The 2011 Fiscal Management and Discipleship Conference will be held on Thursday, June 9th at the Catholic Center. Conference fee for registration is $35 per person, lunch is included in this fee. All payments and registration forms must be received by June 2, 2011. Registration for this event is now available online at http://www.archindy.org/fmdc. Don’t miss out on this exciting and informative event.

2011-12 Budget Guidelines
The guidelines for 2011-2012 are 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 15, 2011 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.

Parish Incorporation
Please be sure to sign and return the Parish Member Resolution, Initial Director Resolution, as well as TWO (2) copies of the By-Laws, of which one will be signed and returned to you. You can find these documents at: http://www.archindy.org/finance/incorporation.html

ADLF Rates for April - June 2011
Loans 3.50%  Deposits 1.0%
If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org.

Parish Annual Financial Report
For the fiscal year ending June 30, 2011, the Parish Annual Financial Reports will again be submitted using the online survey format. An e-mail link to the survey and instructions will be sent to the person at each parish that submitted the report last year. The instructions will NOT be sent by regular mail. All documents will be available online. The e-mail containing the link and the instructions will be sent out in June. If the contact has changed since the prior year, please email accountingservices@archindy.org to have the distribution list updated.

Utility Sales Tax Exemption
With the recent incorporation of the parishes, we have been informed that some utilities have started charging sales tax again to the parishes. Parishes can reapply for utility sales tax exemption per the following:

- For utilities (telephone, electric, gas, water) complete Form ST-200 (for each meter and/or telephone account) (https://forms.in.gov/Download.aspx?id=2701)
- Mail completed form to Indiana Department of Revenue
- Indiana Department of Revenue will issue ST-109
- Submit to utility vendor to receive sales tax exemption
- Keep copy of ST-109 on file

2011 Thresholds for Insubstantial Benefits
Seasoned fundraisers know that the deductible portion of a contribution is calculated by reducing the total amount of the payment by the value of any consideration or benefit received. Benefits received need not affect the deductible portion of a contribution if the benefits are deemed insubstantial. The IRS guidelines for insubstantial benefits for 2011 are as follows:

1. The value of the benefits received does not exceed the lesser of $97 or 2% of the total contribution.
2. The contribution is at least $48.50 and the only items provided to the donor bear the organization’s name or logo, and the cost of these items is within the limit for “low-cost articles.” Low-cost articles are those that do not exceed $9.70.
3. In connection with a campaign, the benefits are distributed to potential donors who neither requested nor expressly consented to receive them, and the cost of the item(s) does not exceed $9.70.

St. Francis Xavier Home Mission Grant Applications
Applications for the July 2011 Home Mission Grant process are due to the Finance Office by Thursday, May 26, 2011. Applications are available by visiting the site: http://www.archindy.org/finance/homemission.html. For further information, please contact Stacy Harris by e-mail at sharris@archindy.org or by phone at 317-236-1535 or 1-800-382-9836 ext. 1535.
**Paycor Transition Update**

As the payroll transition continues over the next few months each location will be contacted by a member from Paycor to ensure training has been scheduled and all information necessary has been obtained. Our central payroll office is working closely with Paycor to make this transition as smooth as possible. In order to move forward we are to provide Paycor with verification of federal and state identification numbers. Office of Accounting Services is working to obtain verification of each parish federal identification numbers. If you receive documentation related to this from the IRS, please fax it to us at 317-236-7327. For payroll purposes, Deanery centers will utilize the Dean’s parish identification numbers.

As noted in our Frequently Asked Questions, one of the changes experienced will be direct withdrawal of funds from designated parish bank accounts 2 days prior to the actual payday. Current Archdiocesan practice is that the payroll funds are withdrawn from the local account on the pay date. As you begin utilizing Paycor, please keep this important date change in mind. The training schedule, training registering directions and an updated version of the rollout schedule is posted to our website at http://www.archindy.org/finance/transition.html. Please visit this site for other documents, such as Frequently Asked Questions and other important notices regarding the transition.

**Form 8655**

There have been questions as to how to fill out the 8655 form for the IRS. This is a form that authorizes and allows for Paycor to submit and file taxes on behalf of the organization. Paycor will be in contact with parishes near their rollout date with more information.

**Parish Voided Checks Needed for Paycor**

In order to verify the bank account information for each location we need to provide Paycor with a copy of a voided check for each parish/school/agency bank account that is used for payroll purposes. Each entity needs to provide us with a copy of a voided check from the appropriate bank account so that we can provide to Paycor for this transition. Please send voided checks by way of fax to: Attention: Charlie Foekey, Fax Number: 317-236-7327 or e-mail a scanned copy to sfoekey@archindy.org. Please be sure to indicate which location(s) it is for in either the fax or e-mail.

**Payroll Questions**

As we continue to work on the transition to Paycor we receive many questions from the locations. Many of these questions are answered in the FAQ on our website at http://www.archindy.org/finance/files/transition-faq.pdf. Please direct all payroll related questions to Rene Raychel at rrayche@archindy.org or centralpayroll@archindy.org.

**Payroll Fee Update**

Many locations have been incorrectly billed for several items. We are aware of the problems and hope to get it resolved soon. Paycor is researching and plan to apply the appropriate fee credits back to all the parishes affected by the 5/31 pay. The following is a list of Paycor fee charges:

- $10 per pay period service fee / $1.25 per pay per employee fee / $60 annual W-2 fee / $4.25 per employee W-2 fee
- $7 per pay period split packing fee (budget guidelines state $16 per month fee for both the service fee and split package– we will update)
- $1 new hire fee- which is optional and can be turned off as requested (contact Rene to adjust this as a report needs to be sent to the State)
- $1.25 check fee for all other items like garnishments, child support, etc.

The delivery fee is based on actual cost and should ONLY be one time for the initial delivery of the paystubs. After that we are paperless and you shouldn’t be charged. Please contact Rene Raychel or your Paycor representatives with any questions.

**New HR Site**

Please check the new Human Resources website, www.archindyhr.org. It is a clearinghouse of information about employment, benefits, discounts and other offerings with convenient links to use. Find out more about our two newest benefits for health plan members: Health Advocate – where one toll-free call can link you with all of your health benefits – and Healthcare Blue Book – which pays you to select high-quality/low-cost medical providers.

**Parish Incorporation and Health Insurance Eligibility**

The Human Resources Office has received questions about whether parish incorporation affects health insurance eligibility. In the past, if an employee worked part-time at several parishes, but totaled 1,500 or more hours per year from all of those different positions, he/she was eligible for health insurance (and other full-time benefits), and the parishes shared the costs. Even though parishes are separately incorporated, our attorney advises that we should keep the same practice. Therefore, no employees should lose health insurance eligibility because of parish incorporation. Please contact Human Resources if you have any questions.

**2012 Health Plan**

The Human Resources Office announced that the 2012 medical and dental plans will have the same monthly premiums, annual deductibles, co-insurance, and annual out-of-pocket maximums as the 2011 medical and dental plans. 2012 will be the third consecutive year with no cost increases in these plans. This information is being provided now for the benefit of administrators and teachers who will soon be signing contracts or work agreements for next year. Please contact Human Resources at hr@archindy.org if you have any questions.