

# 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 November update on electronic timekeeping (Web Time)
- [See page 4](#) for information regarding the 2017 Benefits Open Enrollment
- [See page 4](#) for an exciting announcement related to an additional one-time-only contribution to employees' health savings accounts.

### Upcoming Dates to Remember

- On December 8<sup>th</sup>, the Catholic Center closes at noon to observe the Solemnity of the Immaculate Conception of the Blessed Virgin Mary
- The Catholic Center will be closed for Thanksgiving on November 24<sup>th</sup>
- Christmas Break begins on December 26<sup>th</sup> and the Catholic Center reopens on January 3<sup>rd</sup>

Date	Subject	For more information, see...
<b>Payroll Dates:</b>		
Tuesday, November 1st	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for November 10th pay date	<a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a>
Monday, November 7th	Payroll approval due date for November 10th pay date	
Tuesday, November 15th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for November 25th pay date	
Tuesday, November 22nd	Payroll approval due date for November 25th pay date	
<b>Other Dates:</b>		
Tuesday, November 1st	Open enrollment for health insurance begins for all eligible employees. Open enrollment ends on November 30th.	<a href="#">Page 3</a>
November 12th-13th	United Catholic Appeal Intention Weekend	<a href="#">Page 5</a>
Tuesday, November 15th	Form NP-20 filing due to State of Indiana for each parish and high school. <b><u>It is the responsibility of the parish, high school, and agency to complete this filing.</u></b>	<a href="#">Page 3</a>
Friday March 31, 2017	All locations are required to have electronic timekeeping implemented by March 31, 2017.	<a href="#">Page 3</a>

### Monthly Assessments

November assessments will be distributed to locations the week of November 21st. Assessments will be withdrawn on Wednesday, November 30th. Please email [accountingservices@archindy.org](mailto:accountingservices@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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## CENTRAL PAYROLL

### Please note an important pay date change

**Friday November 11<sup>th</sup> is a bank holiday observing Veteran's Day.**

**EMPLOYEES WILL BE PAID ON THURSDAY NOVEMBER 10<sup>TH</sup>.**

CENTRAL PAYROLL IS UPDATING THE PAYROLL CALENDAR TO REFLECT THE PAY DATE CHANGE.

**LOCATIONS MUST APPROVE THE PAY RUN ON: MONDAY NOVEMBER 7<sup>TH</sup>.**

If the pay run is not approved on Monday November 7<sup>th</sup> we cannot guarantee employees will be paid on Thursday November 10<sup>th</sup>.

Please inform your employees about this important change.

You may contact Central Payroll with any questions or concerns about this change: [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).

### Tax Notices

Please forward any State or IRS taxes notices to [ckendall@archindy.org](mailto:ckendall@archindy.org). The notices will be forwarded to Paylocity who will work with the tax agencies to resolve any tax issues.

### Pay Rates

Hourly rates of pay should not have default hours in the setup. Please remove default hours from any hourly rates of pay.

Salaried rates of pay must have default hours. **\*\*\*Update to October Note\*\*\*** Do not remove system calculated hourly rates from salaried pay rates. Web Time relays this information must be present in order for Web Pay and Web Time to work appropriately.

### Pay Rate Approvals

HR is now reviewing and approving all pay rate changes. Please keep this in mind when planning to process payroll. It would be helpful if locations follow the normal deadlines for other changes in non-payroll weeks to avoid any delays with payroll processing as they relate to changes in pay.

### 2016 W-2 Previews are available under Reports & Analytics | Quarter & Year End reporting menu.

2016 W-2 Previews are available under Reports & Analytics | Quarter & Year End reporting menu. W-2 Previews allow you the opportunity to review all data captured on the W-2 form for accuracy before final W-2's are printed and filed. We encourage you to verify all information and immediately contact Paylocity if you need assistance making corrections. Paylocity suggests a comparison of a minimum 10 employees prior year W-2 information against their current W-2 preview to ensure it is meeting your expectations. Try to select employees with various types of earnings or deductions. **Please note: when the finalized W-2s are generated at year end, the W-2 Preview will be replaced with the actual 2016 W-2 information.**

### 2016 Payroll Processing Deadlines

Please refer to the Payroll Processing calendar for bi-weekly deadline dates. All changes such as new hires, rehires, leave of absence, terminations and stipends are due by Tuesdays in each non-payroll week. Likewise, payroll **must be approved by Tuesday** in each week employees are paid. If you need assistance with meeting the payroll deadlines, please reach out to [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).

### Payroll Processing

After entering all of the necessary payroll data into the pay grid:

1. Ensure **ALL** forms of compensation has hours associated with pay.
2. Run the Payroll Audit | fix any errors related to pay. Central Payroll will resolve any health savings account errors.
3. Approve the payroll batch.
4. Email Central Payroll with a confirmation of your approval; include your five digit Paylocity location ID in the subject line.



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## ELECTRONIC TIMEKEEPING (WEBTIME)

Please read the letter from the Office of the Vicar General regarding implementing Web Time. The letter relays that the Archbishop would like locations to either be using or piloting electronic timekeeping (Web Time) by December 31, 2016. If planning for a pilot or live date is not possible by December, **all locations are required to have completed implementation by March 31, 2017.**

The first step in planning your electronic timekeeping implementation is choosing a target pay date to go live on Web Time. Paylocity has limited implementation resources; there are only about 15 openings per each pay date. Therefore, to ensure you are able to choose your desired target live pay date, please provide that date to Carey Kendall by emailing her your location number and desired target live pay date: [ckendall@archindy.org](mailto:ckendall@archindy.org).

Please note that implementation for electronic timekeeping will take approximately four to six weeks prior to your targeted go live date. After you secure your spot with the implementation team on your targeted go live date, an implementation specialist will reach out to you via email to begin planning the implementation. An **example** timeline of what to expect is shown below so you can gain an understanding of what to expect and plan for during implementation.

If you have any questions about why the Archdiocese is using electronic timekeeping, how the system will be used, or need any assistance before or during implementation, please reach out to Carey Kendall: [ckendall@archindy.org](mailto:ckendall@archindy.org).

### Example timeline for 12/23/16 targeted pay date:

- NOVEMBER 7TH | Welcome Email from Implementation Specialist
- Date Between NOVEMBER 7–10TH | 15 Minute Welcome Call with Implementation Specialist
- Date Between NOVEMBER 14–17TH | Date Paylocity Creates Location's Web Time Database
- Date Between NOVEMBER 14–25TH | Level One Training with Paylocity (Admin 1 Training)
- Date Between NOVEMBER 14–25TH | (After Level One Training) Level Two Training with Paylocity (Admin 2 Training)
- NOVEMBER 25–Through First Live Punch Date | System Testing
- **DECEMBER 5TH | First Live Punch for Employees**
- **DECEMBER 19TH or 20th | First Guided Pay Run with Implementation Specialist**

## 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>.

## ADLF

### ADLF Rates for Oct-Dec 2016

Loans 3.75%      Deposits 0.75%

The 2017 Quarterly ADLF meetings will be scheduled soon and communicated via this e-mail.

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).



## HUMAN RESOURCES

### 2017 Benefits Open Enrollment

The 2017 benefits open enrollment period is 11/1 – 11/30. For additional information, please visit our website at <http://www.archindyhr.org/health/open-enrollment-2017/>.

Some changes for 2017 include:

- An increase to the single maximum HSA contribution level
- HSA contribution frequencies
- Rates for medical and dental plans
- Plan design changes to the medical plan including deductible and out of pocket maximums.

These changes are detailed in the letter mailed out to benefit eligible employees in June, 2016 (also posted on our website). Please visit our website regularly for updates and contact Christa Bunch at [cbunch@archindy.org](mailto:cbunch@archindy.org) with any questions.

### Additional HSA Contribution

On November 3, 2016, the Human Resources Department sent a letter to all Health Plan members in the Archdiocese. The letter communicated that on February 17, 2017, all employees with Archdiocesan Health Plan coverage as of January 1, 2017 will receive a one-time-only additional contribution to their health savings accounts. Employees with single coverage will receive an additional \$200 contribution, and employees who have family coverage will receive an additional \$400 contribution from the Archdiocese.

## PURCHASING

### Item Delivery

When an item is delivered to you, please take the following steps to protect against loss or damage:

1. **VERIFY THE COUNT.** Make sure you receive as many cartons as are listed on the delivery receipt. If any shortage is discovered, note exactly how many cartons are short on the carrier's delivery receipt and have the driver note the shortage on your copy.
2. **CAREFULLY EXAMINE THE CARTONS FOR DAMAGE.** If damage is visible, note this on the delivery receipt and have the driver clearly note that fact on your copy. If the carton has the appearance that the contents inside may possibly be damaged, **insist that it be opened right at that time.** Both you and the driver should make a joint inspection of the contents. Any concealed damage discovered should also be noted on the delivery receipt and on your copy. Be sure to retain your copy.
3. **IMMEDIATELY AFTER DELIVERY, OPEN ALL CARTONS AND INSPECT FOR CONCEALED DAMAGE.** Even though the driver has already left, all cartons should be immediately opened and the contents inspected for possible concealed damage. Retain damaged items. Please keep damaged items and all containers along with the inner packing materials. Please contact APD at once to report concealed damage. We will then make arrangements with the vendor to pick up and replace any damaged items. Damaged items cannot be used or disposed of without authorization from APD.

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## STEWARDSHIP & DEVELOPMENT

November 5 - 6	Awareness Weekends for United Catholic Appeal	Speaker's Bureau <a href="http://www.archindy.org/stewardship/helpdesk.html">http://www.archindy.org/stewardship/helpdesk.html</a>
November 12 - 13	United Catholic Appeal Intention Weekend	<a href="http://www.archindy.org/stewardship/helpdesk.html">http://www.archindy.org/stewardship/helpdesk.html</a>

### Intention Weekend

Intention Weekend is November 12 -13. Parishes are strongly encouraged to employ the In-Pew Process to present the United Catholic Appeal at each Mass to increase participation. A detailed outline, including script for the In-Pew Process is located in the Parish Guide at <http://www.archindy.org/stewardship/documents/In%20Pew%20Process%20pps%205-6%20in%20Guide.pdf>

In anticipation of Intention Weekend, parishes are encouraged to invite speakers to convey how UCA monies directly impact your parish community. The Speakers Bureau, located on the Parish Helpdesk contains a list of those who can talk personally about the impact of United Catholic Appeal dollars.

### Ministry Minutes

Another useful tool for sharing the United Catholic Appeal stories is to upload *Ministry Minutes* on the parish social media platforms. *Ministry Minutes* are 1-3 minute clips which communicate specific stories of how funding impacts ministries throughout the archdiocese. Each parish was sent a flash drive containing all ten *Ministry Minutes* as well as an instruction page for uploading them on the parish social media platforms. Additionally, *Ministry Minutes* may be found on the Parish Helpdesk.

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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**

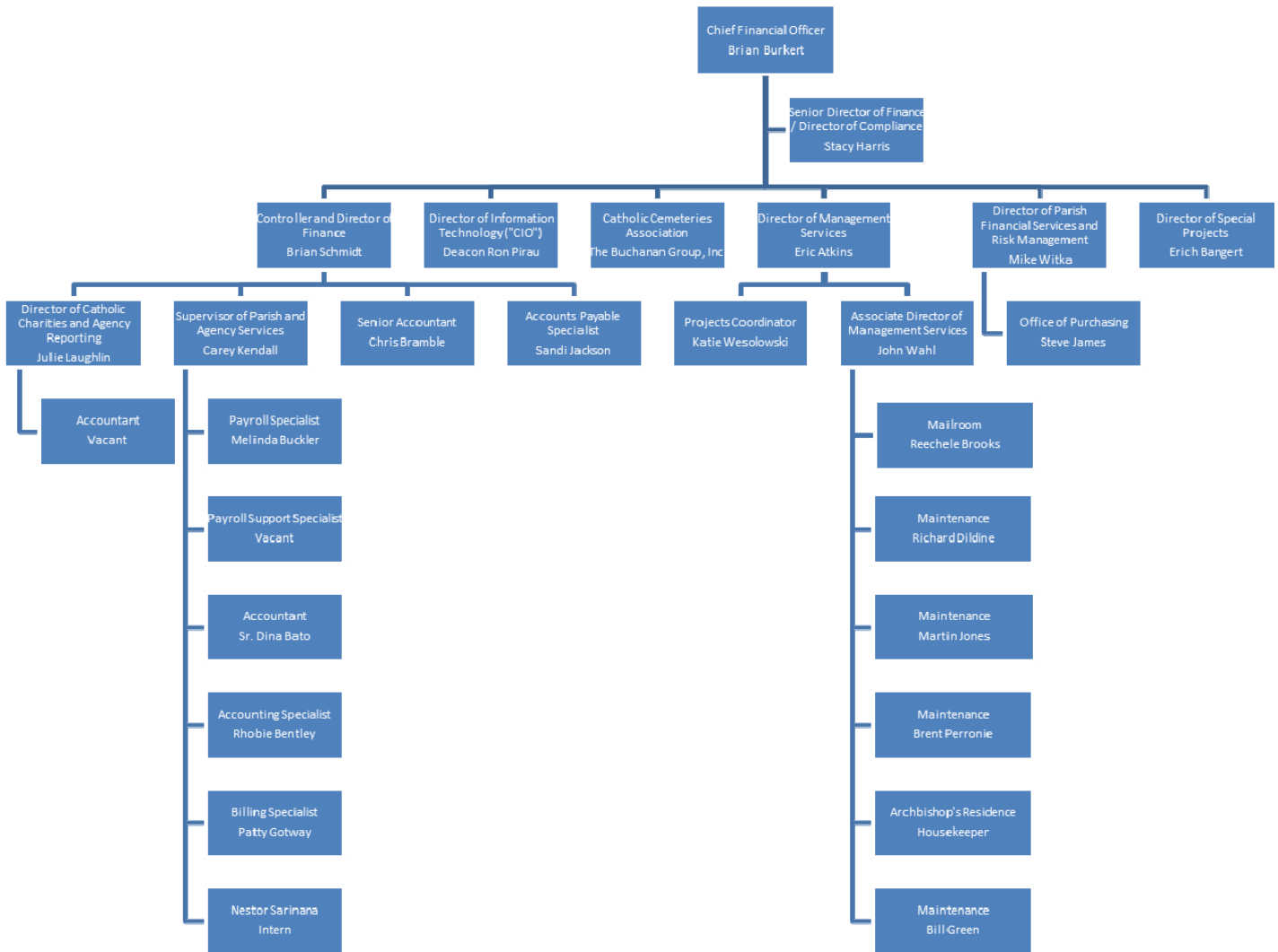
[eatkins@archindy.org](mailto:eatkins@archindy.org)

**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)









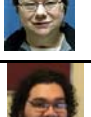



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## OFFICE OF ACCOUNTING SERVICES

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
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
Rhobie Bentley		Accounting Specialist	Rhobie (Row-bee) is responsible for daily cash management including processing all deposits received by OAS.	Phone: 317-261-3376 E-mail: rbentley@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
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.



# ARCHDIOCESE OF INDIANAPOLIS

The Church in Central and Southern Indiana

**Office of the Vicar General**

1400 N. Meridian Street, Indianapolis, IN 46202-2367  
P.O. Box 1410, Indianapolis, IN 46206-1410  
317-236-1405 800-382-9836, ext. 1405  
Fax: 317-236-1406

November 1, 2016

Dear Pastors, Parish Life Coordinators, Administrators, Principals, Directors, Business Managers, and Bookkeepers:

In April 2015, we contracted with Paylocity to implement a new Human Resources Information System (HRIS) to ensure legal compliance throughout the Archdiocese. The HRIS system enabled the Archdiocese to administer compliance with the evolving requirements of the Department of Labor, the Affordable Care Act, the Fair Labor Standards Act, and the Family Medical Leave Act. The HRIS system is comprised of three key Paylocity software components; Web Pay for payroll processing, Web Benefits for tracking and offering benefits electronically, and Web Time for electronic attendance tracking.

Web Pay and Web Benefits have been successfully implemented by all locations. To date, approximately one-third of Archdiocesan locations are using Web Time for electronic timekeeping.

The Archbishop would like for the remaining two-thirds of Archdiocesan locations to either be using or piloting Web Time by December 31, 2016. If planning for a pilot or live date is not possible by December, all locations are required to have completed implementation of Web Time by March 31, 2017.

Implementation takes approximately four to six weeks, so please prepare to plan your targeted pay period to go live well in advance. You may begin planning implementation at any time by contacting Central Payroll at [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).

Thank you very much for your involvement and assistance with completing the implementation of the final module of our Archdiocese's HRIS system and for all the work you do to carry out the mission of the Church.

Sincerely yours in Christ,

Reverend Monsignor William F. Stumpf  
Vicar General and Moderator of the Curia  
Archdiocese of Indianapolis