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## School Finance



### **Welcome Dennis Clague**

The OPI School Finance Division is pleased to announce that Dennis Clague has joined the School Finance Division as our new School Finance Specialist Supervisor. Dennis comes to the OPI, highly recommended, from Nampa, Idaho. He has over six years of experience in school finance budgeting and accounting. Dennis is a proud Butte native and a graduate of the U of M. He also has three sons. Welcome Dennis!

### **Welcome Steve Hamel**

The OPI School Finance Division is pleased to announce that Steve Hamel is our new School Finance Specialist responsible for accounting, auditing and TFS reporting. Steve's education and extensive experience as the business manager in Chester for over 21 years will be great assets to the School Finance Division. Steve has been with the Great Falls school district business office since April as the lead business technician. Steve has two sons: Will, age 22 and Michael, age 18. Both are studying engineering at Montana State University. Welcome Steve!

### **REPORT GRADE RANGE CHANGES TO OPI**

Has your district made grade range changes (i.e., was PreK – 2 last year but serving PreK – 4 this year) in your schools for the 2012-13 school year? If so, please communicate these changes to the OPI as soon as possible. The changes must be made in the OPI Central database to ensure proper set up in the AIM, E-Grants and MAEFAIRS systems.

Please send a copy of the board meeting minutes approving the grade range changes or have the superintendent submit a written notice of the changes on district letterhead to Nica Merala at [nmerala@mt.gov](mailto:nmerala@mt.gov). You can also fax the information to (406) 444-0509 or mail to P.O. Box 202501, Helena MT 50620-2501.

For more information, please contact Nica Merala (406) 444-4401 or [nmerala@mt.gov](mailto:nmerala@mt.gov).

### **MAEFAIRS OPEN FOR TFS AND BUDGET REPORTING**

The MAEFAIRS web application is available to report information for the FY2011-12

Trustees Financial Summary (TFS) and FY2012-13 Budget. Click on this link to access the program:

<https://data.opi.mt.gov/Maefairs/frmLogin.aspx>

**NOTE:** For help logging into MAEFAIRS, please contact Mary Graff at (406) 444-3448 or [mgraff@mt.gov](mailto:mgraff@mt.gov).

The following documents are posted on the OPI website to help you during the reporting process:

MAEFAIRS Tip Sheet: [CLICK HERE](#)

TFS Instructions: [CLICK HERE](#)

Budget Instructions: [CLICK HERE](#)

For more information about Budgets, please contact Dennis Clague, (406) 444-1960 or [dclague@mt.gov](mailto:dclague@mt.gov).

For more information about the TFS, please contact or Steve Hamel. (406) 444-0783 or [shamel@mt.gov](mailto:shamel@mt.gov).

## COUNTY AND SCHOOL DISTRICT BUDGET TIMELINES

- Between **July 1** and **August 10**: District Clerk publishes one notice of date, time and place of budget meeting.
- By **August 6**: Dept. of Revenue delivers taxable valuation information to county superintendent.
- Before **August 13**: County superintendent computes revenue available to finance the transportation budget.
- Not later than **August 15**: Trustees deliver TFS to the county superintendent.
- On or before **August 15**: TFS reports for joint school districts must be submitted to the county superintendent of each county in which part of the joint district is situated.
- **August 15**: County superintendent receiving the budget of a joint district prepares FP-8a. Non-located county submits information to located county.
- On or before **August 20**: Trustees meet to consider all budget information and any attachments required by law.
- Not later than **August 25**: Trustees adopt final budget.
- Within **3 days** after approval of final budget: Trustees deliver adopted budget to the county superintendent.
- On or before **August 25**: County superintendent in located county prepares FP-8b and submits to county superintendent in non-located county.
- By the **later of the September 4** or within **30 calendar days after receiving certified taxable values**: County superintendent reports levy requirements and places the final adopted school budgets before the county commissioners.
- By the **later of the September 6** or within **30 calendar days after receiving certified taxable values**: County commissioners fix tax levies.

- On or before **September 15**: TFS and final adopted budgets are due to OPI.

For more information, please contact Dennis Clague, (406) 444-1960 or [dclague@mt.gov](mailto:dclague@mt.gov).

### **FY2012-13 1<sup>st</sup> SEMESTER TR-13 BUS INSPECTIONS**

The Montana Highway Patrol must inspect all school buses used to transport students 30 days prior to the beginning of the first semester. If they fail inspection, the buses must be reinspected before the beginning of the school year.

Pre-printed TR-13 bus inspection forms are available by logging into the Pupil Transportation Data Entry program located at [CLICK HERE](#) under the Reports menu. To enter the inspection date and approval, go to the Data Entry menu and click on TR-13 Bus Inspection. Districts are encouraged to download the instructions for entering bus inspection information from the following link: [CLICK HERE](#).

For more information, contact Donell Rosenthal, (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **BUS DRIVER TRAINING REQUIREMENTS – 10 HOURS PER YEAR**

Standards adopted by the Board of Public Education in 2002 require a minimum of 10 hours of training for school bus drivers each year. This includes substitute bus drivers. Each district must design and implement a training program using the guidelines and requirements found in the 2002 Yellow School Bus Standards (see [CLICK HERE](#)).

OPI has a variety of videos on bus driving techniques and bus safety issues that are available for district use. The video listing and various bus driver training opportunities across the state are listed at [CLICK HERE](#) (click on Training on the left side of the page).

For more information, contact Donell Rosenthal, (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

**New programming to the Pupil Transportation Program effective for the FY2012-13 school year.** This programming will affect the submission and approval of TR-1's, TR-35's, TR-4's, TR-5's & TR-6 Reports. (MCA 20-10-145 and ARM 10.7.101)

The new programming is as follows:

- (1) New validations have been added which will prevent districts from submitting their TR-6's if any TR-1's and TR-35's have not been marked "Received" by the County Superintendent.
- (2) Districts also will not be able to submit their TR-5's if there are any TR-4's that have not been marked "Received" by the County Superintendent.
- (3) All TR-5 and TR-6 Claim Reports will require approval by the County

Superintendent in order to be paid state and county reimbursement.

Failure to follow the receipt and approval process of these reports will have an effect on state and county reimbursement for 1<sup>st</sup> and 2<sup>nd</sup> semesters.

Please watch for reminders that are sent out through the Pupil Transportation Program.

Please contact Donell Rosenthal for any questions at (406) 444-3024 or email [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **TRAFFIC EDUCATION FY 2011-12 REIMBURSEMENT**

The FY2011-12 Traffic Education (TE) reimbursement will be sent to county treasurers in August. School districts that offered state approved TE programs during the 2011-12 school year will be reimbursed approximately \$105 per TE student. Traffic Education reimbursement funds come from a percentage of driver license fees which partially offset district costs. A payment report will be posted on the OPI website at this link: [CLICK HERE](#).

Please contact Fran Penner-Ray, (406)444-4432 or [fmailto:fpenner-ray@mt.gov](mailto:fpenner-ray@mt.gov).

### **Compensation Expenditure Reporting under 20-7-104, MCA**

Please review the information update at the following link: [CLICK HERE](#)

### **RESOURCES AVAILABLE ON IRS WEBSITE**

The Internal Revenue Service (IRS) has a section of information resources for federal, state and local government employers. Click on this link [CLICK HERE](#) and check out their newsletter, fact sheets and FAQs on various topics of interest.

### **SCHOOL FINANCE DIVISION**

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**Kathleen Wanner** [kwanner@mt.gov](mailto:kwanner@mt.gov)

### **USEFUL LINKS**

*State Entitlement Payments to Schools:*

[CLICK HERE](#)

*School Accounting:*

[CLICK HERE](#)

*Forms and Publications & Tuition:*

[CLICK HERE](#)

*Pupil Transportation:*

[CLICK HERE](#)

*Student Count for ANB:*

[CLICK HERE](#)

*Audit Information:*

[CLICK HERE](#)

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