The Catholic Center is Closed  
Wednesday December 24th through January 1st to observe the Christmas and New Years holidays. The Catholic Center reopens Monday January 5, 2015.

Human Resources and Payroll Survey
Thank you to all of the parish representatives who participated in the Human Resources and Payroll survey over the past few weeks. Participants were eligible to win a $25 gift card. Congratulations to the winner: Tom Costello of Little Flower parish!

Human Resources and the Office of Accounting Services have reviewed the survey results. Please read the letter at the end of the newsletter for further details. We’re in the process of evaluating ideas for future enhancements and improvements in these areas. Many parishes offered to participate in this collaborative review and we plan to contact several locations for additional feedback. Please stay tuned for future announcements.

Please read the following message; this change will affect your bank account in January:

Employer H.S.A. Contributions
Beginning January 31, 2015 employer health savings account distributions will be direct deposited to each personal account through Paycor payroll. This means the Archdiocese will need to provide each location a direct deposit to cover the amount that Paycor will withdrawal from the location for the employer H.S.A. contribution. The central office will prefund each location’s bank account with the appropriate sum of employer H.S.A. cash requirements two days prior to the end of month payroll pay date.

In January the central office will activate the health savings accounts for direct deposit with the January 30, 2015 payroll distribution. On January 28, 2015 the Archdiocese will prefund location’s operating bank accounts with the cash required for employer H.S.A. funding prior to Paycor withdrawing the funds due for payroll. This process should not require the locations to make a journal entry. It is merely a cash transfer and not a revenue or expense of the location. The exact amount deposited by the Archdiocese will be withdrawn one day later on January 29th by Paycor to fund the participants’ health savings accounts. Please contact Accounting Services with any questions regarding this change.

Annual Tax Forms
Churches and religious organizations must provide Form 1099-MISC to report payments of $600 or more to persons not treated as employees for services performed. This form is required if your church pays an unincorporated individual or an entity $600 or more in a calendar year for one of the following payments: gross rents, commissions, fees, or other compensations paid to non-employees like prizes and awards, or other fixed and determinable income. The Form 1099-MISC must be provided to the payee by January 31 and Copy A to the IRS by February 28th. For more information on filing requirements for the 1099-MISC, please visit the IRS website at www.irs.gov.

Monthly Assessments
December assessments will be distributed to locations by December 16, 2014. Assessments will be withdrawn on Friday December 31, 2014. Requests for adjustments to withdrawals must be sent to Carey Kendall by noon on Wednesday December 17th:
ckendall@archindy.org

ADLF Rates for Oct-Dec 2014
Loans 3.75%  
Deposits 0.75%
2015 ADLF meetings will be scheduled soon. Meanwhile, 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.
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.

Year End Preparation
Please review the information in the year end Paycor link for guidance on updating critical employee information for year end processing. http://go.paycor.com/rs/paycor/images/Pages%20from%20ye_client_guide_2014_orange.pdf.

It is very important to request employees verify their names, birth dates, social security numbers, and addresses prior to year end processing. Please also remind employees to fill out a new W4 to update their tax withholdings if they’ve had any recent changes in filing status or dependents.

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)

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.

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 pay period end date noted on the Payroll Calendar. This allows human resources and Central Payroll sufficient time to process the required paperwork and ensure the required deductions are being modified appropriately. Sending in the paperwork by the pay period end date ensures the employee will not be burdened with double health and dental deductions.

Do Not Process Payroll Early
Please note the “Pay Period End Dates and Required Approval Dates” for upcoming Perform Payrolls:

Processing payroll before the required approval date may disrupt benefit related changes to employee benefits for new, shared, transferred, or terminated employees. The required approval dates for upcoming payroll cycles are as follows:

12/15/2014 Pay Period Ends 12/5/14 — Required Approval Date is Wednesday December 10, 2014
12/31/2014 Pay Period Ends 12/21/14 — Required Approval Date is Monday December 22, 2014

Please contact Melinda Buckler with any questions about this information: mbuckler@archindy.org
Parish Internal Control Assessments
We have recently updated the work programs used by the firms performing the parish internal control assessments to refine the programs and to include controls over annual incorporation procedures and payroll processing. If you are interested in taking a look at the changes, the programs are on our website at http://www.archindy.org/finance/parish/forms.html. Next up for the Office of Accounting Services is to update and refresh our internal control policy. Keep an eye out for those updates in the spring of 2015.

As good stewards we must report the misappropriation of assets.
To do so conveniently and confidentially you may contact Ethics Point, an independent third-party, by phone at 1-888-393-6810 or by visiting their website: archdioceseofindianapolis.ethicspoint.com. The confidential hotline and website are accessible 24 hours a day 7 days a week. The Chief Financial Officer or his designee will be informed of every report and an investigation is performed with each report.

HUMAN RESOURCES

2015 HSA Contributions
No H.S.A. Bonus contributions will be made to employees HSAs for the 2015 plan year. These bonuses are not guaranteed and are paid based on health plan savings from year to year.

Employees who want their contributions in 2015 do not have to complete a new form. Current savings deductions will continue in 2015 unless a new form is filled out to change or stop the deduction.

The IRS has increased the annual limits for health savings account contributions in 2015 to $3350 for those with single coverage and $6650 for those with family coverage. There is still a $1,000 allowable catch-up contribution for people ages 55 and over.

Newly hired employees are no longer required to open their health savings account (HSA) before being enrolled in health insurance. In the past, health insurance applications have not been processed until the new employee had opened their HSA. Since this was creating missed deductions and delays in coverage, we have eliminated that process. Eligible, completed health applications will now be processed upon receipt by human resources. Please note – in order for the employee to receive the monthly employer HSA contributions, they still must open an account. Back contributions will not be given to anyone whose “account opened date” is beyond their first month of health insurance eligibility.

2015 Retirement Savings Plan Limits
The IRS has increased the allowable annual contribution limit for 403(b) retirement savings plans in 2015 from $17,500 to $18,000. The maximum catch-up contribution allowed for participants who are age 50 or older increased from $5,500 to $6,000.

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.

Voluntary Life and Short-term Disability Deductions
Premium deductions for voluntary life and short-term disability historically have been noted as ARHCDIOCESE, beginning in November, the premium deductions will state AUL. Please share this information with employees who are participating in these plans.
**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. Every **CURRENT** priest, deacon, and employee of the Archdiocese of Indianapolis is asked to complete our online Safe and Sacred training program as soon as possible, if he or she has not already done so. Volunteers who have contact with children should complete the training as well, if they have not already done so. 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.

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**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](http://www.uscis.gov/sites/default/files/files/form/i-9.pdf).

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**“Comings and Goings” Resource for Business Managers**

The Human Resources Office has a new resource for business managers with helpful information of what to do when an employee begins or end work at a parish or school. Please click on the following link and scroll down to the Documents section at the end: [http://www.archindyhr.org/important-forms/resources-for-business-managers/](http://www.archindyhr.org/important-forms/resources-for-business-managers/)

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**United Catholic Appeal (UCA) Gift Processing**

Gift processing for the UCA has been streamlined, lessening the amount of work required at the parish level. We were able to accomplish this by partnering with Fifth Third Bank and Remittance Processing Services (RPS) for gift processing. Please look for more detailed instructions in a mailing early next week.

Please make note of the new mailing address for all gifts to the UCA:

**RPS c/o Archdiocese Process**

**Suite 250**

**2960 N. Meridian St.**

**Indianapolis, IN 46208**

All non-gift communications should still be sent to the Office of Stewardship and Development at the 1400 N. Meridian Street address. If you have any questions, please contact Cyndy Taber at [ctaber@archindy.org](mailto:ctaber@archindy.org) or 317-236-1591.
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.

Parish Self Inspection Program—Due December 1st
We have finally undertaken the parish self-inspection program as outlined in previous issues of this newsletter. After many months of testing the system, writing and re-writing the recommendations, we are now implementing the inspection program. Each parish/school has already received an email invitation to start the inspection process. The forms are written in an easy check off system that can be input through the computer generated email or sent in by mail. This must be completed by December 1, 2014. If you have any questions of did not receive the inspection invite you can contact me at mwitka@archindy.org.

Safety and Loss Control News

Proactive Security Guidelines for Religious Education Activities
Learn more about taking proactive security measures during Religious Education activities, including choosing an appropriate building, controlling access to the facility, and establishing an Emergency plan. http://www.archindy.org/insurance/documents/Proactive%20Security%20CCD%20November%202013.pdf

Boiler Inspections
Here is contact information for 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.
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: ilaughlin@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: sjackson@archindy.org

Patty Gotway – Billing Specialist – Patty prepares the monthly parish and agency assessments.
email: pgotway@archindy.org

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.
December 14, 2014

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

Thank you for participating in the Human Resources and Payroll survey. We appreciate the feedback we received regarding payroll and human resources processes and procedures. The information will allow us to incorporate suggestions as we evaluate ideas for future enhancements and improvements in these areas.

The survey results revealed that most locations would like more guidance in the administration of benefits and compensation. Locations requested assistance with providing benefit information to new employees. Parishes communicated that they need more guidance in hiring and terminating employees as well as in determining benefits eligibility. There are concerns about the data quality and completeness in the payroll databases as well as tracking time worked for compensation.

We requested open communication for any other needs in these areas and appreciate the open feedback we received. Among many outstanding suggestions, common trends communicated include: assistance with understanding the family and medical leave act, determining employee exempt or non-exempt status, and a standardized job title listing with job descriptions.

There were several volunteers who said they would like to provide further feedback and assistance to us as we look for ways we can improve services, processes, and procedures. Therefore, we plan to commission a group that is representative of each type of location within the Archdiocese who will assist with providing additional feedback for improvements in all of these areas. Communication and streamlined efficient services will be the major focal points for those commissioned in this review.

We are grateful for everyone who contributes to administering benefits and processing payroll. We appreciate the time and effort required to assist us with ensuring the administration of these processes runs effectively and efficiently. If you have any comments or concerns please contact our offices: hr@archindy.org or centralpayroll@archindy.org.

We’ll continue to communicate the progression of these processes in the near future; please stay tuned for further developments.

Sincerely,

Andrea Wunnenberg
HR Operations Manager

Carey Kendall
Supervisor, Parish & Agency Services