are ordered by the doctor, OTC drugs, and supplements and herbs.
- Always take medicine as prescribed and don't share with others.
- Take your medicine in good lighting to make sure you get the right dose.
- Take your medicine list to doctor visits to make sure you don't mix drugs that react badly with other things you're taking.
- Ask your doctor or pharmacist about any known side effects from the drugs you are taking.
- Keep drugs in the holder they came in.
- Throw away drugs that you no longer need or that have passed the date they are still good.
- Be in charge of all drugs used for children and teens.

The best cure for mistakes is making sure you always follow orders when taking medicines.



BlueCross BlueShield
of Montana

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Find us on Facebook @MUSTbenefits

mustbenefits.org
bcbsmt.com