

January 2016 Page 1

## ACCOUNTING SERVICES

The Office of Accounting Services welcomes the new Archdiocesan Controller, Brian Schmidt. Brian began work with us on January 4, 2016. He comes to us with 7 years of experience in public accounting at Deloitte. He served as the Account Manager on the Archdiocesan audit this past fiscal year. We are excited that Brian will lead the Office of Accounting Services and confident he's well qualified for his new responsibilities.

### Monthly Assessments

January assessments were distributed to locations Wednesday January 27th. Assessments will be withdrawn on Friday January 29th. Adjustments to January assessments must be received by Thursday January 28th. Please email Carey Kendall adjustment requests for approval: [ckendall@archindy.org](mailto:ckendall@archindy.org).

### ADLF Rates for Jan-Mar 2016

Loans 3.75%      Deposits 0.75%

The ADLF Committee will meet quarterly to review loan requests on the following dates in 2016:

Thursday February 25th, Thursday May 12th, Thursday August 25th and Thursday October 27th.

If your parish would like to be placed on the agenda for any of the meeting dates in 2016, please contact:

Carey Kendall at (317)236-1519 or [ckendall@archindy.org](mailto:ckendall@archindy.org).

## STEWARDSHIP & DEVELOPMENT

### Thank you - we are on the way to achieving the \$6.2 million UCA goal!

The most recent report is favorable with \$5.91 million raised from 17,470 households. We are truly grateful for your continued support of the Appeal. Follow up efforts will begin soon so please continue to highlight the appeal on your website and through bulletin announcements.

### Parish Renewal

Have you started to plan your spring Parish Stewardship Renewal of time, talent and treasure? We are available to offer suggestions, discuss best practices and share with you an easy to use solution that you can customize with your specific ministry needs. Contact Ron Greulich at [rgreulich@archindy.org](mailto:rgreulich@archindy.org) or (317) 236-1426 for more information.

### Tax Letters Out by January 31

What language are you using in your tax letters? To assist your donors in submitting their tax returns, the following should be included (assuming that no benefits such as gifts or services were provided in exchange for the gift):

The organization's name

Contribution date

Amount of the contribution

A statement that no goods or services other than those consisting entirely of intangible religious benefits were provided by the organization in return for the contribution.

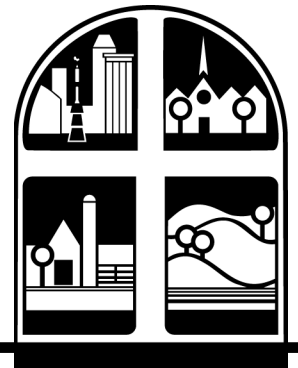
The last bullet point can be summarized as:

*This acknowledgment serves as your tax receipt; please retain it for tax purposes.*

*Beyond intangible religious benefits, <NAME> Parish did not provide goods or services in exchange for your gift. Therefore, under the Internal Revenue Service guidelines, your 2015 contribution is fully tax deductible to the extent allowed by law.*

More information is available in IRS Publication 1771 available at <https://www.irs.gov/pub/irs-pdf/p1771.pdf>.

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.



## CENTRAL PAYROLL

### 2016 Payroll Processing Deadlines

Please refer to the Payroll Processing calendar for bi-weekly deadline dates. All changes such as new hires, rehires, leave of absence, terminations and stipends are due by Tuesdays in each non-payroll week. For example January 26th is the deadline for any changes that would be effective with the February 5th pay cycle. Likewise, payroll must be approved by Tuesday in each week employees are paid. This is Tuesday February 2nd for the February 5th pay period.

### Updated Payroll Web Sites

- ◆ *For Employees*—we've created a web page where you may direct employees to for payroll information. The **Employee Payroll** web page found here: <http://www.archindy.org/finance/employee payroll.html> is full of useful information for employees such as a payroll calendar, notes on how to prepare for the transition to bi-weekly payroll, and links to Paylocity guides that will assist employees with updating important information.
- ◆ *For Parishes and Agencies*—we've updated the resources available for Business Managers and Payroll Processors on the **Parish & Agency Payroll** web page found here: <http://www.archindy.org/finance/payroll.html>. Parishes and agencies will find the 2016 Payroll Calendar with deadlines and many helpful Paylocity guides.

### W2 Delivery

W2s were delivered to each location. Paylocity inadvertently addressed all of these packages to Carey Kendall. The package should be routed to the Business Manager. The Business Manager will hand out the W2s or mail them by Friday January 29th.

### W2s Are Available Online

W2s are available online through the Paylocity Employee Self-Service Portal.

To access W2s online, follow the following instructions:

Employees may find instructions to register for self-service here:

[http://www.archindy.org/finance/files/parish/payroll/Self\\_Service\\_Login.pdf](http://www.archindy.org/finance/files/parish/payroll/Self_Service_Login.pdf)

Employees may find their Paylocity Company ID here:

<http://www.archindy.org/finance/files/parish/payroll/Locate%20Your%20Location%20Paylocity%20ID.pdf>

A link to the portal is found here:

[https://login.paylocity.com/Escher/Escher\\_WebUI/views/login/login.aspx](https://login.paylocity.com/Escher/Escher_WebUI/views/login/login.aspx)

After the employee has accessed their Paylocity employee self-service dashboard.

- ⇒ Click on the down arrow in the Pay Section
- ⇒ Then select More (last link listed)
- ⇒ Select Tax Forms

The W2 information will appear on the screen, the employee may choose to click the orange Download W-2 button to save a copy for their records.

### Paycor Account

Do not process any closure paperwork you receive from Paycor. The Archdiocese is working on an archiving solution with Paycor. During this time, the Archdiocese will pay the minimum monthly fees due to Paycor.

### Taxes

Please forward any State or IRS taxes notices to [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org). We'll work with Paylocity to resolve any tax issues.

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.



## HUMAN RESOURCES

### 2016 Medical & Dental Deductions

The Archdiocese awarded a medical and dental premium holiday on January 8, 2016. Medical and dental deductions will begin with the check date on January 22, 2016. The medical and dental deductions will be spread over 25 pay periods.

### Deductions Per Pay

Family Medical	\$194.31	Family Dental	\$21.23
Single Medical	\$36.00	Single Dental	\$4.15

### 2016 Health Savings Account Contributions

Beginning January 1, 2016 employer health savings account (HSA) contributions occur each pay period, starting on January 8, 2016. The only exceptions are April and September which have three pay periods. Contributions will occur on the first two paychecks in those months. The amount of the employer HAS contributions will be \$50 per pay period for single medical coverage and \$100 per pay period for family medical coverage. Employee contributions will follow the same schedule; every pay period except for the third pay periods in April and September.

### Update EE Information through Employee Dashboard

Name, address, tax, direct deposit, beneficiary, employee health savings account contributions, etc.  
403b deferrals must be changed through McCready & Keene

### **EMPLOYEES ELECTING MEDICAL COVERAGE FOR THE FIRST TIME REQUIRE IMMEDIATE ACTION**

We recognized that many employees who have newly elected medical coverage beginning on January 1 have not yet opened their health savings accounts (HSA). If all your employees already opened their health savings accounts previously and notified HR of your account information, please disregard this note. As always, back contributions are not made due to an account not being opened by the deadline date. Employees will forfeit the employer contributions if their account is not active by the payroll processing date. Please contact [hr@archindy.org](mailto:hr@archindy.org) if you or your employees need assistance opening their health savings bank account.

### Timely Processing of Terminations & New Hires

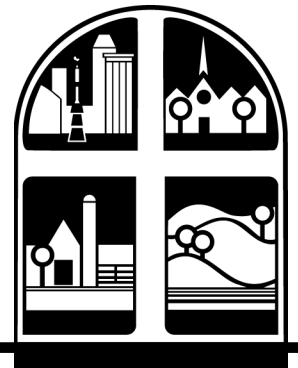
Terminate and hire employees in payroll system timely. The system now notifies us to start or end their health insurance coverage.

### Shared Employees

A shared employee is someone who works at multiple locations across the archdiocese. In order for the payroll and HRIS system to work properly and ensure we are in compliance with both the Department of Labor and the Affordable Care Act, we needed to assign the same "Employee ID" across all locations where you work within the archdiocese. During this process, we terminated one (or more) of the shared employees records in the system and reassigned or created a new record for the location or locations where they work.

Please note that we have been working with Paylocity to ensure that you will still have access to your previous records within the system. This means you may have two different User Names and accounts at some locations: one to access your previous record and one to access your new record going forward.

**Important: Next Steps – Your Action is Required** Due to these changes, shared employees will need to re-register with Paylocity for one (or more) of the locations where they work to gain access to their new record. We have a guide available to assist employees with setting up a new User Account. The previous (or terminated) record can still be accessed with the established User Name and Password if the employee was registered to use the system. Please feel free to contact us by emailing [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org) or [hr@archindy.org](mailto:hr@archindy.org) if you or employees have any questions regarding this information. **Also, please be advised that it is imperative that locations let us know as far in advance as possible that you anticipate entering a shared employee into the system. We'll ensure the employee is setup appropriately.**



## HUMAN RESOURCES

### Effective Dating of Changes to Employee Records

Employee type, position, or job title changes must be entered with the true effective date that the change occurred on. These dates all must be the same in the payroll system. These are known as effective dates and they drive processes for benefits within the system. Any related changes such as pay rate, default hours, etc. must also be made at the same time in the system. We reviewed this subject on our weekly conference call with locations on January 28th and sent a summary of the subject after that conference call with screen prints. We'll work toward publishing a guide for reference. Please let us know if you have any questions about effective dating in the system.

### Database Cleanup Project

The payroll conversion is complete for all locations. We're still working with Paylocity to ensure their databases were loaded with the correct data from Paycor. Some data such as email addresses and phone numbers are still missing. We need each location to ensure that this demographic information is filled in. Email addresses are required in the Paylocity databases and are used as a means to notify employees of important changes to their benefits, payroll, and to distribute mass emergency notifications. Please report any missing data issues to Andrea Wunnenberg or Carey Kendall so we can work with Paylocity to upload data that may have been missed during the conversion.

### ACA Compliance

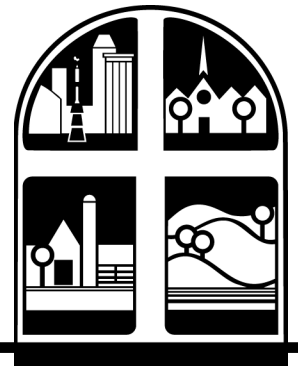
The central office will handle all filing requirements for ACA. To ensure compliance, hours need to be associated with all pay issued to employees. For salaried employees, please ensure the "default hours" field (under Rates) is filled in with the standard number of hours the salaried employee is expected to work during the pay period. This information is being used to fulfill certain reporting requirements for compliance with ACA.

### Safe and Sacred Program

All NEW clergy, religious, employees and volunteers are required to 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](http://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. Please contact Human Resources at [hr@archindy.org](mailto:hr@archindy.org) if you have any questions.

### 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>.



## RISK MANAGEMENT

### IMPORTANT NEW CHANGES IN COVERAGE:

- The auto physical damage will change from the current level of \$5,000 per claim deductible to \$1,000 per claim deductible.
- The student accident coverage will now have a \$500 per occurrence deductible. Example: a football injury that has \$10,000 in medical costs. The family insurance will only pay \$8,000. Then the secondary (student accident) coverage comes into play after a second deductible of \$500 resulting in another payment to the family of \$1,500. The family will incur the cost of the student accident deductible.

## PURCHASING

### Candles

Candles are very important in our church services. The candles we use are at least 51% beeswax. Many of us may not be aware that there is a theology of a candle. The main reason is that they represent Christ, the Light of the World. To break it down further, the flame is what represents Christ as the Light of the World. The wick symbolizes Christ's divinity which is hidden by His humanity (symbolized by the wax). The wax of the candle symbolizes Christ's humanity which hides His divinity (symbolized by the wick).

As the candle burns, it gets smaller and smaller, in a sense, it sacrifices itself, symbolizing how Christ sacrificed Himself on the cross for our salvation. The wax itself is made by female worker bees who never mate and further symbolizes Christ's perfect purity. It makes you look at the candle a little differently!

APD has a special pricing on candles produced by Root, Cathedral, Emkay, Dadant, and Will and Baumer. All of these companies offer a full line of candles including altar candles, sanctuary candles and Paschal candles. You can also get baptismal, advent, votive, candle light service candles, charcoal and incense. If you are purchasing candles from other sources, please contact me and let me quote you some prices. I am sure we can save you some money.

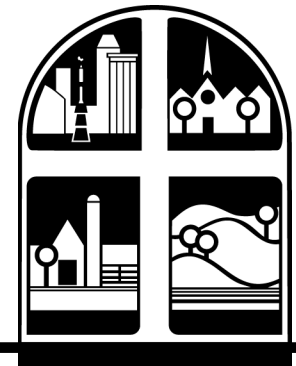
### Receiving Shipments

Many products you receive arrive via a commercial trucking company and we would like to pass along some helpful information about receiving freight.

The standard delivery offered by trucking companies is called tailgate delivery. The driver will move the material to the end of the truck, or tailgate, and you are responsible for taking it off of the truck and into your building. Inside delivery is where the truck driver will bring the materials inside and is usually available at an additional cost. Arrangements should be made in advance for inside delivery. APD always requests that freight companies call you before delivery.

The receipt the driver will ask you to sign is a legal document which states you have received the freight shown in good condition. Please take the time to count the number of cartons and note any shortage on the delivery receipt before you sign it. Also, please inspect the cartons for signs of damage and note it on the delivery receipt before signing it. After you have noted any shortage or damage it is safe to sign the receipt and we can file a claim with the trucking company to pay for a replacement. Sometimes the carton may appear to be fine, but the contents are damaged. This is known as concealed damage. We can file a claim for this but we are not as likely to recover the full amount from the carrier.

Rest assured, that we and our suppliers are making every effort to deliver your order in good condition. You can further protect your institution by following the steps mentioned in this message. We want our valued customers to be satisfied with what they order! You may contact Steve James with questions at: [sjames@archindy.org](mailto:sjames@archindy.org).



## FINANCE & ADMINISTRATION

<b>Brian Burkert – Chief Financial Officer</b>	<a href="mailto:bburkert@archindy.org">bburkert@archindy.org</a>
<b>Stacy Harris – Director of Financial Analysis &amp; Administrative Services</b>	<a href="mailto:sharris@archindy.org">sharris@archindy.org</a>
<b>Mike Witka - Director of Parish Financial Services &amp; Insurance Office</b>	<a href="mailto:mwitka@archindy.org">mwitka@archindy.org</a>
<b>Eric Atkins – Director of Management Services</b>	<a href="mailto:eatkins@archindy.org">eatkins@archindy.org</a>

## OFFICE OF ACCOUNTING SERVICES

<b>Brian Schmidt – Controller</b>	<a href="mailto:bschmidt@archindy.org">bschmidt@archindy.org</a>
<b>Julie Laughlin – Director of Agency Reporting</b> Julie is responsible for the financial reporting for Catholic Charities, Fatima Retreat House, Bishop Simon Brute College Seminary, St. Mary's Child Center, CYO and others.	<a href="mailto:jlaughlin@archindy.org">jlaughlin@archindy.org</a>
<b>Carey Kendall – Supervisor of Parish and Agency Services</b> Carey supervises payroll, parish and agency billing, and the administration of the Deposit and Loan Fund. She coordinates and manages the parish internal control assessments and the parish annual financial reporting process.	<a href="mailto:ckendall@archindy.org">ckendall@archindy.org</a>
<b>Sr. Dina Bato – Accountant</b> Sr. Dina handles the day to day accounting for Catholic Cemeteries and the Deposit and Loan Fund.	<a href="mailto:dbato@archindy.org">dbato@archindy.org</a>
<b>Melinda Buckler – Payroll Specialist</b> Melinda processes payroll and assists diocese locations wide with any payroll related questions.	<a href="mailto:mbuckler@archindy.org">mbuckler@archindy.org</a>
<b>Nancy Hildwein – Catholic Charities Accounting Supervisor</b> Nancy is responsible for accounting and reporting for several Catholic Charities agencies.	<a href="mailto:nhildwein@archindy.org">nhildwein@archindy.org</a>
<b>Chris Bramble – Accountant</b> Chris is responsible for investment accounting and accounting support for Fatima Retreat House and several Catholic Charities agencies.	<a href="mailto:cbramble@archindy.org">cbramble@archindy.org</a>
<b>Rhobie Bentley – Accounting Specialist</b> Rhobie is responsible for daily cash transactions and fixed asset accounting.	<a href="mailto:rbentley@archindy.org">rbentley@archindy.org</a>
<b>Sandi Jackson – Accounts Payable Specialist</b> Sandi is responsible for accounts payable and employee expense reimbursements.	<a href="mailto:sjackson@archindy.org">sjackson@archindy.org</a>
<b>Patty Gotway – Billing Specialist</b> Patty prepares the monthly parish and agency assessments.	<a href="mailto:pgotway@archindy.org">pgotway@archindy.org</a>