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ACCOUNTING SERVICES

Fiscal Management & Discipleship Conference: June 17, 2015

The Fiscal Management & Discipleship Conference will be held on June 17, 2015 at Roncalli High School. The conference will begin with Mass led by Archbishop Tobin and includes networking opportunities, lunch, and informative workshops. Registration and workshop session details follow the newsletter. You can register for the event online at: http://www.archindy.org/finance/fmdc.html. Please contact the Office of Accounting Services with any questions: accountingservices@archindy.org.

Human Resources and Payroll

On April 14th Monsignor Stumpf announced that the Archdiocese of Indianapolis will launch new software to improve service and ensure legal compliance. We've contracted with Paylocity to utilize their payroll, timekeeping, and human resource information systems. Please review the letter from Monsignor Stumpf on page six of this newsletter for further details. A group representing the Catholic Center, parishes, schools, and agencies are piloting the conversion to Paylocity's software in May and we expect to have payroll and timekeeping fully implemented by the end of July. Please stay tuned for a conversion schedule and more information to be published soon. You may contact Carey Kendall at: ckendall@archindy.org if you'd like to adopt the system early in the conversion process.

Monthly Assessments

April assessments were distributed to locations April 20, 2015. Assessments will be withdrawn on Thursday April 30, 2015. Requests for adjustments to withdrawals must be sent to Carey Kendall by noon on Wednesday April 29,2015: ckendall@archindy.org

ADLF Rates for Jan-Mar 2015

Loans 3.75% Deposits 0.75%

The next ADLF committee meeting will be held on Thursday May 7, 2015. If your parish would like to be placed on the agenda for the next meeting, please contact Carey Kendall at (317)236-1519 or ckendall@archindy.org.

Indiana Unclaimed Property

Remember to check the Indiana Unclaimed website for reminder for unclaimed parish property. Visit https://indianaunclaimed.gov/apps/ag/ucp/index.html and search for the parish or entity name. If unclaimed property is found for your parish or agency, select the property to fill out and submit a claim form so the funds may be released back to the property owner.

RISK MANAGEMENT

Contact Changes

Jerry Pachciarz with Gallagher Basset has retired. The new inspection and claim contact at Gallagher Bassett is David Christensen. David can be reached at the same phone and fax numbers listed for Jerry. Also, Helen Baar retired after more than 25 years in Property Management. Many of you have worked with her on property value, insurance, and claims. Future calls should be directed to Mike Witka, Director of Risk Management at mwitka@archindy.org, 317-236-1558 office or 317-997-3561 cell.

Tenant User Liability Insurance Program

Formally known as Special Events Insurance Program is now known as Tenant User Liability Insurance Program or TULIP. The program is now a computer based application and you no longer have to mail in forms. You should have received a folder in the mail about the new program.

Boiler Inspections

Contact Jim Law Office phone, 317-203-5176 Cell phone, 317-987-6573

Email address, jim.law@bpcllcga.com

Feel free to contact Mike Witka at mwitka@archindy.org or (317)236-1558.

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CENTRAL PAYROLL

ACA Compliance

Thanks to all locations who ensured all compensation had the appropriate hours populated in the last pay cycle. Please continue to ensure your pay run has hours associated with all compensation by <u>reviewing the pre-post journal before submission</u> to Central Payroll.

2015 Payroll Calendar

The 2015 Payroll Calendar is published online at: http://www.archindy.org/finance/payroll.html.

Please ensure your pay periods reflect correctly in Paycor.

After opening each pay run, ensure the pay periods reflect correctly. If you do not do this, the pay periods on pay stubs will not reflect correctly. Instructions to update the pay calendar each pay cycle have been added to the Finance-Payroll web page on the Archdiocesan website: http://www.archindy.org/finance/files/parish/payroll/Edit%20Payroll%20Calendar%20Dates%20in%20Perform.pdf.

Please note the following as it relates to the Payroll Calendar:

♦ Anthem Enrollment and Change form Due Dates

Please note the Anthem New Hire Enrollment and Anthem Change forms must be sent to human resources before the due date noted on the Payroll Calendar. This allows Human Resources and Central Payroll sufficient time to process the required paperwork and ensures the required deductions are being modified appropriately. Forms received after the due date noted in "Benefit Changes Due to HR by Noon" on the Payroll Calendar will be processed during the next pay cycle.

♦ Do not reset your Pay run when opening Payroll

Resetting your pay run when opening payroll removes any benefit related changes that were processed by Central Payroll. This will cause issues with employees net pay and warrant back deductions. Please do not reset your pay run when opening payroll. If you do inadvertently reset your pay run, contact Central Payroll to notify the office that this has occurred.

◆ <u>Do not submit payroll before the submission date noted on the payroll calendar.</u>

Processing payroll <u>before the required approval date</u> may disrupt benefit related changes to employee benefits for new, shared, transferred, or terminated employees.

Please ensure Paycor data is complete and accurate. The fields below will be included in the Database Cleanse project that will launch soon.

Hours Worked

A recent audit revealed several locations do not have hours associated with compensation for salaried employees. Hours worked are required to be recorded each pay period. Please ensure there are hours associated with compensation for both hourly and salaried employees. If you have a question on how to ensure hours are associated with compensation, please contact Melinda Buckler at: mbuckler@archindy.org.

◆ Full Time Part-time Employee Status Type

Beginning January 1, 2015 a full time employee is defined as one who works at least 30 hours in the work week. This includes both nine and twelve month employees. Please review all employee's Status Type in Paycor against scheduled hours for 2015 and ensure the appropriate full time or part time designation is assigned to each employee.

♦ Workers Compensation Codes in Paycor

Please ensure all workers compensation codes are assigned appropriately in Paycor. The codes should be assigned as follows: Bus Drivers (WC-7380) / Administration (WC-8868) / Maintenance & Kitchen (WC-9101) / Cemetery (WC-9220)

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PARISH INTERNAL CONTROLS

Exemption from Indiana Utility Sales Tax

One of the benefits of being a tax exempt organization is the ability to be exempt from sales tax under state law, including sales taxes on utilities, if applicable. Utilities (telephone, gas, electric, steam and water) used to further an organization's exempt purpose are exempt from sales tax in Indiana. An organization must apply to receive the exemption by completing Indiana Form ST-200, Utility Sales Tax Exemption Application. Form ST-200, Form No. 48843, can be found by visiting in.gov at: http://www.in.gov/icpr/webfile/formsdiv/index.html. A separate form must be completed for each utility account. In addition to general information about the organization and utility company, the organization must also provide a copy of a utility bill with the application. Nonprofits are also required to explain how the utility is used to further the exempt purpose of the organization.

To claim a refund for Indiana sales tax paid on previous utilities, a nonprofit must complete Form GA-110L, Claim for Refund. The organization must provide an explanation as to why the refund is due along with documentary evidence to support the claim. Documentary evidence usually consists of copies of bills or a "billing history" from the utility service. The bill history must have a column showing the amount of sales tax paid for each period and must be presented on the letterhead, or the like, of the utility company. Refunds for Indiana sales tax paid on previous utilities may only be claimed for the current year and the three previous years. For example, if an organization completes Form GA-110L and it is postmarked on or before December 31, 2015, it could claim a refund for sales taxes paid in all of 2012, 2013, 2014 and 2015.

STEWARDSHIP & DEVELOPMENT

Parish Stewardship Renewal

Are you looking at ways in which you can conduct a parish renewal of time, talent and treasure now that your parish renewal is separate from the United Catholic Appeal? The Office of Stewardship and Development has worked with the Our Sunday Visitor (OSV) to create a custom solution that you can use within your parish. Order what you will use directly from OSV: (1) custom letter, (2) brochure on stewardship, (3) customized parish pledge card/return envelope and (4) posters. Learn more at http://www.archindy.org/stewardship/podcast-kickstart.html.

Free Stewardship Webinar

Loaves+Fishes is a webinar series offered to all parishes, agencies and schools in an effort to increase awareness in areas critical to parish life. If you have missed any of the monthly webinars, please visit http://www.archindy.org/stewardship/podcast.html to listen to one of the 60 minute segments. If you don't have 60 minutes to watch the segment, consider downloading the PowerPoints and reviewing the key points. These are great sessions for small group discussions.

Past topics have included:

- Working Together: How to Create Joint Ministries with Nearby Parishes
- Engaging People as Disciples and Stewards
- When Catholics Don't Go to Mass
- How Stewardship Makes a Difference: Engaging Younger Adults

<u>Upcoming Conference on Stewardship:</u>

Interested in learning more about stewardship? Consider attending the ICSC Annual Conference in Chicago from October 22 - 25, 2015. The Archdiocese of Indianapolis is an ICSC member. This means that if this is the first year a representative from your parish is attending, you can attend using the ICSC Members Special Rate of \$499 per person. (On the registration form, just list Archdiocese of Indianapolis as the organization you are representing.)

Visit http://catholicstewardship.com/ to learn more.

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HUMAN RESOURCES

Anthem Data Breach



As your trusted benefits consultant, I want to let you know that we have just become aware that Anthem, Inc., the parent company of Anthem Blue Cross Blue Shield is the victim of a highly-sophisticated cyber-attack Anthem has informed us that its member data was accessed, and information about our clients could be among the data

We are working closely with Anthem to better understand the impact on its members. Here is what we do know

- Once Anthem determined it was the victim of a sophisticated cyber-attack, it immediately notified federal law enforcement officials and shared the indicators of compromise with the HITRUST C3 (Cyber Threat Intelligence and Incident Coordination Center)
- Anthem's Information Security has worked to eliminate any further vulnerability and continues to secure all of its data
- Anthem immediately began a forensic Information Technology (IT) investigation to determine the number of impacted consumers and to identify the type of information accessed. The investigation is still taking
- The information accessed includes member names, member health ID numbers/Social Security numbers, dates of birth, addresses, phone numbers, email addresses and employment information, including
- income data. Social Security numbers were included in only a subset of the universe of consumers that were impacted. Anthem is still working to determine which members' Social Security numbers were accessed.
- Anthem's investigation to date shows that no credit card or confidential health information was accessed.
- Anthem has advised us there is no indication at this time that any of our clients' personal information has been misused.

 All impacted Anthem members will be enrolled in identity repair services. In addition, impacted members will be provided information on how to enroll in free credit monitoring

Please rest assured, we will continue to work closely with Anthem to better understand the cyber-attack and the impact on our clients. Anthem has created a website – www.anthemfacts.com, and a hotline, 1-877-263-7995, for its members to call for more information, and has shared the attached FAQ that further explains the cyber-attack.

Attached are Q&As Anthem provided to address your concerns along with a letter we encourage you to share with your employees.

We will continue to keep you updated on Anthem's ongoing investigation in hopes to find out who committed the attack, and why

Please feel free to contact me if you have any questions

Benefit Communication Training

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

Safe and Sacred Program

All NEW clergy, religious, employees and volunteers must complete the Safe and Sacred Program BEFORE their first day of ministry, work or volunteer service. Integrated in the training is the background check release form which is also required. The course is available in English and Spanish 24 hours per day, 7 days per week at www.safeandsacred-archindy.org. It takes about 45 minutes to complete and can be done in parts over a series of days. Thank you in advance for your participation in this training and your commitment to the protection of children.

I-9 Forms

Please ensure I-9 forms are on file for all employees. Form I-9 is used for verifying the identity and employment authorization of individuals hired for employment in the United States. All U.S. employers must ensure proper completion of Form I-9 for each individual they hire for employment in the United States. I-9 forms must be completed within 3 day of employment. You can access a link to the I-9 form on the Human Resources website under Forms or at this link: http://www.uscis.gov/sites/default/files/files/form/i-9.pdf.

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OAS STAFF

Tracy Lockwood - Controller

email: tlockwood@archindy.org

Julie Laughlin – Director of Agency Reporting – Julie is currently training to take over agency financial reporting. This will include financial reporting for Catholic Charities, Fatima Retreat House, Bishop Simon Brute College Seminary, CYO and others.

email: jlaughlin@archindy.org

Carey Kendall – Supervisor of Parish and Agency Services – Carey supervises payroll, parish and agency billing, and the administration of the Deposit and Loan Fund. She monitors the accounting services email box, coordinates and manages the parish internal control assessments and the parish annual financial reporting process.

email: ckendall@archindy.org

St. Dina Bato - Accountant - Sr. Dina handles the day to day accounting for Catholic Cemeteries and the Deposit and Loan Fund.

email: dbato@archindy.org

Melinda Buckler - Payroll Specialist - Melinda processes payroll and assists diocese locations wide with any payroll related questions.

email: mbuckler@archindy.org

Nancy Hildwein – Catholic Charities Accounting Supervisor – Nancy is responsible for accounting and reporting for several Catholic Charities agencies.

email: nhildwein@archindy.org

Chris Bramble – Accountant – Chris is responsible for investment accounting and accounting support for Fatima Retreat House and several Catholic Charities agencies.

email: cbramble@archindy.org

Lori Erickson - Accounting Clerk - Lori is responsible for daily cash transactions and fixed asset accounting.

email: lerickson@archindy.org

Sandi Jackson - Accounts Payable Specialist - Sandi is responsible for accounts payable and employee expense reimbursements.

email: siackson@archindy.org

Patty Gotway - Billing Specialist - Patty prepares the monthly parish and agency assessments.

email: pgotway@archindy.org



The Church in Central and Southern Indiana

Chancery

1400 N. Meridian Street, Indianapolis, IN 46202-2367 P.O. Box 1410, Indianapolis, IN 46206-1410 317-236-1400 800-382-9836, ext. 1400 Fax: 317-236-1406 Website: www.archindy.org

April 14, 2015

Dear Pastors, Parish Life Coordinators, Administrators, Presidents, Principals, Directors, Business Managers, and Bookkeepers:

Thank you to everyone who provided input through the Human Resources and Payroll survey conducted of business managers and bookkeepers in November and the focus group that followed. The ideas and feedback received provided valuable insight for improving service in each of these areas. This information also served as the basis for the decision to embark on a project to search for improved software to better meet the needs of parishes, schools and agencies.

In addition to meeting the needs of parishes, schools and agencies, the Archdiocese also needs improved software to fully comply with the Affordable Care Act (ACA). The ACA mandates that we offer health insurance benefits to 95% of eligible employees in 2016 or pay a penalty of approximately \$6 million. The present payroll system does not accurately track time worked by employees, creating liability for a large penalty. Also, hours worked at different parishes, schools, and agencies need to be combined when calculating eligibility, necessitating an archdiocesan-wide solution.

To improve service and ensure legal compliance, we are contracting with *Paylocity*, a cloud-based software solution with excellent customer support, to provide an integrated attendance, payroll, and human resources information system for all parish, school, and agency employees. This new integrated system will replace our current *Paycor* payroll system. *Paylocity* currently contracts with four dioceses, and we've confirmed with these dioceses that *Paylocity* has successfully serviced their accounts with their software solutions.

The Catholic Center and other archdiocesan agencies will adopt the new system first, along with any parishes and schools that wish to implement it early. There will be a phased roll-out with the goal of having all parishes, schools, and agencies using the system by system by July, since hours worked in 2015 determine eligibility for health insurance in 2016. A help desk will be available to answer questions, and field representatives will provide on-site assistance during implementation.

Please direct any suggestions, ideas or questions to the Human Resources Office at https://humanresources@archindy.org or the Accounting Office at eentralpayroll@archindy.org.

Thank you very much for your involvement and assistance with implementing this new system.

Sincerely yours in Christ,

Reverend Monsignor William F. Stumpf Vicar General and Moderator of the Curia

Moneyon Wellow Stung

Archdiocese of Indianapolis



2015 FISCAL MANAGEMENT AND DISCIPLESHIP CONFERENCE

SPONSORED BY FIFTH THIRD BANK

Wednesday, June 17, 2015 Roncalli High School Indianapolis, Indiana

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

Program hosted by: Most Rev. Joseph W. Tobin, C.Ss.R.

The workshops will be hosted by the offices of:

- Accounting Services
- · Risk Management
- Stewardship and Development
- · Catholic Education
- Human Resources

This Conference is targeted at:

- Priests
- Bookkeepers
- Business Managers
- ♦ Finance Volunteers
- School Commission Chairs
- ♦ Principals
- High School Presidents

Event

Participant Registration

8:00 -9:00

Mass led by Archbishop Tobin

9:00

General Session

10:00 - 11:15

Networking break

11:15 - 11:30

Workshop Session A

11:30 - 12:30

Lunch

12:30 - 1:15

Workshop Session B

115 - 215

Networking break

215 - 2:30

Workshop Session C

2:30 - 3:30

Networking break

3:30 - 3:40

Workshop Session D

3:40 - 4:40

FMDC 2015 – Workshop Sessions

Human Resources and Legal/Compliance Matters Update

Ginger Thomas, Human Resources Jay Mercer, Legal Counsel

The presenters will be discussing a wide range of topics including compliance with Department of Labor standards, personnel issues that require legal counsel, best practices for evaluating contracts and the importance of annual personnel reviews. Learn how creating a compliance culture can benefit your parish and the Archdiocese as a whole for years to come.

Suggested Audience: Pastors, Business Managers, Principals, Finance Council/School Commission Members

Payroll and HRISTips and Tricks

Andrea Wunnenberg, Human Resources Operations Manager Carey Kendall, Supervisor, Parish and Agency Services

This session will include an overview of Paylocity's payroll and HRIS system including the move to time and attendance. You'll hear about the implementation process and best practices for a successful implementation and on-going payroll processing and ACA reporting. We will help you understand who to reach out to with questions, Paylocity, Central Payroll or Human Resources.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Accounting Guidance and Bookkeeping Best Practices

Representative from Agresta, Storms & O'Leary CPA Firm

This session will include general accounting topics such as: bookkeeping best practices, tax forms and reports, budget preparation, the Archdiocesan Monthly Assessment, depositing and withdrawing from the Archdiocesan Deposit and Loan Fund, PAFR; Archdiocesa Website and who to contact in OAS.

Suggested Audience: Business Managers, Bookkeepers, Finance Counsel Members

Charity Gaming

Representative from Indiana Gaming Commission

This session will focus on the qualification requirements to conduct charity gaming in the State of Indiana. When is a license required and when does an organization need only to apply for and receive approval to conduct a charity gaming event. Learn how to fill out your required reports including when reports are due, what information needs to be reported, and what records need to be retained.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Growing your Ministry through Planned Gifts and Endowments

Ellen Brunner, Director, Catholic Community Foundation Joanna S Felts, JD., Director of Planned Giving

Would you like to learn about a charitable gift that benefits your Ministry and your supporter? This session is an overview of how you can raise support for your ministry and provide your donors with a charitable tax deduction and a lifetime stream of annual income through a charitable gift annuity. Learn how to use the resource toolkit provided and available to every ministry to help sustain the work of your ministry. A practical approach will be shared. Come and learn the long term benefits of nurturing and growing your ministry endowment.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

The Archdiocese's Response to Indiana's Tax Credit Scholarships and Indiana Vouchers

Chris Brunson, Director of Finances, Mother Theodore Catholic Academies Erich Bangert, Office of Finance, Special Projects

There has been no greater time to plan for the future sustainability of our Catholic schools! This past year alone, \$61 million was raised to provide tax credit scholarships (TCS) in the Archdiocese, awarding approximately 2,200 students this year alone. Additionally, 6,775 students received state vouchers in 2014-15, generating \$27.6 million to pay tuition/fees. During this session participants will learn about the TCS process and benefits to donors and families. We will also cover ways to plan for the sustainability of schools beyond these funding sources. Finally, we will share the current status of voucher legislation in the state of Indiana and the Archdiocese's approach to voucher compliance in all Catholic schools. We will share a helpful guidance document along with the internal compliance plan that has been established.

Suggested Audience: Pastors, Business Managers, Principals, Finance Council/School Commission Members

STRATEGIC PLANNING: Using the National Standards and Benchmarks of Effective Catholic Schools

Gina Fleming, Superintendent of Catholic Schools

Is your parish school seeking ways to better align all of its practices to our Catholic faith? Is your school leadership and commission developing or operating from a strategic plan that addresses Mission and Catholic Identity, Academic Excellence, Operational Vitality, and Leadership/Governance? Do you simply want to learn how accreditation, strategic planning and school improvement plans correlate? If so, please participate in this session to learn more about effective strategic planning in Catholic schools.

Suggested Audience: Pastors, Principals, School Commission Members

STEWARDSHIP: The parish renewal and how a Stewardship Committee can benefit your parish

Jolinda Moore, Director of Stewardship and Development

Explore the ways in which your parish can engage parishioners in renewal of time, talent and treasure activities. For many parishes that have "split" the United Catholic Appeal from the parish renewal efforts, this is a great way to learn more about how to conduct your own renewal. Best practices and examples from other parishes will be showcased as take-away items that you can use. Has your parish wondered what is the purpose of a stewardship committee and how do you start one? Many parishes seek a greater understanding of the role a stewardship committee plays within the parish. They are often curious as to how to get such a committee up and running Exploring best practices and examples from other parishes, this session will help explain how a stewardship committee can become an essential component in parish ministry.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Parish Budgets and Risk Management – Lessons Learned in the Field

Mike Witka, Director, Risk Management

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.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Parish Internal Control Audits (PICA)

Representative from Yount and Company, LLC

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.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

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 Session A Topics ~ 11:30 am		Workshop Session C Topics ~ 2:50 pm	
1	HR-HR and Legal update	1.	HR-Payroll and HR tips and tricks
2.	OAS-Bookkeeping	2.	OAS-Charity Gaming
3.	CCF-Planned Giving	3.	OAS-PICA
4.	OCE-Strategic Planning	4.	OSD-Parish Stewardship Renewal
Workshop Session B Topics ~115 pm		Workshop Session D Topies - 3:40 pm	
1	OAS-Charity Gaminé	1.	OAS-Bookkeeping
2.	OCE-Indiana's Tax Credit Scholarships and Indi- ana Vouchers	2.	OAS-PICA
3.	OSD-Parish Stewardship Renewal	3.	OCE-Indiana's Tax Credit Scholarships and Indiana Vouchers
4.	Risk-RiskManagement Update	4.	4. CCF-Planned Giving
5.	HR-Payroll and HR tips and tricks		

Registration for Conference

Parish Name					
Parish#					
Participants					
Name	Role				
Telephone#	Email				
Workshop Choices: ABC	_D				
CPE Certificate Needed: Yes or No PGP Points Needed:	Yes or No				
Name	Role				
Telephone#	Email				
Workshop Choices: ABC_	_D				
CPE Certificate Needed: Yes or No PGP Points Needed:	Yes or No				

Registration fee is sponsored by Fifth Third Bank Registration is available online at www.archindy.org/funde. If you do not wish to fill out an online registration, then all registration forms must be received by June 9, 2015 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 ekendall@archindy.org or fax to (517) 256-7327

For more information, please contact Carey Kendall in the Office of

Accounting Services by phone: (317)261-1519 or email: accountingservices@archindy.org