

THE OAS MESSENGER



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OVERVIEW

What's New This Month?

Here are some key items to pay special attention to in this month's newsletter:

- [See page 3](#) for a reminder on annual filings with the State of Indiana (DUE NOVEMBER 15th) and information about Grant Opportunities.
- [See page 4](#) for payroll deadlines during Thanksgiving week.
- [See page 4](#) for information on open enrollment
- [See Page 5](#) for important notes from Stewardship and Development.

Parish Annual Financial Reports (PAFR)

I want to offer a big thank you to all Archdiocesan locations who have submitted their annual Parish Annual Financial Reports (PAFR) for fiscal year ending June 30, 2017. This is the quickest we have completed the PAFR process in recent years, and all credit belongs to our business managers. Thank you so much!!

Upcoming Dates to Remember

Date	Subject	For more information, see...
Payroll Dates:		
Tuesday October 31st	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for November 10th payroll.	http://www.archindy.org/finance/payroll.html
Tuesday November 7th	Payroll approval due date for November 10th payroll.	
Tuesday November 14th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for November 24th payroll.	
Monday November 20th	Required payroll approval due date for November 24th payroll.	
Other Dates:		
Oct 20th–Nov 12th	Open Enrollment for Eligible Employees through Paylocity's Web Benefits System.	Page 4
October 31st	Grant applications due for combined grant process	Page 3
October 31st	Applications due for Ministerial Excellence Fund	Page 5
November 9th	FMDC Fall Hot Topics Meeting in Bloomington	Page 2
November 11th-12th	United Catholic Appeal Intention Weekend	Page 5
November 15th	FMDC Fall Hot Topics Meeting in Indianapolis	Page 2
November 15th	Form NP-20 filing is due to the State of Indiana for each parish and high school. It is the responsibility of the parish, high school, and agency to complete this filing.	Page 3

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FMDC—FALL HOT TOPICS

Financial Management Discipleship Conference (FMDC)

We will be hosting two Financial Management and Discipleship Conference meetings on hot topics for our business managers and other interested parties. Topics include Form I-9, background checks, and policy updates on Charity Gaming, SCRIP, and Crowdfunding.

The dates offered are:

- Thursday, November 9th, from 11 am to 1 pm in Bloomington, IN (St. Paul Catholic Center)
- Wednesday, November 15th from 12 pm to 2 pm in Indianapolis, IN (Our Lady of Fatima Retreat House)

Invitations were e-mailed using Eventbrite.com. If you did not receive an invitation but are interested in attending, please reach out to Brian Schmidt at bschmidt@archindy.org.

Billing Calendar

To help parishes and schools manage the timing of cash flows, we prepared a billing calendar in the 2017-18 Budget Guidelines to provide a high-level overview of when major items are scheduled to be billed by our office.

Description	Billing Frequency	October	November	December
Cathedraticum	Monthly	X	X	X
Clergy Healthcare	Monthly	X	X	X
Lay Retirement	Monthly	X	X	X
Indianapolis Education	Monthly	X	X	X
Property Ins.	Monthly	X	X	X
Vehicle Ins.	Monthly	X	X	X
Workers Comp.	Monthly	X	X	X
Lay Health Ins.	Monthly	X	X	X
Criterion Subscriptions	Monthly	X	X	X
ADvancED	Annually		X	
Jupiter	Annually		X	
Renaissance	Annually		X	
Student Accident Insurance	Annually		X	

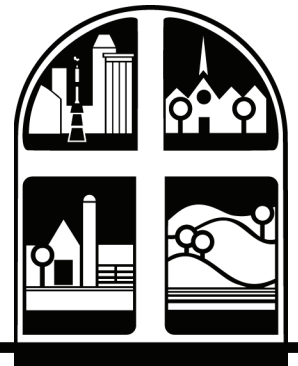
Monthly Assessments

October assessments will be withdrawn on Tuesday, October 31st.

ADLF Rates for Oct-Dec 2017

Loans 3.75% Deposits 0.75%

The final 2017 quarterly ADLF meeting was held on Thursday October 26, 2017. Meeting dates for 2018 are forthcoming. If your parish would like to be placed on the agenda for a meeting in 2018, please contact Chris Bramble at (317)592-4099 or cbramble@archindy.org.



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ANNUAL REPORT FILINGS WITH THE STATE OF INDIANA

Prepare to File Year-end Form NP-20

State Form NP-20 is due annually by November 15th. **It is the responsibility of the parish / high school to file this report.** If you do not receive a form in the mail by the State, please contact the Indiana Department of Revenue's Non-profit Sector at 317-232-2188.

The NP-20 form is available online at <http://www.in.gov/dor/3506.htm>.

Annual Report to Secretary of State: Business Entity Report

You may receive a notice from the Secretary of State's office asking that the parish file a Business Entity Report. Please do not file this report. The Office of Accounting Services will file this report on each parish's behalf. If you receive a notice that the Business Entity Report is past due or that the Secretary of State intends to administratively dissolve the parish corporation for not filing the Business Entity Report, please forward that notice to the Office of Accounting Services: accountingservices@archindy.org.

RISK MANAGEMENT

Coming Soon!

Risk Management will begin adding a new feature for schools and parishes to their Insurance web page called **Risk Management Tools**. Under the Risk Management Tools section, articles with Risk Management topics will be accessible to use as a resource, especially for employees who work in the maintenance field. Look for more information and links in upcoming newsletters.

Safety news is also available on the Insurance portion of the Archdiocesan website: <http://www.archindy.org/insurance/newsletter.html>.

GRANT AWARDS UPDATE

Grant opportunities for home mission, growth & expansion and capital needs in the Archdiocese of Indianapolis

Applications Due October 31, 2017

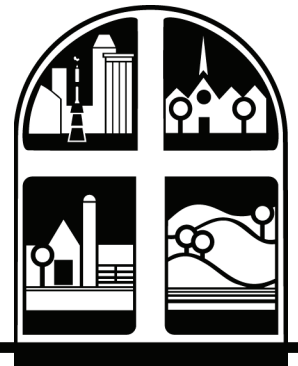
Through the generosity of the parishioners of our Archdiocese, we have 3 different endowment funds that will support a twice-annual grant awarding process. This grant process is jointly administered by the Finance Office and the Office of Stewardship and Development of the Archdiocese of Indianapolis.

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 30th and October 31st each year.

For more information, please see the Finance and Administrative Services page at <http://www.archindy.org/finance/grant.html> or contact Stacy Harris in the Office of Finance and Administrative Services at sharris@archindy.org or (317) 236-1535.



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CENTRAL PAYROLL

November 24th Pay Run

The Catholic Center is closed for the Thanksgiving holiday on Thursday November 23rd. This will require Central Payroll to run Archdiocesan-wide payroll reports on Wednesday November 22nd which is one day earlier than normal. Therefore, **locations will be required to approve pay runs for Friday November 24th on Monday November 20th.** Please reach out to Carey Kendall if you will not be able to approve your pay run on Monday November 20th.

Web Time

Please do not check or uncheck the Enable Time and Labor box on the Web Time tab, Central Payroll manages the use of that option.

Contact Central Payroll:

- **When a shared employee is hired.** Central Payroll will assist with this special setup in Web Time so the employee is able to clock-in and transfer to the appropriate location. This ensures the employee won't experience any issues with clocking or transferring and also ensures the correct location pays for the wages worked at the appropriate location.
- **When a shared employee is terminated.** Central Payroll will ensure the special setup is modified so the employee doesn't accidentally choose and bill the wrong location for the labor.
- **When entering a manual check or voiding a check.** Every manual check or voided check is different and requires a full review of all settings to ensure taxes and benefits as well as many other data points are setup correctly. Employees, locations, and the Archdiocese has experienced several issues that require subsequent corrections. We'd like to assist with the initial correction and ensure it is processed correctly; so please reach out to us for assistance.
- **When you hire a religious employee or need to update their pay rate.** Religious employees require a different setup than lay employees. Their pay rates are not setup like lay employee pay rates. Therefore, please contact Central Payroll so they may assist you with the setup.

Time Off Requesting System

In order for employees to request time off electronically through their employee self-service portal, you'll need to ensure you have your Time Off benefits and balances such as **vacation, sick, and personal time off** set up in WEB PAY. This makes using electronic timekeeping easier for the employee and the payroll processor by allowing the employee to request time off through their self-service portal so that the information automatically populates in the timecard upon approval.

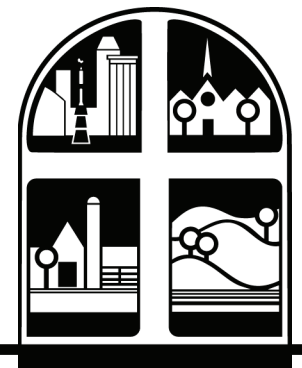
If you need time off balances set up, please email your time off policy to Carey Kendall: ckendall@archindy.org. Carey will work with Paylocity to ensure a programmer is assigned to get this setup for your location. The programmer will contact the location directly when they are ready to review the setup to ensure it is accurate and assist with loading time off balances.

If you are unsure if your location has a time off policy; it might be helpful to review the Archdiocese's suggested policy: <http://www.archindyhr.org/wp-content/uploads/2015/07/Suggested-HR-Policies-2014-CY-v2.pdf>

HUMAN RESOURCES

2018 OPEN ENROLLMENT

Open enrollment for the 2018 health and dental coverage began on October 20th and will conclude on November 12th.



Ministerial Excellence Fund Application

The application process for grants through the Ministerial Excellence Fund is now open until October 31, 2017. Individuals perceived to meet the application criteria (working at least 15 hours per week as an archdiocesan employee in the role of Parish Life Coordinator, Business Manager, Pastoral Associate, Youth Minister, Religious Education Director, Principal, or Assistant Principal) have received a message from the Archdiocesan human resources office. Since only limited number of people meet the application criteria, the application website (<http://www.archindy.org/hr/mef/>) is not publicly published. More on this project and how it was funded is available from *The Criterion*: <http://www.archindy.org/criterion/local/2016/03-04/grant.html>.

United Catholic Appeal

Intention Weekend is November 11-12. Parishes will receive two mailings beginning the second week of October. The first will include posters, In-Pew Approach supplies, as well as the UCA video in the requested format. The second mailing will be included in the weekly parish mailing from the Catholic Center. It will include the Gift Processing Guide and all supplies necessary for mailing pledges and gifts to be processed. Please be sure to discard all mailing supplies from past appeals. Using old mailing envelopes could result in lost gifts or delayed processing.

Regional Stewardship Education Session

This semi-annual series of trainings is already underway. Clergy, staff and parish volunteers are finding they have much to share about the session topic, "Parish Stewardship Best Practices". Click on the following link to learn more about the dates and locations of the meetings and to register to attend the meeting that best fits your schedule: <http://www.archindy.org/stewardship/fall17/index.html>.

Catholic Community Foundation

Our 30th Anniversary Launch Kit's were mailed in June and are an excellent resource to all parishes, agencies and schools as one step in promoting legacy giving. If you have not received your kit or have questions about the materials, please contact us at (317) 236-1482 or e-mail ccf@archindy.org.

The Catholic Community Foundation is presenting information on planned giving at two parishes in the North and West Deaneries. All are invited to attend as the discussion will focus on the elements of the anointing of the sick, cremation, the vigil, Mass, scripture readings, hymns, symbols, burial, and information on *Planned Giving*.

November 11th at St. Luke the Evangelist

November 12th at St. Malachy, Brownsburg

November 15th at Holy Name, Beech Grove (Planned Giving only)

RSVPs can be sent to ccf@archindy.org

Loaves+Fishes Monthly Webinar Series

The "Loaves+Fishes" monthly webinar series continues through the end of the year. Webinars are available to the staff and volunteers of all parishes **at no cost to the parish**. The presenters are knowledgeable and well prepared. The topics are current and timely. The feedback is enthusiastic. Don't miss the upcoming FREE sessions listed below. To ensure that you are receiving the monthly announcements with the registration link, email your contact information to Barb Samsel at bsamsel@archindy.org.

Date	Topic
November 14	Spirituality of Giving
December 12	Faith-filled Ways to Call Parishioners to Serve in the Parish

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FINANCE & ADMINISTRATIVE SERVICES

Brian Burkert – Chief Financial Officer / Executive Director of Finance and Administrative Services

bburkert@archindy.org

Stacy Harris – Senior Director of Finance / Director of Compliance

sharris@archindy.org

Brian Schmidt – Director of Finance / Controller

bschmidt@archindy.org

Mike Witka - Director of Parish Financial Services & Risk Management

mwitka@archindy.org

Eric Atkins – Director of Management Services

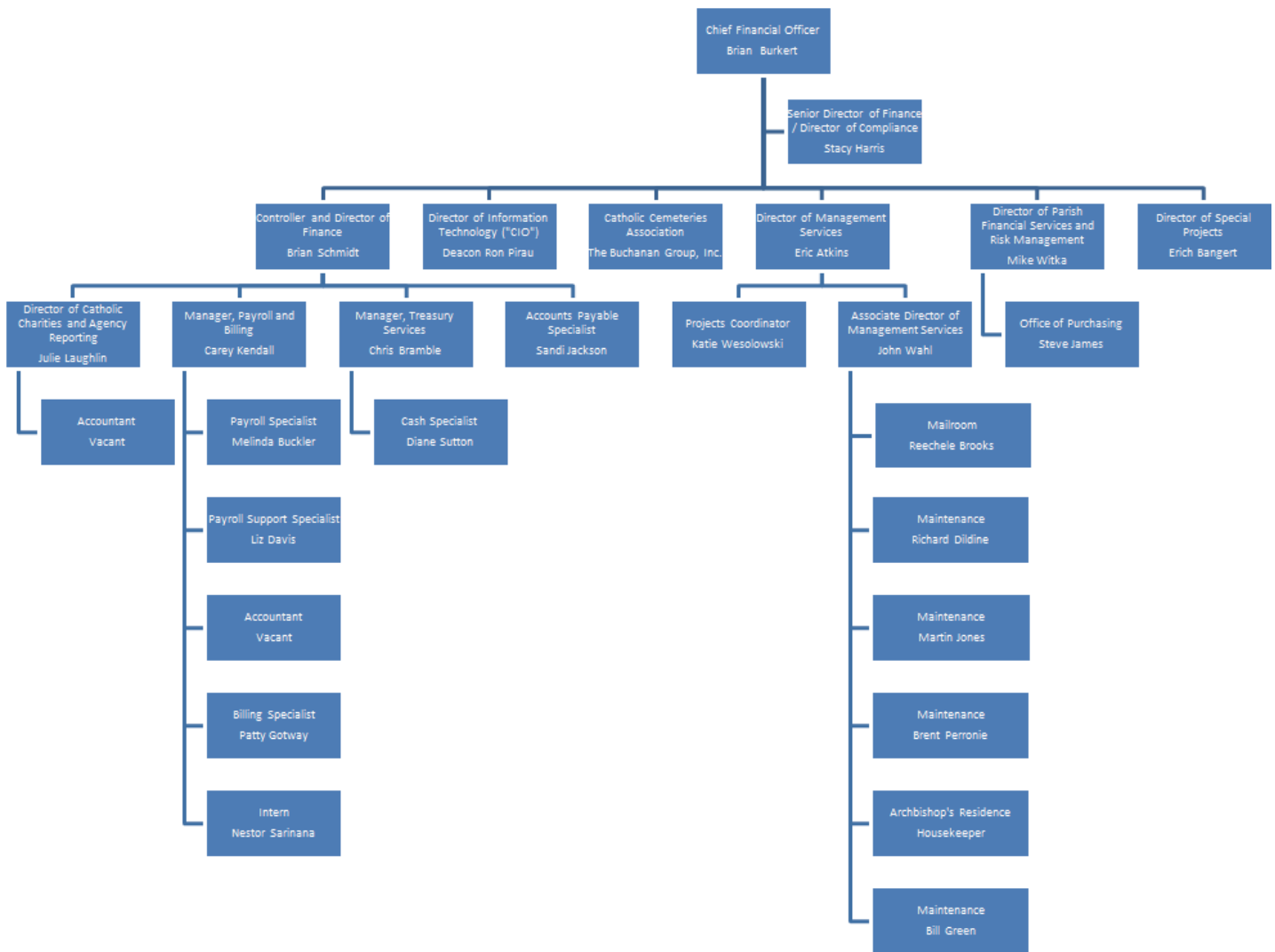
eatkins@archindy.org

Deacon Ron Pirau—Director of Information Technology

rpirau@archindy.org

Erich Bangert – Director of Special Projects

ebangert@archindy.org







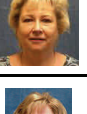
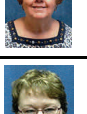
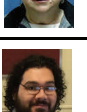
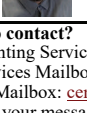


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OFFICE OF ACCOUNTING SERVICES

Name	Photo	Title	What We Do	Contact Information
Brian Schmidt		Controller and Director of Finance	As 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, agencies, and departments within the Catholic Center).	Phone: 317-592-4005 E-mail: bschmidt@archindy.org
Carey Kendall		Manager, Payroll and Billing	Carey manages payroll and parish and agency billing. She monitors the accounting services email inbox and also manages the parish annual financial reporting process.	Phone: 317-236-1519 E-mail: ckendall@archindy.org
Julie Laughlin		Director of Catholic Charities & Agency Reporting	Julie is responsible for agency financial reporting. This includes financial reporting for Catholic Charities, Bishop Simon Brute College Seminary, CYO, St. Mary's Child Center, and others.	Phone: 317-261-3371 E-mail: jlaughlin@archindy.org
Chris Bramble		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 several Catholic Charities agencies. Chris also coordinates and manages the parish internal control assessments (PICA).	Phone: 317-592-4099 E-mail: cbramble@archindy.org
Ben Phares		Accountant	Ben is responsible for accounting for agencies and administering the Archdiocesan Deposit and Loan Fund (ADLF) transactions.	Phone: 317-236-1418 E-mail: bphares@archindy.org
Diane Sutton		Cash Specialist	Diane is responsible for daily cash management including processing all deposits received by OAS.	Phone: 317-261-3376 E-mail: dsutton@archindy.org
Melinda Buckler		Payroll Specialist	Melinda processes payroll and is involved in the monthly parish and agency billing.	Phone: 317-236-1439 E-mail: mbuckler@archindy.org
Liz Davis		Payroll Support Specialist	Liz is responsible for processing payroll for parishes and schools.	Phone: 317-592-4065 E-mail: ldavis@archindy.org
Sandi Jackson		Accounts Payable Specialist	Sandi is responsible for accounts payable and employee expense reimbursements.	Phone: 317-236-1561 E-mail: sjackson@archindy.org
Patty Gotway		Billing Specialist	Patty is responsible for preparing the parish and agency billing.	Phone: 317-236-1572 E-mail: pgotway@archindy.org
Nestor Sarinana		Intern	Nestor assists on a wide variety of projects within the Office of Accounting Services.	E-mail: oasintern@archindy.org

Not sure who to contact?

Office of Accounting Services General Phone Number: 317-236-1410

Accounting Services Mailbox: accountingservices@archindy.org

Central Payroll Mailbox: centralpayroll@archindy.org

We will reply to your message as soon as possible with a desired response time of less than 48 hours.