

# THE OAS MESSENGER



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## OVERVIEW

### Catholic Center Holiday

The Catholic Center will close for winter break beginning Friday December 22nd through Tuesday January 2nd to observe Christmas and New Year's Day holidays.

### What's New This Month?

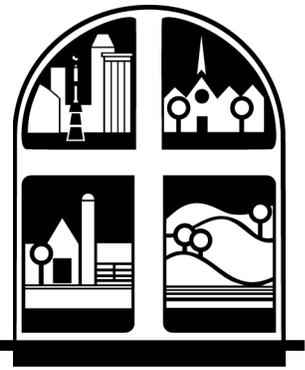
Here are some key items to pay special attention to in this month's newsletter:

- [See pages 2 & 3](#) for important monthly assessment notes including new information about the Indianapolis Deaneries Catholic Education Assessment.
- [See page 3](#) for 2018 ADLF Committee meeting dates, deposit & loan rates, and important information about using updated ADLF deposit and withdrawal forms.
- [See page 4](#) for Stewardship & Development notes about year-end contributions.
- [See page 4](#) for important notes about using fire-lit candles.
- [See page 5](#) for notes from the Archdiocesan Purchasing Department

### Upcoming Dates to Remember

Date	Subject	For more information, see...
<b>Payroll Dates:</b>		
Friday December 15th	Changes were due for new hires, rehires, leave of absence, terminations and stipends for January 5th payroll.	<a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a>
Tuesday December 19th	Required payroll approval due date for December 22nd payroll.	
Tuesday January 2nd	Required payroll approval due date for January 5th payroll.	
Tuesday January 9th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for January 19th payroll.	
<b>Other Dates:</b>		
None currently		

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## ACCOUNTING

### Monthly Assessments

In an effort to alleviate recent challenges we've experienced with the monthly health and dental billing, the reports that are mailed to support the health and dental amounts billed have been updated. The reports now show only one line per employee. Previously, the reports detailed multiple lines per employee if the employee had both dental and health coverage. Billing amounts remain the same as published in the Budget Guidelines at \$37 for dental coverage and \$769 for health coverage. However, the report that supports the amount billed on the monthly assessment now lists one line per employee combining the dental and health charges if where applicable. The details on the report will show one line per employee as follows:

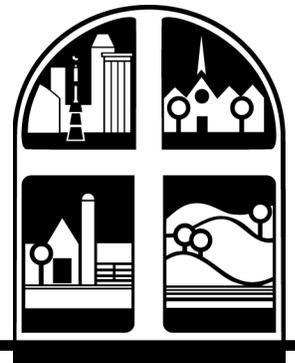
- Health Coverage Only \$769
- Dental Coverage Only \$37
- Health & Dental Coverage \$806

Please contact Carey Kendall if you have any questions about the reports or the health and dental details that are billed: ckendall@archindy.org or 317-236-1519.

December assessments will be withdrawn on Friday December 29th.

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	December	January	February
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
SECA Reimbursement	As occurs, annually			X



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## ACCOUNTING

### **Indianapolis Deaneries Catholic Education Assessment “6<sup>th</sup> bucket” Framework**

#### Background and History

In fiscal year 2017-2018, the Archdiocese of Indianapolis launched a new Indianapolis Deaneries Catholic Education Assessment. This new assessment replaced two previous assessments. *As a result of the implemented changes, a new, separate funding bucket has been established that will contain discretionary dollars to be awarded as need-based grants on an annual basis to support education-related ministries in our parishes and schools and/or address special needs that arise in a given fiscal year.*

#### Purpose of the Funding

Generally, the funding is available for three purposes:

Relieve short-term financial burdens in our parishes and schools – in the 3 year implementation phase of the new assessment, this financial burden could be due to the change in assessment itself.

Provide supplemental funding for new Catholic education-related initiatives in our parishes and schools

Grow and Strengthen Catholic education ministries in our parishes

#### Eligibility

All parishes and schools in the four Indianapolis Deaneries are eligible to apply for this funding

#### Amount of Funding Available

In year one of the new assessment implementation (FY 2017-2018), there will be \$100,000 available for funding.

#### Timing

Official applications for the funding dollars will be due in the Archdiocesan offices on February 28<sup>th</sup> each year. Funding decisions will be made by the Funding Committee and approved by the Archbishop or his designee by March 31<sup>st</sup> each year.

**MORE INFORMATION WILL BE AVAILABLE ON THE ARCHDIOCESAN WEBSITE AFTER THE FIRST OF THE YEAR.**

## ADLF

### **ADLF Rates for Oct-Dec 2017**

**Loans 3.75%      Deposits 0.75%**

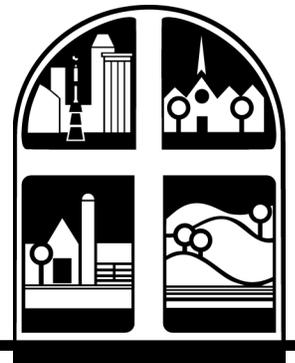
2018 ADLF Committee Meetings will be held on Wednesdays at 9am on the following dates:

February 21st | May 16th | August 22nd | October 24th

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](mailto:cbramble@archindy.org).

### **ADLF Deposit & Withdrawal Requests**

In an effort to eliminate the submission of sensitive information via fax and/or e-mail, we have removed the requirement to provide full bank account and routing numbers on the ADLF deposit and withdrawal forms. Moving forward, we ask that you provide only the last four digits of the parish/school/agency's bank account number. The new forms have been published on our website: <http://www.archindy.org/finance/parish/forms.html>



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## CENTRAL PAYROLL

### New Year's Week—January 5, 2018 Pay Run

All changes for new hires, rehires, terminations, and stipends are due by December 15th for the January 5th pay run. The Archdiocese and Paylocity are closed on Monday January 1st to observe the New Year's holiday. Locations will be required to approve their pay run by Tuesday January 2nd in order to guarantee employees are paid by Friday January 5th.

## STEWARDSHIP & DEVELOPMENT

### End of Year Giving

Statistically, 12% of all giving happens on the last three days of the year. It is important to know how to cultivate year-end funding and it is equally necessary to know how to properly acknowledge the gifts in a timely manner. The Office of Stewardship and Development hosted a webinar recently addressing those two topics. View the "Boosting End of Year Giving and Guidelines for Acknowledgements" webinar as a podcast and download quick reference guides and other helpful information at <http://www.archindy.org/stewardship/podcast>.

### United Catholic Appeal

The United Catholic Appeal response is right on target. We are still seeing a one week turnaround time for gift processing. As a reminder, please continue to quickly send out United Catholic Appeal gifts returned to the parish as they need to be postmarked by December 31 for tax purposes. No matter how many gifts are received each week, we encourage you to send them in on a weekly basis. If additional mailing supplies are needed, please email Dana Stone at [dstone@archindy.org](mailto:dstone@archindy.org). We make it a priority to fulfill your request and mail supplies out within the next business day.

## RISK MANAGEMENT

### Candle Fires

The tranquil setting of a flickering candle can quickly become a towering inferno without the proper safety precautions. Each year about 15 churches experience serious fires. The average damage from a candle-related fire is \$157,000. Primary causes – candles left unattended, candles too close to flammable materials, and candles tipping over.

Some helpful ideas:

- Keep candles away from items that can catch fire
- Use candleholders that are sturdy and won't tip over
- Never leave a candle burning in an unattended room
- Keep wicks trimmed to one-quarter inch
- Never let candles burn for more than 4 hours at a time

There is a new Accident Claim Form being provided with this newsletter (see final page). Please use the current form.

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## ARCHDIOCESAN PURCHASING DEPARTMENT (APD)

### A message from Steve James, Archdiocesan Purchasing Manager...

I want to wish you and your staff a Blessed Christmas and a very Happy New Year. This year gave me the opportunity to begin visiting each parish in our archdiocese. As we enter 2018, I will continue visiting you in your parishes. I would love the opportunity to speak at one of your staff meetings. If you want to schedule a specific time, please call 317 236-1451 or e-mail me [sjames@archindy.org](mailto:sjames@archindy.org).

Here are a couple of thoughts for 2018.

1. Palm information will come out in January. I will put information on our webpage and I will send a flyer to each location. Watch for these as there will be ordering deadlines.
2. Our annual catalog is changing format. Instead of one larger catalog in January, you will receive a catalog focusing on parish needs in January and in March you will receive a catalog for school needs. There will also be some quarterly advertising on our webpage.
3. My Sunday Visitor wants to ensure that you get the proper pricing for product you order. They would like for you to get a purchase order number from APD which will alert them to give you special pricing. They also suggest that you call orders in versus using their website.
4. Buckeye is a janitorial supply and equipment supplier. Their pricing is very good and they are doing a great job of servicing some of our locations. Their rep is Evan Webb. He can be reached at 317 441-2437 or by email [ewebb@buckeyeinternational.com](mailto:ewebb@buckeyeinternational.com). Their website is also accessible through our webpage.
5. Be sure to spread the word to your staff that APD is not just about facility-related product. We also offer furniture, religious clothing and items, books and supplies.
6. We have an opportunity to get a Virco desk donated if your school is interested. You have to pick them up from the Hancock cty school system. There are 600 Virco 3640br desks available. Go to [www.virco.com](http://www.virco.com) to see the style. If interested, please reach out to me.

Again, wishing you a very Merry Christmas!

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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**

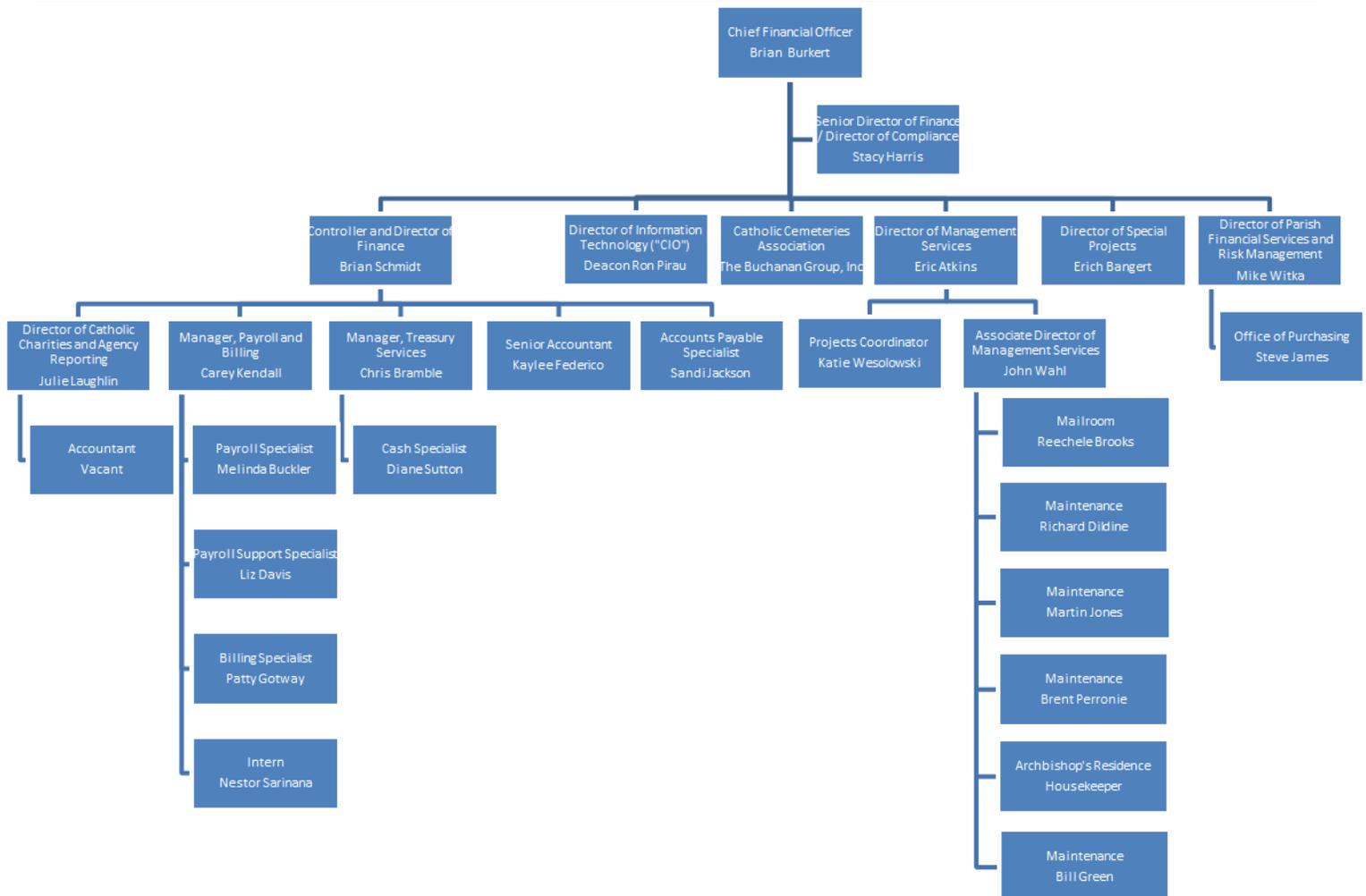
[eatkins@archindy.org](mailto:eatkins@archindy.org)

**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 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
Kaylee Federico		Senior Accountant	Kaylee is responsible for accounting for Catholic Cemeteries, the Archdiocesan Deposit and Loan Fund, various Archdiocesan campaigns and appeals (UCA, LFOM), and monthly financial reporting and reconciliations.	Phone: 317-592-4021 E-mail: kfederico@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.

**HOW TO FILE A CLAIM:**

1. Complete this form within 90 days.
2. Attach Itemized Bills and Primary Carrier Statements
3. Mail to: Gallagher Student Health, 500 Victory Rd. Quincy, MA 02171 or Fax: 617-479-0860 attn: sports / Ph: 877-345-8928

**BMI Benefits, LLC. Accident Claim Form**



**The Student Accident Policy has a \$500 Corridor Deductible. Please refer to the claim documents provided to you by the school for further information or contact Gallagher Student Health with any questions.**

*This part must be completed and signed by an official of the policyholder or the claim cannot be processed*

**PART 1A: POLICYHOLDER**

School/Organization <b>Archdiocese of Indianapolis</b>		Policy# <b>11KTT8190401</b>	
School Mailing Address		City, State, Zip	
Injured Person's Name		Birth date	Male <input type="checkbox"/> Female <input type="checkbox"/>
Date of Injury	Time	Type of Sport	Part of body injured
How did Injury occur?			
Accident Type: Interscholastic <input type="checkbox"/> Classroom <input type="checkbox"/> PE Class <input type="checkbox"/> Recess <input type="checkbox"/> Other <input type="checkbox"/>			
At the time of the injury, was the injured involved in an activity sponsored and supervised by the policy holder?			YES <input type="checkbox"/> NO <input type="checkbox"/>
Name of Supervisor		Was he/she a witness to the accident?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Signature of Supervisor/Official		Title	Date

**PART 1 B: INJURED PERSON'S INFORMATION**

**THE INJURED PERSON'S SOCIAL SECURITY NUMBER MUST BE PROVIDED AS REQUIRED BY THE CENTER FOR MEDICARE SERVICES**

Injured Person's Social Security Number	
Injured Person's Home Address (Street, City, State, Zip)	
Are you covered by any other insurance policy, either as a dependent, group, individual, automobile medical or liability YES <input type="checkbox"/> NO <input type="checkbox"/>	
If Yes: Name of Insurance Carrier _____ Policy #: _____	
Is the above insurance a Medicaid Plan or a Military Insurance such as Tricare YES <input type="checkbox"/> NO <input type="checkbox"/>	

**PARENT/GUARDIAN INFORMATION**

Father/Guardian Name		Mother/Guardian Name	
Address (Street, City, State, Zip)		Address (Street, City, State, Zip)	
Home Phone	Email	Home Phone	Email
Is the Father Employed? YES <input type="checkbox"/> NO <input type="checkbox"/>		Is the Mother Employed? YES <input type="checkbox"/> NO <input type="checkbox"/>	

**SECTION A (INSURED/FATHER)**

**SECTION B (SPOUSE/MOTHER)**

Employer		Employer	
Address (Street, City, State, Zip)		Address (Street, City, State, Zip)	
Business Phone		Business Phone	
Insurance Company	Policy#	Insurance Company	Policy#

**MEDICAL INFORMATION AUTHORIZATION ASSIGNMENT OF BENEFITS:**

You are hereby authorized to furnish at the request of and to BMI Benefits, LLC or the underwriting companies with which it works, information which you may possess; including findings and treatment rendered, X-rays and copies of all hospital and medical records, all occasioned by professional services and hospital care rendered on my behalf. The foregoing authorization is granted with the understanding that any legal rights I may ordinarily have to claim communications between us as privileged are hereby expressly and voluntarily waived. A Photostat of this authorization shall be considered as effective and valid as the original, PAYMENT WILL BE MADE TO THE PROVIDERS OF SERVICE (HOSPITAL, PHYSICIAN AND OTHERS), UNLESS A PAID RECEIPT OR STATEMENT ACCOMPANIES THE BILL AT THE TIME THE CLAIM IS SUBMITTED.

**New York:** Any person who knowingly and with intent to defraud any insurance company or other person files a statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

Claimant or Authorized Person's Signature	Date
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