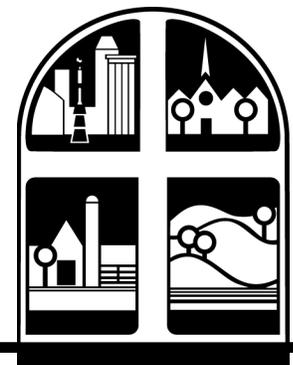


# THE OAS MESSENGER



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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 Parish Annual Financial Report (PAFR) information.
- [See page 2](#) for **new** information regarding the Billing Calendar.
- [See page 3](#) for updated Risk Management information.
- [See page 4](#) for important Paylocity system notes, updated payroll processing instructions, manuals and forms.
- [See page 4](#) for Catholic Community Foundation updates.
- [See Page 5](#) for an update on the United Catholic Appeal, information on the Regional Stewardship session, and Loaves+Fish webinar opportunities.

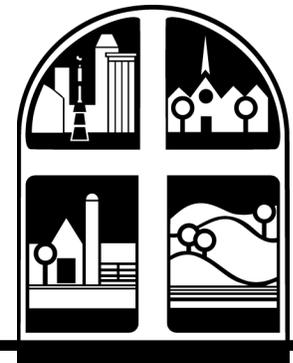
We have two staffing changes to announce:

- Angela Erfman, our Charities and agency accountant, had her last day on August 2nd. Her role is being filled by Hayley Hubble as we search for a full-time replacement for this position. See page 6 for Hayley's contact information if you have any questions.
- Sr. Dina Bato will celebrate her last day on August 14th. Sr. Dina is becoming the Mission and Ministry Coordinator at Resurrection University in Chicago. We will miss Sr. Dina dearly and wish her the best as she continues to serve the Lord! We are currently searching for her replacement. If you know of somebody interested, please have them reach out to Brian Schmidt at bschmidt@archindy.org.

### Upcoming Dates to Remember

Date	Subject	For more information, see...
<b>Payroll Dates:</b>		
Tuesday, August 15	Payroll approval due date for August 18 pay date.	<a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a>
Tuesday August 22	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for September 1st pay date.	
Tuesday August 29	Payroll approval due date for September 1st pay date.	
Tuesday September 5	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for September 15th pay date.	
Tuesday September 12	Payroll approval due date for September 15th pay date.	
<b>Other Dates:</b>		
September 15th	Parish Annual Financial Reports are due to be completed.	<a href="#">Page 2</a> and <a href="#">Page 3</a>
September 15th	Annual Meeting completed.	<a href="#">Page 3</a>
September 15th	Complete Conflict of Disclosure Statements	<a href="#">Page 3</a>

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## ACCOUNTING

### Parish Annual Financial Reports (PAFR)

We will utilize World App's Key Survey to collect Parish Annual Financial Reports (PAFR) for fiscal year ending June 30, 2017. The PAFR link was launched by Wednesday August 9, 2017 to the primary Business Manager at each location. Please reach out to [accountingservices@archindy.org](mailto:accountingservices@archindy.org) if you did not receive a link to the survey. Parish Annual Financial Reports are due to be completed by September 15th. PAFR Instructions can be found online: <http://www.archindy.org/finance/parish.html>. If you need assistance in completing the PAFR, please contact Mike Witka, Director of Risk Management and Parish Financial Services: [mwitka@archindy.org](mailto:mwitka@archindy.org).

### Monthly Assessments

August assessments will be withdrawn on Thursday August 31st.

Please email [ckendall@archindy.org](mailto:ckendall@archindy.org) with deferral requests by Friday August 25th.

### 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. Please note that we originally planned to bill Safe & Sacred in July, but we were unable to do so. Safe & Sacred will appear on the August assessment.

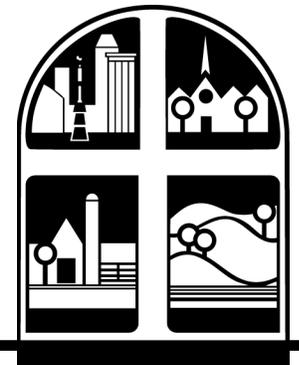
Description	Billing Frequency	August	September	October
Cathedraticum	Monthly	X	X	X
Clergy Healthcare	Monthly	X	X	X
Lay Retirement	Monthly	X	X	X
Safe and Sacred	Annually	X		
Indianapolis Education	Monthly	X	X	X
Property Ins.	Monthly	X	X	X
Vehicle Ins.	Monthly	X	X	X
Workers Comp.	Monthly	X	X	X
Lay Health Ins.	Monthly	X	X	X
Criterion Subscriptions	Monthly	X	X	X
Permanent Deacon Prof. Dev.	Annually		X	

### ADLF Rates for Jul-Sept 2017

Loans 3.75% Deposits 0.75%

The 2017 Quarterly ADLF meetings will be held on Thursday August 24, 2017 and Thursday October 26, 2017. If your parish would like to be placed on the agenda for the October meeting, please contact Carey Kendall at (317)236-1519 or [ckendall@archindy.org](mailto:ckendall@archindy.org).

Sr. Dina Bato's last day with the Archdiocese is Monday August 14th; please do not send ADLF inquires or requests to her email address. ADLF inquires, deposit, and withdrawal requests should be emailed (preferred) to [accountingservices@archindy.org](mailto:accountingservices@archindy.org) or faxed to: 317-592-4035.



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## ANNUAL DOCUMENTATION REQUIRED FOR PARISHES AND HIGH SCHOOLS

### Annual Requirements for Incorporated Entities

There are annual documentation requirements that must be met by each individually incorporated parish, school, and agency. These requirements are listed below, along with resource information for how to meet and document your compliance with the requirement.

- Conduct Annual Meeting between July 1st and September 15th. You will document the Annual Meeting Minutes and retain these at the parish or high school. Refer to this link for information on the topics that should be covered in the Annual Meeting. [Annual Meeting Minutes Example](#)
- Complete Conflict of Interest Disclosure Statements for each officer and director by September 15th and retain the signed disclosure statements at the parish or high school. The following link will take you to an example Conflict of Interest Disclosure Statement. [Conflict of Interest Disclosure Statement Example](#)
- Parish Annual Financial Report—due September 15th. See additional information on the PAFR on page 2.
- If your parish has been affected by Connected in Spirit in the previous fiscal year, please reach out to the Office of Accounting Services for further instructions.

Please confirm that you have completed the above action items and returned the necessary documents to the Archdiocese. If you have any questions, please contact OAS at [accountingservices@archindy.org](mailto:accountingservices@archindy.org).

## RISK MANAGEMENT

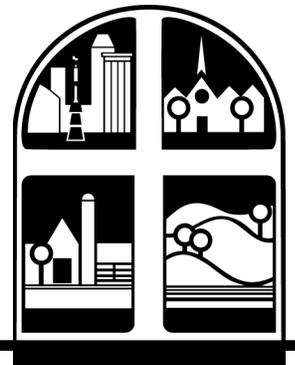
We still are encouraging every parish and school to complete this round of the self-inspection forms. This helps us work with parishes that need a little more guidance and helps in the prevention of accidents to our people.

Now is the start of school for many. It is important to review all equipment on campuses, especially playgrounds, sidewalks and black-tops. Also it is good to review security measures for the school building and surrounding areas. Any suspicious activity should be reported. And as the weather is still good it is time to inspect those gutters and downspouts before our snow and ice arrive.

### Risk Management Best Practices

4 warning signs of a disengaged employee:

- **An “I don’t care” attitude**—Coupled with their lower productivity, employees who illustrate less interest or care for their work or their organization’s overall mission are probably disengaged.
- **Increased tardiness or absences**—An employee exhibiting a pattern of tardiness or absences is probably disengaged, indicating a decreased motivation to complete tasks—or he or she might be looking for a new job.
- **Declining quality of work**—Failing to meet deadlines or meeting deadlines with sub-par work on a regular basis shows that an employee is less committed, especially if you know that person to be capable of better performance.
- **Permanent mood swings**—A once happy employee who slips into a persistent negative attitude might be having personal trouble or might be disengaged. Either situation is detrimental to the workplace and must be addressed.



## 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). Each location should be utilizing electronic timekeeping by:

1. All salaried employees should have schedules automatically posting to their timecards; salaried employees do not have to clock in and out.
2. All hourly employees are required to clock in and out.
3. All supervisors are responsible for approving timecards electronically each pay period.
4. All locations are required to utilize the electronic time import file from Web Time to populate the payroll pay grid each pay period.

### Time Off Balances

Time off benefits such as vacation, sick, and personal time is not set up through Web Time. Time off is set up through Web Pay. If you need time off balances set up, please email your time off policy to Carey Kendall: [ckendall@archindy.org](mailto:ckendall@archindy.org).

### Web Time | Web Pay Sync Issue

The Web Time | Web Pay sync issue has been resolved.

- You may assign badge numbers on the Web Time tab—if it is a duplicate badge number—you will receive an error message. If you receive an error message, please reach out to Central Payroll for assistance with the badge number assignment.
- Do not check or uncheck the Enable Time and Labor box on the Web Time tab, Central Payroll manages the use of that option.

Although we do not anticipate any further time off balance discrepancies between Web Pay and Web Time, please report any possible issues to Central Payroll.

### Priest Stipends

All priest stipends should be paid through Central Payroll. Email priest stipend requests to [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org); include your location number, submission is due by Tuesday in non-payroll weeks for payment to be included in the following Friday's pay date. It is helpful if you provide your priests with the details of the stipend requests.

## CATHOLIC COMMUNITY FOUNDATION

### 30<sup>th</sup> Anniversary Celebration

To celebrate the 30th anniversary, we are hosting events not only in June, but throughout the year! Your parish or school should have received a "Launch Kit" from us. In that kit are posters, brochures, church bulletin announcements and social media content for our 30th anniversary. If you have any questions on how to promote your current endowments or would like to establish a new endowment, please contact us at [ccf@archindy.org](mailto:ccf@archindy.org) or (317)236-1482.

### Staff Announcements

Rhobie Bentley joined the Catholic Community Foundation in the new position of Donor Relations Coordinator. She was previously in the accounting department for the Archdiocese and recently completed her MPA in Nonprofit Management from the School of Public and Environmental Affairs with a certificate in Philanthropic Studies from the Lilly Family School of Philanthropy at IUPUI.

In an effort to better describe Melanie Johnson's role and her work within the Catholic Community Foundation and Office of Stewardship and Development, we have changed the title of her position from Finance Administrator to Gift Administration and Parish Resource Specialist as of July 1.

# THE OAS MESSENGER



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## STEWARDSHIP & DEVELOPMENT

### United Catholic Appeal

Thank you to Pastors, PLCs and all parish staff for your efforts in completing the Census reports. A letter containing the new parish **United Catholic Appeal** goal as well as the planning forms was sent the first week of the month. If you have not received your letter, please contact Cindy Riley at [criley@archindy.org](mailto:criley@archindy.org) or by calling her directly at 317-236-1415.

Upcoming UCA dates to note include:

Parishes receive Parish Kits

Households receive UCA materials and pledge card

**Intention Weekend**

Week of October 2nd

Week of October 16th

**November 11 – 12**

Bulletin announcements will be available on the Parish Helpdesk of the OSD web pages by late September. Access them at: <http://www.archindy.org/stewardship/helpdesk.html>

### Regional Stewardship Education Session

Coming this fall, watch for your invitation to attend one of the **Regional Stewardship Education Session** to be held throughout the archdiocese during September and October. The sessions will focus on Stewardship Best Practices and are open to clergy, staff and parish volunteers. More details to follow.

### Loaves+Fishes Monthly Webinar Series

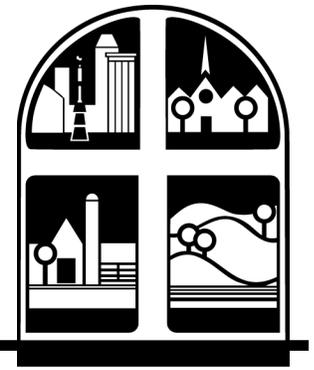
The “**Loaves+Fishes**” **monthly webinar series** continues through the end of the year. Webinars are available to the staff and volunteers of all parishes **at no cost to the parish**. The presenters are knowledgeable and well prepared. The topics are current and timely. The feedback is enthusiastic.

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](mailto:bsamsel@archindy.org).

Date	Topic
August 8	Social Media for Your Parish
September 12	Good Stewardship of Time in Parish Meetings
October 10	Nurturing Gratitude – The Foundation Upon Which the Pillars of Stewardship Stand
November 14	Spirituality of Giving
December 12	Faith-filled Ways to Call Parishioners to Serve in the Parish

For those unable to attend the live webinar, each is recorded and posted on the Stewardship website at <http://www.archindy.org/stewardship/podcast.html>

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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**

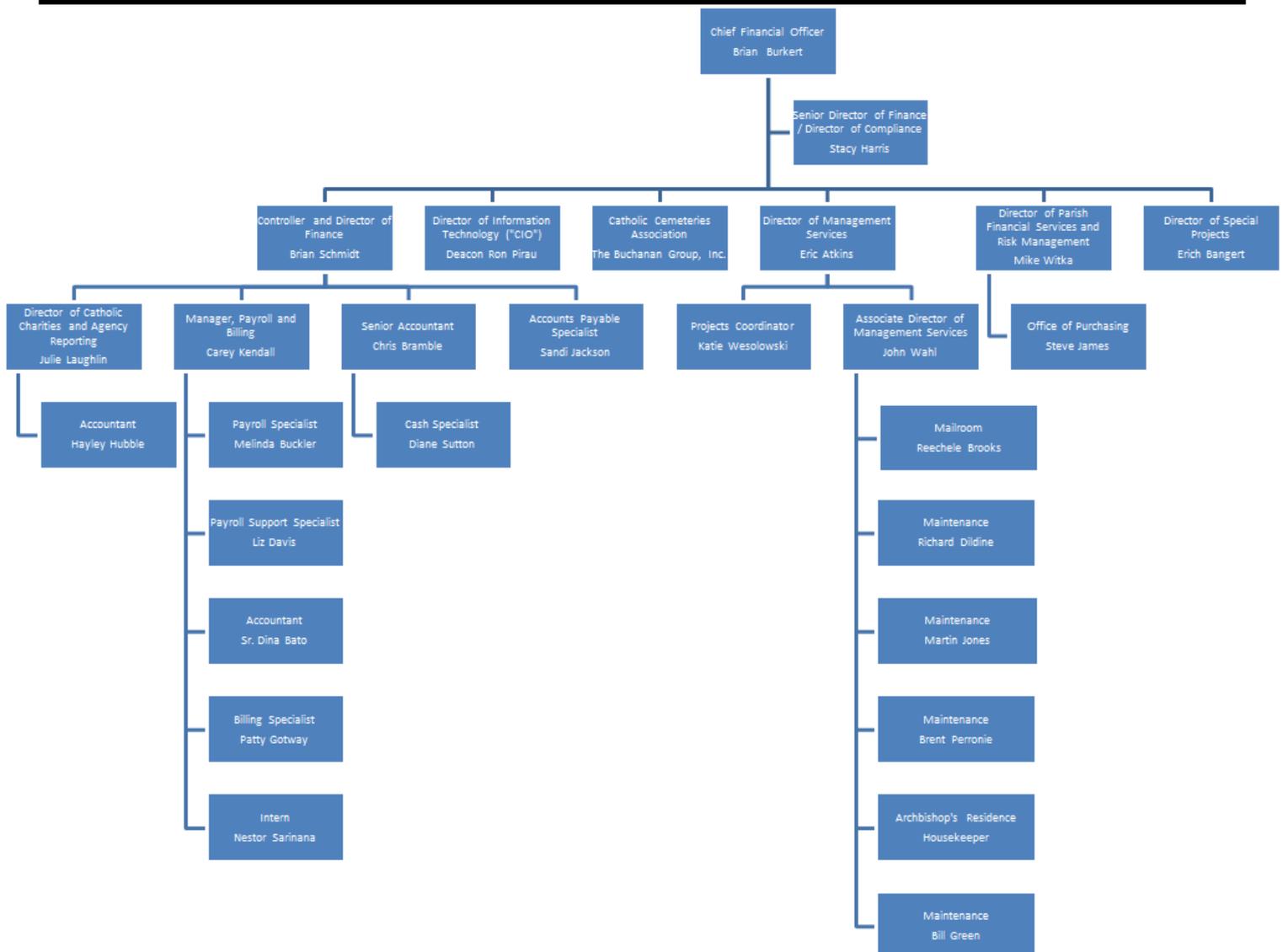
[eatkins@archindy.org](mailto:eatkins@archindy.org)

**Deacon Ron Pirau—Director of Information Technology**

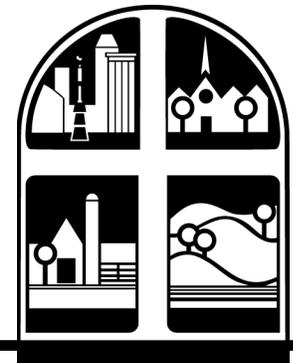
[rpirau@archindy.org](mailto:rpirau@archindy.org)

**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, 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, parish and agency billing, and the administration of the Archdiocesan Deposit and Loan Fund. She monitors the accounting services email inbox 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
Hayley Hubble		Accountant	Hayley is responsible for accounting for our agencies, with a primary focus on Catholic Charities.	Phone: 317-236-1525 E-mail: hhubble@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.