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ACCOUNTING NEWS!

OAS will be hosting our bi-annual Fiscal Management and Discipleship Conference Thursday, June 20th, 2013 at SS. Francis and Clare. We are very excited to announce that Archbishop Tobin will say mass and deliver the keynote address for the event. Please see the attached flyer for additional details about the event.

ACCOUNTING SERVICES

ADLF Policy Update

The ADLF policy has been updated to include technology loans. Please see the updated policy on our website at http://www.archindy.org/finance/files/parish/general/current_adlf_policy.pdf

Excess Funds Deposit

Parishes, schools and agencies are required to deposit excess funds into the ADLF. Excess funds are all funds on hand in excess of anticipated cash disbursements for the following ninety days. Parishes schools and agencies should address the matter of excess funds on a monthly basis. Excess funds should also include all funds raised from fund drives, capital improvements, or major renovations. All excess funds must be deposited in the ADLF; a parish, school or agency may not invest such funds or deposit them in financial institutions.

ADLF Rates for April- June 2013

Loans 3.75% Deposits 0.75%

If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org. The next ADLF meeting is scheduled for Thursday May 9, 2013.

April Assessment Withdrawals

The April Assessment will be withdrawn on **Tuesday, April 30th**. Requests for adjustments to this withdrawal must be **sent to Carey Kendall (ckendall@archindy.org) by NOON on Monday, April 29th**.

Group Ruling

The IRS Group Ruling exemption letter for 2012 is available on our website at <http://www.archindy.org/finance/files/parish/general/2012GroupRuling.pdf>

Parish Internal Control Audits

An updated Internal Controls Policy has been published. There are updates in the Cash Disbursements (CD) section regarding the separation of duties, qualifying for (CD 6) tax exempt purchases, and the addition of utilizing (CD 10) Electronic Banking. Please contact Carey Kendall with any questions (317) 236-1519 or email Accounting Inquiries at accountinginquiries@archindy.org.

Fiscal Management and Discipleship Conference

Save The Date - The Fiscal Management and Discipleship Conference is scheduled for Thursday, June 20, 2013 at Saints Francis and Clare Church in Greenwood. This conference includes workshops related to Stewardship, HR, Payroll, Education and Finance and is designed to meet training and information needs of administrators, business managers, bookkeepers, finance council members, stewardship council members and volunteers handling bookkeeping or stewardship functions. **For additional details including registration information please see the flyer attached to the end of the newsletter.**

Please share these newsletters with your fellow co-workers who normally would not receive through Accounting Services. There is always valuable information that can be shared throughout your parish, school or agency.



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ACCOUNTING SERVICES CTD.

Fifth Third Pooled Checking Account

Fifth Third Bank Interest Bearing Checking Account is where catholic-related entities' funds are pooled together and invested to receive a higher rate of return each month. This account has been with the Archdiocese since 1993. Besides a higher rate of return than an average interest-bearing checking account, the advantages include no investment sweep fee, lower service charges, and the ability to increase the rate of return as the pool grows. Currently, the Indianapolis Pool has over 100 accounts with approximately \$35,000,000 invested. If your parish is interested in joining this account, please contact Paul Burch at Fifth Third bank at 317-383-2668 or Paul.Burch@53.com.

2013-2014 Budget Guidelines

The guidelines for 2013-2014 are now available on our website at <http://www.archindy.org/finance/parish/guidelines.html>. The budgets may be mailed, e-mailed, or faxed and due by June 14, 2013 to the Office of Accounting Services. Please also submit the signed and completed Budget Approval Form found in Appendix B. If you have any questions or require assistance with budget preparation, please contact the Office of Accounting Services at our email accountingservices@archindy.org or call (800)382-9836 Ext 1410 or (317)236-1410.

HUMAN RESOURCES

Health Savings Account Limits for 2013

The IRS has increased the annual limits for health savings account contributions in 2013 to \$3,250 for single coverage and \$6,450 for family coverage. There is still a \$1,000 allowable catch-up contribution for people age 55 and over.

Retirement Savings Plan Limits for 2013

The IRS has also raised the annual contribution limit for 403(b) retirement savings plans in 2013 to \$17,500. There is also a \$5,500 catch-up contribution for people who are age 50 and over.

Benefit Communication Training

The Archdiocese Human Resources Department is offering Employee Benefits Communications Training to any interested Parish or School. Contact Kristen Leffler at (317) 236-1594 or Courtney Mitchell at (317) 236-7314 for more information or to schedule your on-site Benefits Communications training session.

Health Insurance

All health insurance paperwork should be sent to Human Resources including new enrollments, changes and terminations. The forms can be found at www.archindyhr.org under Forms You'll Need. Please note that terminating an employee in Paycor does not cancel health insurance. A form must be submitted to Human Resources.

Eli Lilly Federal Credit Union (ELFCU)

The Archdiocese is now partnering with Eli Lilly Federal Credit Union (ELFCU) to open health savings accounts for new health insurance enrollments. As you have new or newly eligible employees electing health insurance, please direct them to the following link to open an HSA with ELFCU. www.elfcu.org/newhsa. We are no longer accepting forms for Teachers Credit Union.

Terminating Employee Health Insurance Benefits

We have attached a letter to the end of this newsletter from our Controller, Tracy Lockwood and our Director of Human Resources, Ed Isakson regarding employee healthcare benefits. If you have any questions or comments, feel free to contact HR at hr@archindy.org or centralpayroll@archindy.org.



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HUMAN RESOURCES CTD.

New Federal Requirements for Health Insurance Eligibility

Federal health care reform legislation includes regulations regarding eligibility for health insurance coverage. These federal regulations require employers to offer coverage to employees who work 30 or more hours per week. A special provision of the law affects educational institutions, including Catholic schools. This provision states that **any employee who works regularly 30 hours per week during a school year is eligible for health insurance**. These new regulations require the Archdiocese to change its health insurance eligibility policy from 1,500 hours per calendar year to 30 hours per week during a school year, effective September 1, 2013. As a result of this change, some school employees, such as teachers' aides and cafeteria workers, who are not currently eligible for health insurance coverage will be eligible for coverage in the 2013-4 school year. Each school has 2 options regarding these employees: 1) budget funds for them to be covered by our medical and dental plans, effective September 1, 2013 or 2) reduce the hours of these employees to under 30 hours per week, effective September 1, 2013. Please note that even if these employees become eligible for health insurance, they may decline coverage, so the actual cost that will be incurred cannot be fully anticipated during the budgetary process. However, each school that has employees who currently work 30 or more hours per week on a regular basis and are not currently eligible for health insurance should plan for either increases in health insurance expense or a reduction in those employees' work hours during the next school year. Please contact Ed Isakson at edisakson@archindy.org if you have any questions about this new federal requirement.

New I-9 Form Requirement

Effective March 2013, the federal government has updated the I-9 Immigration form which is required of all new employees and part of our new hire paperwork. We have updated our human resources site with the new and correct form. Please follow this link and begin using the new form effective immediately. If you have any questions, please contact human resources at hr@archindy.org.

2013 HSA Reminders

If you are covered by the Archdiocesan Health Plan, please read the flier attached at the end of the newsletter. It contains important information regarding employee HSAs.

CENTRAL PAYROLL

Payroll Information

Please ensure you are following the 'P/R Processing' deadline date on the Archdiocese Payroll Calendar on our website at <http://www.archindy.org/finance/files/parish/payroll/2013%20Payroll%20Calendar.xls> Payrolls processed after this deadline cause issues with benefits being distributed on time to employees.

SECA Reimbursement

Updated 2012 SECA Reimbursement guidelines and the request form are located on our website at <http://www.archindy.org/finance/parish/forms.html>. Please be sure to utilize the new forms and submit the reimbursement request on or before June 1, 2013 for the 2012 tax year.

CATHOLIC EDUCATION

Clergy Wages

Priest wages are billed to the parishes on the monthly billing assessment. All stipends and priest related pay and personnel changes for priests are processed through Central Payroll. Please submit these to Central Payroll at centralpayroll@archindy.org.

Special Events Policy

And now is a good time to review the special events policy and application so you can help those wanting to rent the space from our parishes for wedding receptions. If you have any questions see our Insurance page on the Archindy website.



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RISK MANAGEMENT

Fire Safety

We have had recent fires to two of our properties. So a reminder to all: keep doors locked on all buildings whenever possible and not in use. Secondly, do not light candles in non-Church environments. The recent fire caused by a candle has been our fourth of this type.

Spring Storms

As Spring approaches so does the stormy season. Please make sure everything is secure around and atop your buildings. Report any wind or rain damage as soon as possible.

Parish Budgets

Mike Witka is willing to come and help with your parish budget process. Feel free to contact him at mwitka@archindy.org or (317)236-1558.

ARCH GRANT OPPORTUNITY

Grants now available for home missions, growth and expansion and capital needs in the Archdiocese of Indianapolis

The Finance Office and the Office of Stewardship and Development has consolidated and streamlined the process for awarding grant dollars to the parishes, schools and agencies of the Archdiocese of Indianapolis. Through the generosity of the parishioners of our archdiocese, we now have 3 different endowment funds that will support an annual or twice-annual grant awarding process.

We are introducing a process that will make grants 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 that will be used to support capital needs in the archdiocese.

The Home Mission Grant – Growth and Expansion Grant – James P. Scott Grant process that includes all three grants. Please see the executive summary and combined grant application available now on the Finance Office page of the Archdiocesan website:

www.archindy.org/finance.

Please download the grant application and e-mail the completed form to Stacy Harris in the Finance Office @ sharris@archindy.org. You also may contact Stacy Harris with questions. Applications are due no later than April 30, 2013. Thank you!

ARCH CONTACTS

Do you know who to contact ?

Property insurance or risk questions
ADLF
Payroll
Billing questions
Parish budget or other questions
Accounting Office
Human Resources

Mike Witka—mwitka@archindy.org or (317) 236-1558
Sr. Dina Bato—dbato@archindy.org
centralpayroll@archindy.org
accountingservices@archindy.org
accountingservices@archindy.org
(317) 236-1410 or 1-800-382-9836 ext. 1410
Courtney Mitchell-(800)382-9836 ext.7314



ARCHDIOCESE
OF INDIANAPOLIS

The Church in Central and Southern Indiana

2013 FISCAL MANAGEMENT AND DISCIPLESHIP CONFERENCE

SPONSORED BY FIFTH THIRD BANK

Thursday, June 20, 2013
SS. Francis and Clare Church
Greenwood, Indiana

- ◆ *Financial Management*
- ◆ *Stewardship*
- ◆ *Accounting Techniques*
- ◆ *Human Resources Issues*

Program hosted by
Most Rev. Joseph W. Tobin, C.Ss.R.
Archbishop of Indianapolis

Registration fee is sponsored by Fifth Third Bank. Registration is available online at www.archindy.org/fmdc. If you do not wish to fill out an online registration, please submit your registration through the mail. All registration forms must be received by June 2, 2013 to:

Archdiocese of Indianapolis
Attn: Carey Kendall
P.O. Box 1410
Indianapolis, IN 46206-1410

Or you can e-mail your registration form to Accounting Services at accountingservices@archindy.org or fax to (317) 236-7327.

For more information, please contact Carey Kendall in the Office of Accounting Services Phone: (317) 261-1519 or by e-mail at accountingservices@archindy.org.

Agenda

8:00 a.m.

Participant Registration

9:00 am

Mass Celebrated by
Most Rev. Joseph W. Tobin, C.Ss.R.

10:00 am

Participant Registration Continued and
Networking Break

10:15 am

General Session: Keynote Address presented by
Archbishop Tobin

11:00 a.m.

General Session: Update on key Archdiocesan
matters, panel discussion

11:45 a.m.

Lunch (Provided)

12:45 p.m.

Workshop Session A

1:30 p.m.

Networking Break

1:45 pm

Workshop Session B

2:30

Networking Break

2:45

Workshop Session C

3:30 pm

Conference Concludes

Workshop Sessions

The workshop sessions will be structured in the following manner: A 15-20 minute presentation will be made relating to the topic and the presenters will then facilitate group discussion to allow for a sharing of information and ideas.

Workshop A 12:45 p.m.

1. Risk Management Update

Much of my time is spent working with parishes/schools on budget items. A lot more time is spent with parishes helping them understand how to avoid risks. Come to the sessions for discussions of both. Join Mike Witka to get the latest information on these and other risk management topics. (Mike Witka, Director, Risk Management)

2. Charity Gaming

This session will include a review of legislative changes to the emergency rule, gaming licenses, financials to event summary reports and allowable expenses. There will also be a question and answer period for participants to obtain information about any specific gaming questions and concerns. (Indiana Gaming Commission)

3. Parish Internal Control Audits (PICA)

This session will include a discussion of the most common PICA findings, parish best practices, guidance on how to prepare for a PICA and the importance of utilizing the PICA report to create a plan of action for improvement. (Yount and Company, LLC)

4. Indiana's Tax Credit Scholarships and School Vouchers

We find ourselves at the end of the first full year of receiving state vouchers in our Catholic Schools with new developments in the law. We also have nearly 1000 students attending our schools on Indiana Tax Credit Scholarships, most of whom will go on to receive vouchers. This is good news! However, we must be prudent and cautious with these new sources of funding. (Joe Peters, Associate Executive Director, Office of Catholic Education)

5. Catholic Community Foundation Funds: Application, Agreement, and Access to Investment and Distribution Information

This session will review the fund application, agreement, and distribution processes. Learn how Catholic Community Foundation staff can support efforts to secure funding for endowments that ensure perpetual support for your ministry work. New online access and fund administration as well as marketing and promotion will be discussed. (Ellen Brunner, Director, Planned Giving)

Workshop B 1:45 p.m.

6. Legal Update

What situations should you seek legal counsel help with? Why should legal counsel be involved? What should you consider prior to signing a contract? What types of personnel issues need legal counsel input? Join Jay Mercer for a discussion of these and other legal issues. (Jay Mercer, Legal Council)

7. Accounting and Administrative Guidance

This session will include general accounting topics such as: Archdiocesan Monthly Assessment; Budget; Archdiocesan Deposit and Loan Fund; PAFR; Archdiocese Website and who to contact in OAS. (Julie Laughlin and Carey Kendall)

Workshop B 1:45 p.m. continued

8. Charity Gaming

This session will include a review of legislative changes to the emergency rule, gaming licenses, financials to event summary reports and allowable expenses. There will also be a question and answer period for participants to obtain information about any specific gaming questions and concerns. (Indiana Gaming Commission)

9. Parish Internal Control Audits (PICA)

This session will include a discussion of the most common PICA findings, parish best practices, guidance on how to prepare for a PICA and the importance of utilizing the PICA report to create a plan of action for improvement. (Yount and Company, LLC)

10. How to Launch, Sustain, and Grow a Planned Giving Program

This session is an overview of planned giving resources available to your ministry. Learn how your ministry can implement and grow a planned giving program to benefit its programs. (Ellen Brunner, Director, Planned Giving)

Workshop C 2:45 p.m.

11. Payroll

This session will include an overview of Paycor process and Central Payroll's role in processing payroll and information on how locations can better use the reporting functionality in Paycor to help them manage their employees. Including a question and answer period to help understand who to reach out to with questions. Paycor or Central Payroll. (Carey Kendall, Supervisor Parish and Agency Services, Office of Accounting Services)

12. Cultivating Donor Relationships

This session will provide information on how to cultivate donor relationships. Discussion will take place around identifying prospective donors, engaging them in volunteer opportunities, promoting giving options and stewarding gifts and relationships. (Jolinda Moore, Director, Annual Major Giving)

13. Capital Campaign Approval Process

The Capital Campaign Approval process for all Archdiocesan parishes, schools and agencies will be reviewed and explained. If you are considering a possible campaign, please attend this session to learn about this process designed to ensure capital campaign readiness prior to requesting formal approval from the Chancery. (Kent Goffinet, Director, Stewardship and Development)

14. What's Happening in Human Resources in 2013 and Beyond

Join in a discussion of health care reform, new benefit offerings, and other changes affecting employees in parishes, schools, and agencies. There will be lots of time for questions and suggestions. (Ed Isakson, Director, Human Resources)

Registration for Conference

Parish Name			
Parish #			
Participants			
Name			
Telephone #			
Workshop Choices:	A	B	C
CPE Certificate Needed:	Yes or No		
Name			
Telephone #			
Workshop Choices:	A	B	C
CPE Certificate Needed:	Yes or No		

Registration fee is sponsored by Fifth Third Bank. Registration is available online at www.archindy.org/fmdc. If you do not wish to fill out an online registration, then all registration forms must be received by June 6, 2013 to:

Archdiocese of Indianapolis
Attn: Carey Kendall
Office of Accounting Services
P.O. Box 1410
Indianapolis, IN 46206-1410

You may also email your registration forms to Carey Kendall at ckendall@archindy.org or fax to (317) 236-7327

For more information, please contact Carey Kendall in the Office of Accounting Services by phone: (317) 261-1519 or email: accountingservices@archindy.org

Important HSA Reminders

Please read if you are covered by the Archdiocesan Health Plan.

Health Savings Accounts (HSAs) provide:

- A tax-free way to set aside funds through payroll deduction for healthcare needs for you, your spouse, and dependent children, even if your spouse and children are on a different health plan
- Tax-free interest
- Carry-over of funds from year-to-year (no “use-it-or-lose-it” rule)

If you are saving money in a Health Savings Account, please remember:

- In 2013, the annual savings limits are \$3,250 for single coverage and \$6,450 for family coverage.
- If you are age 55 or older, you can contribute an additional \$1,000 in 2013.
- Contributions from the Archdiocese to your account each month count toward the annual savings limit.
- If you had coverage in January 2013, there was a one-time lump sum contribution from the Archdiocese of \$500 for single coverage and \$1,000 for family coverage. There are also monthly contributions from the Archdiocese of \$100 for single coverage and \$200 for family coverage.
- You are responsible for making sure that your annual contributions are within the annual limits. Please remember that there may be tax penalties for over-contributing.
- You can start saving, stop saving or change your savings amount at any time. Please complete the HSA Payroll Savings Form, which can be found at www.archindyhr.org. Click on the **Forms You’ll Need** box on the right side.
- If you have any questions, please contact Human Resources at hr@archindy.org or (317) 236-1594.

Please post through December 2013.