



ACCOUNTING NEWS!

OAS will be hosting our bi-annual Fiscal Management and Discipleship Conference Thursday, June 20th, 2013 at SS. Francis and Clare. We are very excited to announce that Archbishop Tobin will say mass and deliver the keynote address for the event. Please see the attached flyer for additional details about the event.

Staff Update

Please welcome Tyler Williams to the Archdiocese of Indianapolis. Tyler will serve the Office of Accounting Services as he completes his summer internship. Tyler is a Junior at Marian University majoring in Accounting & Finance.

ACCOUNTING SERVICES

Parish Annual Financial Report

For the fiscal year ending June 30, 2013, the Parish Annual Financial Reports will again be submitted using the online survey format. An e-mail link to the survey and instructions will be sent to the person at each parish. The instructions will not be sent by regular mail. All documents will be available online. The e-mail containing the link and the instructions will be sent out in June. If the contact has changed since the prior year, please email accountingservices@archindy.org to have the distribution list updated.

Teacher Salary Scale

The 2013-14 Teacher Salary Schedule for the Archdiocese of Indianapolis is now on our website at http://www.archindy.org/oce/download_documents/newsletters/20132014_teacher_salary_scale.pdf

Excess Funds Deposit

Parishes, schools and agencies are required to deposit excess funds into the ADLF. Excess funds are all funds on hand in excess of anticipated cash disbursements for the following ninety days. Parishes schools and agencies should address the matter of excess funds on a monthly basis. Excess funds should also include all funds raised from fund drives, capital improvements, or major renovations. All excess funds must be deposited in the ADLF; a parish, school or agency may not invest such funds or deposit them in financial institutions.

ADLF Rates for April– June 2013

Loans 3.75% Deposits 0.75%

The deadline for loan requests is July 24th. If you have any questions please contact the Office of Accounting Services at our email accountingservices@archindy.org. The next ADLF meeting is scheduled for Thursday Aug 15, 2013.

May Assessment Withdraws

The May Assessment will be withdrawn on **Thursday, May 30th**. Requests for adjustments to this withdrawal must be **sent to Carey Kendall (ckendall@archindy.org) by NOON on Wednesday, May 29.**

Group Ruling

The IRS Group Ruling exemption letter for 2012 is available on our website at <http://www.archindy.org/finance/files/parish/general/2012GroupRuling.pdf>

Fiscal Management and Discipleship Conference

Save The Date – The Fiscal Management and Discipleship Conference is scheduled for Thursday, June 20, 2013 at Saints Francis and Clare Church in Greenwood. This conference includes workshops related to Stewardship, HR, Payroll, Education and Finance and is designed to meet training and information needs of administrators, business managers, bookkeepers, finance council members, stewardship council members and volunteers handling bookkeeping or stewardship functions. **For additional details including registration information please see the flyer attached to the end of the newsletter.**

Please share these newsletters with your fellow co-workers who normally would not receive through Accounting Services. There is always valuable information that can be shared throughout your parish, school or agency.

THE OAS MESSENGER



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ACCOUNTING SERVICES CTD.

Tax Credit Scholarship Giving Tops \$1 Million

Last October the archdiocese celebrated \$960,000 in giving for Indiana Tax Credit Scholarships at the annual *Celebrating Catholic school Values: Scholarship and Career Achievement* event and that has grown to over \$1 million in tax credit scholarships alone since that time.

The Indiana Tax Credit Scholarship, when applied to a kindergarten or first grade student in one of our Catholic Schools, allows the child to receive an Indiana School Voucher after being enrolled in our school on the scholarship for two semesters. This year some 931 students in 54 schools received over \$721,000 in scholarships through the Educational CHOICE Charitable Trust, the scholarship granting organization (SGO) for our schools. Donors received a state tax credit for 50 percent of their gift up to their total state income tax liability.

2294 students attended Catholic schools on Indiana School Vouchers this year compared to 1058 last year. This represents \$9.7 million in tuition aid from the state for 2012-13. Many more students will qualify for vouchers next school year through the Tax Credit Scholarships.

There is great news from the Indiana Legislature that will affect the scholarship and voucher programs for the coming school year (see box). **However, this means in no uncertain terms, that schools will need to redouble their efforts to sponsor Indiana Tax Credit Scholarships through the CHOICE Trust for 2013-14.**

Changes in the Scholarship/Voucher Law for Next School Year	
<p><i>Expanded eligibility for the Indiana School Voucher Program and Scholarship Tax Credit Program:</i></p> <p>Allows income-eligible students assigned to "F" public school to access a voucher (including kindergarten and CURRENT private school students)</p> <p>Allows siblings of students who previously received a voucher or SGO scholarship (beginning next year, scholarship must be more than \$500)</p> <p>Allows students with special needs (IEP or ISP) whose income is below 200% of Free or Reduced Price Lunch to access a voucher</p> <p>Allows a student of a family who meets income requirements originally to continue to receive a voucher as long as they do not exceed 200% of income for Free or Reduced Lunch</p> <p>Allows CURRENT private school students who meet the income requirements to receive a scholarship from an SGO</p> <p>Allows kindergarten to count as the "prior year of public school"</p>	<p><i>Expanded financial provisions of the Choice Programs:</i></p> <p>Increases elementary voucher cap from \$4,500 to \$4,700 in 2013-14 and \$4,800 in 2014-15</p> <p>Increases the program cap on the Scholarship Tax Credit Program from \$5 to \$7.5 million</p> <p>Allows special education dollars follow students in addition to their voucher amount</p> <p>Allows a carry-over of unused portions of annual tax credit in a taxable year (for donors)</p> <p><i>Other changes:</i></p> <p>Requires a summer study committee on vouchers</p> <p>Requires that a student receive a minimum \$500 SGO scholarship in order to qualify for the voucher in a subsequent year (or for a sibling to become eligible) after next year. (Note: this does not apply to current or past SGO recipients)</p> <p>Requires the Department of Education to process (student and school) applications within 15 days and to make two payments to schools</p> <p>Source: INPEA</p>

OCTOBER 8, 2013

Union Station, Indianapolis

Please mark your calendars now for this premiere event to celebrate our Catholic schools together. Once again fund-raising will concentrate on Tax Credit Scholarships.

CELEBRATING
CATHOLIC SCHOOL
VALUES:

Scholarship and Career Achievement Awards



ACCOUNTING SERVICES CTD.

Fifth Third Pooled Checking Account

Fifth Third Bank Interest Bearing Checking Account is where catholic-related entities' funds are pooled together and invested to receive a higher rate of return each month. This account has been with the Archdiocese since 1993. Besides a higher rate of return than an average interest-bearing checking account, the advantages include no investment sweep fee, lower service charges, and the ability to increase the rate of return as the pool grows. Currently, the Indianapolis Pool has over 100 accounts with approximately \$35,000,000 invested. If your parish is interested in joining this account, please contact Paul Burch at Fifth Third bank at 317-383-2668 or Paul.Burch@53.com.

HUMAN RESOURCES

Health Savings Account 2013

The IRS has increased the annual limits for health savings account contributions in 2013 to \$3,250 for single coverage and \$6,450 for family coverage. There is still a \$1,000 allowable catch-up contribution for people age 55 and over.

If you had coverage in January 2013, there was a one-time lump sum contribution from the Archdiocese of \$500 for single coverage and \$1,000 for family coverage. There are also monthly contributions from the Archdiocese of \$100 for single coverage and \$200 for family coverage.

If you are covered by the Archdiocesan Health Plan, please read the flier attached at the end of the newsletter. It contains important information regarding employee HSAs.

Retirement Savings Plan Limits for 2013

The IRS has also raised the annual contribution limit for 403(b) retirement savings plans in 2013 to \$17,500. There is also a \$5,500 catch-up contribution for people who are age 50 and over.

Benefit Communication Training

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

Health Insurance

All health insurance paperwork should be sent to Human Resources including new enrollments, changes and terminations. The forms can be found at www.archindyhr.org under Forms You'll Need. Please note that terminating an employee in Paycor does not cancel health insurance. A form must be submitted to Human Resources.

Eli Lilly Federal Credit Union (ELFCU)

The Archdiocese is now partnering with Eli Lilly Federal Credit Union (ELFCU) to open health savings accounts for new health insurance enrollments. As you have new or newly eligible employees electing health insurance, please direct them to the following link to open an HSA with ELFCU. www.elfcu.org/newhsa. We are no longer accepting forms for Teachers Credit Union.



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HUMAN RESOURCES CTD.

New Federal Requirements for Health Insurance Eligibility

Federal health care reform legislation includes regulations regarding eligibility for health insurance coverage. These federal regulations require employers to offer coverage to employees who work 30 or more hours per week. A special provision of the law affects educational institutions, including Catholic schools. This provision states that **any employee who works regularly 30 hours per week during a school year is eligible for health insurance**. These new regulations require the Archdiocese to change its health insurance eligibility policy from 1,500 hours per calendar year to 30 hours per week during a school year, effective September 1, 2013. As a result of this change, some school employees, such as teachers' aides and cafeteria workers, who are not currently eligible for health insurance coverage will be eligible for coverage in the 2013-4 school year. Each school has 2 options regarding these employees: 1) budget funds for them to be covered by our medical and dental plans, effective September 1, 2013 or 2) reduce the hours of these employees to under 30 hours per week, effective September 1, 2013. Please note that even if these employees become eligible for health insurance, they may decline coverage, so the actual cost that will be incurred cannot be fully anticipated during the budgetary process. However, each school that has employees who currently work 30 or more hours per week on a regular basis and are not currently eligible for health insurance should plan for either increases in health insurance expense or a reduction in those employees' work hours during the next school year. Please contact Ed Isakson at edisakson@archindy.org if you have any questions about this new federal requirement.

New I-9 Form Requirement

Effective March 2013, the federal government has updated the I-9 Immigration form which is required of all new employees and part of our new hire paperwork. We have updated our human resources site with the new and correct form. Please follow this link and begin using the new form effective immediately. If you have any questions, please contact human resources at hr@archindy.org.

CENTRAL PAYROLL

Payroll Information

Please ensure you are following the 'P/R Processing' deadline date on the Archdiocese Payroll Calendar on our website at <http://www.archindy.org/finance/files/parish/payroll/2013%20Payroll%20Calendar.xls> Payrolls processed after this deadline cause issues with benefits being distributed on time to employees.

SECA Reimbursement

Updated 2012 SECA Reimbursement guidelines and the request form are located on our website at <http://www.archindy.org/finance/parish/forms.html>. Please be sure to utilize the new forms and submit the reimbursement request on or before June 1, 2013 for the 2012 tax year.

Clergy Wages

Priest wages are billed to the parishes on the monthly billing assessment. All stipends and priest related pay and personnel changes for priests are processed through Central Payroll. Please submit these to Central Payroll at centeralpayroll@archindy.org.

CATHOLIC EDUCATION

Special Events Policy

And now is a good time to review the special events policy and application so you can help those wanting to rent the space from our parishes for wedding receptions. If you have any questions see our Insurance page on the archindy website.



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RISK MANAGEMENT

Fire Safety

We have had recent fires to two of our properties. So a reminder to all: keep doors locked on all buildings whenever possible and not in use. Secondly, do not light candles in non-Church environments. The recent fire caused by a candle has been our fourth of this type.

Spring Storms

As Spring approaches so does the stormy season. Please make sure everything is secure around and atop your buildings. Report any wind or rain damage as soon as possible.

Parish Budgets

Mike Witka is willing to come and help with your parish budget process. Feel free to contact him at mwitka@archindy.org or (317)236-1558.

ARCH CONTACTS

Do you know who to contact ?

Property insurance or risk questions
ADLF
Payroll
Billing questions
Parish budget or other questions
Accounting Office
Human Resources

Mike Witka—mwitka@archindy.org or (317) 236-1558
Sr. Dina Bato—dbato@archindy.org
centralpayroll@archindy.org
accountingservices@archindy.org
accountingservices@archindy.org
(317) 236-1410 or 1-800-382-9836 ext. 1410
Courtney Mitchell-(800)382-9836 ext.7314



ARCHDIOCESE
OF INDIANAPOLIS
The Church in Central and Southern Indiana

2013 FISCAL MANAGEMENT AND DISCIPLESHIP CONFERENCE

SPONSORED BY FIFTH THIRD BANK

THURSDAY, JUNE 20, 2013
SS. FRANCIS AND CLARE CHURCH
Greenwood, Indiana

- ◆ *Financial Management*
- ◆ *Stewardship*
- ◆ *Accounting Techniques*

Program hosted by
Most Rev. Joseph W. Tobin, C.Ss.R.

Registration fee is sponsored by Fifth Third Bank. Registration is available online at www.archindy.org/fmdc. If you do not wish to fill out an online registration, please submit your registration through the mail. All registration forms must be received by June 2, 2013 to:

Archdiocese of Indianapolis
Attn: Carey Kendall
P.O. Box 1410
Indianapolis, IN 46206-1410

Or you can e-mail your registration form to Accounting Services at accountingservices@archindy.org or fax to (317) 236-7327.

For more information, please contact Carey Kendall in the Office of Accounting Services Phone: (317) 261-1519

Agenda

8:00 a.m.

Participant Registration

9:00 am

Mass Celebrated by

Most Rev. Joseph W. Tobin, C.Ss.R.

10:00 am

Participant Registration Continued and
Networking Break

10:15 am

General Session: Keynote Address presented by
Archbishop Tobin

11:00 a.m.

General Session: Update on key Archdiocesan
matters, panel discussion

11:45 a.m.

Lunch (Provided)

12:45 p.m.

Workshop Session A

1:30 p.m.

Networking Break

1:45 pm

Workshop Session B

2:30

Networking Break

2:45

Workshop Session C

Workshop Sessions

The workshop sessions will be structured in the following manner: A 15-20 minute presentation will be made relating to the topic and the presenters will then facilitate group discussion to allow for a sharing of information and ideas.

Workshop A 12:45 p.m.

1. Risk Management Update

Much of my time is spent working with parishes/schools on budget items. A lot more time is spent with parishes helping them understand how to avoid risks. Come to the sessions for discussions of both. Join Mike Witka to get the latest information on these and other risk management topics. (Mike Witka, Director, Risk Management)

2. Charity Gaming

This session will include a review of legislative changes & the emergency rule, gaming licenses, financials & event summary reports and allowable expenses. There will also be a question and answer period for participants to obtain information about any specific gaming questions and concerns. (Indiana Gaming Commission)

3. Parish Internal Control Audits (PICA)

This session will include a discussion of the most common PICA findings, parish best practices, guidance on how to prepare for a PICA and the importance of utilizing the PICA report to create a plan of action for improvement. (Yount and Company, LLC)

4. Indiana's Tax Credit Scholarships and School Vouchers

We find ourselves at the end of the first full year of receiving state vouchers in our Catholic Schools with new developments in the law. We also have nearly 1000 students attending our schools on Indiana Tax Credit Scholarships, most of whom will go on to receive vouchers. This is good news! However, we must be prudent and cautious with these new sources of funding. (Joe Peters, Associate Executive Director, Office of Catholic Education)

5. Catholic Community Foundation Funds: Application, Agreement, and Access to Investment and Distribution Information

This session will review the fund application, agreement, and distribution processes. Learn how Catholic Community Foundation staff can support efforts to secure funding for endowments that ensure perpetual support for your ministry work. New online access and fund administration as well as marketing and promotion will be discussed. (Ellen Brunner, Director, Planned Giving)

Workshop B 1:45 p.m.

6. Legal Update

What situations should you seek legal counsel help with? Why should legal counsel be involved? What should you consider prior to signing a contract? What types of personnel issues need legal counsel input? Join Jay Mercer for a discussion of these and other legal issues. (Jay Mercer, Legal Council)

Workshop B 1:45 p.m. continued

8. Charity Gaming

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9. Parish Internal Control Audits (PICA)

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10. How to Launch, Sustain, and Grow a Planned Giving Program

This session is an overview of planned giving resources available to your ministry. Learn how your ministry can implement and grow a planned giving program to benefit its programs. (Ellen Brunner, Director, Planned Giving)

Workshop C 2:45 p.m.

11. Payroll

This session will include an overview of Paycor process and Central Payroll's role in processing payroll and information on how locations can better use the reporting functionality in Paycor to help them manage their employees. Including a question and answer period to help understand who to reach out to with questions, Paycor or Central Payroll. (Carey Kendall, Supervisor Parish and Agency Services, Office of Accounting Services)

12. Cultivating Donor Relationships

This session will provide information on how to cultivate donor relationships. Discussion will take place around identifying prospective donors, engaging them in volunteer opportunities, promoting giving options and stewarding gifts and relationships. (Jolinda Moore, Director, Annual Major Giving)

13. Capital Campaign Approval Process

The Capital Campaign Approval process for all Archdiocesan parishes, schools and agencies will be reviewed and explained. If you are considering a possible campaign, please attend this session to learn about this process designed to ensure capital campaign readiness prior to requesting formal approval from the Chancery. (Kent Goffinet, Director, Stewardship and Development)

Registration for Conference

Parish Name			
Parish #			
Participants			
Name			
Telephone #			
Workshop Choices:	A	B	C
CPE Certificate Needed:	Yes or No		
Name			
Telephone #			
Workshop Choices:	A	B	C
CPE Certificate Needed:	Yes or No		

Registration fee is sponsored by Fifth Third Bank. Registration is available online at www.archindy.org/fmcd. If you do not wish to fill out an online registration, then all registration forms must be received by June 6, 2015 to:

Archdiocese of Indianapolis
Attn: Carey Kendall
Office of Accounting Services
P.O. Box 1410
Indianapolis, IN 46206-1410

You may also email your registration forms to Carey Kendall at ckendall@archindy.org or fax to (317) 236-7327

For more information, please contact Carey Kendall in the Office of Accounting Services by phone: (317)261-1519 or email: accountingservices@archindy.org