

THE OAS MESSENGER



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OAS CONTACTS

OAS Contact Information

With recent staffing changes to the OAS, please note the following changes to contact information.

Payroll related questions should be sent to centralpayroll@archindy.org.

ADLF and Archdiocesan Billing questions should be sent to accountingservices@archindy.org.

CENTRAL PAYROLL

Payroll Information

As a rule, please give ONE WEEK AFTER the pay date before submitting your next payroll. When your location payroll is submitted to Paycor, we are not able to make timely updates or changes (health, dental, etc.). This can cause employee benefit deductions to be doubled unnecessarily to catch up for the employee.

ACCOUNTING SERVICES

2012-13 Budget Guidelines

The guidelines for 2012-2013 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 15, 2012 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 1-800-382-9836 Ext 1410 or 317-236-1410.

ADLF Rates for April - June 2012

Loans 3.50% Deposits 1.0%

If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org.

Parish Annual Financial Report

For the fiscal year ending June 30, 2012, the Parish Annual Financial Reports will again be submitted using the online survey format. An e-mail link to the survey and instructions will be sent to the person at each parish that submitted the report last year. The instructions will NOT be sent by regular mail. All documents will be available online. The e-mail containing the link and the instructions will be sent out in June. If the contact has changed since the prior year, please email accountingservices@archindy.org to have the distribution list updated.

SECA Reimbursement

Updated 2011 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, 2012 for the 2011 tax year, to centralpayroll@archindy.org.

Paycor Contact

Now that we are more familiar with the Paycor system, our contact at Paycor is GiGi Gonzalez, GGonzalez@paycor.com or 513-345-6878. Gerri Smith can still assist when necessary, but GiGi should be contacted first with any issues.

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.

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.

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

Mileage Reimbursement Rate

The IRS on Friday December 9, 2011 released standard mileage rates for use in 2012 (Notice 2012-1). Taxpayers can use the optional standard mileage rates to calculate the deductible costs of operating an automobile.

For business use of an automobile remains at 55½ cents per mile.

The Archdiocese reimburses employees for 75% of the IRS issued standard mileage rate. Effective for miles driven on or after July 1, 2011 (last date the reimbursement rate was modified), the Archdiocese mileage reimbursement rate continues to be **41.63 cents** per business mile incurred. We recommend that parishes examine individual budgets carefully when determining a reimbursement rate.

CATHOLIC EDUCATION

Private School Tax Deduction

Effective Jan. 1, 2012, IC 6-3-2-22 authorizes taxpayers to claim a retroactive \$1,000 state income tax deduction per dependent who is enrolled in a private school or who is home schooled in grades K-12 and incurs costs for tuition, fees, computer software, textbooks or school supplies. To claim this credit, you will need to provide the following information about the school attended: School Name and DOE School Number under the Archdiocese of Indianapolis Corp. #9200. Three PDF documents are posted: 1) Information about the deduction; 2) Form IT-40, Schedule 2 Deductions Form; 3) List of IDOE School Numbers. Find these at: www.archindy.org/oce/, Public Downloads, Misc., Private School Parent Tax Deduction, or click on: <http://www.archindy.org/oce//index.asp?action=ioi&catid=198>.

Scholarships and Vouchers

Up-to-date information on SGO Scholarships and State School Vouchers can be found at <http://www.archindy.org/oce//index.asp?action=ioi&catid=206>. Please select 'SGO Scholarships and State Vouchers Information' on the drop down list.

HUMAN RESOURCES

2013 Health Plan

The 2013 health plan will have the same premiums for employees and parishes, schools, and agencies, as well as the same deductibles, out-of-pocket maximums, and monthly health savings account contributions. This is the fourth consecutive year of no plan changes or cost increases. Since health care costs are rising by about 10% per year across the country, this is great news for employees and the locations where they work. Please contact Human Resources at hr@archindy.org if you have any questions.

Employee Auto-Saving

The IRS has increased the annual limits for health savings account contributions in 2012 to \$3,100 for single coverage and \$6,250 for family coverage. There is still a \$1,000 allowable catch-up contribution for people age 55 and over. The IRS has also raised the annual contribution limit for 403(b) retirement savings plans to \$17,000. There is also a \$5,500 catch-up contribution for people who are age 50 and over.

Pension Plan Changes

Employees were notified by mail of important changes to Archdiocesan pension benefits. It is important that business managers, principals and administrators understand the changes being made to effectively communicate this with all existing and future employees.

Current pension benefit changes: We intend to continue funding pension benefits for all current employees and for employees hired before January 1, 2012. It is the current intention of the Archdiocese to continue to make contributions to the pension for these employees. Please note, new employees hired on or after January 1, 2012 will NOT be covered by the pension plan.

Retirement savings 403(b) plan changes: Effective January 1, 2012, the Archdiocese will improve the matching contributions in our retirement 403(b) savings plan. The Archdiocesan match will be 50% of eligible contributions up to **8%** of pay (up from the previous 6% of pay). This improved matching contribution is available to both existing and newly hired employees (even those hired after 1/1/2012).

Contact Human Resources at hr@archindy.org with questions.

Benefits Meetings

Ed Isakson from Human Resources would be glad to come to your parish or school to talk about employee benefits and answer questions. To schedule a meeting on a date and time convenient for your staff, please contact Ed at eisakson@archindy.org

Send us your questions! Each month one or two questions will be addressed based on inquiries of the parishes.
Please submit any questions you would like answered to accountingservices@archindy.org.



HUMAN RESOURCES

New Smoking Ban Takes Effect on July 1st

Indiana's new workplace smoking ban takes effect on July 1st. The law requires:

Informing current and prospective employees that smoking is prohibited inside the building

Removing all ashtrays

Posting a sign at each public entrance to the school or office that reads "State Law Prohibits Smoking Within 8 Feet of This Entrance"

If you do not already have signs posted that ban smoking on your property, you can obtain them for free by contacting Human Resources at hr@archindy.org.

Background Re-Checks for Employees

Our policy requires priests, deacons, employees, and volunteers who have contact with children to have background re-checks every 5 years. Thanks to everyone who processes these re-checks. We appreciate your help in ensuring a safe environment for children, co-workers, and others whom we serve.

In preparation for our on-site audit through the USCCB in November, we asked Barada Associates to process re-checks for priests, deacons, and employees who have not been checked since July 1, 2007. They anticipate completing this project by the end of June. The person designated to perform checks at your location will receive reports from these re-checks and an invoice from Barada Associates.

Since we don't have a database of volunteers who have contact with children, we ask each location to continue to re-check them every 5 years. A letter from Bishop Coyne regarding child protection will be distributed in June along with a form for each location to certify that volunteers who have contact with children receive checks and re-checks. These certification forms are due back to Human Resources by August 31st.

Thanks again for your help with this important process to maintain a safe environment. If you have any questions or suggestions, please contact Human Resources.

RISK MANAGEMENT

Self Inspections

We are in the early stages of the self-inspection program. If you have not sent in a contact person please do so - we need the name of the person to contact, phone number, and email address.

Event Rental Insurance

You have received by now a packet explaining the event rental insurance coverage. If you have any question contact Mike Witka at mwitka@archindy.org

Insurance Office on the Web Site

We have renewed the insurance for July 1, 2012 with a couple of changes. One is the property will now be through Church Mutual. The Boiler and Machinery will be through XL Greenwich Insurance. The normal contacts for insurance will continue. Please become familiar with all the reporting forms and information on the Insurance Office Website page.

Storms and Claims

After each major storm system that comes through your area please physically inspect the possible damage to your building. One major concern would be the roof. If you can not see damage but suspect there may be some please call our office or Jerry Pachciarz 317-546-4833.

ARCH CONTACTS

Do you know who to contact when...

Property insurance or risk questions?

ADLF?

Payroll?

Billing questions?

Parish budget or other questions?

Accounting Office

Mike Witka—mwitka@archindy.org or (317) 236-1558

accountingservices@archindy.org

centralpayroll@archindy.org

accountingservices@archindy.org

accountingservices@archindy.org

(317) 236-1410 or 1-800-382-9836 ext. 1410



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June 25, 2012

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

In an effort to better serve you, the Office of Accounting Services has taken a fresh look at how we prepare the monthly billing statement. We looked for opportunities to streamline the process and simplify the statement. One of the ways we wish to accomplish this is to determine the monthly billing amount for certain items, which do not fluctuate significantly throughout the year, as of a point in time and bill the same amount each month based on that information. We recognize this is a change from our process in previous years but we believe the dollar impact will not be significant to any location and the benefit of knowing the monthly billing amount in advance outweighs any negative consequences. Based on this effort we are making the following changes to the monthly statement for the 2012-2013 fiscal year.

Property Insurance, Property Assessment and Vehicle Insurance

The amounts billed will become static amounts based on property and vehicles held as of July 1, using the new rates as published in the 2012-2013 budget guidelines. Therefore if you acquire or dispose of property or vehicles during the year, the amount you are billed will not change until the next fiscal year.

Criterion Subscriptions

The amount billed will become a static amount set at the beginning of each fiscal year based on the number of households less direct subscriptions as of July 1.

Worker's Compensation Insurance

This amount will become a static amount set at the beginning of each fiscal year based on total salaries as of December 31 of the previous calendar year (December 31, 2011 for fiscal year 2012-2013), using the new rates for each type of employee as published in the 2012-2013 budget guidelines.

Lay Retirement

Currently, we do not have the payroll data to determine full time employees and update the lay retirement calculation as we have in the past (See the payroll database update letter from Mickey Lentz). As such for 2012-2013 the lay retirement assessment will increase 2% for each location.

The remaining items on the bill will continue to be calculated as they have been previously. Thank you for your understanding. We hope this improved process will simplify your accounting as well as ours! If you have any questions or suggestions, please contact OAS at accountingservices@archindy.org.

Tracy Lockwood
Controller – Office of Accounting Services
tlockwood@archindy.org
317-592-4005

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June 27, 2012

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

We are contacting you to ask for your assistance. Our payroll database is used to calculate costs for life insurance, disability insurance, worker's compensation and other benefits. As good stewards, we want to ensure that the database is accurate, so that our benefits-related expenses are correct.

Please help us to update the payroll database at your location. **As a token of our thanks, you will receive a \$250 to \$1,500 reduction from your September bill from the Archdiocese.**

The more employees you have, the bigger the reduction, as shown below:

Number of Employees on Payroll Prior to Updates	Reduction in September Bill
24 or less	\$250
25 - 49	\$500
50-99	\$1,000
100 or more	\$1,500

Here are the areas where we need your help:

1. Entering Termination dates for employees that no longer work at your location
2. Updating worker's compensation codes on the Earnings tab
3. Ensuring correct job titles and job codes
4. Indicating whether each employee is part-time or full-time and if Seasonal
5. Identifying whether each employee is exempt or non-exempt
6. Correcting scheduled hours, when necessary on the Regular hours including Salaried employees
7. Ensuring accurate tax deductions, including local county taxes
8. Including a location number for each employee , formatted as stated in the instructions
9. Entering the employee's gender on the general tab
10. Updating Religious employees order and earnings code

A full, user-friendly explanation of these 10 steps and a Paycor User Guide can be found at www.archindy.org/finance/

The deadline to receive the fee reduction is August 31, 2012. Please complete the attached verification form and e-mail it to hr@archindy.org or fax it to (317) 261-3389. There will be spot checks of corrected databases at some locations to ensure that the 8 steps listed above were completed.

We are very grateful for your assistance! If you have any questions or suggestions, please contact Human Resources at hr@archindy.org or Payroll at centeralpayroll@archindy.org.

God bless you,

Annette "Mickey" Lentz
Chancellor

Send us your questions! Each month one or two questions will be addressed based on inquiries of the parishes.
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Verification Form for Payroll Database Update June - August 2012

Parish, School, or Agency Name: _____

Street Address: _____

Location Number: _____

Name(s) of Person(s) Who Updated Database (please include e-mail address next to name):

Total Number of Employees on Payroll Prior to Updates: _____

Fee Reduction

Amount of Fee Reduction Based on Chart Below: _____

Number of Employees on Payroll Prior to Updates	Reduction in September Bill
24 or less	\$250
25 - 49	\$500
50-99	\$1,000
100 or more	\$1,500

Certification by Pastor, Parish Life Coordinator, President, Principal, or Director

I certify that the payroll database for the location listed above was updated as instructed, and that the location should receive the fee reduction indicated on this form.

Signature: _____

Printed Name: _____

Date: _____

Please e-mail this form to Human Resources at hr@archindy.org or fax it to (317) 261-3389 by August 31, 2012 to receive the fee reduction in September.

Send us your questions! Each month one or two questions will be addressed based on inquiries of the parishes. Please submit any questions you would like answered to accountingservices@archindy.org.