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Montana
Office of Public Instruction
Denise Juneau, State Superintendent

School Finance



FY 2013 Salary and Compensation Expenditure Reporting

The deadline for submitting the FY 2013 Salary and Compensation Report to OPI was December 16, 2013. Thank you to the 321 school districts and special education cooperatives that have submitted this report. If your district is one of the 110 school districts or special education cooperatives that has not submitted the information, please complete the task as soon as possible. The information is necessary in order to comply with the Transparency and Public Availability requirements pursuant to 20-7-104, MCA. Salary and Compensation Expenditure Reports may be accessed at the following link: [CLICK HERE](#)

For questions or assistance, contact any of the individuals below:
Steve Hamel at (406) 444-0783 or shamel@mt.gov
Paul Taylor at (406) 444-1257 or ptaylor@mt.gov
Janelle Mickelson at 444-3249 or jmickelson@mt.gov

FY 2013 Federal A-133 Audits Due March 31, 2014

A-133 "Federal" audits for FY2012-13 are due to the OPI by **March 31, 2014**. This affects districts and cooperatives that spent more than \$500,000 of federal money (including USDA commodities) during FY2012-13.

For districts and cooperatives that spent less than \$500,000 of federal funds and received more than \$500,000 of revenue under all sources during that year, audits for FY2012-13 are due **June 30, 2014**.

OPI contact: Steve Hamel at (406) 444-0783 or shamel@mt.gov

FY2014 Budgets and FY2013 Trustee Financial Summaries

FY2014 Budgets and FY2013 Trustee Financial Summaries have been posted on the OPI School Finance website. The Budgets may be accessed at the following link: [CLICK HERE](#)

The Trustee Financial Summaries may be accessed at the following link: [CLICK HERE](#)

OPI contact: Debbie Casey at (406) 444-3096 or dcasey@mt.gov.

FY 2015 Indirect Cost Rate Applications Now Available

Districts that plan to charge indirect costs (e.g., general administration, accounting services, and personnel services) to FY 2015 federal and state grant awards using an indirect cost rate must complete an indirect cost application form. Application for an indirect cost rate *does not* increase the amount of the grant award.

Indirect Cost Rate Application forms and resources for FY 2015 are now available on the OPI website.

Indirect Cost Rate Cover Letter (please read): [CLICK HERE](#)

Indirect Cost Rate Instructions: [CLICK HERE](#)

If you intend to reclassify costs to adjust your indirect cost rate, please read the indirect cost rate instructions carefully. For your convenience, costs that may be reclassified are highlighted in blue. We have also created a reclassification calculator to assist in the determination of your adjusted indirect cost rate. The calculator is located at the following link: [CLICK HERE](#)

Schedule A, which shows preliminary rates: [CLICK HERE](#)

The Certification forms are located at: [CLICK HERE](#)

If you have questions or need assistance viewing the files, please contact Debbie Casey at (406) 444-3096 or dcasey@mt.gov.

If you have questions about how to complete the indirect cost rate application, please contact Paul Taylor (406)444-1257 or ptaylor2@mt.gov or Debbie Casey, (406)444-3096 or dcasey@mt.gov.

FY 2014 First Semester Transportation Claim Forms Due

By **February 15, 2014**, school districts must electronically submit first semester transportation claim forms TR-6 Bus Route Reimbursement and TR-5 Individual Transportation Contract Reimbursements to the OPI online Pupil Transportation Program. In addition, a hard copy of each claim form must be signed by the board chair and submitted to the county superintendent. A copy of the signed claim form

must be maintained at the district.

By **February 22, 2014**, the county superintendent must electronically authorize each district's TR-5 and TR-6 for the first semester.

Upon receipt of the electronic claims and authorization, OPI will verify and disburse the approved amount of state reimbursement for first semester transportation. Payments will be made on **March 28, 2014**. Upon receipt of the electronic state payment report, the county superintendent orders the payment of the county reimbursement for first semester transportation on the basis of the state reimbursement.

OPI contact: Donell Rosenthal, (406) 444-3024 or drosenthal@mt.gov

School Elections

The deadline for districts to request a mail ballot election from the Secretary of State's Office is **Tuesday, February 25th**. Districts must have their election plan/timetable/sample instructions submitted to the Secretary of State's office **no later than Friday, March 7th**.

If your district is considering a mail ballot election for the upcoming trustee election in May, please keep these dates in mind!

OPI Contact: Nicole Thuotte, (406) 444-4524 or nthuotte@mt.gov.

District Classification

The County application is now open for external reporting. The County application will collect district classification, which is based on the most recent district population data available, and determines the number of trustees a district should have, the number of nomination signatures required (20 in a first class district and 5 in both second and third class districts), and the requirements to submit campaign finance information to the Montana Commissioner of Political Practices (first class district, county population greater than 15,000 and campaign expenditures and/or revenues greater than \$500).

County Superintendent's with current access to MAEFAIRS and/or Transportation will use their same username and password to access the County application. County Superintendents may request additional users to enter District Classification data by contacting Debbie Casey at (406) 444-3096 or dcasey@mt.gov. Click on the following link to log into the County application: [CLICK HERE](#)

District clerks may assist their county superintendent by completing a data form for

their district(s) and sending it to their county superintendent. The form is located under Basic Election Forms/Election Administrator: CLICK [HERE](#)

The deadline for entering district classification data has been extended to **February 10, 2014**. The OPI will publish a final report showing which districts are required to file with the MCPP based upon the data entered.

OPI contact: Nicole Thuotte at (406) 444-4524 or nthuotte@mt.gov

Impact Aid

Impact Aid applications were due to the Department of Education by **January 31, 2014**. Late applications will be assessed a 10% late payment penalty. Once your application has been submitted, please forward a copy to the Office of Public Instruction (OPI) for review. If there are enrollment discrepancies with your application, OPI will contact you to discuss your application.

Recent legislation has increased the amount of Impact Aid dollars available to districts. Any additional payment, up to 80% of LOT for FY 2014, should be available in the next couple of months.

OPI contact: Nicole Thuotte, (406) 444-4524 or nthuotte@mt.gov.

TEAMS Opened January 6, 2014

The Terms of Employment, Accreditation, and Master Schedule (TEAMS) data collection system opened on January 6, 2014. TEAMS replaces the former Annual Data Collection (ADC) system.

Public school districts, special education cooperatives, nonpublic accredited schools, Montana state funded schools, and residential treatment facilities have seven weeks to enter the information required for the Office of Public Instruction (OPI) to accredit schools and provide the necessary information for federal and state reporting. TEAMS will close at **11:59pm on February 21, 2014**.

The TEAMS User Manual and Reference Guide, along with instructional videos, are available on the [OPI School Staffing webpage](#).

Contact the OPI TEAMS Help Line at OPITEAMS@mt.gov with questions about TEAMS, the data the OPI is collecting, or the data collection process.

OPI contact: Danielle Murphy, (406) 444-9444 or dmurphy@mt.gov

TEAMS Question and Answer Presentation

The final TEAMS Question and Answer session via Adobe Connect will be held Tuesday, February 11, 2014, from 10 am to noon.

You are encouraged to tune into the session, bring your questions to the "chat" section of Adobe Connect, or email them ahead of time to ebenoit@mt.gov.

Adobe Connect is a web-based program that does not require any special equipment. All you need is your computer, internet access, and a speaker through which to hear the audio.

The link to the Q&A is: <http://connect.opi.mt.gov/teams>. Enter as Guest and sign in with your school name.

OPI contact: Danielle Murphy, (406) 444-9444 or dmurphy@mt.gov

2014 OPI Title I Conference

Registration is now open for the 2014 OPI Title I Conference. This year's conference will be held in Billings, MT, at the Holiday Inn Grand hotel. The dates are April 23-24, 2014. Registration for the conference is \$125 which includes a light, continental breakfast and full lunch each day. This year's keynote address will be by Aric Bostick, nationally known motivational and educational speaker. Registration for the conference will close April 16, 2014. A block of rooms has been set aside at the hotel for the conference. If you have further questions, please contact the Title I unit at the OPI.

OPI contact: Shawna Pieske, (406)444-5660 or spieske@mt.gov

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 <http://www.irs.gov/govt/fslg/article/0,,id=96062,00.html> and check out their newsletter, fact sheets and FAQs on various topics of interest.

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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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