

# 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 2](#) for important budget guideline notes and important grant opportunities
- [See page 3](#) for important Paylocity system notes, updated payroll processing instructions, manuals and forms.
- [See Page 4](#) for requests from Risk Management to update property listings and examine your grounds.
- [See Page 4](#) for important notes about the Queen and Divine Mercy Grant, an update on the United Catholic Appeal, important event dates, and webinar opportunities.
- At the end of March, we welcomed a new hire to the OAS Team. Diane Sutton is our new Cash Specialist and is assuming many of Rhobie Bentley's previous responsibilities. Rhobie is now working in Stewardship and Development with the Catholic Community Foundation. You can reach out to Diane for any questions you would have previously sent to Rhobie. See [page 6](#) for Diane's contact information.

### Upcoming Dates to Remember

*Monday, May 29th the Catholic Center will be closed to observe Memorial Day.*

Date	Subject	For more information, see...
<b>Payroll Dates:</b>		
Tuesday, April 25th	Payroll approval due date for April 28th pay date	<a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a>
Tuesday May 2nd	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for May 12th pay date.	
Tuesday May 9th	Payroll approval due date for May 12th.	
Tuesday May 16th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for May 26th pay date.	
<b>Other Dates:</b>		
Sunday April 30th	Grant Applications due to the Finance Office for Home Missions, Growth & Expansion, and Capital needs are due.	<a href="#">Page 2</a>
Wednesday May 8th	Grant Applications due to Stewardship & Development for Queen & Divine Mercy grant.	<a href="#">Page 4</a>
Thursday May 25th	S&D is hosting an annual evening of thanks: <i>A Mass of Thanksgiving, Stories of Philanthropy, An Evening of Impact</i> in Floyd Knobs.	<a href="#">Page 4</a>
Thursday, June 15th	Parish and schools budgets are due to OAS.	<a href="#">Page 2</a>

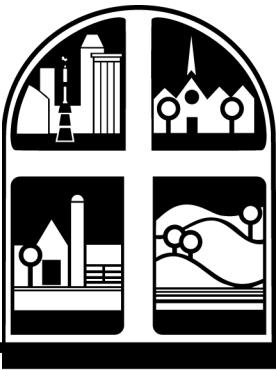
### Monthly Assessments

April assessments will be distributed to locations the week of April 24th.

Assessments will be withdrawn on Friday, April 28th. Please email [okendall@archindy.org](mailto:okendall@archindy.org) with deferral requests.

Please share these newsletters with your fellow co-workers who normally would not receive Accounting Service News.

There is always valuable information that can be shared throughout your parish, school or agency.



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## ACCOUNTING

### **Budgets are due to the Office of Accounting Services by June 15, 2017**

Budget guidelines for 2017-18 are available at: <http://www.archindy.org/finance/parish/guidelines.html>

Budgets should be submitted in the format used by the parish or school. Budgets should be completed and forwarded to the Office of Accounting Services for review on or before June 15, 2017. Please complete the budget approval form with the pastor, PLC, administrator or principal's signature indicating the budget has been approved; see the Budget Approval Form in Appendix D. The budget and budget approval form may be e-mailed to [accountingservices@archindy.org](mailto:accountingservices@archindy.org) (preferred) or faxed to 317-236-7327.

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

#### **Applications Are Due April 30, 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 30<sup>th</sup> and October 31<sup>st</sup> each year.

For more information, please see the finance office page on the Archindy.org website or contact Stacy Harris in the finance office at [sharris@archindy.org](mailto:sharris@archindy.org) or 317-236-1535.

### **ADLF Rates for Apr-Jun 2017**

**Loans 3.75%      Deposits 0.75%**

The 2017 Quarterly ADLF meetings will be held on the following dates:

- Thursday May 4, 2017 | Thursday August 24, 2017 | Thursday October 26, 2017

If your parish would like to be placed on the agenda for an upcoming meeting, please contact: Carey Kendall at (317)236-1519 or [ckendall@archindy.org](mailto:ckendall@archindy.org).

## PURCHASING

### **Unused and Unwanted Merchandise on Hand**

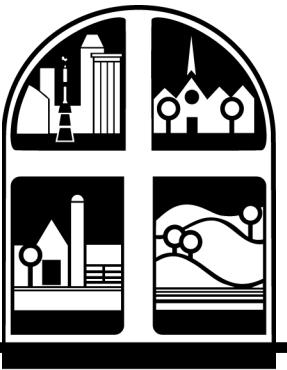
In an effort to be of service to all parishes and schools, Steve James will field merchandise you are interested in getting rid of. Furniture, equipment, religious items, and other supplies are some examples. You can send Steve pictures, descriptions and prices (if you want money for the products) along with a contact name. Steve will post items on the Purchasing Office page of the Archdiocesan web site. Send information to Steve at [sjames@archindy.org](mailto:sjames@archindy.org).

### **New Lectionary Supplements**

Purchasing has some of the new lectionary supplements from Catholic Book Publishing for sale. The price is \$24.15 (this includes shipping).

### **Site Visits**

Steve is offering visit your location or any of the customers who purchase items through his department. He would love to have the opportunity to speak or present at any upcoming staff meeting. The visit will afford Steve the opportunity to refresh your staff about the products and services Purchasing has available. If a site visit isn't ideal Steve welcomes your feedback on any services he might be able to provide your location—reach out to Steve directly at 317 236-1451 or 800 382-9836 x1451 ([sjames@archindy.org](mailto:sjames@archindy.org))



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## CENTRAL PAYROLL

### Updated Payroll Processing Instructions

There is an updated payroll processing instruction available online that incorporates electronic timekeeping (Web Time) with the original payroll processing instructions you were provided for Web Pay. These instructions combine the steps required to process payroll when using Web Time and Web Pay; the new instruction supersedes any previous version you were provided by the Archdiocese or Paylocity and can be found at this link: <http://www.archindy.org/finance/files/parish/payroll/Detailed%20WebTime%20to%20WebPay%20Processing%20Instructions.pdf>

### Electronic Timekeeping (Web Time)

All locations were required to have completed Web Time by March 31, 2017. Please contact Carey Kendall if you have not scheduled your implementation: [ckendall@archindy.org](mailto:ckendall@archindy.org).

### Web Time | Web Pay Sync Issue

Paylocity reports the sync issue between Web Pay and Web Time still exists; developers are working on addressing the issue. Paylocity relays that duplicate timecards and duplicate badge numbers for active and inactive employees may be the cause of the issue. To assist with isolating and resolving the issues, Central Payroll will now manage the settings on the Web Time tab. Central Payroll is running a new hire report each Catholic Center business day and completing the Web Time setup for new employees and rehires. Reach out to Central Payroll if you need assistance with the settings on the Web Time tab. Locations can assist with the resolution of the issue by:

- 1.** **Please do not erroneously assign badge numbers on the Web Time tab.** Central Payroll will assign badge numbers.
- 2.** **Please do not assign badge numbers or check the Enable Time & Labor box on the Web Time tab.** Central Payroll will also assist with this setting.
- 3.** If you notice a difference in time off balances between Web Time and Web Pay, follow the updated payroll instructions to **close out any open pay periods for your location in Web Time**. If that doesn't resolve the issue, please reach out to Central Payroll for assistance with a manual system sync request.

### Employees Identification Numbers

Paylocity is working with the Archdiocese to ensure all employee identification numbers are unique for all employees in the Archdiocese. Paylocity or the Archdiocese may reach out to you while we are working on this issue with special instructions about employee identification number re-assignments. **Please remember to review the employee identification numbers with HR for shared employees or re-hires before submitting those changes in the system.**

### Updates to Manuals & Forms

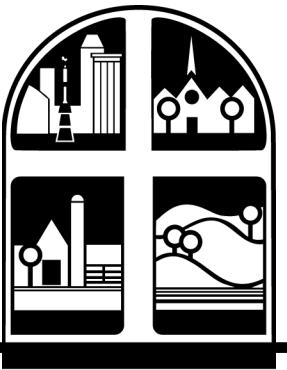
- The Archdiocese Employment Law Manual has been updated. Please be sure you use the version dated: April 5, 2017.
- Please ensure you are using the most recent version of the I-9 Form for your new hires and rehires. You may access the most recent version by clicking on the following link: <https://www.uscis.gov/i-9>

### Summer Coupon Plan

Employees who are not receiving a paycheck over the summer months but who are covered on our health or dental insurance will utilize a coupon payment plan over the summer. **The options for paying are by check, money order, or by authorizing direct debit.** Christa Bunch has created an automatic debit form that you can use to authorize direct debit for paying insurance premiums over the summer. Please reach out to Christa with questions: [cbunch@archindy.org](mailto:cbunch@archindy.org).

### Taxes & Quarter End

- Please log into your INtax account to make sure that all of your tax liabilities are paid and up to date. We've found that many locations have received notices from the State of Indiana relaying taxes are still due from 2015. **FORWARD ALL STATE and FEDERAL TAX NOTICES DIRECTLY TO CAREY KENDALL: [ckendall@archindy.org](mailto:ckendall@archindy.org).**
- Paylocity's Year End Dashboard is also an effective tool for your Quarter End needs. To obtain your quarter end tax return package, navigate to the **Reports** column of the Year End Dashboard. **It is recommended that you check the quarter end items each calendar quarter end so you can fix issues each quarter before year-end arrives.**



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## RISK MANAGEMENT

### Request for Review of Property Insurance

As we prepare our info for the insurance renewal please check info previously provided for updates. That would be new buildings, buildings removed or sold, vehicles purchased or sold, and if you have any type of preschool enrollment or Mom's day out type programs. Send to Mike Witka at [mwitka@archindy.org](mailto:mwitka@archindy.org).

### Examine Grounds

During this spring season walk the grounds of your location, note any structures that need attention (gutters, drain pipes, playgrounds, parking lots, roofs, sidewalks, and entrances).

## STEWARDSHIP & DEVELOPMENT

### Queen and Divine Mercy Grant

The "Queen and Divine Mercy Endowment" was established by Rev. Elmer J. Burwinkel to promote devotion to the Queenship of Mary and to the Divine Mercy of Jesus. Parishes and agencies of the Archdiocese of Indianapolis are eligible to apply for a grant. The applications are reviewed by the Queen and Divine Mercy Board. Grants have been awarded annually since 2012. Applications for 2017 are due by Wednesday May 8th. Please contact Rhobie Bentley through email at [rbentley@archindy.org](mailto:rbentley@archindy.org) or by phone at: 317-592-4066 to obtain an application. Applicants who have applied should monitor their email for a confirmation of receipt.

### United Catholic Appeal

With each gift that we process, we are reminded how truly blessed we are. We are touched by the generosity of each person who has given to the appeal, and are so thankful for the parish support.

We are happy to report that there continues to be a steady flow of gifts. As of the second week of April, \$6.22 M has been received/pledged from 18,463 donors. The UCA is now at 97% of the \$6.4M goal with 24% of household participation.

Thank you again for continuing to monitor the success of your parish's efforts. Your commitment is what makes funding for ministry possible.

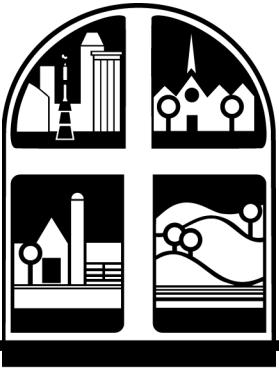
### A Mass of Thanksgiving, Stories of Philanthropy, An Evening of Impact

The Office of Stewardship and Development and the Catholic Community Foundation are combining their annual evenings of thanks to host A Mass of Thanksgiving, Stories of Philanthropy, An Evening of Impact. The evening will begin with Mass followed by a reception and program. The theme of the evening is gratitude to God and to our donors for gifts to the United Catholic Appeal and Catholic Community Foundation. Our program will share stories of how donors' financial gifts impact the lives of others throughout central and southern Indiana. The events will be held on Thursday, May 4 in Indianapolis and on Thursday, May 25 in Floyds Knobs.

This event will replace the Miter Society Mass of Appreciation and the Catholic Community Foundation Annual Meeting. Combining the events will allow us to share our gratitude throughout the archdiocese by holding one event in the Indianapolis area and another in southern Indiana.

### Loaves+Fishes Webinar Series

The Office of Stewardship and Development is once again offering the **Loaves+Fishes** webinar series to parishes at no cost. View a listing of all monthly topics and register for any or all webinars you wish to attend at <http://www.archindy.org/stewardship/podcast.html>. Mark your calendar for May 9<sup>th</sup> to learn more about "Building Bridges to the Heart of the Community". This webinar will explore ways to engage your people to be committed disciples of Jesus Christ and to live as good and faithful stewards through an annual period of stewardship renewal and commitment or parish covenant process.



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## FINANCE & ADMINISTRATIVE SERVICES

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

[bburkert@archindy.org](mailto:bburkert@archindy.org)

Stacy Harris – Senior Director of Finance / Director of Compliance

[sharris@archindy.org](mailto:sharris@archindy.org)

Brian Schmidt – Director of Finance / Controller

[bschmidt@archindy.org](mailto:bschmidt@archindy.org)

Mike Witka - Director of Parish Financial Services & Risk Management

[mwitka@archindy.org](mailto:mwitka@archindy.org)

Eric Atkins – Director of Management Services

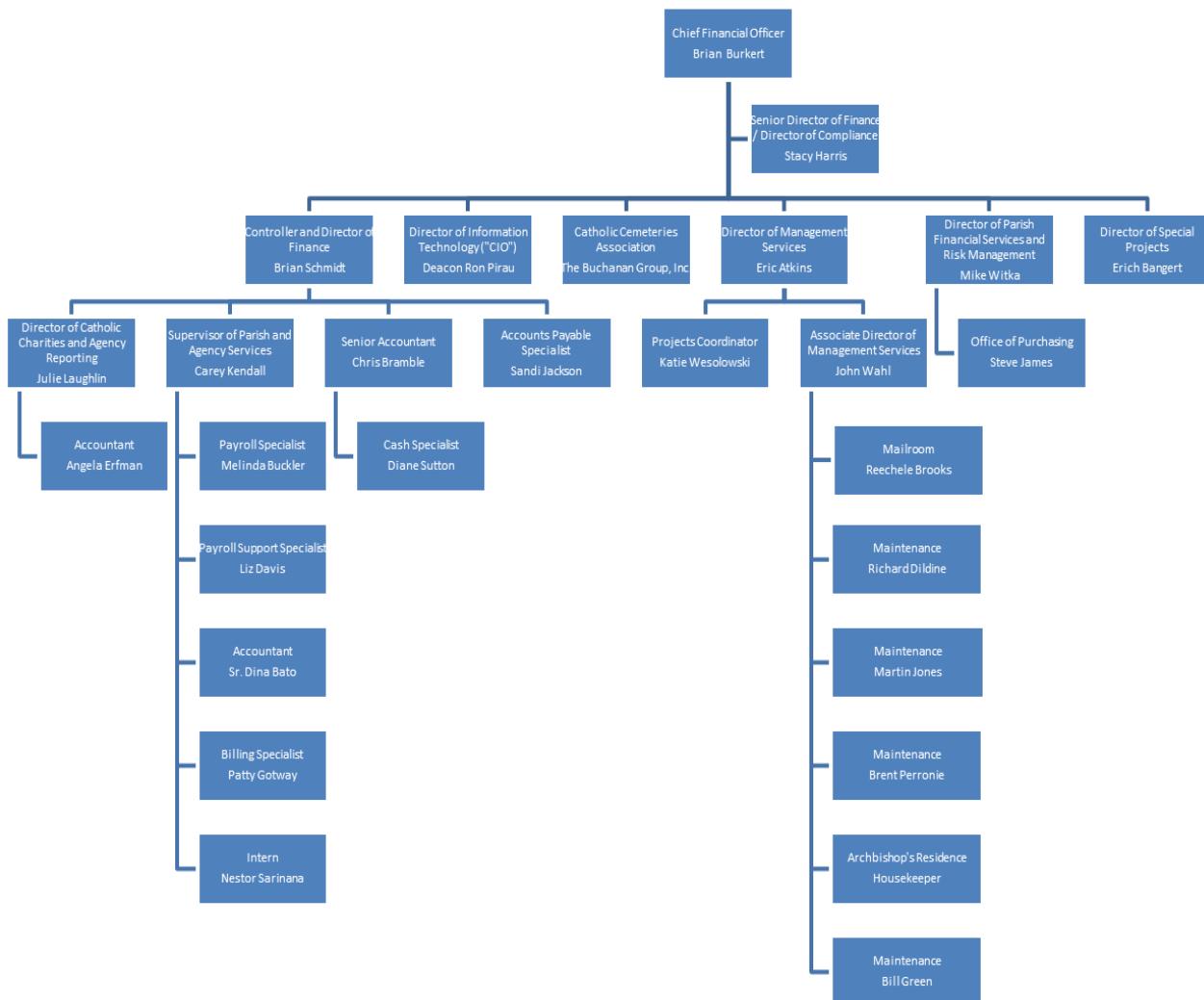
[eatkins@archindy.org](mailto:eatkins@archindy.org)

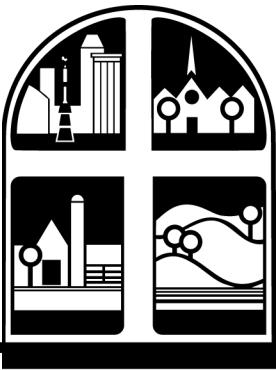
Deacon Ron Pirau—Director of Information Technology

[rpirau@archindy.org](mailto:rpirau@archindy.org)

Erich Bangert – Director of Special Projects

[ebangert@archindy.org](mailto: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, departments within the Catholic Center, and various agencies).	Phone: 317-592-4005 E-mail: bschmidt@archindy.org
Carey Kendall		Supervisor of Parish & Agency Services	Carey supervises payroll, parish and agency billing, and the administration of the Archdiocesan Deposit and Loan Fund. She monitors the accounting services email box and 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 and others.	Phone: 317-261-3371 E-mail: jlaughlin@archindy.org
Chris Bramble		Senior Accountant	Chris is responsible for investment accounting and accounting support for Fatima Retreat House and several Catholic Charities agencies, as well as coordinates and manages the parish internal control assessments.	Phone: 317-592-4099 E-mail: cbramble@archindy.org
Angela Erfman		Accountant	Angela is responsible for accounting for our agencies, with a primary focus on Catholic Charities.	Phone: 317-236-1525 E-mail: aerfman@archindy.org
Sister Dina Bato		Staff Accountant	Sr. Dina handles the day to day accounting for Catholic Cemeteries, United Catholic Appeal, and the Archdiocesan Deposit and Loan Fund (ADLF).	Phone: 317-236-1418 E-mail: dbato@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](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.