



# OAS Messenger Newsletter

## Fall 2019

### Newsletter Highlights

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### Grant Opportunities – Applications Due October 31, 2019

Through the generosity of the parishioners of our archdiocese, we have 3 different endowment funds that will support a twice-annual grant awarding process. This grant process is jointly administered by the Finance Office and the Office of Stewardship and Development of the Archdiocese of Indianapolis.

Twice a year (spring and fall), the parishes, schools and agencies of the Archdiocese of Indianapolis have an opportunity to apply for grants which will be available from the following 3 endowments:

- (1) Home Mission Endowment Fund – used to support parishes and schools that qualify as home missions;
- (2) Growth and Expansion Endowment Fund – used to support growth and expansion initiatives throughout the archdiocese in our parishes, schools and agencies; and
- (3) The James P. Scott Endowment Fund – made possible by a very generous gift by James P. Scott to be used to support capital needs in the archdiocese.

Combined grant applications are due to the Archdiocese for the 2 grant allocation periods on April 30<sup>th</sup> and October 31<sup>st</sup> each year.

For more information, please see <https://www.archindy.org/finance/grant.html> or contact Stacy Harris in the finance office at [sharris@archindy.org](mailto:sharris@archindy.org) or 317-236-1535.



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### Fiscal Year 2018-19 Reporting and Close-out

An e-mail was sent to all business managers on August 15<sup>th</sup> reminding them of various fiscal year requirements for their locations. These include the annual meeting, conflict of interest disclosure statements, and the parish annual financial report. Refer to the detailed communication which is available on our website at: [www.archindy.org/finance/parish/newsletter.html](http://www.archindy.org/finance/parish/newsletter.html) A reminder too that all parish annual financial reports were due on September 6<sup>th</sup>, so please complete it if you haven't already done so.

### Form 990-T (Unrelated Business Income)

Parishes and high schools of the Archdiocese of Indianapolis are not required to file a Form 990 *Return of Organization Exempt from Tax*; however, some parishes and high schools may have to file a Form 990-T *Exempt Organization Business Income Tax Return* depending on its circumstances. Form 990-T is required if the organization's unrelated business gross income is \$1,000 or more. If this applies to your location, you must file your Form 990-T or an extension request by November 15<sup>th</sup>. To learn more about this topic and the various types of unrelated business income, including advertising income from parish bulletins, SCRIP, or disqualified fringes (i.e. the "parking lot tax"), refer to the November 12, 2018 e-mail on our website at: [www.archindy.org/finance/parish/newsletter.html](http://www.archindy.org/finance/parish/newsletter.html)

Also, this past spring all of our locations were required to document their analysis of their parking lots and transportation benefits to determine if the entity had any unrelated business income related to disqualified fringes (i.e. the "parking lot tax"). **ACTION REQUIRED - This documentation is required to be updated each year by each location.** The table below summarizes the timing of fiscal years, counts, and quantification of costs.

Fiscal Year	Count	Costs
1/1/2018 – 6/30/2018	Completed in spring 2019	Quantified in spring 2019
7/1/2018 – 6/30/2019	Completed in spring 2019	Need to quantify now
7/1/2019 – 6/30/2020	Start counting any time. Recommend multiple counts during the year.	Quantify in fall 2020

Please update your analysis and documentation now to reflect fiscal year ended June 30, 2019 costs and determine if you have any unrelated business income. Your counts should not change since they were done during the fiscal year 7/1/18 – 6/30/19, but your original analysis would have been for costs during the period of 1/1/2018 – 6/30/2018. For the fiscal year 7/1/2019 – 6/30/2020, we recommend doing at least 1 count in the fall and 1 count in the spring. Refer to the memo sent March 25, 2019 available on our website at [www.archindy.org/finance/parish/newsletter.html](http://www.archindy.org/finance/parish/newsletter.html)



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### Form NP-20

#### What is the Form NP-20?

The NP-20 form is the Indiana Department of Revenue's Nonprofit Organization's Annual Report.

#### Which organizations are required to file an NP-20?

To maintain Indiana Nonprofit Compliance, all nonprofit organizations are required to complete the Nonprofit Organization's Annual Report (Form NP-20) each year. *Each parish and high school within the Archdiocese of Indianapolis is required to file the annual NP-20.*

#### Who is responsible for filing the NP-20?

**ACTION REQUIRED - Each parish and high school is responsible for filing their own NP-20.** The Office of Accounting Services will file the NP-20 for the following agencies of the Archdiocese of Indianapolis: ADI Schools, Catholic Cemeteries, Bishop Brute Seminary, CYO Camp Rancho Framasa, Catholic Charities Bloomington, Catholic Charities Indianapolis, Catholic Charities Tell City, Catholic Charities Terre Haute, Catholic Community Foundation, Catholic Youth Organization, Criterion Press, Mother Theodore Catholic Academies, Our Lady of Fatima Retreat House, Roman Catholic Archdiocese of Indianapolis, Inc, Roman Catholic Archdiocese of Indianapolis Properties, Inc, St. Elizabeth Catholic Charities, St. Mary's Child Center, and Terre Haute Catholic Charities Foodbank

#### When is the Form NP-20 due?

The form is due on the 15<sup>th</sup> day of the 5<sup>th</sup> month following the end of the fiscal year. Since the Archdiocese of Indianapolis and all related entities have fiscal years ending on June 30<sup>th</sup>, the form is due on November 15<sup>th</sup>.

#### Do I paper file the Form NP-20 or is it an electronic filing?

2019 is the first year you have the option to electronically file your Form NP-20, using the IN Dept. of Revenue's new INTIME website. Letters were mailed to all organizations by the IN DOR inviting them to register on the INTIME website using the Federal EIN and the Letter ID included on each letter.

To register, go to <https://intime.dor.in.gov> and create a username.

INTIME Indiana Taxpayer Information Management Engine

Username

Password

Log in

Forgot username or password

Don't have a username?  
Create One

If you didn't receive a letter, you can request a new one.



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What do I need to create a logon?

In order to complete this request, you will need one of the following items:

- a letter ID from correspondence received from DOR
- one of the last 5 payment amounts you have made

If you do not know one of your last 5 payment amounts and have not yet received a letter, you may [request a letter](#).

If you didn't receive a letter, [click here](#).

If you did receive a letter, [click here](#).

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If you prefer to paper file your Form NP-20, you can download a fillable PDF version of the NP-20 from the Department of Revenue's website using the following link: <https://www.in.gov/dor/3506.htm>. Before mailing the completed form, we recommend scanning and saving a copy of the form so you can reference prior submissions during next year's filing. The completed form should be mailed to:

Indiana Department of Revenue, Tax Administration  
P.O. Box 6481  
Indianapolis, IN 46206-6481

### How do I fill out the NP-20?

Each entity should fill out the form for the fiscal year Beginning 07/01/2018 and Ending 6/30/2019. Each entity has a unique non-profit registration number and federal ID number to include on the form.

- **Is this your final return?** No
- **Year of continuous existence.** Varies by location
- **Have any changes been made to your governing documents?** No
- **Purpose or mission of organization:** Include a brief mission statement for the parish/school
- **Non-profit officers:** Include current parish council members or school board members
- **Attachments:** None. Parishes and high schools are not required to file a Form 990, so the attachment of the 990 is not applicable.

### Who should sign the NP-20?

For parishes, the parish pastor or administrator should sign the NP-20 as the Officer/Trustee. For high schools, the school principal or school board president should sign as the Officer/Trustee. If filing electronically, the business manager can submit.

### More Questions?

For more information regarding tax filing requirements for nonprofit organizations, you can refer to the IN Department of Revenue's information bulletin #17 (<https://www.in.gov/dor/reference/files/ib17.pdf>). If you have additional questions regarding the NP-20 form or other required tax filings, please contact the Indiana Department of Revenue at 317-232-0129.



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### IT Incidents and What to Do

Cybersecurity incidents have been increasingly on the rise. The end of the calendar year brings an increase in these threats. If you believe that a cybersecurity incident has occurred, the Archdiocese can provide resources to help assist by contacting one of the following personal as soon as possible:

Deacon Ron Pirau, CIO, 317-261-3379, [rpirau@archindy.org](mailto:rpirau@archindy.org)

Brian Burkert, CFO, 317-592-4000, [bburkert@archindy.org](mailto:bburkert@archindy.org)

Mike Witka, Risk Manager, 317-236-1558, [mwitka@archindy.org](mailto:mwitka@archindy.org)

To prevent further damage and to preserve information that could help determine the root cause of the incident its best to follow steps below:

- 1) Do not power the device off.
- 2) Isolate the affected device to prevent further damage by disconnecting from the network. If the device has a wired connection, then disconnect the network cable. If the device is wireless disconnect from the wireless network.
- 3) Do not perform any actions on the affected device such as trying to restore data or performing a system cleanup until an Archdiocese authorized information security professional is able to assist.

### What is a cybersecurity "incident"?

A cybersecurity incident is a security event that compromises the integrity, confidentiality or availability of an information asset (computer, server, mobile phone, tablet, phone system). An incident could include an attack, that is, an intentional attempt to gain unauthorized access to damage or destroy a network or data. Or an incident could be a simple accident, such as an employee leaving a company laptop in a cab. An incident may or may not involve a breach, such as the theft of company information. A cybersecurity incident could be one of the following:

- **Phishing.** In a phishing attack, criminals send an organization's employees a message (usually via email) that includes a malicious attachment.
- **Stolen Credentials.** The goal of many phishing or malware attacks is to obtain credentials that will allow an attacker to access the organization's network.
- **Malware.** Malware is a broad category that includes any kind of malicious software. Examples include viruses, trojan horses, rootkits, adware and the increasingly common ransomware.
- **Denial of service attacks.** In a denial of service (DoS) attack, attacks flood a system, usually a Web server, with so much traffic that legitimate users can no longer access it.
- **Web app attacks.** Hackers attack organizations' Web apps in several different ways, such as buffer overflows, SQL injection, cross-site scripting and, as already mentioned, DoS attacks.
- **Cyber espionage.** Cyber espionage occurs when an unauthorized person attempts to infiltrate a system or network in order to gain access to secret information.



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- **Loss of theft of devices.** As mobile devices have become more common, there has been an increase in the loss or theft of devices that contain corporate information or that can access corporate networks.
- **Insider attacks.** Insider attacks are threats from employees or partners' employees. These attacks can be very difficult to detect and mitigate because insiders often have knowledge that helps them evade security measures
- **Social engineering attacks.** Social engineering attacks involve tricking employees into divulging sensitive information, or to physically gain access to restricted areas. Social engineering is usually performed to conduct malicious activities to internal network resources

### Additional Notes

**CCF Endowment Distribution Update** – On September 17<sup>th</sup>, Melanie Johnson from the Office of Stewardship and Development reached out to all Fundriver users asking them to review and update the frequency by which their organization will receive endowment distributions. If you have not already done so, please respond to Melanie Johnson. If you did not receive the e-mail, please contact Melanie at [mjohnson@archindy.org](mailto:mjohnson@archindy.org).

**Payments Sent to the Catholic Center** – If you are sending a payment to the Archdiocese, please indicate what it is for and who should receive it. This will allow us to more promptly deposit your check and ensure the correct person is notified of the incoming payment.

### OAS Staffing Update

We are sad to announce that Kaylee Federico is no longer working for the Archdiocese of Indianapolis. We wish Kaylee well! In the meantime, please be sure to direct all ADLF-related inquiries to [accountingservices@archindy.org](mailto:accountingservices@archindy.org).






**The Archdiocese of Indianapolis Office of Accounting Services is looking for a full-time senior accountant to join our team.** The Senior Accountant is responsible for a wide array of analysis, reconciliation, and reporting. This includes ownership of accounting functions for several areas, including, Archdiocesan Deposit & Loan Fund, property & health insurance plans, United Catholic Appeal, mission office, Catholic Cemeteries, fixed assets, prepaid expenses, deferred revenue, and bank reconciliations. The Senior Accountant will work extensively in Sage Intacct and will need to be able to work with non-accounting users to help monitor and analyze spending through custom reports and dashboards.

Candidates must have a bachelor's degree with a major in accounting, as well as at least two years of accounting experience. Please see our website at <https://www.archindy.org/hr/job.html> for additional information.



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Name	Photo	Title	What We Do	Contact Information
Brian Schmidt		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, departments within the Catholic Center, and various agencies).	Phone: 317-592-4005 E-mail: <a href="mailto:bschmidt@archindy.org">bschmidt@archindy.org</a>
Chris Bramble		Assistant Controller and Manager, Treasury Services	Chris is responsible for managing our treasury services, including the Archdiocesan Deposit and Loan Fund (ADLF), cash and investment accounting, and accounting support for Fatima Retreat House and MTCA. Chris also coordinates and manages the parish internal control assessments (PICA).	Phone: 317-592-4099 E-mail: <a href="mailto:cbramble@archindy.org">cbramble@archindy.org</a>
Carey Kendall		Manager, Payroll and Billing	Carey is responsible for managing payroll and parish and agency billing, as well as the parish annual financial reporting process.	Phone: 317-236-1519 E-mail: <a href="mailto:ckendall@archindy.org">ckendall@archindy.org</a>
Julie Laughlin		Director of Catholic Charities and Agency Reporting	Julie is responsible for agency financial reporting. This includes financial reporting for Catholic Charities, Bishop Simon Brute College Seminary, CYO, and St. Mary's Child Center.	Phone: 317-261-3371 E-mail: <a href="mailto:jlaughlin@archindy.org">jlaughlin@archindy.org</a>
Vacant	Vacant	Senior Accountant	The Senior Accountant is responsible for accounting for Catholic Cemeteries, the Archdiocesan Deposit and Loan Fund, various Archdiocesan campaigns and appeals (UCA, LFOM), and monthly financial reporting and reconciliations.	Phone: E-mail:
Susan Burris		Accountant	Susan is responsible for accounting for the Mother Theodore Catholic Academies (MTCA/NDAA).	Phone: 317-236-1505 E-mail: <a href="mailto:sburris@archindy.org">sburris@archindy.org</a>
Valorie Curran		Accountant	Valorie is responsible for accounting for the activities of Archdiocesan agencies, with a	Phone: 317-592-4018 E-mail: <a href="mailto:vcurran@archindy.org">vcurran@archindy.org</a>



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			primary focus on Catholic Charities.	
Diane Sutton		Treasury Specialist	Diane is responsible for daily cash management, including ACH processing and recording all deposits received by OAS.	Phone: 317-261-3376 E-mail: <a href="mailto:dsutton@archindy.org">dsutton@archindy.org</a>
Melinda Buckler		Payroll Specialist	Melinda processes payroll and is involved in the monthly parish and agency billing.	Phone: 317-236-1439 E-mail: <a href="mailto:mbuckler@archindy.org">mbuckler@archindy.org</a>
Liz Davis		Payroll Support Specialist	Liz is responsible for processing payroll for parishes and schools as well as reviewing and processing employee expense reimbursements.	Phone: 317-592-4065 E-mail: <a href="mailto:ldavis@archindy.org">ldavis@archindy.org</a>
Sandi Jackson		Accounts Payable Specialist	Sandi is responsible for accounts payable.	Phone: 317-236-1561 E-mail: <a href="mailto:sjackson@archindy.org">sjackson@archindy.org</a>
Patty Gotway		Billing Specialist	Patty is responsible for preparing the parish and agency billing.	Phone: 317-236-1572 E-mail: <a href="mailto:pgotway@archindy.org">pgotway@archindy.org</a>

**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.





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### Secretariat for Finance and Administrative Services

Brian Burkert – Chief Financial Officer  
 Stacy Harris – Senior Director of Finance / Director of Compliance  
 Brian Schmidt – Director of Finance / Controller  
 Mike Witka – Director of Parish Financial Services & Risk Management  
 Eric Atkins – Director of Capital Projects  
 Daniel Herbertz – Director of Property Management  
 Deacon Ron Pirau – Director of Information Technology  
 Erich Bangert – Director of Real Estate Projects

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