

THE OAS MESSENGER



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OVERVIEW

What's New This Month?

Here are some key items to pay special attention to in this month's newsletter:

- If you are using Web Time and spend more than 30-60 minutes processing payroll, then we have prepared a Resource Guide to assist in identifying opportunities for process efficiencies. See [page 4](#) for additional information on this new resource.
- We have a new Loss Adjuster for Gallagher Bassett. See [page 5](#) for his contact information as well as other Risk Management news.

OAS Staffing Update

At the end of February, the intern for the Office of Accounting Services (Nestor Sarinana) accepted a full-time offer from another employer. Nestor's last day was March 1st. We want to thank Nestor for his excellent service as an intern! Please note that his e-mail address (oasintern@archindy.org) is now inactive, so please direct all inquiries to accountingservices@archindy.org.

HR & Central Payroll Weekly Webinars

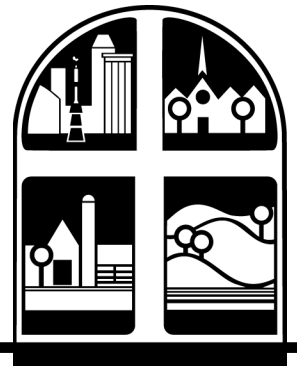
Recently, HR and Central Payroll surveyed all Archdiocesan locations regarding the platform and format of the HR & Central Payroll weekly webinars. Based on the survey results, we will be suspending the weekly Thursday webinars. Instead, HR & Central Payroll will now offer more focused, in-depth presentations on individual topics on an as-needed basis. The in-depth focused webinars will last anywhere from 30 to 60 minutes and will be scheduled and announced at least two weeks in advance to allow locations to plan attendance. HR & Central Payroll will continue to send out important updates via email on a weekly basis to keep you informed about human resources, payroll, or Paylocity system topics. If you were not able to participate in the survey, we welcome your feedback and suggestions. Please send any additional feedback regarding the webinars and any focused topic ideas you may have to Carey Kendall (ckendall@archindy.org) and Andrea Wunnenberg (awunnenberg@archindy.org).

Upcoming Dates to Remember

Monday, April 2nd the Catholic Center will be closed for Easter Monday.

Date	Subject	For more information, see...
Payroll Dates:		
Tuesday March 13th	Required payroll approval due date for March 16th payroll.	http://www.archindy.org/finance/payroll.html
Tuesday March 20th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for March 30th payroll.	
Tuesday March 27th	Required payroll approval due date for March 30th payroll.	
Tuesday April 3rd	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for April 13th payroll.	
Other Dates:		
Friday March 30th	March assessments will be withdrawn from bank accounts	Page 2
Tuesday April 10th	Loaves+Fishes Webinar: Examining Missed Growth Opportunities	Page 5
Monday April 30th	Application deadline for Combined Grant Opportunities	Page 3
Friday June 15th	Parish and High School Budgets due to OAS	Page 2

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ACCOUNTING

Budget Guidelines

The budget guidelines were published on February 22nd and can be found on the Finance page of the Archdiocesan website: <http://www.archindy.org/finance/parish/guidelines.html>

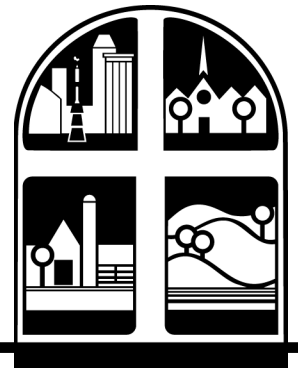
Budgets are due to the Office of Accounting Services by June 15, 2018. Budgets should be submitted in the format used by the parish or school. Budgets should be completed and forwarded to the Office of Accounting Services for review on or before June 15, 2018. Please complete the budget approval form with the pastor, PLC, administrator or principal's signature indicating the budget has been approved; see the Budget Approval Form in Appendix D. The budget and budget approval form may be e-mailed to accountingservices@archindy.org (preferred) or faxed to 317-236-7327.

Billing

March assessments will be withdrawn on Friday March 30th.

To help parishes and schools manage the timing of cash flows, we prepared a billing calendar in the 2017-18 Budget Guidelines to provide a high-level overview of when major items are scheduled to be billed by our office. We currently do not expect any changes from the planned timeline.

Description	Billing Frequency	March	April	May
Cathedraticum	Monthly	X	X	X
Clergy Healthcare	Monthly	X	X	X
Lay Retirement	Monthly	X	X	X
Indianapolis Education	Monthly	X	X	X
Property Ins.	Monthly	X	X	X
Vehicle Ins.	Monthly	X	X	X
Workers Comp.	Monthly	X	X	X
Lay Health Ins.	Monthly	X	X	X
Criterion Subscriptions	Monthly	X	X	X
SECA Reimbursement	As occurs, annually	X	X	X



ADLF

ADLF Rates for Jan-Mar 2018

Loans 3.75% Deposits 0.75%

2018 ADLF Committee Meetings will be held on Wednesdays at 9am on the following dates:

May 16th | August 22nd | October 24th

If your parish would like to be placed on the agenda for a meeting in 2018, please contact Chris Bramble at (317)592-4099 or cbramble@archindy.org.

ADLF Deposit & Withdrawal Requests—NEW FORMS AVAILABLE

In an effort to eliminate the submission of sensitive information via fax and/or e-mail, we have removed the requirement to provide full bank account and routing numbers on the ADLF deposit and withdrawal forms. Moving forward, we ask that you provide only the last four digits of the parish/school/agency's bank account number. The new forms have been published on our website: <http://www.archindy.org/finance/parish/forms.html>

GRANT OPPORTUNITIES

Grant Opportunities for home mission, growth & expansion and capital needs in the Archdiocese of Indianapolis

Applications Due April 30, 2018

Through the generosity of the parishioners of our archdiocese, we have 3 different endowment funds that will support a twice-annual grant awarding process. This grant process is jointly administered by the Finance Office and the Office of Stewardship and Development of the Archdiocese of Indianapolis.

Twice a year (spring and fall), the parishes, schools and agencies of the Archdiocese of Indianapolis have an opportunity to apply for grants which will be available from the following 3 endowments:

- (1) Home Mission Endowment Fund – used to support parishes and schools that qualify as home missions;
- (2) Growth and Expansion Endowment Fund – used to support growth and expansion initiatives throughout the archdiocese in our parishes, schools and agencies; and
- (3) The James P. Scott Endowment Fund – made possible by a very generous gift by James P. Scott to be used to support capital needs in the archdiocese.

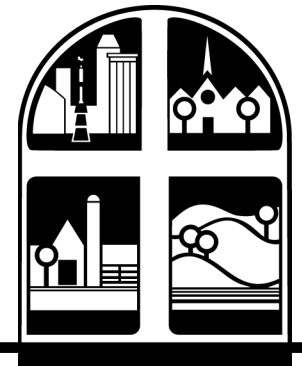
Combined grant applications are due to the Archdiocese for the 2 grant allocation periods on April 30th and October 31st each year.

For more information, please see the finance office page on the Archindy.org website

(<http://www.archindy.org/finance/grant.html>) or contact Stacy Harris in the Finance office at sharris@archindy.org or 317-236-1535.

PLEASE NOTE: The application has been updated for this cycle, please make sure to visit the website for an accurate copy of the application.

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CENTRAL PAYROLL

March Payroll

There are three pay periods in March. All deductions are set up to occur on each of the 26 pay dates in 2018.

April Payroll

The Catholic Center is closed on Monday April 2nd in observance of Easter. Please note that all changes for the April 13th pay date are still due on Tuesday April 3rd.

Improving Payroll Processing Time

With the proper Web Time setup, typically it should take a parish with a school of about 70 employees approximately 30 minutes or less to process payroll. The Parish and Agency Payroll web page has been updated to include a guide that will aid in improving the time it takes to process payroll: <http://www.archindy.org/finance/files/parish/payroll/ReviewYour%20Payroll%20Process.pdf>. If you are using Web Time and spend **more than 30-60 minutes** processing payroll you may use this guide or reach out to Carey Kendall for assistance with reviewing your location's Web Pay and Web Time setup: 317-236-1519 | ckendall@archindy.org

Web Time Employee Time Card Report Setup

Web Time is one database with one single timecard for each employee. Employees who work at multiple locations are considered "shared employees". A shared employee's single timecard is set up with the cost centers of the locations where they work. Shared employees are trained and required to clock in, out, and transfer to the correct location (cost center 1), Pay Group (cost center 2) and department (cost center 3). If shared employees do not select the correct cost centers, supervisors are responsible for ensuring the cost centers are corrected before approving timecards. It is also the payroll processor's responsibility to review timecards to ensure the parish or agency isn't incorrectly paying employees who did not work in the correct company (or other cost centers). Please use the instructions added to the Parish and Agency payroll web-page to ensure Employee Time Card reports are setup correctly to include cost centers (company and/or department): <http://www.archindy.org/finance/files/parish/payroll/Employee%20Time%20Card%20Report%20Filters.pdf>.

It is imperative cost centers on time cards are reviewed before importing time into Web Pay for payroll processing.

Payroll Personnel—Be aware of Phishing Scams

Oftentimes, at this time of year, payroll personnel become the target of phishing scams, specifically as they relate to W2s. All W2s are available to employees online through their employee self-service portal. **Payroll staff should never electronically distribute W2s to anyone at any time.** Paylocity published guidance regarding W2 phishing scams which can be found at the following link:

<https://www.paylocity.com/2018/01/19/tax-agencies-warns-w-2-phishing-schemes/>



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RISK MANAGEMENT

A message from Mike Witka...

We are changing information on the Arch website's Insurance page to include new forms for reporting claims individually for Auto, General Liability, Property and Workers Comp, that can be filled out online or called in using the information on the form. We will no longer be using the South Bend office for notification but rather per the line of coverage. Please refer to the new forms and information and remove all older forms.

Our new loss adjuster and inspector is Matt McDonald (Matt_McDonald@gbtpa.com. phone # 574-344-2913).

Active Shooter information. A study group has been formed to develop guidelines for Active Shooter policies and procedures. We anticipate announcing these guidelines by May 1st. If you have any questions, please contact Mike Witka at mwitka@archindy.org.

STEWARDSHIP & DEVELOPMENT

United Catholic Appeal

Thank you – we continue to work toward the \$6.5M United Catholic Appeal goal! We appreciate the pastors, PLCs, and parish staff who do such a wonderful job of promoting the UCA. While we focus on tracking the goal, we also celebrate the 65 parishes, who to date have met or exceeded the 25% household participation goal, and the 54 parishes, who to date have met or exceeded 100% of the parish goal. These are great accomplishments, and we congratulate you on your success!

By the first week of March all parishioners who have not participated in the current UCA will receive another opportunity to share their blessings by supporting the United Catholic Appeal. We encourage parishes to utilize the resources available on the Helpdesk of the UCA website to highlight the impact of how even the smallest gift, given in love, can touch a life. Parishes should expect to see an uptick in UCA contributions during this time. If you need additional mailing supplies, please email Cindy Riley at criley@archindy.org.

Have you checked out the resources on the International Catholic Stewardship Conference (ICSC) website recently? Clicking on the link to ICSC, <http://catholicstewardship.com/> opens a treasure trove of information and tips for putting stewardship into action in your parish and in the lives of your parishioners. The monthly bulletin has articles that can be used in the parish bulletin. Each month a Stewardship Saint is featured. Opportunities to participate in webinars as well as conferences are a listed. The subscription for the Archdiocese of Indianapolis includes all of the archdiocesan parishes.

Loaves+Fishes Webinar Series

The Office of Stewardship and Development continues to offer the **Loaves+Fishes** webinar series to parishes *at no cost*. The April webinar topic is **Examining Missed Growth Opportunities** to be held on April 10, 2018. Click [HERE](#) to register for the next webinar; view a listing of all monthly topics; *and*, to register for future webinars you wish to attend. This option not only saves you time but also provides a calendar icon that will automatically add the webcast to your calendar. Additionally, one reminder email is sent two weeks prior to the webinar and a second email reminder is sent the day of the webinar. As always, past webinars are available as podcasts on the [OSD Online Training](#) webpage. Just click the link.

Stewardship Education Meetings

Please hold the date on your calendar now to attend one of the upcoming Stewardship Education Meetings. The topic for the evening is **An Evening of Spiritual Growth in Stewardship "How is God Calling You to Serve?"**

Thursday, April 12, 2018: St. Ambrose Parish, 325 S Chestnut Street, Seymour, IN 47274

Tuesday, April 17, 2018: St. Anthony of Padua; 316 N Sherwood Ave., Clarksville, IN 47129

Thursday, April 19, 2018: Knights of Columbus, 921 N. Central Ave., Connersville, IN 47331

Tuesday, April 24, 2018: St. Louis Parish, 13 St. Louis Place, Batesville, IN 47006

Thursday, April 26, 2018: St. Joseph University Parish, 113 S Fifth Street, Terre Haute, IN 47807

Thursday, May 10, 2018: Catholic Center, 1400 N Meridian Street, Indianapolis, IN 46202



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FINANCE & ADMINISTRATIVE SERVICES

Brian Burkert – Chief Financial Officer / Executive Director of Finance and Administrative Services

bburkert@archindy.org

Stacy Harris – Senior Director of Finance / Director of Compliance

sharris@archindy.org

Brian Schmidt – Director of Finance / Controller

bschmidt@archindy.org

Mike Witka - Director of Parish Financial Services & Risk Management

mwitka@archindy.org

Eric Atkins – Director of Management Services

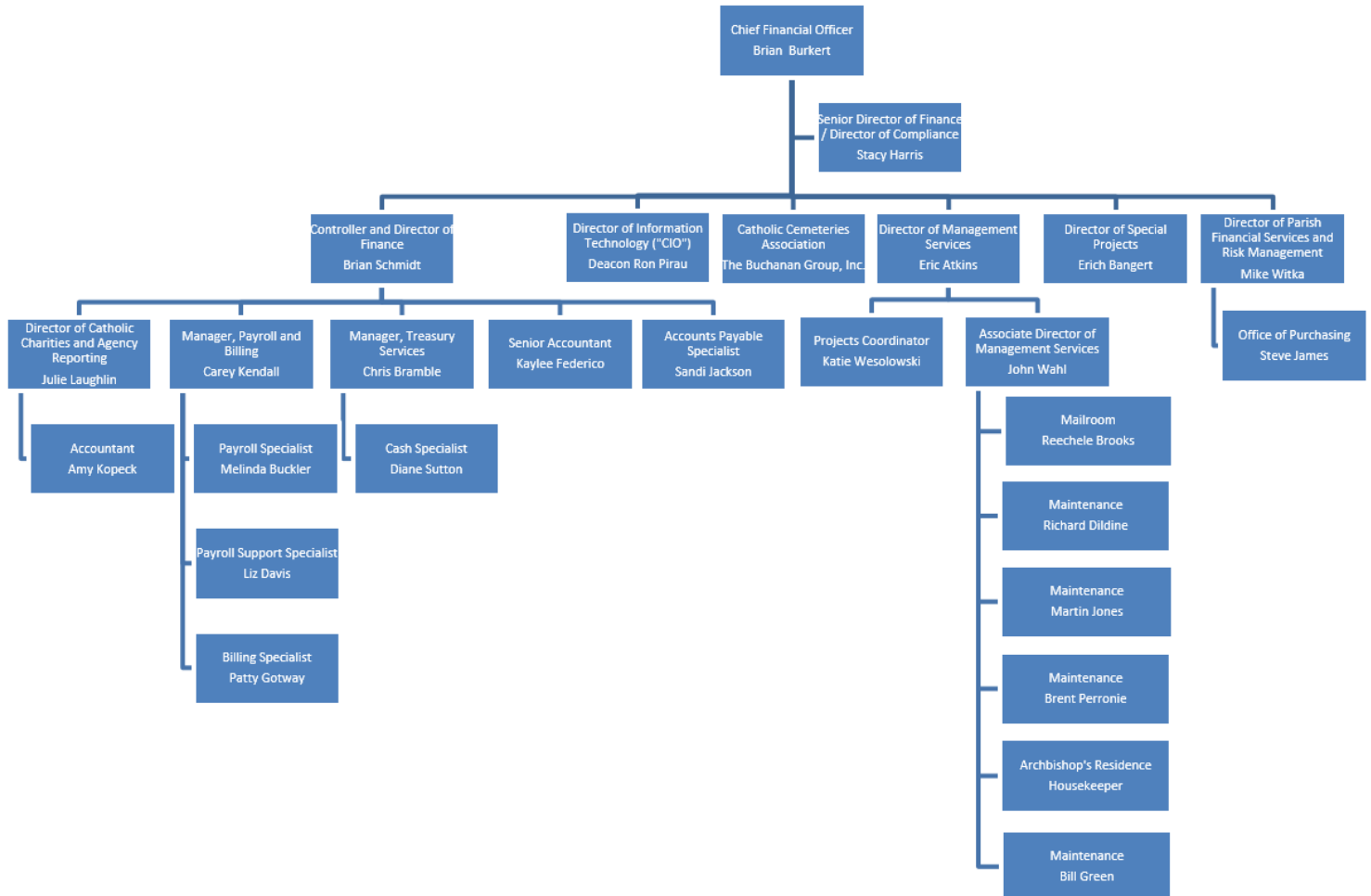
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Deacon Ron Pirau—Director of Information Technology

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Erich Bangert – Director of Special Projects

ebangert@archindy.org







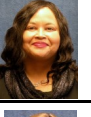

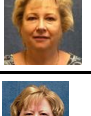

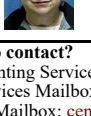


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OFFICE OF ACCOUNTING SERVICES

Name	Photo	Title	What We Do	Contact Information
Brian Schmidt		Controller and Director of Finance	As Controller, Brian is responsible for oversight and management of the Office of Accounting Services and ensuring that our office provides high quality service to our clients (parishes, schools, agencies, and departments within the Catholic Center).	Phone: 317-592-4005 E-mail: bschmidt@archindy.org
Carey Kendall		Manager, Payroll and Billing	Carey manages payroll and parish and agency billing. She monitors the accounting services email inbox and also manages the parish annual financial reporting process.	Phone: 317-236-1519 E-mail: ckendall@archindy.org
Julie Laughlin		Director of Catholic Charities & Agency Reporting	Julie is responsible for agency financial reporting. This includes financial reporting for Catholic Charities, Bishop Simon Brute College Seminary, CYO, St. Mary's Child Center, and others.	Phone: 317-261-3371 E-mail: jlaughlin@archindy.org
Chris Bramble		Manager, Treasury Services	Chris is responsible for managing our treasury services, including the Archdiocesan Deposit and Loan Fund (ADLF), cash and investment accounting, and accounting support for Fatima Retreat House and several Catholic Charities agencies. Chris also coordinates and manages the parish internal control assessments (PICA).	Phone: 317-592-4099 E-mail: cbramble@archindy.org
Kaylee Federico		Senior Accountant	Kaylee is responsible for accounting for Catholic Cemeteries, the Archdiocesan Deposit and Loan Fund, various Archdiocesan campaigns and appeals (UCA, LFOM), and monthly financial reporting and reconciliations.	Phone: 317-592-4021 E-mail: kfederico@archindy.org
Amy Kopeck		Accountant	Amy is responsible for accounting for the activities of Archdiocesan agencies, with a primary focus on Catholic Charities.	Phone: 317-592-4018 E-mail: akopeck@archindy.org
Diane Sutton		Cash Specialist	Diane is responsible for daily cash management including processing all deposits received by OAS.	Phone: 317-261-3376 E-mail: dsutton@archindy.org
Melinda Buckler		Payroll Specialist	Melinda processes payroll and is involved in the monthly parish and agency billing.	Phone: 317-236-1439 E-mail: mbuckler@archindy.org
Liz Davis		Payroll Support Specialist	Liz is responsible for processing payroll for parishes and schools.	Phone: 317-592-4065 E-mail: ldavis@archindy.org
Sandi Jackson		Accounts Payable Specialist	Sandi is responsible for accounts payable and employee expense reimbursements.	Phone: 317-236-1561 E-mail: sjackson@archindy.org
Patty Gotway		Billing Specialist	Patty is responsible for preparing the parish and agency billing.	Phone: 317-236-1572 E-mail: pgotway@archindy.org

Not sure who to contact?

Office of Accounting Services General Phone Number: 317-236-1410

Accounting Services Mailbox: accountingservices@archindy.org

Central Payroll Mailbox: centralpayroll@archindy.org

We will reply to your message as soon as possible with a desired response time of less than 48 hours.