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ACCOUNTING SERVICES

Fiscal Management & Discipleship Conference—Save the Date

The Fiscal Management & Discipleship Conference will be held on June 17, 2015 at Roncalli High School. The conference will begin with Mass at 9:00am; with meetings starting thereafter at 10:00am. Please save the date and look for more registration information in the coming months.

Human Resources and Payroll

Thank you for completing the payroll database cleanup project! We appreciate the time and effort required to complete the project. The central office is in the process of verifying the accuracy and completeness for all fields except for the I-9 portion of the project. A representative from human resources or accounting will follow up with your location if there are any questions or further adjustments required. Please stay tuned for announcements in April regarding I-9 verification and compliance and further developments regarding our research for a Human Resources Information System and Timekeeping software system.

Monthly Assessments

March assessments were distributed to locations March 19, 2015. Assessments will be withdrawn on Tuesday March 31, 2015. Requests for adjustments to withdrawals must be sent to Carey Kendall by noon on Monday March 30, 2015: ckendall@archindy.org

ADLF Rates for Jan-Mar 2015

Loans 3.75% Deposits 0.75%

The next ADLF committee meeting will be held on Thursday May 7, 2015. If your parish would like to be placed on the agenda for the next meeting, please contact Carey Kendall at (317)236-1519 or ckendall@archindy.org.

CENTRAL PAYROLL

ACA Compliance

The Archdiocese is preparing to enter into the measurement period for the Affordable Care Act (ACA) which will commence on April 1, 2015. To comply with the measurement period requirements and department of labor laws, Archdiocesan parishes and agencies will be required to have hours associated with all hourly, salaried, and stipend methods of compensation beginning with the April 15, 2015 pay cycle.

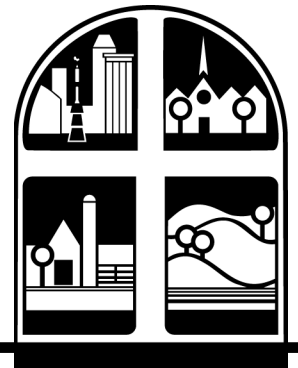
Payrolls submitted for approval will be reviewed by Central Payroll to ensure there are hours associated with all compensation. Central Payroll will not submit the pay run to Paycor if hours are missing or not associated with compensation. If hours are missing from the pay cycle, Central Payroll will un-approve the pay run and contact the location for corrective action and second approval to Central Payroll for final submission to Paycor.

You can take a proactive approach to ensure your location is in compliance by checking the **Hours Per Pay** field for all of your salaried employees in the Paycor payroll system. The field can be accessed in Paycor by selecting Manage Employees; select Time & Attendance from the left-hand menu, then choose the Work Schedule screen. Hours Per Pay is the first data field listed on that screen. Each employee should have hours populated in this field. Another pro-active approach to identify non-compliance would be to check the most recent pre-post or payroll journal for hours associated with all employees pay.

To assist parishes with ensuring the diocese is in compliance with the Affordable Care Act (ACA), Central Payroll will begin screening the payroll databases beginning with the March 31, 2015 pay cycle. The audit will review the Hours Per Pay field in the Work Schedule under Time & Attendance in Paycor. An Archdiocesan representative will contact your location for corrective action if there is any indication of non-compliance.

We appreciate all of the time and effort required to ensure the Archdiocese is in compliance with these federal regulations. Please contact Central Payroll at centralpayroll@archindy.org with any questions or you may call Melinda Buckler at 317-236-1439.

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.



2015 Payroll Calendar

The 2015 Payroll Calendar is published online at: <http://www.archindy.org/finance/payroll.html>.

Please ensure your pay periods reflect correctly in Paycor.

After opening each pay run, ensure the pay periods reflect correctly. If you do not do this, the pay periods on pay stubs will not reflect correctly. Instructions to update the pay calendar each pay cycle have been added to the Finance-Payroll web page on the Archdiocesan website: <http://www.archindy.org/finance/files/parish/payroll/Edit%20Payroll%20Calendar%20Dates%20in%20Perform.pdf>.

Please note the following as it relates to the Payroll Calendar:

◆ **Anthem Enrollment and Change form Due Dates**

Please note the Anthem New Hire Enrollment and Anthem Change forms must be sent to human resources before the due date noted on the Payroll Calendar. This allows Human Resources and Central Payroll sufficient time to process the required paperwork and ensures the required deductions are being modified appropriately. Forms received after the due date noted in "Benefit Changes Due to HR by Noon" on the Payroll Calendar will be processed during the next pay cycle.

◆ **Do not reset your Pay run when opening Payroll**

Resetting your pay run when opening payroll removes any benefit related changes that were processed by Central Payroll. This will cause issues with employees net pay and warrant back deductions. Please do not reset your pay run when opening payroll. If you do inadvertently reset your pay run, contact Central Payroll to notify the office that this has occurred.

◆ **Do not submit payroll before the submission date noted on the payroll calendar.**

Processing payroll before the required approval date may disrupt benefit related changes to employee benefits for new, shared, transferred, or terminated employees.

Please ensure Paycor data is complete and accurate. The fields below will be included in the Database Cleanse project that will launch soon.

◆ **Hours Worked**

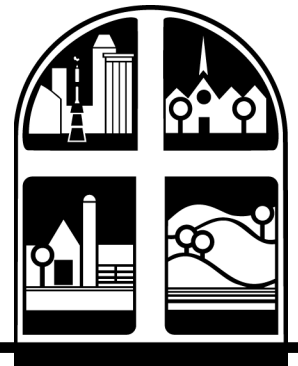
A recent audit revealed several locations do not have hours associated with compensation for salaried employees. Hours worked are required to be recorded each pay period. Please ensure there are hours associated with compensation for both hourly and salaried employees. If you have a question on how to ensure hours are associated with compensation, please contact Melinda Buckler at: mbuckler@archindy.org.

◆ **Full Time Part-time Employee Status Type**

Beginning January 1, 2015 a full time employee is defined as one who works at least 30 hours in the work week. This includes both nine and twelve month employees. Please review all employee's Status Type in Paycor against scheduled hours for 2015 and ensure the appropriate full time or part time designation is assigned to each employee.

◆ **Workers Compensation Codes in Paycor**

Please ensure all workers compensation codes are assigned appropriately in Paycor. The codes should be assigned as follows: Bus Drivers (WC-7380) / Administration (WC-8868) / Maintenance & Kitchen (WC-9101) / Cemetery (WC-9220)



PARISH INTERNAL CONTROLS

Exemption from Indiana Utility Sales Tax

One of the benefits of being a tax exempt organization is the ability to be exempt from sales tax under state law, including sales taxes on utilities, if applicable. Utilities (telephone, gas, electric, steam and water) used to further an organization's exempt purpose are exempt from sales tax in Indiana. An organization must apply to receive the exemption by completing Indiana Form ST-200, Utility Sales Tax Exemption Application. Form ST-200, Form No. 48843, can be found by visiting in.gov at: <http://www.in.gov/icpr/webfile/formsdiv/index.html>. A separate form must be completed for each utility account. In addition to general information about the organization and utility company, the organization must also provide a copy of a utility bill with the application. Nonprofits are also required to explain how the utility is used to further the exempt purpose of the organization.

To claim a refund for Indiana sales tax paid on previous utilities, a nonprofit must complete Form GA-110L, Claim for Refund. The organization must provide an explanation as to why the refund is due along with documentary evidence to support the claim. Documentary evidence usually consists of copies of bills or a "billing history" from the utility service. The bill history must have a column showing the amount of sales tax paid for each period and must be presented on the letterhead, or the like, of the utility company. Refunds for Indiana sales tax paid on previous utilities may only be claimed for the current year and the three previous years. For example, if an organization completes Form GA-110L and it is postmarked on or before December 31, 2015, it could claim a refund for sales taxes paid in all of 2012, 2013, 2014 and 2015.

STEWARDSHIP & DEVELOPMENT

Building Blocks to Creating Good Disciples in Each Generation

Many have enjoyed the presentation titled **The Building Blocks to Creating Good Disciples in Each Generation** hosted by the Office of Stewardship and Development. There is one last chance to join in the conversation – this time online through a webinar. You can join via your computer on Wednesday, April 22 from 1 – 2 p.m. by registering at <https://cc.readytalk.com/r/x6il3o4xwy64&eom>.

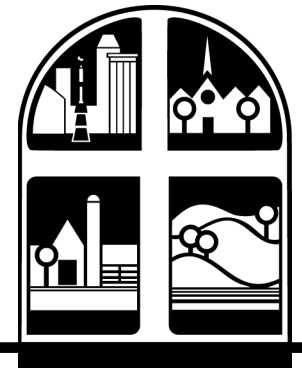
During the webinar, we will discuss generational differences and then reflect upon ideas to help people within each generation deepen their prayer life. We will also address opportunities to better utilize each generation in the New Evangelization.

More educational opportunities are available online at <http://www.archindy.org/stewardship/podcast.html>. Here you can review the 2015 Loaves+Fishers Stewardship Webinar Series hosted by Our Sunday Visitor. Three topics are currently available to review individually or as a committee:

- Working Together: How to Create Joint Ministries with Nearby Parishes
- Engaging People as Disciples and Stewards
- When Catholics Don't Go to Mass

There is no cost to participate in these webinars.

Questions or comments can be submitted to Ron Greulich at rgreulich@archindy.org or (317) 236-1426.



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HUMAN RESOURCES

Anthem Data Breach



As your trusted benefits consultant, I want to let you know that we have just become aware that Anthem, Inc., the parent company of Anthem Blue Cross Blue Shield is the victim of a highly-sophisticated cyber-attack. Anthem has informed us that its member data was accessed, and information about our clients could be among the data.

We are working closely with Anthem to better understand the impact on its members. Here is what we do know:

- Once Anthem determined it was the victim of a sophisticated cyber-attack, it immediately notified federal law enforcement officials and shared the indicators of compromise with the HITRUST C3 (Cyber Threat Intelligence and Incident Coordination Center).
- Anthem's Information Security has worked to eliminate any further vulnerability and continues to secure all of its data.
- Anthem immediately began a forensic Information Technology (IT) investigation to determine the number of impacted consumers and to identify the type of information accessed. The investigation is still taking place.
- The information accessed includes member names, member health ID numbers/Social Security numbers, dates of birth, addresses, phone numbers, email addresses and employment information, including income data. Social Security numbers were included in only a subset of the universe of consumers that were impacted.
- Anthem is still working to determine which members' Social Security numbers were accessed.
- Anthem's investigation to date shows that no credit card or confidential health information was accessed.
- Anthem has advised us there is no indication at this time that any of our clients' personal information has been misused.
- All impacted Anthem members will be enrolled in identity repair services. In addition, impacted members will be provided information on how to enroll in free credit monitoring.

Please rest assured, we will continue to work closely with Anthem to better understand the cyber-attack and the impact on our clients. Anthem has created a website – www.anthemfacts.com, and a hotline, 1-877-263-7995, for its members to call for more information, and has shared the attached FAQ that further explains the cyber-attack.

Attached are Q&As Anthem provided to address your concerns along with a letter we encourage you to share with your employees.

We will continue to keep you updated on Anthem's ongoing investigation in hopes to find out who committed the attack, and why.

Please feel free to contact me if you have any questions.

Benefit Communication Training

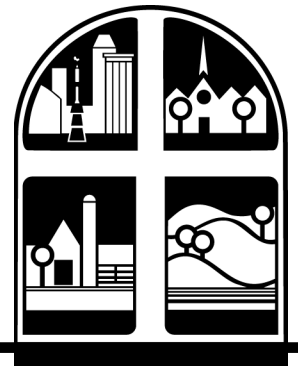
The Human Resources Department is offering Employee Benefits Communications Training to any interested Parish or School. Contact Kristen Leffler at (317) 236-1594 or Christa Bunch at (317) 236-7314 for more information or to schedule your on-site Benefits Communications training session.

Safe and Sacred Program

All NEW clergy, religious, employees and volunteers must complete the Safe and Sacred Program BEFORE their first day of ministry, work or volunteer service. Integrated in the training is the background check release form which is also required. The course is available in English and Spanish 24 hours per day, 7 days per week at www.safeandsacred-archindy.org. It takes about 45 minutes to complete and can be done in parts over a series of days. Thank you in advance for your participation in this training and your commitment to the protection of children. Please contact Human Resources at hr@archindy.org if you have any questions.

I-9 Forms

Please ensure I-9 forms are on file for all employees. Form I-9 is used for verifying the identity and employment authorization of individuals hired for employment in the United States. All U.S. employers must ensure proper completion of Form I-9 for each individual they hire for employment in the United States. **I-9 forms must be completed within 3 day of employment.** You can access a link to the I-9 form on the Human Resources website under Forms or at this link: <http://www.uscis.gov/sites/default/files/files/form/i-9.pdf>.



Contact Changes

Jerry Pachciarz with Gallagher Basset has retired. The new inspection and claim contact at Gallagher Bassett is David Christensen. David can be reached at the same phone and fax numbers listed for Jerry.

Helen Baar retired after more than 25 years in Property Management. Many of you have worked with her on property value, insurance, and claims. Your future calls should be directed to Mike Witka, Director of Risk Management at mwitka@archindy.org, 317-236-1558 office or 317-997-3561 cell.

Tenant User Liability Insurance Program

Formally known as Special Events Insurance Program is now known as Tenant User Liability Insurance Program or TULIP. The program is now a computer based application and you no longer have to mail in forms. You should have received a folder in the mail about the new program.

Safety and Loss Control News

Please check out the following link which features Smoke Detector Safety Tips, Maintenance of Battery Operated Emergency Lights, and Proper Snow Removal. <http://www.archindy.org/insurance/documents/Newsletter%2012-13.pdf>

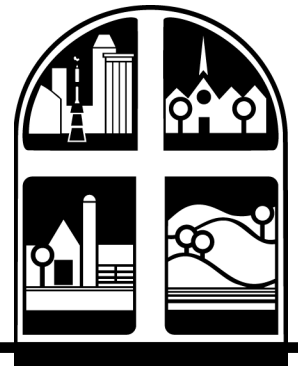
Proactive Security Guidelines for Religious Education Activities

Learn more about taking proactive security measures during Religious Education activities, including choosing an appropriate building, controlling access to the facility, and establishing an Emergency plan. <http://www.archindy.org/insurance/documents/Proactive%20Security%20CCD%20November%202013.pdf>

Boiler Inspections

Here is contact information for Jim Law
Office phone, 317-203-5176
Cell phone, 317-987-6573
Email address, jim.law@bpcllca.com

Feel free to contact Mike Witka at mwitka@archindy.org or (317)236-1558.



OAS STAFF

Tracy Lockwood – Controller

email: tlockwood@archindy.org

Julie Laughlin – Director of Agency Reporting – Julie is currently training to take over agency financial reporting. This will include financial reporting for Catholic Charities, Fatima Retreat House, Bishop Simon Brute College Seminary, CYO and others.

email: jlaughlin@archindy.org

Carey Kendall – Supervisor of Parish and Agency Services – Carey supervises payroll, parish and agency billing, and the administration of the Deposit and Loan Fund. She monitors the accounting services email box, coordinates and manages the parish internal control assessments and the parish annual financial reporting process.

email: ckendall@archindy.org

St. Dina Bato – Accountant – Sr. Dina handles the day to day accounting for Catholic Cemeteries and the Deposit and Loan Fund.

email: dbato@archindy.org

Melinda Buckler – Payroll Specialist – Melinda processes payroll and assists diocese locations wide with any payroll related questions.

email: mbuckler@archindy.org

Nancy Hildwein – Catholic Charities Accounting Supervisor – Nancy is responsible for accounting and reporting for several Catholic Charities agencies.

email: nhildwein@archindy.org

Chris Bramble – Accountant – Chris is responsible for investment accounting and accounting support for Fatima Retreat House and several Catholic Charities agencies.

email: cbramble@archindy.org

Lori Erickson – Accounting Clerk – Lori is responsible for daily cash transactions and fixed asset accounting.

email: lerickson@archindy.org

Sandi Jackson – Accounts Payable Specialist – Sandi is responsible for accounts payable and employee expense reimbursements.

email: sjackson@archindy.org

Patty Gotway – Billing Specialist – Patty prepares the monthly parish and agency assessments.

email: pgotway@archindy.org