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The Catholic Center will be closed on Monday April 1st to observe Easter Monday.

ACCOUNTING NEWS!

OAS will be hosting our bi-annual Fiscal Management and Discipleship Conference Thursday, June 20th, 2013 at SS. Francis and Clare. We are very excited to announce that Archbishop Tobin will say mass and deliver the keynote address for the event. More details will follow.

ACCOUNTING SERVICES

ADLF Policy Update

The ADLF policy has been updated to include technology loans. Please see the updated policy on our website at http://www.archindy.org/finance/files/parish/general/current_adlf_policy.pdf

Excess Funds Deposit

Parishes, schools and agencies are required to deposit excess funds into the ADLF. Excess funds are all funds on hand in excess of anticipated cash disbursements for the following ninety days. Parishes schools and agencies should address the matter of excess funds on a monthly basis. Excess funds should also include all funds raised from fund drives, capital improvements, or major renovations. All excess funds must be deposited in the ADLF; a parish, school or agency may not invest such funds or deposit them in financial institutions.

ADLF Rates for January- March 2013

Loans 3.75% Deposits 0.75%

If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org. The next ADLF meeting is scheduled for Thursday May 9, 2013. If your parish would like to be placed on the agenda for this meeting, please contact Carey Kendall by April 15th at (317)236-1519 or accountingservices@archindy.org.

March Assessment Withdraws

The March Assessment will be withdrawn on **Friday, March 29th**. Requests for adjustments to this withdrawal must be **sent to Carey Kendall (ckendall@archindy.org) by NOON on Tuesday, March 26th**.

Group Ruling

The IRS Group Ruling exemption letter for 2012 is available on our website at <http://www.archindy.org/finance/files/parish/general/2012GroupRuling.pdf>

Parish Internal Control Audits

An updated Internal Controls Policy has been published. There are updates in the Cash Disbursements (CD) section regarding the separation of duties, qualifying for (CD 6) tax exempt purchases, and the addition of utilizing (CD 10) Electronic Banking. Please contact Carey Kendall with any questions (317) 236-1519 or email Accounting Inquiries at accountinginquiries@archindy.org.

Fiscal Management and Discipleship Conference

Save The Date - The Fiscal Management and Discipleship Conference is scheduled for Thursday, June 20, 2013 at Saints Francis and Clare Church in Greenwood. This conference includes workshops related to Stewardship, HR, Payroll, Education and Finance and is designed to meet training and information needs of administrators, business managers, bookkeepers, finance council members, stewardship council members and volunteers handling bookkeeping or stewardship functions.

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 CTD.

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.

2013-2014 Budget Guidelines

The guidelines for 2013-2014 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 14, 2013 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.

HUMAN RESOURCES

Health Savings Account Limits for 2013

The IRS has increased the annual limits for health savings account contributions in 2013 to \$3,250 for single coverage and \$6,450 for family coverage. There is still a \$1,000 allowable catch-up contribution for people age 55 and over.

Retirement Savings Plan Limits for 2013

The IRS has also raised the annual contribution limit for 403(b) retirement savings plans in 2013 to \$17,500. There is also a \$5,500 catch-up contribution for people who are age 50 and over.

Benefit Communication Training

The Archdiocese Human Resources Department is offering Employee Benefits Communications Training to any interested Parish or School. Contact Kristen Leffler at (317) 236-1594 or Courtney Mitchell at (317) 236-7314 for more information or to schedule your on-site Benefits Communications training session.

Health Insurance

All health insurance paperwork should be sent to Human Resources including new enrollments, changes and terminations. The forms can be found at www.archindyhr.org under Forms You'll Need. Please note that terminating an employee in Paycor does not cancel health insurance. A form must be submitted to Human Resources.

Eli Lilly Federal Credit Union (ELFCU)

The Archdiocese is now partnering with Eli Lilly Federal Credit Union (ELFCU) to open health savings accounts for new health insurance enrollments. As you have new or newly eligible employees electing health insurance, please direct them to the following link to open an HSA with ELFCU. www.elfcu.org/newhsa. We are no longer accepting forms for Teachers Credit Union.

Terminating Employee Health Insurance Benefits

We have attached a letter to the end of this newsletter from our Controller, Tracy Lockwood and our Director of Human Resources, Ed Isakson regarding employee healthcare benefits. If you have any questions or comments, feel free to contact HR at hr@archindy.org or centralpayroll@archindy.org.



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HUMAN RESOURCES CTD.

New Federal Requirements for Health Insurance Eligibility

Federal health care reform legislation includes regulations regarding eligibility for health insurance coverage. These federal regulations require employers to offer coverage to employees who work 30 or more hours per week. A special provision of the law affects educational institutions, including Catholic schools. This provision states that **any employee who works regularly 30 hours per week during a school year is eligible for health insurance**. These new regulations require the Archdiocese to change its health insurance eligibility policy from 1,500 hours per calendar year to 30 hours per week during a school year, effective September 1, 2013. As a result of this change, some school employees, such as teachers' aides and cafeteria workers, who are not currently eligible for health insurance coverage will be eligible for coverage in the 2013-4 school year. Each school has 2 options regarding these employees: 1) budget funds for them to be covered by our medical and dental plans, effective September 1, 2013 or 2) reduce the hours of these employees to under 30 hours per week, effective September 1, 2013. Please note that even if these employees become eligible for health insurance, they may decline coverage, so the actual cost that will be incurred cannot be fully anticipated during the budgetary process. However, each school that has employees who currently work 30 or more hours per week on a regular basis and are not currently eligible for health insurance should plan for either increases in health insurance expense or a reduction in those employees' work hours during the next school year. Please contact Ed Isakson at edisakson@archindy.org if you have any questions about this new federal requirement.

New I-9 Form Requirement

Effective March 2013, the federal government has updated the I-9 Immigration form which is required of all new employees and part of our new hire paperwork. We have updated our human resources site with the new and correct form. Please follow this link and begin using the new form effective immediately. If you have any questions, please contact human resources at hr@archindy.org.

CENTRAL PAYROLL

Payroll Information

Please ensure you are following the 'P/R Processing' deadline date on the Archdiocese Payroll Calendar on our website at <http://www.archindy.org/finance/files/parish/payroll/2013%20Payroll%20Calendar.xls> Payrolls processed after this deadline cause issues with benefits being distributed on time to employees.

SECA Reimbursement

Updated 2012 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, 2013 for the 2012 tax year.

Paycor Credit for Annual Reconciliation Fee

Please review your Paycor invoice. There may be an "Annual Reconciliation" fee charge. If this fee was charged, expect a credit from Paycor.

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.

CATHOLIC EDUCATION

Special Events Policy

And now is a good time to review the special events policy and application so you can help those wanting to rent the space from our parishes for wedding receptions. If you have any questions see our Insurance page on the Archindy website.



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RISK MANAGEMENT

Fire Safety

We have had recent fires to two of our properties. So a reminder to all: keep doors locked on all buildings whenever possible and not in use. Secondly, do not light candles in non-Church environments. The recent fire caused by a candle has been our fourth of this type.

Spring Storms

As Spring approaches so does the stormy season. Please make sure everything is secure around and atop your buildings. Report any wind or rain damage as soon as possible.

Parish Budgets

Mike Witka is willing to come and help with your parish budget process. Feel free to contact him at mwitka@archindy.org or (317)236-1558.

ARCH GRANT OPPORTUNITY

Grants now available for home missions, growth and expansion and capital needs in the Archdiocese of Indianapolis

The Finance Office and the Office of Stewardship and Development has consolidated and streamlined the process for awarding grant dollars to the parishes, schools and agencies of the Archdiocese of Indianapolis. Through the generosity of the parishioners of our archdiocese, we now have 3 different endowment funds that will support an annual or twice-annual grant awarding process.

We are introducing a process that will make grants 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 that will be used to support capital needs in the archdiocese.

The Home Mission Grant – Growth and Expansion Grant – James P. Scott Grant process that includes all three grants. Please see the executive summary and combined grant application available now on the Finance Office page of the Archdiocesan website:

www.archindy.org/finance.

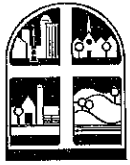
Please download the grant application and e-mail the completed form to Stacy Harris in the Finance Office @ sharris@archindy.org. You also may contact Stacy Harris with questions. Applications are due no later than April 30, 2013. Thank you!

ARCH CONTACTS

Do you know who to contact ?

Property insurance or risk questions
ADLF
Payroll
Billing questions
Parish budget or other questions
Accounting Office
Human Resources

Mike Witka—mwitka@archindy.org or (317) 236-1558
Sr. Dina Bato—dbato@archindy.org
centralpayroll@archindy.org
accountingservices@archindy.org
accountingservices@archindy.org
(317) 236-1410 or 1-800-382-9836 ext. 1410
Courtney Mitchell-(800)382-9836 ext.7314



ARCHDIOCESE OF INDIANAPOLIS

The Church in Central and Southern Indiana

Office of Human Resources

1400 N. Meridian Street, Indianapolis, IN 46202-2367

P.O. Box 1410, Indianapolis, IN 46206-1410

317-236-1594 1-800-382-9836 Fax: 317-236-1401

March 21, 2013

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

Subject: Terminating Employees' Health Insurance Benefits

Our Goal: Excellent Service

We would appreciate your help in ensuring that our health insurance billing, health savings account (HSA) contributions, and Anthem enrollment database are all as accurate as possible. Our goal is to administer our employee benefit programs and manage the costs involved very effectively, and we request your ongoing help in that process.

The Challenge: Benefits Expenses Continue After Employment Termination

When a parish, school, or agency stops an employee's pay at the end of his/her employment, it does not automatically stop his/her Anthem medical and dental coverage or the contributions being made to his/her health savings account. A recent internal audit found that insurance benefits and HSA contributions were continuing for many former employees, and in some cases this occurred for a period of years. The former employees' parishes, schools and agencies were not being billed for this coverage, resulting in unnecessary expense for our health plan.

The Solutions: Anthem Change Forms and Billing Based on the Anthem Database

The following two steps will greatly help us to ensure effective benefits administration and billing:

1. **Please submit Anthem Change Forms (which are available through Human Resources) whenever an employee's medical or dental insurance stops or changes.** Promptly receiving this information will allow us to notify Anthem, stop HSA contributions, and adjust your billing.
2. **Please closely monitor your monthly health insurance billing.** Effective April 1, your billing will be based on Anthem enrollment. As a result, you will be billed for employees who are no longer being paid if an Anthem Change Form was not submitted to Human Resources. If you notice that former employees are still on the bill, please send Human Resources an Anthem Change Form immediately to avoid ongoing charges.

Our Thanks

We are grateful for everyone who assists us in administering employee benefits and updating parish, school, and agency billing. It takes a team effort to be successful, and we appreciate your time and effort to make the process run smoothly. If you have any comments or questions, please contact Human Resources at hr@archindy.org or centralpayroll@archindy.org.

Sincerely,



Tracy Lockwood

Controller



Ed Isakson

Director, Human Resources