



District Superintendent Training

Office of Public Instruction | Presented by School Finance Division

Putting Montana Students First **A+**

Agenda

- Website areas of interest
 - OPI
 - Public Charter Schools
 - School Trustee Repository
 - School Finance Website
 - Understanding School Finance
 - School Finance Budget Website
 - State School Payments
 - Auditing
 - Tuition & Attendance
 - OPI Compass
- Authorized Representative
- Access request information
 - Information for District Superintendents
 - OPI Secure Portal
 - Updating Contacts

Note: Underlined,
blue text
throughout this
presentation is a
link!



OPI WEBSITE REVIEW

- OPI main page
- School Trustee Repository
- Charter Schools



Montana Office of Public Instruction Homepage: [OPI.mt.gov](https://opi.mt.gov)

Click on the OPI Logo on any OPI webpage to return to this homepage



PUTTING MONTANA STUDENTS FIRST



Search...

[Families & Students](#) [Educators](#) [Leadership](#) [Directory](#)

Use the search bar to find what you need

Montana Office of Public Instruction

Welcome to the
Office of Public Instruction

BUDGET & EDUCATION WORKING GROUP

LOOK FOR: IMPORTANT DATES

COMMUNITY CHOICE SCHOOLS

PUBLIC CHARTER SCHOOLS

Browse through the menu to locate pages

Scroll down for videos, helpful information, links and more



OFFICE OF THE
SUPERINTENDENT

Superintendent Elsie Arntzen is proud to serve our Montana families, students, and teachers. **Families are the foundation of learning as our parents are our first teachers.** Our students are our most precious resource and the future of this great state. As a teacher of 23 years, the Superintendent knows the importance of quality educators in the classroom and is working to ensure Montana teachers have the flexibility needed to put our Montana students first.

The Montana Office of Public Instruction (OPI) is charged with the responsibility of providing technical assistance in:

- School Finance
- School Law
- Teacher Certification and Licensing
- School Accreditation
- Teaching and Learning Standards

The OPI staff administer a number of federally funded programs and provide a variety of information services, including the information systems necessary to assess student achievement and the quality of Montana's elementary and secondary school systems.

- › School Trustee Repository
- › Parent Resources
- › School Leadership Support
- › Enrichment Courses for Educators and Support Staff
- › ESSA Report Card
- › Education Savings Account (ESA)
- › 2024 Teacher of the Year
- › Meet the Executive Staff
- › OPI Organizational Chart
- › OPI Annual Plan
- › See OPI Press Releases

Quick links for current, priority items



Putting Montana Students First **A+**

Trustees

List of current school trustees. [Select a county to filter system names.](#)

County

System

[Show Report](#)

Trustee information is updated by your District Clerk in the OPI Secure Portal

Trustees

List of current school trustees. [Select a county to filter system names.](#)

[Return To Criteria Selection](#)

School System Name	Website	Trustee Name	Email	phone	TermStart	TermEnd	Clerk Name	Clerk Email	Clerk Phone
Yaak Elementary	yaakschool.org	David Gambill	dgambill@yaakschool.org	(406)295-7515	05/17/2022	05/17/2025	D'Rae Hammond	schoolclerk@yaakschool.org	(406)295-9311
Yaak Elementary	yaakschool.org	Kenneth Royal	kroyal@yaakschool.org	(406)295-9311	06/19/2024	05/30/2025	D'Rae Hammond	schoolclerk@yaakschool.org	(406)295-9311
Yaak Elementary	yaakschool.org	Pamela Fuqua	pfuqua@yaakschool.org	(406)295-6007	05/22/2024	05/22/2027	D'Rae Hammond	schoolclerk@yaakschool.org	(406)295-9311
Zurich Elementary		Isaac Drugge	jffarmandranch@gmail.com	(406)357-2159	05/09/2022	05/09/2025	Deanna Gilmore	dgilmorezurich@gmail.com	(406)357-4164
Zurich Elementary		Jamie MacLeod	jay-macleod@hotmail.com	(406)357-2604	05/16/2024	05/12/2027	Deanna Gilmore	dgilmorezurich@gmail.com	(406)357-4164
Zurich Elementary		L G Miller	dancingmoonranch@gmail.com	(406)357-3614	05/11/2023	05/11/2026	Deanna Gilmore	dgilmorezurich@gmail.com	(406)357-4164

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[Create Excel Spreadsheet](#)

Charter Schools

Welcome, Public Charter Schools!

Newly approved public charter schools will need to notify OPI in order to begin the school opening process. Below, find a fillable form, including a guidance document, in order to facilitate the school opening process and ensure your school receives the proper funding and programmatic support. If you are looking for the Community Choice School Page [click here](#).

- [Public Charter Applications for 2025-2026 school year are now available!](#)
Applications are due November 1, 2024. Find application materials [here](#).
- [Guidance document](#) for new public charter schools.
- [Fillable form](#) for new public charter schools.

JOIN US!

- **Community Discussion on Public Charter Schools:**
February 28, 2024 7:00 pm ([Recording here](#))
- **OPI Webinars for new Public School Charters:**
 - February 29, 2024 at 10:30 am ([link](#)) | [Agenda](#) | [Recording](#)
 - March 20, 2024 at 4:00 pm ([link](#)) | [Agenda](#) | [Recording](#)

QUESTIONS:

School finance? [Contact School Finance](#)

Programs questions? Contact our [Chief Program Officer](#)

Assessment questions? Contact our [State Assessment Director](#)

Accreditation questions? Contact our [Accreditation Team](#)

AIM/Data questions? [Contact the AIM unit](#)

Congratulations Charter Schools

Billings Early College
Billings Multilingual Academy
Billings Opportunity School
Bozeman Bridger Charter
Corvallis Distance Learning Center
Corvallis Pathways Learning Center
East Helena 227 Academy
Frenchtown Broc Fast Track Public Charter
Great Falls CORE School at Morningside Elementary
Hamilton Bitterroot Polytech
Helena Montessori Charter
Helena Mount Ascension Learning Academy
Helena Project for Alternative Learning
Kalispell Flathead PACE Academy Charter
Kalispell Rising Wolf Charter
Missoula Connect Academy
Missoula Teach Academy

These Public Charter Schools
are on track to open for the
2024-2025 school year!

SCHOOL FINANCE WEBSITE REVIEW

- Understanding School Finance
- School Finance Budget Website
- State School Payments
- Audit
- Tuition & Attendance
- OPI Compass



School Finance Webpage

Go to: [OPI>Leadership> School Finance](#)

The screenshot displays the Montana Office of Public Instruction (OPI) website. The header features the OPI logo with the text "OFFICE OF PUBLIC INSTRUCTION" and "PUTTING MONTANA STUDENTS FIRST". A search bar is located in the top right corner. Below the header, there are navigation tabs for "Families & Students", "Educators", "Leadership", and "Directory". The "Leadership" tab is selected, and the "School Finance" link is highlighted within the "Finance & Grants" category. The "School Finance" page lists various resources and links, including "Administrators Professional Learning", "After School Programs", "Every Student Succeeds Act (ESSA)", "Executive & Teacher Leadership Academies", "Montana Advanced Opportunities", "Federal Programs", "Transformational Learning", "Assessment & Accountability", "Educator Licensing & Preparation Task Forces", "Educator Preparation", "Montana Aligned to Standards Through-Year", "School Accreditation", "Statewide Testing", "Data & Reporting", "Access OPI Reporting Systems", "AIM-Achievement in Montana", "CSPR", "Find & Request Data", "Data and Research", "GEMS Data Warehouse", "Privacy & Data Governance", "Youth Risk Behavior Survey", "Finance & Grants", "District Travel Reimbursements", "E-Grants", "Elections", "Legislative Updates", "School Finance", "School Nutrition Payments", "Management & Operations", "Emergency Planning & Safety", "Legal Division", "Montana Schools Directory", "Office of the Superintendent", "OPI Secure Portal", "School Innovation, Flexibility & Efficiency", "School Nutrition", "IT Resources for Schools - Programs & Grants", and "OPI Communication", "Education Advocates", "MASS Resources", "OPI Email Communication", "OPI Monthly Compass", "OPI Navigator", "OPI Productions", and "Subscribe to Emails".

OFFICE OF PUBLIC INSTRUCTION
PUTTING MONTANA STUDENTS FIRST

Search...

Families & Students **Educators** **Leadership** **Directory**

School Finance

Academic Success

- Administrators Professional Learning
- After School Programs
- Every Student Succeeds Act (ESSA)
- Executive & Teacher Leadership Academies
- Montana Advanced Opportunities
- Federal Programs
- Transformational Learning

Assessment & Accountability

- Educator Licensing & Preparation Task Forces
- Educator Preparation
- Montana Aligned to Standards Through-Year
- School Accreditation
- Statewide Testing

Data & Reporting

- Access OPI Reporting Systems
- AIM-Achievement in Montana
- CSPR
- Find & Request Data
- Data and Research
- GEMS Data Warehouse
- Privacy & Data Governance
- Youth Risk Behavior Survey

Finance & Grants

- District Travel Reimbursements
- E-Grants
- Elections
- Legislative Updates
- School Finance**
- School Nutrition Payments

Management & Operations

- Emergency Planning & Safety
- Legal Division
- Montana Schools Directory
- Office of the Superintendent
- OPI Secure Portal
- School Innovation, Flexibility & Efficiency
- School Nutrition
- IT Resources for Schools - Programs & Grants

OPI Communication

- Education Advocates
- MASS Resources
- OPI Email Communication
- OPI Monthly Compass
- OPI Navigator
- OPI Productions
- Subscribe to Emails

FUNDING & SUPPORT

SCHOOL FINANCE

MAEFAIRS RELEASE

School Finance Webpage

Go to: [OPI>Leadership> School Finance](#)

Welcome to School Finance

We hope you like the new look and find it easier to navigate. We are here to help, so if you are having difficulty finding what you need please let us know.

School Finance email

OPI Staff are here to help:
Contact us at OPISchoolFinance@mt.gov



- School Finance Information
- School Finance Application Resources

School Finance team
information and contact
details

MEET THE TEAM

Notice: Do not send files to group emails (individuals only). Please do not email any student personally identifiable information (PII), including names or student IDs, to the OPI or AIM Help Desk. Please call AIM Support directly for assistance with individual student PII or use ePass MT for the secure transfer of larger student data files.

Transfer Service for
document submissions

MONTANA FILE TRANSFER SERVICE

Important School Finance News and Updates

EMERGENCY SCHOOL CLOSURES

BOARD OF TRUSTEE REPORTING
DUE 14 DAYS FOLLOWING OATH TAKING

Current School Finance
news and Updates

- About School Finance
- Accounting
- Auditing
- Budgets
- County
- Elections
- ESSA Per Pupil
- Impact Aid
- OPI Financial Data Files
- Pupil Transportation
- School Open/Close/Change
- Session History
- State School Payments
- Student Count ANB
- Tuition & Attendance
- Webinars

Auditing information

Legislative session
history and summaries



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School Finance Webpage

Go to: [OPI>Leadership> Finance & Grants> School Finance> School Finance Information](#)

OPI Staff are here to help:
Contact us at OPISchoolFinance@mt.gov.



Important School Finance News and Updates

MAEFAIRS - OPEN OFFICE HOURS

MAEFAIRS RELEASE

EMERGENCY SCHOOL CLOSURES

BOARD OF TRUSTEE REPORTING
DUE 14 DAYS FOLLOWING
OATH TAKING

OPI COMPASS

Understanding
Montana School
Finance

▼ School Finance Information

[OPI \(GEMS\) Data Collections Calendar](#)

[School Data Error Correction Request Form](#)

[Understanding Montana School Finance - Winter 2023](#)

[School District Closures - Unforeseen Emergencies](#)

► School Finance Application Resources

► About School Finance

► Accounting

Putting Montana Students First **A+**



Understanding Montana School Finance And School District Budgets



MONTANA OFFICE OF PUBLIC INSTRUCTION
DECEMBER 2023

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Putting Montana Students First **A+**



School Finance / Budgets

Go to: [OPI>Leadership>Finance & Grants>School Finance>Budgets](#)



- › School Finance Information
- › School Finance Application Resources

MEET THE TEAM

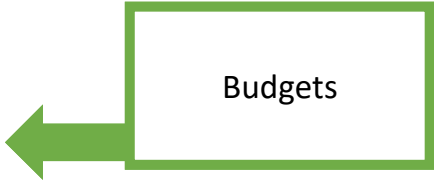
MAEFAIRS RELEASE

EMERGENCY SCHOOL CLOSURES

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OPI COMPASS

- › About School Finance
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- › Budgets
- › County



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Budgets

[Return to School Finance Homepage](#)

Budget Quicklinks

Maefairs Login

- ▶ Budget Reports
- ▶ Budget Spreadsheets & Guidance
- ▶ Budget Timeline
- ▶ Preliminary Budget Data Reports



Budget Quicklinks

Maefairs Login

▶ Budget Reports

Historical Reports

▼ Budget Spreadsheets & Guidance

- [FY2025 Budget Instructions](#)
- [FY2025 General Fund Budget Spreadsheet](#)
- [FY2025 General Fund Budget Overview Worksheet](#)
- [Budget Amendment Packet](#)
- [Significant Enrollment Increases](#)
- [Transportation Budgeting Worksheet](#)
- [Technology Fund levy Spreadsheet](#)
- [Projecting General Fund Reserves](#)

Other helpful
worksheets and
information

Timeline

▶ Budget Timeline

▶ Preliminary Budget Data Reports

Historical Reports



State School Payments

▶ Current Year Payments

▶ FY2024 Payments

▶ Prior Year Payments

▶ Entitlements

▶ Information

▶ Fiscal Payment Schedule



OPI Staff are here to help:

[Cori Opie](#), Budget Analyst, 406-444-3533

School Finance / Auditing

Go to: [OPI>Leadership> Finance & Grants>School Finance>Auditing](#)



Information and resources for school

▶ Information to Schools

Information and resources for auditors, including prior year reports, letters, and information

▶ Information to Auditors

▶ Resources

▶ Audit Processes

Regulatory information

Regulatory information



School Finance / State School Payments

Go to: [OPI>Leadership>Finance & Grants>School Finance>State School Payments](#)

MEET THE TEAM

Notice: Do not send files to group emails (individuals only). Please do not email any student personally identifiable information (PII), including names or student ID's, to the OPI or AIM Help Desk. Please call AIM Support directly for assistance with individual student PII or use ePass MT for the secure transfer of larger student data files.

MONTANA FILE TRANSFER SERVICE

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- › OPI Financial Data Files
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- › School Open/Close/Change
- › Session History
- › State School Payments
- › Student Count ANB

State School
Payment



Auditing

Auditor position currently vacant. For assistance contact OPIAuditReports@mt.gov.

Information to Schools

- [GASB Information](#)
- [High Risk Status and Appeal Process](#)
- [LGS Training Resources and Documentation](#)
- [LGS Auditor Roster](#)
- [Miscellaneous Fund Worksheet](#)
- [Reconciliation of Cash to Treasurer](#)
- [School District Compliance Supplements](#)
- [Segregation of Duties - Internal Controls](#)
- [Student Activity Fund Worksheet](#)

Information to Auditors

Resources

Audit Processes



School Finance / Tuition and Attendance

Go to: [OPI>Leadership>School Finance>Tuition and Attendance](#)

Tuition and Attendance

- Forms
- Guidance
- Calculation Spreadsheets



[Return to School Finance Homepage](#)

School Finance / Compass

Go to: [OPI>Leadership>Finance & Grants>School Finance>Compass](#)

OPI Staff are here to help:
Contact us at OPISchoolFinance@mt.gov.



► School Finance Information

► School Finance Application Resources

MEET THE TEAM

Important School Finance News and Updates

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OPI COMPASS

OPI Compass



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School Finance / Compass

Go to: [OPI>Leadership>Finance & Grants>School Finance>Compass](#)



Upcoming Due Dates

Deadline	Topic	Contact
July 19 th	MAEFAIRS Release	OPISchoolFinance@mt.gov
At least 30 Days Prior to 1 st Semester	School Bus Inspections	Local Montana Highway Patrol Department
August 13 th	MAEFAIRS – Open Office Hours	OPISchoolFinance@mt.gov
August 15 th	TFS Due to County Superintendent	Laci Novark (406) 444-4401 Alivia Skeslien-Jenkins (406) 444-1964
September 15 th	Budget - The law states that districts have until August 20 th to convene their Budget Meeting and must conclude within 5 days. They have an additional 3 days to submit to the county superintendent.	Laci Novark (406) 444- 4401 Alivia Skeslien-Jenkins (406) 444-1964 OPISchoolFinance@mt.gov
September 15 th	TFS (Trustee's Financial Summary) Deadline	Laci Novark (406) 444- 4401 Alivia Skeslien-Jenkins (406) 444-1964 OPISchoolFinance@mt.gov
September 15 th	ESSA (Every Student Succeeds Act) Reporting	Andrea Mohammadi (406) 444-1960
December 1 st	TEACH Act	OPISchoolFinance@mt.gov

Due Dates in the School Finance section



Authorized Representative

- Who is the Authorized Representative?
- What is the role of the Authorized Representative?

Who is the Authorized Representative?

- ❖ An Authorized Representative (AR) is a person who legally acts on behalf of the subgrantee of federal and state grants. The authorized representative is the liaison between the subgrantee and the grantor.
- ❖ Typically, the District Superintendent is assigned the role of AR as soon as the District Clerk enters their contact information in OPI Contacts.
- ❖ If updating OPI Contacts doesn't apply the AR role to the District Superintendent, contact CentralUpdates@mt.gov

What is the role of the Authorized Representative (AR)?

- ❖ The signature of the AR forms a legal contract between the subgrantee and the grantor agency, the OPI.
- ❖ By signing or submitting documents on behalf of the organization, the AR commits the subgrantee to perform within the terms of the grant agreement, common assurances and specific program assurances, administrative requirements, programmatic requirements, etc.
- ❖ The signature of the authorized representative:
 - ❖ protects the legal rights and interests of the subgrantee; and
 - ❖ commits the subgrantee to fulfill obligations of federal projects.

What is the role of the Authorized Representative (AR)? (Cont.)

- ❖ The Authorized Representative is responsible for:
 - ❖ Developing a work plan or calendar to administer and achieve the goals and objectives of the grant award;
 - ❖ Informing the clerk/business manager of the local education agency (LEA) or other entity of the application, approval of the award, applicable requirements for allowable costs of the program, reporting requirements, budget or program modifications (i.e. "amendments"), closeout procedures, etc;
 - ❖ Completing and submitting the E-Grants Security Assignments form to set up staff roles and access rights in the E-Grants system;

What is the role of the Authorized Representative (AR)? (Cont.)

- ❖ Ensuring the entity meets the Federal Financial Management Standards (see Fiscal and Accounting Requirements in section 400.1 of this handbook);
- ❖ Ensuring an appropriate system of time and effort records is used in cases where an employee paid using grant funds is also paid using local or state funds or funds of another federal program (see Time and Effort in section 400.4 of this handbook);
- ❖ Submitting timely, accurate program reports and ensuring the person responsible for fiscal reporting is also prompt and accurate; and
- ❖ Ensuring the grant award is administered in compliance with applicable state and federal laws and regulations.

Authorized Representative (AR)

Useful materials and resources

- **Resources:**

- ❖ [Montana State and Federal Grants Handbook](#)

- ❖ Located at: [OPI > Leadership > Finance & Grants > EGrants > Grant Management](#)

- ❖ Contact us at CentralUpdates@mt.gov

Access Request Information

- Information for District Superintendents
- OPI Secure Portal
- Updating Contacts



Application Access Resources

Go to: [OPI>Leadership>School Finance>School Finance Application Resources](#)

OPI Staff are here to help:
Contact us at OPISchoolFinance@mt.gov.



» School Finance Information

» School Finance Application Resources

Application Access Resources

OPI Application Access Guides for:

- [District Clerk](#)
- [District Superintendent](#)
- [County Superintendent](#)



[School Finance Access Form](#)

Application Login Links

[MAEFAIRS System](#)

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» Impact Aid

» OPI Financial Data Files



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Application Access Resources> District Superintendent



OPI Access, Applications, And Information for District Superintendents

Action	Location	Contact
New user access		
Complete & submit the OPI School Finance Access form to gain access to the OPI Secure Portal .	School Finance Access Request Form This form is used to request access the MAEFAIRS, Pupil Transportation, County, & School Contacts (Clerk only) applications	Amanda Zigan (406) 444-3096
E-Grants ➤ Clerks must have the current Authorized Rep (AR) listed in School Contacts before a "New User" account can be requested on the E-Grants Welcome Page, or a modification can be requested for a user's current account/roles within the E-Grants system. ➤ Follow steps in the Security User Guide found in the Training Section on the E-Grants Welcome Page. ➤ Contact egrants@mt.gov with questions about transfers or problems.	E-Grants Login Page E-Grants Logins/Help other information	Egrants@mt.gov (406) 444-3680
OPI Jobs For Teachers	Jobs for Teachers	OPIJ4T@mt.gov
School Finance Applications		
MAEFAIRS ➤ TFS ➤ Budget ➤ Comp. Expenditure ➤ Tuition ➤ Dist. Enrollment	OPI Secure Portal Access Request Form	Amanda Zigan (406) 444-3096
Pupil Transportation ➤ Bus ➤ Individual Contract	OPI Secure Portal Access Request Form	Donell Rosenthal (406) 461-9316 Amanda Zigan (406) 444-3096

Please allow OPI personnel one full business day to respond to any voicemails or emails sent

Slide

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Application Access Resources

Go to: [OPI>Leadership>School Finance>School Finance Application Resources](#)

OPI Staff are here to help:
Contact us at OPISchoolFinance@mt.gov.



[School Finance Information](#)

[School Finance Application Resources](#)

Application Access Resources

OPI Application Access Guides for:

- [District Clerk](#)
- [District Superintendent](#)
- [County Superintendent](#)

[School Finance Access Form](#)

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- [Impact Aid](#)
- [OPI Financial Data Files](#)



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Application Login Links > [MAEFAIRS System](#)

OPI Secure Portal

Bookmark this page or store it in your favorites, so you can easily navigate here to access the majority of your OPI applications.

 username



Login

 [Contact the Helpdesk](#)

 [Reset Password](#)

 [How to Reset Your Password and Other Frequently Asked Questions](#)

 [User Access Request Forms](#)

×

User Access Request Forms

 DCA

 [DCA User Access Request Form](#)

 Financial Reporting

MAEFAIRS
Pupil Transportation
County
Contacts

 [User Access Request Form](#)

 GEMS

 [GEMS Secure Access](#)

 [OPI Employee - GEMS Secure Access](#)

 Jobs for Teachers

 [Jobs for Teachers Access](#)



School Finance Access Request Form

I understand I am requesting access or to have access removed for myself or for another person for School Finance applications. I will not release confidential information to others unless it is for the purposes directly connected to the program for which purpose it was originally intended. Each school is responsible for maintaining secure systems with which to access state systems to ensure the data is safeguarded. Each user must choose a strong password and secure their username and password. Usernames and passwords must never be shared or reused. Each user must agree to use the data only within the direct scope of their current employment and within the scope of the role granted, and to comply with FERPA and the OPI Student Records Confidentiality Policy.

Send completed forms to OPISchoolFinance@mt.gov

User Information

Full Name:

Email:

Phone:

Title: Dist. Superintendent

☐ Remove User:

District/County: District/County

☒ New User

☐ Existing User:

☒ ADD ROLES

☐ REMOVE ROLES

See back of form for role definitions

MAEFAIRS

- ☒ MaefairsCompensationExpenditure
- ☒ MaefairsDistrictBudget
- ☒ MaefairsDistrictEnrollment
- ☒ MaefairsDistrictTFS
- ☒ MaefairsDistrictTuition(Schools)
- ☐ MaefairsFacilityTuition(nonSchool)
- ☐ MaefairsCounty (ReadOnly)
- ☐ MaefairsReadOnly

Transportation

- ☒ TransportationBus
- ☒ TransportationIndividualContract
- ☐ TransportationCounty
- ☐ TransportationReadOnly

Contacts (For Clerks Only)

☐ ContactsUser

School
System #

County

☐ CountyCoUser

CO

☐ CountyNonLocatedCOUser
(Read Only)

CO

Authorized Representative Signature

Name:

Title:

Dist. Superintendent

Phone:

Signature:

Date:



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Updating OPI Contacts

OPI Contacts information for:

- ❖ Trustees
- ❖ District Superintendent
- ❖ District Clerk
- ❖ Board Chair
- ❖ Principal

Can be updated by your District Clerk in the OPI Secure Portal in OPI Contacts.



WORK CLOSELY WITH YOUR CLERK!





Questions?

CONTACT US



Barbara Quinn, CPA
School Finance Manager
(406) 444-3249
barbara.quinn@mt.gov

Amanda Zigan
Computer Support
Specialist
(406) 444-3096
Amanda.Zigan@mt.gov

Autumn Belmont
Budget Analyst
(406) 444-9852
Autumn.Belmont@mt.gov