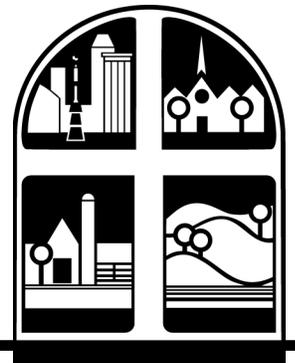


THE OAS MESSENGER



September 2017 Page 1

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 an update on the due date for the Parish Annual Financial Report (PAFR).
- [See page 3](#) for information about Grant Opportunities.
- [See page 3](#) for exciting information on the FMDC Fall Hot Topics meetings to be held in November
- [See page 4](#) for important Paylocity system notes.
- [See page 4](#) for a link to the 2018 Health Plan Announcement and information on open enrollment
- [See Page 5](#) for important notes from Stewardship and Development.

OAS Staffing Updates

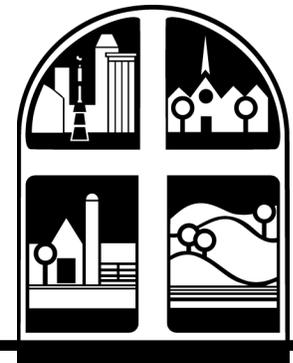
In our August newsletter, we announced that Sr. Dina Bato's last day was August 14th. We have brought on a temporary employee, Ben Phares, to perform this position's responsibilities while we search for a full-time replacement. Ben's contact information is on Page 7. All ADLF requests should be sent to Ben Phares. We are currently accepting applications for an Accountant and Senior Accountant position in the Office of Accounting Services. See job postings at: <http://www.archindy.org/hr/job.html>

During this season of change, we are also transitioning management responsibilities for the ADLF from Carey Kendall to Chris Bramble. Carey will remain focused on managing payroll and billing services for the Archdiocese and Chris will be managing our treasury services, including investments (CCF), ADLF, and cash.

Upcoming Dates to Remember

Date	Subject	For more information, see...
Payroll Dates:		
Tuesday September 22nd	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for September 29th pay date.	http://www.archindy.org/finance/payroll.html
Tuesday September 26th	Payroll approval due date for September 29th.	
Tuesday October 3rd	Due date for changes such as new hires, rehires, leave of absence, terminations and stipends for October 13th pay date.	
Tuesday October 10th	Payroll approval due date for October 13th.	
Other Dates:		
September 15th	Annual Meeting and Conflict of Disclosure Statements completed	Page 3
September 30th	Parish Annual Financial Report due	Page 2
October 10th	Loaves + Fishes Monthly Webinar Series: Nurturing Gratitude – The Foundation Upon Which the Pillars of Stewardship Stand	Page 5
Oct 20th–Nov 12th	Open Enrollment for Eligible Employees through Paylocity's Web Benefits System.	Page 4
October 31st	Grant applications due for combined grant process	Page 3
November 9th	FMDC Fall Hot Topics Meeting in Bloomington	Page 3
November 15th	FMDC Fall Hot Topics Meeting in Indianapolis	Page 3

THE OAS MESSENGER



September 2017 Page 2

ACCOUNTING

Parish Annual Financial Reports (PAFR)

Parish Annual Financial Reports (PAFR) for fiscal year ending June 30, 2017 were launched on August 10th using the primary contact information from the Archdiocese Human Resource Information System. If you did not receive the link to the survey, please reach out to accountingservices@archindy.org. 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.

Key Survey experienced an issue with the report which would not allow some respondents to move past 90% completed. As of Monday September 5th, they have resolved this issue. Please use the link to log back into the survey to finish and submit the report. **Due to the delay in resolving the issue the deadline for submission has been extended to September 30, 2017.**

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	September	October	November
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		
ADvancED	Annually			X
Jupiter	Annually			X
Renaissance	Annually			X
Student Accident Insurance	Annually			X

Monthly Assessments

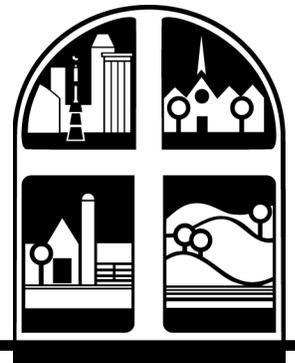
September assessments will be withdrawn on Friday, September 29th.

Please email ckendall@archindy.org with deferral requests by Friday, September 22nd.

ADLF Rates for Jul-Sept 2017

Loans 3.75% Deposits 0.75%

The final 2017 quarterly ADLF meeting will be held on Thursday October 26, 2017. If your parish would like to be placed on the agenda for the October meeting, please contact Chris Bramble at (317)592-4099 or cbramble@archindy.org.



September 2017 Page 3

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 30th. 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.

FMDC—FALL HOT TOPICS

FMDC—Fall Hot Topics Meeting

We are excited to announce that we will be hosting two Fiscal Management and Discipleship Conference meetings this fall. The purpose of these meetings is to address several hot topics for business managers and other interested parties in the areas of HR, payroll, and compliance. We are offering two date and location options for attendance:

1. Bloomington (St. Paul Catholic Center) - Thursday, November 9th from 11 am until 1 pm
2. Indianapolis (Exact location TBD) - Wednesday, November 15th from noon until 2 pm

We will be sending an e-mail in the next week or two with event registration information.

GRANT AWARDS UPDATE

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

Applications Due October 31, 2017

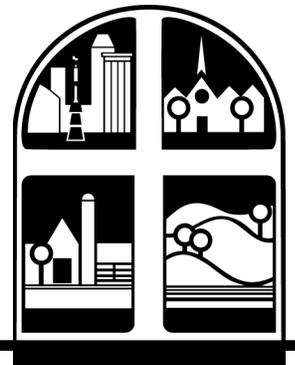
Through the generosity of the parishioners of our Archdiocese, we have 3 different endowment funds that will support a twice-annual grant awarding process. This grant process is jointly administered by the Finance Office and the Office of Stewardship and Development of the Archdiocese of Indianapolis.

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 30th and October 31st each year.

For more information, please see the Finance and Administrative Services page at <http://www.archindy.org/finance/grant.html> or contact Stacy Harris in the Office of Finance and Administrative Services at sharris@archindy.org or (317) 236-1535.



CENTRAL PAYROLL

Contact Central Payroll:

- **When a shared employee is hired.** Central Payroll will assist with this special setup in Web Time so the employee is able to clock-in and transfer to the appropriate location. This ensures the employee won't experience any issues with clocking or transferring and also ensures the correct location pays for the wages worked at the appropriate location.
- **When a shared employee is terminated.** Central Payroll will ensure the special setup is modified so the employee doesn't accidentally choose and bill the wrong location for the labor.
- **When entering a manual check or voiding a check.** Every manual check or voided check is different and requires a full review of all settings to ensure taxes and benefits as well as many other data points are setup correctly. Employees, locations, and the Archdiocese has experienced several issues that require subsequent corrections. We'd like to assist with the initial correction and ensure it is processed correctly; so please reach out to us for assistance.
- **When you hire a religious employee or need to update their pay rate.** Religious employees require a different setup than lay employees. Their pay rates are not setup like lay employee pay rates. Therefore, please contact Central Payroll so they may assist you with the setup.

Close Your Pay Periods

On Thursdays in paid weeks; please set a reminder to close your pay periods in Web Time. Doing so allows for the two systems time off balances to sync so that employees, supervisors, payroll processors, and business managers do not have conflicting balances in Web Pay, Web Time, and Employee Self-Service. Updated payroll instructions can be found on the Parish & Agency Payroll web page:

<http://www.archindy.org/finance/files/parish/payroll/Detailed%20WebTime%20to%20WebPay%20Processing%20Instructions.pdf>.

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. 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>

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.

HUMAN RESOURCES

2018 HEALTH PLAN ANNOUNCEMENT

The Director of Human Resources, Ed Isakson, released a 2018 Health Plan announcement on August 14, 2017. The details can be found on the Human Resources Benefits web page using the following link:

<http://www.archindyhr.org/wp-content/uploads/2017/08/2018-United-Health-Plan.pdf>.

2018 OPEN ENROLLMENT

Open enrollment for the 2018 health and dental coverage will begin on October 20th and conclude on November 12th. More information will be available soon from the Archdiocese Human Resources team.



Regional Stewardship Education Session

Watch for your invitation to attend one of the Regional Stewardship Education Session to be held in six locations throughout the archdiocese during late September and October. The sessions will focus on “Parish Stewardship Best Practices” and are open to clergy, staff and parish volunteers. Click on the following link to learn more about the dates and locations of the meetings and to register to attend the meeting that best fits your schedule: www.archindy.org/stewardship/fall2017.

Increased Offertory Program

Several parishes have enrolled in Our Sunday Visitor’s Increased Offertory Program and have been pleased with the results. An information session will be held on Thursday, October 5th at Ss. Francis and Clare Church where staff from Our Sunday Visitor will be on hand to discuss their many parish services. Information was sent to each parish by Our Sunday Visitor. If you would like a copy of the flyer, please contact Barb Samsel at bsamsel@archindy.org.

United Catholic Appeal

Intention Weekend is November 11-12. Watch for parish kits to arrive during the second week of October. The Parish Helpdesk has a new, streamlined look. Find updated bulletin ads, intercessions and other marketing resources to promote the appeal.

Capital Campaign

Considering a parish, school or agency Capital Campaign in the next 6 to 24 month?

Contact the Office of Stewardship and Development to discuss the process.

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.

Date	Topic
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>

THE OAS MESSENGER



September 2017 Page 6

FINANCE & ADMINISTRATIVE SERVICES

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

bburkert@archindy.org

Stacy Harris – Senior Director of Finance / Director of Compliance

sharris@archindy.org

Brian Schmidt – Director of Finance / Controller

bschmidt@archindy.org

Mike Witka - Director of Parish Financial Services & Risk Management

mwitka@archindy.org

Eric Atkins – Director of Management Services

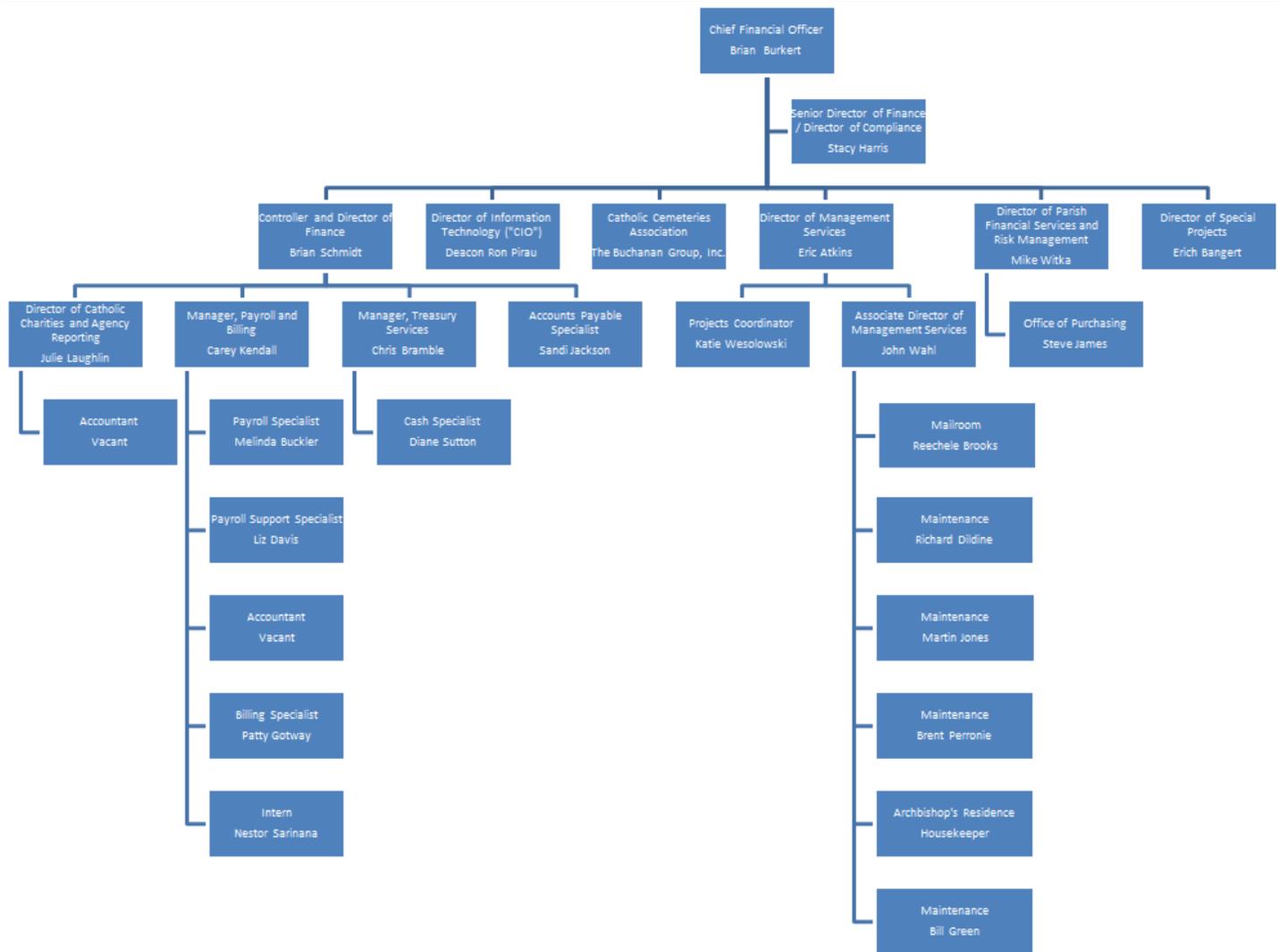
eatkins@archindy.org

Deacon Ron Pirau—Director of Information Technology

rpirau@archindy.org

Erich Bangert – Director of Special Projects

ebangert@archindy.org



THE OAS MESSENGER



September 2017 Page 7

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
Ben Phares		Accountant	Ben is responsible for accounting for agencies and administering the Archdiocesan Deposit and Loan Fund (ADLF) transactions.	Phone: 317-236-1418 E-mail: bphares@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

Central Payroll Mailbox: centralpayroll@archindy.org

We will reply to your message as soon as possible with a desired response time of less than 48 hours.