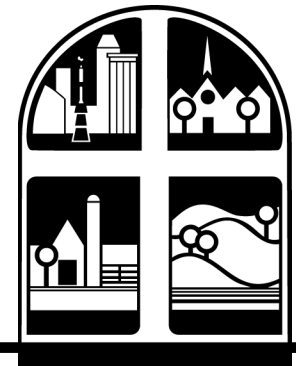


THE OAS MESSENGER



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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:

- [See page 2](#) for information about W2s and 1095Cs
- [See page 3](#) for information about the timing of deposits of UCA overages and LFOM contributions into ADLF deposit accounts, **which will allow us to provide your ADLF deposit statements on a more timely basis each month.**
- [See page 4](#) for a link to the newly-released 2017 Archdiocesan Purchasing Catalog.
- [See page 4](#) for an introduction of 2 new members to the OAS Team.

Upcoming Dates to Remember

Monday, February 20th, is Presidents' Day and although the Catholic Center will be open, the bank will be closed. We will not be able to process ACH's or deposits for the date of February 20th. Please plan accordingly, as items will need to be processed on February 16th or February 21st instead.

Date	Subject	For more information, see...
Payroll Dates:		
Tuesday, February 7th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for February 17th pay date	http://www.archindy.org/finance/payroll.html
Tuesday, February 14th	Payroll approval due date for February 17th pay date	
Tuesday, February 21st	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for March 3rd pay date	
Tuesday, February 28th	Payroll approval due date for March 3rd pay date	
Other Dates:		
Wednesday, February 1st	Deposit of January 2017 UCA overages and LFOM contributions into ADLF deposit accounts	Page 3
Thursday, February 16th	Orders for palms and ashes are due to Steve James in APD.	Page 4
Thursday, February 16th	Tentative release date for the fiscal year 2017-18 Budget Guidelines for Parishes and Schools	E-mail will be sent to all business managers and pastors upon release of the Budget Guidelines.
Friday, March 31st	All locations are required to have electronic timekeeping implemented by March 31, 2017	Page 3

Monthly Assessments

February assessments will be distributed to locations the week of February 20th.

Assessments will be withdrawn on Tuesday, February 28th. Please email accountingservices@archindy.org with deferral requests.

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

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CENTRAL PAYROLL

Pay Period Notes

Friday February 3, 2017

- Central Payroll began back-deductions for any missed premiums or employer health savings account contributions from the January 6th pay date.
- Letters were mailed to employees last week

Friday February 17, 2017

- Central Payroll plans to include the annual health savings account bonus on the February 17th pay check. '\$200 single | \$400 family Bonus' will only be issued to active employees who were enrolled in insurance as of January 1st. Employees who picked up health coverage after that date are not awarded the bonus.
- Changes for new hires, terminations, pay rate changes, and stipends are due February 7th.
- Locations must approve pay runs and send an approval email to centralpayroll@archindy.org by February 14th.

Friday March 3, 2017

- Changes for new hires, terminations, pay rate changes, and stipends are due February 21st.
- Locations must approve pay runs and send an approval email to centralpayroll@archindy.org by February 28th.

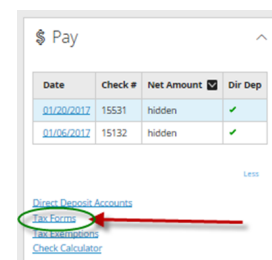
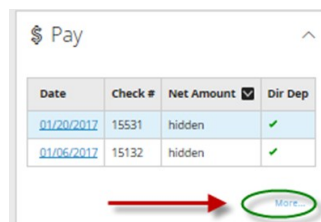
Payroll Processing

After entering all of the necessary payroll data into the pay grid:

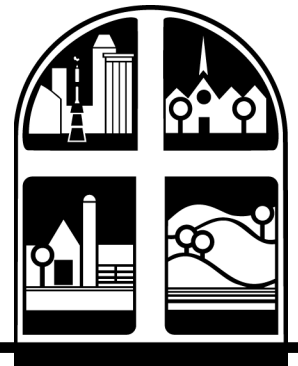
1. Ensure **ALL** forms of compensation has hours associated with pay.
2. Run the Payroll Audit | fix any errors related to pay. Central Payroll will resolve any health savings account errors.
3. Approve the payroll batch.
4. **Email Central Payroll with a confirmation of your approval; include your five digit Paylocity location ID in the subject line, and any notes about any Payroll Audit exceptions (multiple checks, extra hours, extra pay, etc.).**

Tax Forms

- Please direct employees to their **Paylocity Self-Service portal to retrieve W2s** that may have been routed through the mail. Employees have access to Tax Forms under the **\$Pay** section of their portal under the **\$Pay** area: click the down arrow > select **More** > then select Tax Forms.



- Online 1095Cs are currently not accurate. The finalized forms are almost ready. Human Resources will notify employees when these forms are finalized and available to print for your records. The forms will be mailed by the IRS deadline of March 2, 2017.



CENTRAL PAYROLL

Health Savings Accounts (HSA)

- The frequency for health savings account contributions occurs in ALL pay periods in 2017. Previously, the earning and deductions were only set up for 24 pay periods blocking any third payroll of any month.
- There are about 100 covered health participants who have not opened their health savings accounts. To find out if you have employees with health coverage who do not have health savings accounts open - review your pre-process register to find employees with health deductions, who are under the age of 65 - employees without an AHSA earning code and matching deduction have not opened their health savings accounts.

New Employees

Please DO NOT enter new hires or rehires in the payroll system until

(1) The employee has completed safe and sacred training **and** (2) the employee has completed the correct type of criminal background check.

SUBS: DO NOT USE TEMPORARY PART-TIME FOR SUBS. SUBS are either (1) Regular Part-Time or (2) Temporary Full-Time

ELECTRONIC TIMEKEEPING (WEBTIME)

All locations are required to have completed implementation of Web Time by March 31, 2017.

Please contact Carey Kendall if you have not scheduled your implementation date: ckendall@archindy.org.

ADLF

UCA Overages and LFOM Contributions

Beginning with the January 2017 ADLF close, receipt of UCA overages and LFOM contributions will be applied to ADLF deposit accounts on the first day of the subsequent month. *This will not impact how much interest you earn and will allow us to provide you with ADLF statements on a more timely basis each month.*

Example: For UCA overages and LFOM contributions received in January, parish overages will be posted as a deposit to ADLF deposit accounts on February 1st

ADLF Withdrawal Approvals

In the ADLF Policy Statement, withdrawals of deposits can be made by submitting an application signed by (1) the pastor, parish life coordinator, administrator or agency director, (2) the president of the parish (or agency) council, **and** (3) chairperson of the finance committee. It is important that all three signatures exist in order for transactions to be processed timely. Additional information about the Archdiocesan Deposit and Loan Fund can be found on our website at <http://www.archindy.org/finance/parish/forms.html>

ADLF Rates for Jan-Mar 2017

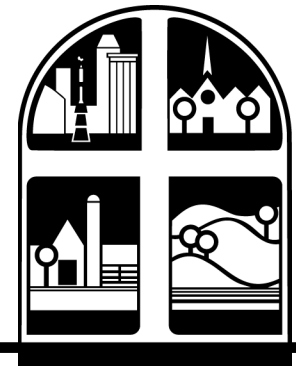
Loans 3.75% Deposits 0.75%

The 2017 Quarterly ADLF meetings will be held on the following dates:

- Thursday February 23, 2017 | Thursday May 4, 2017 | Thursday August 24, 2017 | Thursday October 26, 2017

If your parish would like to be placed on the agenda for an upcoming meeting, please contact: Carey Kendall at (317)236-1519 or ckendall@archindy.org.

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RISK MANAGEMENT

Tips to Ensure Property Safety

In order to assess the safety of your property, please ask yourself the following questions: How safe is our entrance to the church, school, parish office? Is our school used for Religious Education or other meetings? Is our building as secure in the evenings as it is during the school day? Have we had a risk assessment for our property? Please be aware of suspicious activity with people filming mass and church property with malicious intent. This type of behavior should be monitored and reported to the pastor or Mike Witka. Your local law enforcement personnel may be able to help you in assessing potential risks. If you have questions about this, please contact Mike Witka, mwitka@archindy.org for assistance.

PURCHASING

Purchasing Catalog

The 2017 Archdiocesan Purchasing Department is now available at the following link: <http://www.archindy.org/purchasing/files/products/whole/catalog.pdf>. If your location did not receive a purchasing catalog for 2017 and would like a hard copy, please contact Steve James at SJames@archindy.org or call (317)236-1451.

Palms & Ashes

Please don't forget to place your orders for palm and ashes! Orders are due by February 16th. The order form is available at <http://www.archindy.org/purchasing/files/order/Ashes%20Palms%20Order%20Form.pdf>. If you are interested in Paschal candles, candles can be ordered any time from our catalog.

STEWARDSHIP & DEVELOPMENT

UCA

The **United Catholic Appeal** is at 93% of the \$6.4M goal! The success of the appeal is due largely to the efforts of pastors, PLCs and parish staff. It is your commitment to the overall effort; it is your belief in the good works accomplished by the money generated by the appeal that allow so many lives to be impacted in such profound ways. Thank you for the work to do and for your willingness to adopt best practices in promoting the annual appeal.

Webinars



The Office of Stewardship and Development is once again offering the **Loaves+Fishes** webinar series to parishes *at no cost*. View a listing of all monthly topics *and* register for any or all webinars you wish to attend at <http://www.archindy.org/stewardship/podcast.html>. This option not only saves you time, but 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. Past webinars are available as podcasts on the OSD Online Training webpage, accessed using the link above.

Mailing Supplies

If you need additional mailing supplies, please email Cindy Riley at criley@archindy.org.

OTHER NEWS

We are pleased to announce that we have two new team members in the Office of Accounting Services, Angela Erfman and Liz Davis. Both started on January 3rd and are welcome additions to our team!

<p>Angela Erfman, Accountant, with a specific focus in Catholic Charities and other agency accounting support</p>		<p>About Angela...</p> <p><i>I just recently moved to Indianapolis (Geist Area) from Knoxville, TN due to my spouse taking a position with Pepper Construction. We have 3 children, Ashley, Ethan and Rylan. Ashley our oldest is in college, Ethan is a freshman at Hamilton Southeastern and Rylan is a 6th grader at Riverside Intermediate School. We are originally from the Lawrenceburg, IN area and we look forward to being closer to home and family. Outside of work, I enjoy watching my children play soccer, basketball and football.</i></p>
<p>Liz Davis, Payroll Support Specialist</p>		<p>About Liz...</p> <p><i>I am married to Richard and we have two children and 4 grandchildren. Our fifth grandchild is due this spring! I live in Camby, IN, and I love to work outside in my flower gardens in the summer.</i></p>

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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

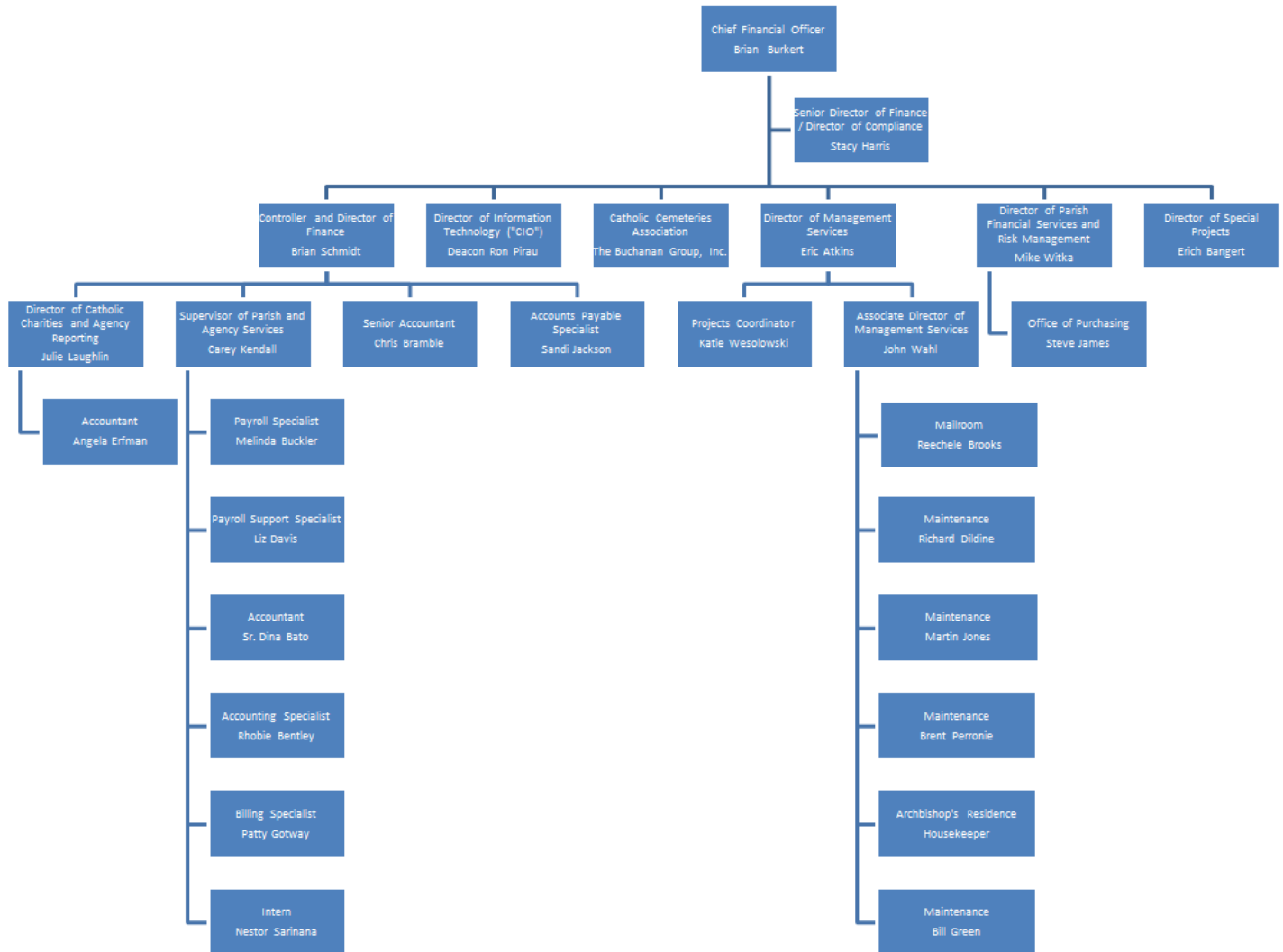
eatkins@archindy.org

Deacon Ron Pirau—Director of Information Technology

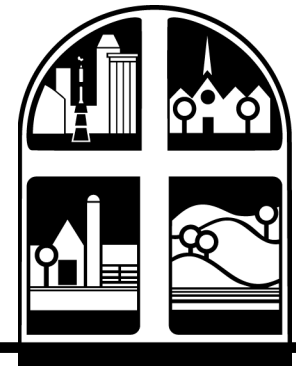
rpirau@archindy.org

Erich Bangert – Director of Special Projects

ebangert@archindy.org








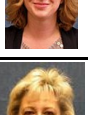






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OFFICE OF ACCOUNTING SERVICES

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, departments within the Catholic Center, and various agencies).	Phone: 317-592-4005 E-mail: bschmidt@archindy.org
Carey Kendall		Supervisor of Parish & Agency Services	Carey supervises payroll, parish and agency billing, and the administration of the Archdiocesan Deposit and Loan Fund. She monitors the accounting services email box and 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 and others.	Phone: 317-261-3371 E-mail: jlaughlin@archindy.org
Chris Bramble		Senior Accountant	Chris is responsible for investment accounting and accounting support for Fatima Retreat House and several Catholic Charities agencies, as well as coordinates and manages the parish internal control assessments.	Phone: 317-592-4099 E-mail: cbramble@archindy.org
Angela Erfman		Accountant	Angela is responsible for accounting for our agencies, with a primary focus on Catholic Charities.	Phone: 317-236-1525 E-mail: aerfman@archindy.org
Sister Dina Bato		Staff Accountant	Sr. Dina handles the day to day accounting for Catholic Cemeteries, United Catholic Appeal, and the Archdiocesan Deposit and Loan Fund (ADLF).	Phone: 317-236-1418 E-mail: dbato@archindy.org
Rhobie Bentley		Accounting Specialist	Rhobie (Row-bee) is responsible for daily cash management including processing all deposits received by OAS.	Phone: 317-261-3376 E-mail: rbentley@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
Nestor Sarinana		Intern	Nestor assists on a wide variety of projects within the Office of Accounting Services.	E-mail: oasintern@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.