

# 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 payroll deadlines during Thanksgiving and New Years weeks and information on annual IRS notices.
- [See page 4](#) for important notes from Stewardship and Development.

### Thanksgiving Week Payroll

The Archdiocese of Indianapolis and Paylocity are closed to observe the Thanksgiving holiday on Thursday November 23rd. Therefore, in order to guarantee employees are paid on Friday November 24th, all locations are required to approve their pay run on Monday November 20th. This allows Central Payroll one day to complete an adequate review and submission of all Archdiocesan payrolls and allows Paylocity to ensure the payroll liability is drafted by Wednesday November 23rd to ensure timely deposits on Friday November 24th

**Please contact Central Payroll if you are unable to approve your pay run on Monday November 20th:** [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).

### OAS Staff Update

We are pleased to announce that we have a new team member in the Office of Accounting Services, Kaylee Federico. Kaylee started on October 30th and is a welcome addition to our team!

Also, Ben Phares' last day of temporary employment with OAS was November 2nd. Kaylee is assuming all ADLF responsibilities.

Kaylee Federico, Senior Accountant (primary areas of focus include ADLF, Catholic Cemeteries, UCA, and monthly reporting and reconciliations.



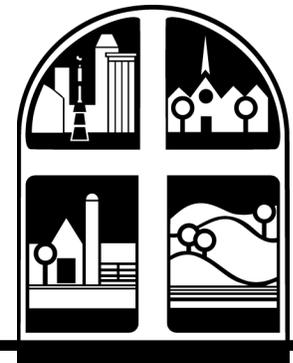
My name is Kaylee Federico and I recently moved to the Indianapolis area with my family. My husband, Matt, and I have a sixteen month old son, Charlie, and a four year-old Samoyed, Izzy. We decided to move to Carmel to be closer to my immediate family, to accommodate our new life as a family of four (if you count Izzy ☺), and to spend more time on the golf course! While we lived in Chicago, I worked as an auditor with Deloitte and Touche, LLP. After three years in public accounting, I made a conscious decision to change career paths so I could spend more time with our little guy, Charlie. The Archdiocese has provided an invaluable opportunity for me to develop both spiritually and professionally and to spend the extra time at home with my family. I am very excited to be joining the Archdiocese and I am looking forward to getting to know everyone!

We are also still searching for an Accountant (<http://www.archindy.org/hr/job.html>).

### Upcoming Dates to Remember

Date	Subject	For more information, see...
<b>Payroll Dates:</b>		
Monday November 20th	Required payroll approval due date for November 24th payroll.	<a href="http://www.archindy.org/finance/payroll.html">http://www.archindy.org/finance/payroll.html</a>
Tuesday November 28th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for December 8th payroll.	
Tuesday December 5th	Required payroll approval due date for December 8th payroll.	
Tuesday December 12th	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for December 22nd payroll.	
<b>Other Dates:</b>		
None currently		

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## ACCOUNTING

### 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](mailto:accountingservices@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	November	December	January
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		

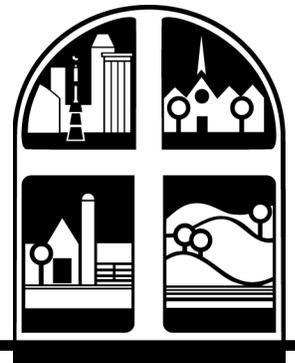
### Monthly Assessments

November assessments will be withdrawn on Thursday November 30th.

### 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](mailto:cbramble@archindy.org).



## CENTRAL PAYROLL

### Thanksgiving Week—November 24th Pay Run

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**Please contact Central Payroll if you are unable to approve your pay run on Monday November 20th: [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).**

### 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.

### 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.

### Annual Notices from IRS

You may have received an annual statement from the Internal Revenue Service (IRS) stating "We have determined your 2018 deposit requirements for Form 941". The notice lists estimated amounts due each quarter. These types of notices might indicate that Paylocity needs to change the filing frequency with the IRS. Central Payroll has established a good partnership with Paylocity's tax team, so we ask that you please continue to forward any notices you receive from either the IRS or the Indiana Department of Revenue to Carey Kendall for resolution: [ckedall@archindy.org](mailto:ckedall@archindy.org).

### Time Off Requesting System

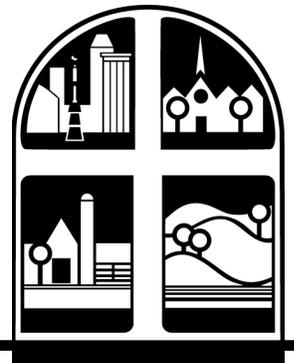
In order for employees to request time off electronically through their employee self-service portal, you'll need to ensure you have your Time Off benefits and balances such as **vacation, sick, and personal time off** set up in WEB PAY. This makes using electronic timekeeping easier for the employee 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](mailto: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>

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## STEWARDSHIP & DEVELOPMENT

### United Catholic Appeal

Thank you for all your efforts in preparation for Intention Weekend. It typically takes seven to ten days to process and record gifts. Parish Update Reports are being emailed at the end of each week again. Please send out all gifts turned into the parish as quickly as possible to ensure the most accurate reporting. If additional mailing supplies are needed, email Cindy Riley at [criley@archindy.org](mailto:criley@archindy.org).

### End-of-Year Giving Webinar for Pastors and Parish Staff

Mark your calendars for the Boosting Year End Giving and Guidelines for Acknowledgements Webinar on Thursday, November 30<sup>th</sup> from 11 – 11:45 am. The webinar will address two important and timely topics: 1) Promoting year-end gifts and 2) How to properly acknowledge 2017 gifts in January of 2018. Register for the webinar now by clicking the following link: [www.archindy.org/stewardship/YrEnd](http://www.archindy.org/stewardship/YrEnd) .

### An Evening of Lights

Thursday, December 7<sup>th</sup> marks the inaugural Archdiocesan Christmas Tree Lighting & Prayer Service held in the Catholic Center Assembly Hall. The Prayer Service led by Archbishop Thompson begins at 6 pm with a reception to follow. Dedicate a luminaria in memory of a loved one to be lit at the prayer service for a donation of \$10 or more. To RSVP and/or to make a donation, please visit [www.archindy.org/CCF/EveningofLights](http://www.archindy.org/CCF/EveningofLights). For more information, please contact Rhobie Bentley at 317-236-1482 or [ccf@archindy.org](mailto:ccf@archindy.org).

### IQE - IMPACT THE FUTURE

You can literally change a child's life by providing them with the means to afford a quality Catholic education while you benefit from a 50 percent state tax credit on your gift made through the Institute for Quality Education. **Act now!** With year-end giving season upon us, Indiana State Tax Credit Scholarship Program funds are expected to diminish quickly. Both individuals and companies are eligible to take advantage of the state tax credit and may be eligible for a federal tax deduction as well. There's no better time than **NOW** to impact the future. For more information or to donate, visit: [indianataxcreditscholarship.org](http://indianataxcreditscholarship.org) or contact Kim Pohovey at 317-236-1568 or [kpohovey@archindy.org](mailto:kpohovey@archindy.org).

### Professional Development for Professional Advisors

The Catholic Community Foundation is sponsoring two continuing education seminars for professional advisors including attorneys, accountants, financial advisors and life insurance representatives as well as clients and those who may have an interest in the seminar material. Topics of discussion include Catholic Community Foundations (fund types, fund agreements, endowment law, and comparison to private foundations); Ethics in Charitable Estate Planning; and, Gift Planning with Retirement plans. This program qualifies for three hours of continuing professional education credit, including two hours of ethics credit.

- Tuesday, December 5, 2017 at the McCauley Centre (702 North Shore Dr., Jeffersonville)
- Wednesday, December 6, 2017 at the Edward T. O'Meara Catholic Center (1400 N Meridian St., Indianapolis)

Registration opens at 8:30 AM. The program begins at 9 AM and concludes by 12:30 PM. A continental breakfast and box lunch will be provided. For easy registration visit [www.archindy.org/CCF/ProfDevelopment](http://www.archindy.org/CCF/ProfDevelopment).

Please contact Rhobie Bentley at 317-236-1482 or [ccf@archindy.org](mailto:ccf@archindy.org) with additional questions.

### 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
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](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**

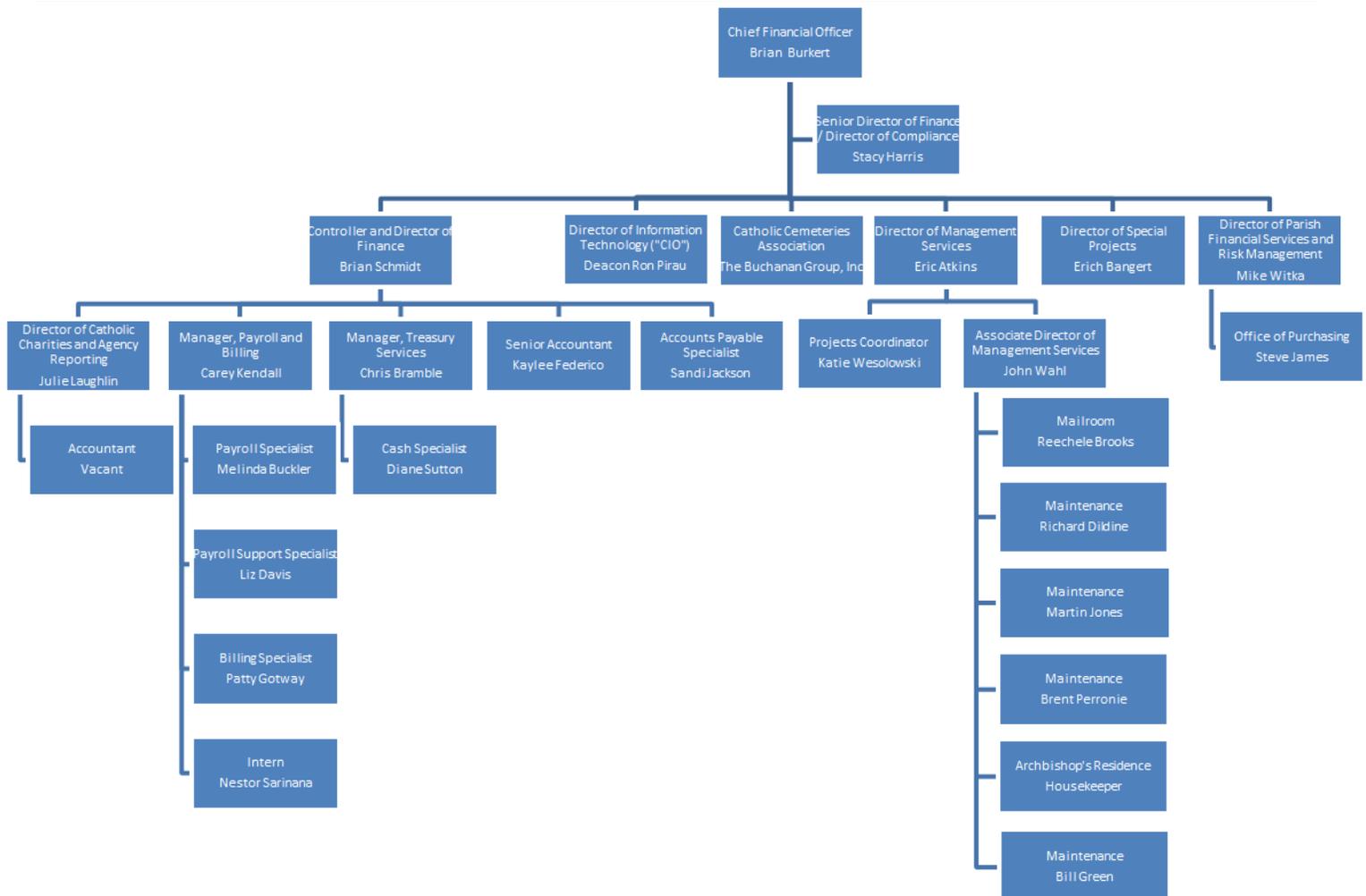
[eatkins@archindy.org](mailto:eatkins@archindy.org)

**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.