Paycor began migrating all locations to their new web-based payroll module Perform. Please see the news in the Payroll section for further details.

March Assessments
Please note that the source for health billing has changed from Paycor to Anthem. Due to the data source change the Archdiocese will no longer allocate the charges between parish and school on the locations behalf. The health charge will appear as one line item on the assessment. Please use the Anthem Bill Report that you receive in the parish mailing to determine the allocation.

Health charges are assessed one month in arrears; therefore, March health assessments appear on the Anthem Bill Report titled “February 2014”. Please refer to the date at the bottom of each monthly report to ensure you match up the correct Anthem Health Report with its corresponding assessment. The February 2014 Anthem Bill Report will have a March production date in the bottom left hand corner of the report and match up to charges appearing on the March assessment.

February Assessments will be distributed to locations on March 19, 2014. Assessments will be withdrawn on Monday March 31st. Requests for adjustments to this withdrawal must be sent to Carey Kendall (ckendall@archindy.org) by Noon on Wednesday March 26th.

2013 Financials
The 2013 Audited Financials, which include our financial position, cash flows, activities, along with additional supplementary information, are now available on our website at http://www.archindy.org/finance/archdiocese.html

Mileage Reimbursement Rate
The IRS released standard mileage rates for use in 2014 on Friday, December 6th. (Notice 2013-95). Taxpayers can use the optional standard mileage rates to calculate the deductible costs of operating an automobile.

The rate for business use of an automobile was increased to 56 cents per mile.

The Archdiocese reimburses employees for 75% of the IRS issued standard mileage rate. Effective for miles driven on or after January 1, 2014, the Archdiocese mileage reimbursement rate will be 42 cents per business mile incurred.

ADLF Rates for January-March 2014
Loans 3.75% Deposits 0.75%

The next ADLF meeting is scheduled for Thursday May 15, 2014. If your parish would like to be placed on the agenda for this meeting, please contact Carey Kendall by Wednesday, April 30th at (317)236-1519 or accountingServices@archindy.org.

ADLF requests that are received after 4pm Monday through Wednesday will be processed the following business day. Requests for deposits and loans made on Thursdays will be processed up through 4:30pm. Deposit and Loan forms have been revised to include notes about these processing changes.

2012 Small Employer Tax Credit
Similar to last year the Archdiocese has enlisted the help of Wayne Lenell from the diocese of Rockford Illinois, in determining which of our parishes qualify for the small employer tax credit for health insurance premiums. If your parish did indeed qualify you will be receiving correspondence directly from Mr. Lenell requesting information to assist him in preparing the forms necessary to receive the refunds, please respond to his requests. We are also beginning the process of applying for the credit for the 2013 tax year.

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.
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.

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.

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. 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.

Additional HSA Contributions in 2014
Employees with health plan coverage on January 1st will receive additional bonus contributions on January 31st of $200 for single coverage and $400 for family coverage. These additional contributions are due to a plan surplus and are not guaranteed each year.

HSA Savings through Payroll Deduction
Employees who contributed to their HSAs in 2013 do not have to complete a new form. Their current savings deductions will continue in 2014 unless they fill out a form to change or stop the deduction.

Health Savings Account Limits for 2014
The IRS has increased the annual limits for health savings account contributions in 2014 to $3,300 for single coverage and $6,550 for family coverage. There is still a $1,000 allowable catch-up contribution for people age 55 and over.

Retirement Savings Plan Limits for 2014
The IRS has maintained the same annual contribution limit for 403(b) retirement savings plans in 2014 of $17,500. There is also a $5,500 catch-up contribution for people who are age 50 and over.

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 Courtney Mitchell at (317) 236-7314 for more information or to schedule your on-site Benefits Communications training session.

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. The program can be accessed by following this link: https://safeandsacred-archindy.org/login/index.php. Integrated in the training is the background check release form which is also required.

Safe and Sacred Training
As part of our ongoing commitment to the care and protection of children, every priest, deacon, and employee of the Archdiocese of Indianapolis is asked to complete our online Safe and Sacred training program by February 28, 2014. Volunteers who have contact with children should complete the training in March or April 2014. The course is available in English and Spanish 24 hours per day, 7 days per week at 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 if you have any questions.
**Code of Conduct Posters**
New Code of Conduct posters were recently sent to all locations. These posters have been updated to include our Safe and Sacred online safe environment training and are available in English and Spanish. Please contact hr@archindy.org if you need additional copies. We are happy to send more!

**New Medical Benefits Enrollment Document**
One of the challenges we face is getting new employees to open their ELFCU health savings accounts in a timely manner. Our goal is for employees to have the HSA money when they need it for medical expenses. Too often, we hear from employees months after they enroll who have not received any HSA deposits because they never opened an account! Effective November 1, 2013, we will no longer make retroactive HSA payments to individuals. Also, we will not enroll an employee in Anthem health insurance until we receive notice from ELFCU that the health savings account has been opened. To emphasize this, we have added an instruction page to the Anthem application on our website. If you have an old copy saved on your computer, please delete it and begin using the new one. You can find it at www.archindyhr.org, then FORMS, then ALL FORMS, then MEDICAL/DENTAL ENROLLMENT FORM.

**Central Payroll**
All payroll related information has moved to the following link: http://www.archindy.org/finance/payroll.html on the finance portion of the Archdiocesan website. This includes payroll guides, calendars, and links to log in to access pay stubs. Please contact Central Payroll at centralpayroll@archindy.org if you have any questions or suggestions about the content on this page.

**Paycor Perform Migration**
Paycor has migrated Cycle One locations to Perform. Please let Central Payroll know if you need any support from our offices as you familiarize yourselves with the new platform. A recorded training session is available here: http://www.archindy.org/finance/payroll.html.

Each location received an email with cycle-specific migration dates and training materials on February 25, 2014. All Perform migration details, including the master migration schedule, are listed on the Payroll tab in the Finance portion of the Archdiocese website (link noted above).

**Email Address**
Please ensure your location’s Paycor contact email address is up to date. You may update this information by emailing centralpayroll@archindy.org.

**Employee Paystubs**
There is a Paycor application available for download to your mobile device. Please encourage your staff to access their pay information every pay period through the online Paycor service or through their mobile device http://www.paycor.com/products/payroll/mobile-app.
Each month we feature news that will aid administrators in safeguarding assets and ensuring compliance in parish internal controls. If there are topics in this area you’d like to see featured please contact the Office of Accounting Services: accountingservices@archindy.org.

As good stewards we must report the misappropriation of assets.
To do so conveniently and confidentially you may contact EthicsPoint, 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.

Budget Guidelines
The Budget Guidelines were published recently on the Finance portion of the Archdiocese’s website. One area of concentration during an assessment by the contracting firm is Budget and Financial Reporting. That section of the policy can be found online here: http://www.archindy.org/finance/files/parish/parish-finance/ic_policy.pdf. The policy explains that not only is it important to create an annual budget, but it is of equal importance that the budget is compared to actual financial results on a regular basis. The policy further explains those results are required to be reviewed by an oversight body such as the Parish Finance Committee. We’ve attached a tool developed by one of the auditing firms, Sackrider & Company, that will allow each parish to keep track of having the oversight body review and approve monthly financial results. The tracking sheet is also intended to record approved minutes for each committee that may exist at your parish. The aid is not required for use, rather it is provided as a suggested courtesy for tracking and accountability purposes. If you have any questions about the Internal Control Policy or this particular section, please contact the Office of Accounting Services at accountingservices@archindy.org.

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.
Safety and Loss Control News—Dec 2013

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

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.

Student Accident Insurance
We have a new provider for this coverage beginning July 1, 2013. The company name is Gallagher Koster. We will have new claim forms and coverage highlights on our Insurance Web page shortly. Please throw away any old forms or information. You can reach the website by going to http://www.archindy.org/insurance/student.html

New contact for the Special Events
A new contact has been listed on the insurance page of our website:
Mira Andreeva
Email: mira_andreeva@ajg.com
Phone: 630-634-4583

Feel free to contact Mike Witka at mwitka@archindy.org or (317)236-1558.
Tracy Lockwood – Controller
   email: tlockwood@archindy.org

Julie Laughlin – Assistant Controller/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: jlaughlin@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: c kendall@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

Robyn Roller – Payroll Specialist – Robyn processes payroll and prepares the month parish and agency billing.
   email: rroller@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

Melinda Buckler – Accounting Clerk – Melinda is responsible for daily cash management including processing all deposits received by OAS and fixed asset accounting.
   email: mbuckler@archindy.org

Sandi Jackson – Accounts Payable Specialist – Sandi is responsible for accounts payable and employee expense reimbursements.
   email: sjackson@archindy.org
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Budget approval
Fundraiser financial statement review