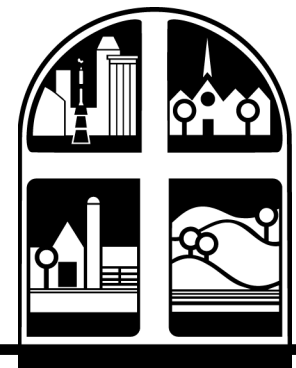


# THE OAS MESSENGER



June 2017 Page 1

## OVERVIEW

### What's New This Month?

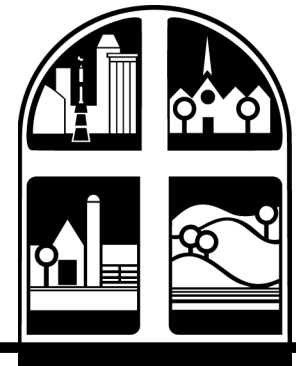
Here are some key items to pay special attention to in this month's newsletter:

- [See page 2](#) for important budget notes
- [See page 2](#) for **new** information regarding the Billing Calendar.
- [See page 3](#) for important Paylocity system notes, updated payroll processing instructions, manuals and forms.
- [See page 4](#) for information on what your parish / school / agency must do to maintain compliance with incorporation annual requirements.
- [See page 4](#) for an information technology update on the recent ransomware attacks sweeping the nation
- [See Page 5](#) for an update on the United Catholic Appeal, important Stewardship and Development event dates, and webinar opportunities.

- At the end of March, we welcomed a new hire to the OAS Team. Diane Sutton is our new Cash Specialist and is assuming many of Rhobie Bentley's previous responsibilities. Rhobie is now working in Stewardship and Development with the Catholic Community Foundation. You can reach out to Diane for any questions you would have previously sent to Rhobie. [See page 7](#) for Diane's photo and contact information.

### Upcoming Dates to Remember

| Date                  | Subject  | For more information, see...  |
|-----------------------|--|---|
| <b>Payroll Dates:</b> |  |   |
| Tuesday, May 30th     | Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for June 9th pay date.  | <a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a> |
| Tuesday June 6th      | Payroll approval due date for June 9th pay date.   |   |
| Tuesday June 13th     | Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for June 23rd pay date. |   |
| Tuesday June 20th     | Payroll approval due date for June 23rd pay date.  |   |
| Tuesday June 27th     | Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for July 7th pay date.  |   |
| <b>Other Dates:</b>   |  |   |
| Thursday, June 1st    | Priests are to submit their reimbursement of SECA on or before June 1, 2017 for the 2016 tax year.                   | <a href="#">Page 2</a>  |
| Thursday, June 15th   | Parish and schools budgets for fiscal year 2017-18 are due to OAS.   | <a href="#">Page 2</a>  |



## ACCOUNTING

### Monthly Assessments

May assessments will be withdrawn on Wednesday May 31st. Please email [ckendall@archindy.org](mailto:ckendall@archindy.org) with deferral requests. June assessments will be distributed to locations the week of June 26th.

### Billing Calendar

To help parishes and schools manage the timing of cash flows, we prepared a billing calendar in the 2017-18 Budget Guidelines to provide a high-level overview of when major items are scheduled to be billed by our office. In the monthly OAS Messenger newsletter, we will communicate any deviations from this timeline by publishing the billing calendar for the upcoming three billing months (e.g. the July newsletter will show the table below for the current month and upcoming two billing months of August and September). Note that this month's calendar omits June (current month) as the calendar's first month is for July 2017.

| Description             | Billing Frequency | July | August |
|-------------------------|-------------------|------|--------|
| Cathedraticum           | Monthly           | X    | X      |
| Clergy Healthcare       | Monthly           | X    | X      |
| Lay Retirement          | Monthly           | X    | X      |
| Safe and Sacred         | Annually          | X    |        |
| Indianapolis Education  | Monthly           | X    | X      |
| Property Ins.           | Monthly           | X    | X      |
| Vehicle Ins.            | Monthly           | X    | X      |
| Workers Comp.           | Monthly           | X    | X      |
| Lay Health Ins.         | Monthly           | X    | X      |
| Criterion Subscriptions | Monthly           | X    | X      |

### SECA Reimbursement Forms Are Due

The primary institution will reimburse the priest for SECA (Self Employment Compensation Act) after he has filed his taxes for the previous year. **Priests are to submit their reimbursement of SECA on or before June 1, 2017 for the 2016 tax year.** All SECA Reimbursements are paid through Central Payroll and billed to the primary institution. SECA reimbursement requests should be sent to:

[centralpayroll@archindy.org](mailto:centralpayroll@archindy.org)

### Parish and School Budgets are due to the Office of Accounting Services by June 15, 2017

Budget guidelines for fiscal year 2017-18 are available at: <http://www.archindy.org/finance/parish/guidelines.html>

Budgets should be submitted in the format used by the parish or school. Budgets should be completed and forwarded to the Office of Accounting Services for review on or before June 15, 2017. Please complete the budget approval form with the pastor, PLC, administrator or principal's signature indicating the budget has been approved; see the Budget Approval Form in Appendix D. The budget and budget approval form may be e-mailed to [accountingservices@archindy.org](mailto:accountingservices@archindy.org) (preferred) or faxed to 317-236-7327.

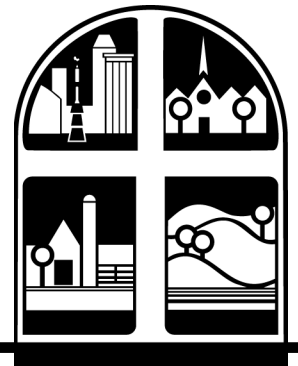
### ADLF Rates for Apr-Jun 2017

**Loans 3.75%      Deposits 0.75%**

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

- 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](mailto:ckendall@archindy.org).



## CENTRAL PAYROLL

### Updated Payroll Processing Instructions

There is an updated payroll processing instruction available online that incorporates electronic timekeeping (Web Time) with the original payroll processing instructions you were provided for Web Pay. These instructions combine the steps required to process payroll when using Web Time and Web Pay; the new instruction supersedes any previous version you were provided by the Archdiocese or Paylocity and can be found at this link: <http://www.archindy.org/finance/files/parish/payroll/Detailed%20WebTime%20to%20WebPay%20Processing%20Instructions.pdf>

### Electronic Timekeeping (Web Time)

All locations were required to have completed Web Time by March 31, 2017. Please contact Carey Kendall if you have not scheduled your implementation: [ckendall@archindy.org](mailto:ckendall@archindy.org).

### Web Time | Web Pay Sync Issue

Paylocity reports the sync issue between Web Pay and Web Time still exists; developers are working on addressing the issue. Paylocity relays that duplicate timecards and duplicate badge numbers for active and inactive employees may be the cause of the issue. To assist with isolating and resolving the issues, Central Payroll will now manage the settings on the Web Time tab. Central Payroll is running a new hire report each Catholic Center business day and completing the Web Time setup for new employees and rehires. Reach out to Central Payroll if you need assistance with the settings on the Web Time tab. Locations can assist with the resolution of the issue by:

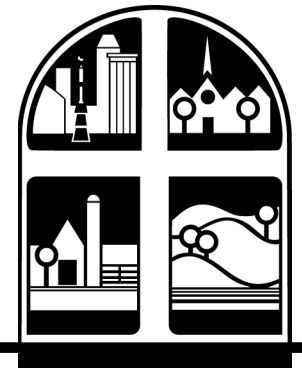
1. **Please do not erroneously assign badge numbers on the Web Time tab.** Central Payroll will assign badge numbers.
2. **Please do not assign badge numbers or check the Enable Time & Labor box on the Web Time tab.** Central Payroll will also assist with this setting.
3. If you notice a difference in time off balances between Web Time and Web Pay, follow the updated payroll instructions to **close out any open pay periods for your location in Web Time.** If that doesn't resolve the issue, please reach out to Central Payroll for assistance with a manual system sync request.

### Employees Identification Numbers

Paylocity is working with the Archdiocese to ensure all employee identification numbers are unique for all employees in the Archdiocese. Paylocity or the Archdiocese may reach out to you while we are working on this issue with special instructions about employee identification number re-assignments. **Please remember to review the employee identification numbers with HR for shared employees or re-hires before submitting those changes in the system.**

### Summer Coupon Plan

Employees who are not receiving a paycheck over the summer months but who are covered on our health or dental insurance will utilize a coupon payment plan over the summer. **The options for paying are by check, money order, or by authorizing direct debit.** Christa Bunch has created an automatic debit form that you can use to authorize direct debit for paying insurance premiums over the summer. Please reach out to Christa with questions: [cbunch@archindy.org](mailto:cbunch@archindy.org).



## ANNUAL DOCUMENTATION REQUIRED FOR PARISHES AND HIGH SCHOOLS

### Annual Requirements for Incorporated Entities

There are annual documentation requirements that must be met by each individually incorporated parish, school, and agency. These requirements are listed below, along with resource information for how to meet and document your compliance with the requirement. Although certain of these requirements won't require action until July or August, we wanted to provide this information as early as possible this year to allow you to plan for these meetings and actions.

- Conduct Annual Meeting between July 1st and September 15th. You will document the Annual Meeting Minutes and retain these at the parish or high school. Refer to this link for information on the topics that should be covered in the Annual Meeting. [Annual Meeting Minutes Example](#)
- Complete Conflict of Interest Disclosure Statements for each officer and director by September 15th and retain the signed disclosure statements at the parish or high school. The following link will take you to an example Conflict of Interest Disclosure Statement. [Conflict of Interest Disclosure Statement Example](#)
- Parish Annual Financial Report—due September 15th. More information to come in the July newsletter!
- If your parish has been affected by Connected in Spirit in the previous fiscal year, please reach out to the Office of Accounting Services for further instructions.

Please confirm that you have completed the above action items and returned the necessary documents to the Archdiocese. If you have any questions, please contact OAS at [accountingservices@archindy.org](mailto:accountingservices@archindy.org).

## INFORMATION TECHNOLOGY

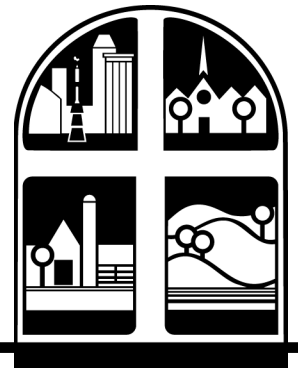
### IT Hot Topics

Periodically, Deacon Ron Pirau will publish updates on IT hot topics that are relevant to both the Catholic Center as well as parishes, schools, and agencies. Within this section of the OAS Messenger, we will provide links to these updates.

[Update on Security Measures to combat Wannacry and Prevention \(Ransomware\)](#)

### IT Security Self-Assessment

Due to the increase in IT security incidents it would be a good time to assess if your parish is prepared to prevent malicious attacks. A document has been prepared to do a self-assessment of IT security and can be found at <http://www.archindy.org/finance/is.html>. If you don't have a parish staff member that is capable of doing the self-assessment or don't have a professional IT services firm who can help, please contact Deacon Ron Pirau (Archdiocese Director of Information Technology), [rpirau@archindy.org](mailto:rpirau@archindy.org), or 317-261-3379. The AME Group may be contracted to help with the self-assessment. The Archdiocese has contracted with the AME Group to provide IT support at the Catholic Center and to support other ministry locations. The AME Group has locations throughout the Archdiocese. If you wish to utilize The AME Group, please let Deacon Ron Pirau know first and he will assist you in this process.



## Circle of Giving Mass and Dinner

The Circle of Giving Mass and Dinner was held on May 25th. The Circle of Giving Mass and Dinner is an event to thank our generous donors for gifts to the United Catholic Appeal and Catholic Community Foundation. The theme of the evening is gratitude to God as we celebrate *A Mass of Thanksgiving, Stories of Philanthropy, An Evening of Impact*. The program shares stories of how donors' financial gifts impact the lives of others throughout central and southern Indiana, highlighting that there is more than one avenue in which to make a lasting impact. This event replaces the Miter Society Mass of Appreciation and the Catholic Community Foundation Annual Meeting. Combining the events allows us to share our gratitude throughout the archdiocese by holding one event in the Indianapolis area and another in southern Indiana. Thank you for your support last week!

## Loaves+Fishes Webinar Series

The next Loaves+Fishes webcast is Tuesday, May 13th at 2 pm EST: ***Stewardship of Time: Activating People in the Pews*** presented by Lorene Duquin. This webinar, *offered at no cost*, will explore practical (and easy to implement) ideas on how to get parishioners to commit their time to enhance parish liturgy, to serve the needs of the poor, to intercede with prayer, and to change the world. Register at: <http://event.on24.com/wcc/r/1287100/6DAE6AD54818686E7AFBAC1F53751D38>. Or, see a listing of all 2017 webcasts you can register for at this link: <http://bit.ly/2ht3N7x>

## Creating a Congregational Culture of Generosity

How do you inspire generosity? Creating a Congregational Culture of Generosity (CCCG) is an interactive seminar demonstrating how pastors and ministry leaders can unearth and energize parish generosity by exploring the significant and necessary steps to creating lasting cultural change within a parish.

CCCG is made possible by the grant from the Lilly Endowment for Empowering Pastoral Leaders and is designed for parish teams – three to five individuals made up of pastors/PLCs, pastoral administrators, business managers, parish council leadership, finance council leadership and stewardship committee leadership. The parish teams attend three one-day seminars: August 19 at St. Monica; September 9 at Nativity; and, September 30 at Ss. Francis and Clare. Total registration cost for the parish is \$100 per parish.

Download a flyer at <http://www.archindy.org/leadership/programs.html> or contact Peggy Crawford at (317) 236-1562 or by email at [pcrawford@archindy.org](mailto:pcrawford@archindy.org).

## United Catholic Appeal

At a time when we know you are busy with many things, we appreciate your continued thoughts and prayers for a successful appeal. We are inching closer and closer to our goal.

As of May 4, 2017, \$6.3 million has been received/pledged from 18,808 donors which is 98% of goal! Thank you again for continuing to monitor the success of your parish's efforts. We appreciate your commitment, as it is what makes this funding for ministry possible.

Please mark your parish calendar for the fall 2017 Appeal – *November 11-12, 2017*.

## Webinar on 13 REASONS WHY and Suicide Prevention

The Office of Youth Ministry, *one of the ministries funded by United Catholic Appeal gifts*, sent information this week regarding the Netflix series, *13 Reasons Why*. Scott Seibert, the Marriage and Family Enrichment Coordinator for the Archdiocese, recorded a webinar in an effort to help you as you are on the front lines with young people who may be facing similar issues. This webinar will equip youth leaders, teachers, campus ministers, and administrators with plot information, discussion questions when teens talk about the show, basic symptoms and warning signs of suicide, steps you can take, and community resources. His near decade of clinical experience (mainly working with youth and families) makes him a very credible and valuable resource. To access the webinar, click [HERE](#).

# THE OAS MESSENGER



June 2017 Page 6

## FINANCE & ADMINISTRATIVE SERVICES

**Brian Burkert – Chief Financial Officer / Executive Director of Finance and Administrative Services**

[bburkert@archindy.org](mailto:bburkert@archindy.org)

**Stacy Harris – Senior Director of Finance / Director of Compliance**

[sharris@archindy.org](mailto:sharris@archindy.org)

**Brian Schmidt – Director of Finance / Controller**

[bschmidt@archindy.org](mailto:bschmidt@archindy.org)

**Mike Witka - Director of Parish Financial Services & Risk Management**

[mwitka@archindy.org](mailto:mwitka@archindy.org)

**Eric Atkins – Director of Management Services**

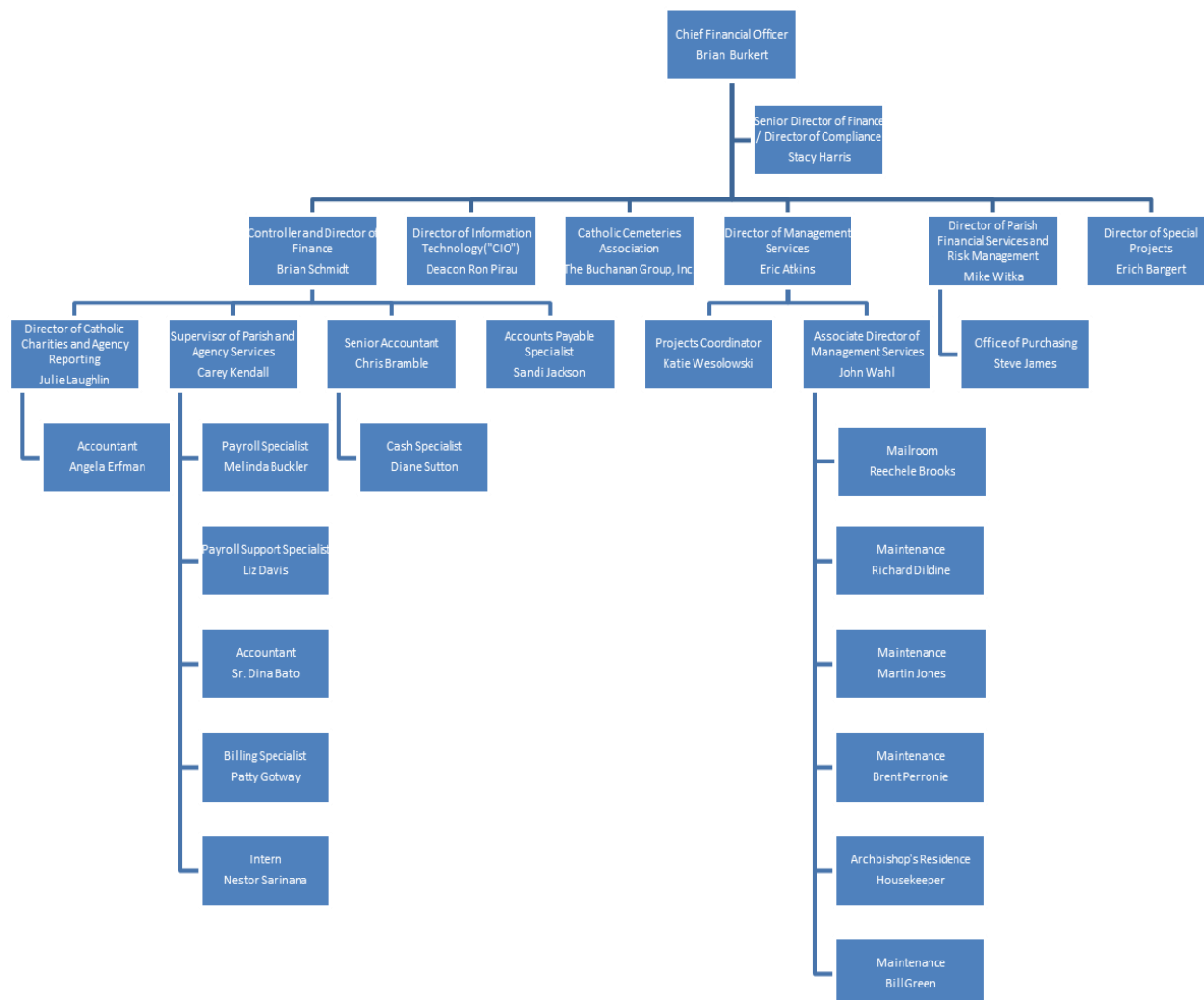
[eatkins@archindy.org](mailto:eatkins@archindy.org)

**Deacon Ron Pirau—Director of Information Technology**

[rpirau@archindy.org](mailto:rpirau@archindy.org)

**Erich Bangert – Director of Special Projects**

[ebangert@archindy.org](mailto:ebangert@archindy.org)







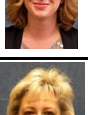




# THE OAS MESSENGER



June 2017 Page 7

## 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, agencies, and departments within the Catholic Center). | Phone: 317-592-4005<br>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<br>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<br>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<br>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<br>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<br>E-mail: dbato@archindy.org     |
| Diane Sutton     |  | Cash Specialist                                   | Diane is responsible for daily cash management including processing all deposits received by OAS.  | Phone: 317-261-3376<br>E-mail: dsutton@archindy.org   |
| Melinda Buckler  |  | Payroll Specialist                                | Melinda processes payroll and is involved in the monthly parish and agency billing.  | Phone: 317-236-1439<br>E-mail: mbuckler@archindy.org  |
| Liz Davis        |  | Payroll Support Specialist                        | Liz is responsible for processing payroll for parishes and schools.  | Phone: 317-592-4065<br>E-mail: ldavis@archindy.org    |
| Sandi Jackson    |  | Accounts Payable Specialist                       | Sandi is responsible for accounts payable and employee expense reimbursements.   | Phone: 317-236-1561<br>E-mail: sjackson@archindy.org  |
| Patty Gotway     |  | Billing Specialist                                | Patty is responsible for preparing the parish and agency billing.  | Phone: 317-236-1572<br>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](mailto:accountingservices@archindy.org)

Central Payroll Mailbox: [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org)

We will reply to your message as soon as possible with a desired response time of less than 48 hours.