



Parishes And Curia Together

Parish Support Newsletter

VOLUME 2, ISSUE 5

May 2017

May To-Do List

- Work on FY18 budgets
- Continue working on COA
- Continue working budget process for 2017-2018
- RSVP for End of Year meeting

Training/ Meeting Schedule

Fiscal Yearend

- 6/6 CRC 9-12
- 6/7 OLL – Washington 9-12
- 6/13 Ste. Genevieve 9-12
- 6/14 Holy Name of Jesus 9-12
- 6/15 St Patrick – Wentzville 1-4
- 6/22 CRC 9-12

Inside This Issue

| | |
|-----------------------|---|
| Budget Training | 2 |
| Fin. Mgt. Manual | 2 |
| Payroll Changes | 2 |
| Password & Vital Info | 3 |
| Transamerica | 3 |
| PHOL—Notifications | 3 |
| HR—Open Enroll | 4 |
| Lawson Update | 4 |
| Contact Info | 4 |

You're Invited!

Can you believe we're closing in on the end of FY 2017 and preparing for FY 2018? As is our practice, we invite all secretaries, bookkeepers and business managers to attend a Fiscal Yearend Meeting. We are again taking the 'show on the road' for the four of the six meetings. Dates, locations and times are on the left margin of this page in the Training/Meeting Schedule.

If you choose not to attend because "it's always the same old information", we urge you to reconsider and attend this year. Joining us for the first time is Elizabeth Westhoff, Director of Commu-

nications. Elizabeth, along with Mike Eagan, Sharon Gogel, Eric Fair and others, will be making a presentation and answering questions.

New payroll requirements and changes taking effect on July 1 will be discussed as will year-end procedures.

There is always information given at the meetings that does not appear in handouts so please plan on attending. Seating is limited at all locations. Please register by sending Karen Mueller an email at karenmueller@archstl.org.



941 Reviews

WOW! You guys are FANTASTIC! As of Friday, April 21st, all but two parishes had submitted their 941s. We can't tell you how much we appreciate your efforts.

The reviews went well. Most were completed within twenty-four hours. Those with problems were completed within one week. The #1 problem was using a payroll item that was not set up to handle taxes correctly. It's very important to use the correct tax setting when setting up payroll deductions.

Setting up payroll items does not happen often and can be confusing. We're happy to assist or even set up the needed items. Just ask.

Visiting Priest Compensation

Summertime brings pastors' vacations and vacationing pastors bring visiting priests. Which brings to mind the question, "Are there recommended amounts to pay a visiting priest?" The answer is yes.

Briefly, Section 14.8 of the Financial Management and Control Manual states: "While these guidelines will give you some parameters in knowing what the proper remuneration for visiting priests is, the overriding principle should be that of generosity."



Sunday Mass \$40-\$50

Weekday Mass \$30-\$40

Confessions (when heard before a Mass) \$15-\$25

Budget Training Testimonial:

“It was really good. Budgets are my strong suit (I love doing them, it’s like working a crossword puzzle) and I was glad to find out that I am doing things the way Sally suggested today. The handout was excellent and I will keep it as a reference tool. I learned some stuff too (how to project my year end numbers). I saw a couple of other business managers there so I am sure there is a need for this particular content to be repeated. Parish Support has come a long way since 2007!!! You guys just keep getting better and better.” - Joyce



Budget Training



Parish Support held three Budget 101 seminars for bookkeepers and business managers in April. The training included Budget Theory, Guidelines and Practical Application. The seminars were well received by all (see testimonial on left).

For those unable to attend, the eleven page handout is available on the Parish Support—Best Practices page of the website or by [clicking here](#).

We want to thank the hosting parishes and everyone who attended. Your questions, concerns and input are valuable feedback for future training opportunities.

Financial Manual Update

The overriding goal of Parish Support is to keep parish staff well informed and up-to-date. With that in mind, please note that Section 14.3, Priests’ Accountable Plan, pages 1-3, has been updated. This section includes information on The Continuing Education Benefits; Accountable Plan; Auto Insurance, Excess Accountable Plan Expenses; Cell Phone Expense; and Computers, Peripherals and Software. It also includes the Priests’ Accountable Plan Reimbursement Form with accompanying instructions.

[Click here](#) to access the update.

Payroll Changes

On July 1, 2017, two new additions to payroll take effect.

The first is the Spousal Surcharge of \$125 per month for employees whose spouse is included in the health insurance plan but have coverage available through the spouse’s employer.

The second addition is calculating and recording imputed income. Imputed income is the dollar value

the IRS puts on the amount of group term life insurance coverage in excess of \$50,000. The term life insurance referred to is the Archdiocesan benefit from Hartford. The Life and AD&D benefit is one times the employee’s basic annual earnings.. This item is manually calculated for each employee whose salary is \$50,000+ and/or hourly rate is \$24.04+.

For non-Lawson par-

ishes, Parish Support or your Shared Accountant will set up the required payroll items and accounts. Detailed instructions on how to use the items and calculate imputed income will be included in the yearend meetings. Please make arrangements to attend.

Just two more items parishes on Lawson payroll don’t have to worry about.

Passwords and Vital Information



While we never advocate sharing your user names and passwords, it is imperative that parishes have a 'back-up' plan for when key personnel are unavailable.

Parish Support recently received a call from a parish secretary asking for help. The bookkeeper was unavailable for a few days and no one at the parish had on-line access

to the bank to initialize the direct deposit of paychecks. They also could not submit a Federal tax payment, process on-line giving reports and so on.

We mention this to remind every parish to establish a 'dooms day' plan. What happens if....? It can be as simple as locking vital information in the safe or as complex as training a back-up team.

What's important is that the parish has a plan.

"Treat your password like your toothbrush. Don't let anybody else use it, and get a new one every six months."
- Clifford Stoll

TransAmerica Password

Effective April 2017, Transamerica requires users of Plan Sponsor Direct, the site used to transmit parish Retirement Contributions, to change their password every 90 days. This means that sometime during April, when you go to sign in you'll be prompted to create a new password.

The instructions will look like this:

Password Tips

Your password must consist of eight to fifteen characters with a mix of upper and lower case alpha characters, numbers and special characters. Your password must not contain your name or User ID. (ex. Daisy!1a, or 22ball?22)

Please contact Sharon Gogel at 314.792.7261 or sharon.gogel@ajg.com with any questions.

Did You Know? - PHOL

While you're still required to mail sacrament notifications to churches of baptism, did you know you don't have to create the notifications manually? Parish Helper OnLine will print a notification for you with just a mouse click.

All sacrament windows (except for baptisms) include a 'Print Notification' button. Just enter the sacrament, click the button and save the sacrament.

Using the 'Print Notification' button has three benefits:

- 1) Saves time—no need to manually create the notification. Just print it, add an address (if needed), place it in an envelope and mail.
- 2) Eliminates duplicate entries in PHOL—some secretaries mail manual notifications before entering the information in PHOL. At times, this practice results in the church of baptism erroneously entering the

- 3) Ensures accuracy and consistency—what is entered in PHOL is what appears on the notification.



From the Curia— Human Resources



Open Enrollment Information Reminders :

• The Open Enrollment Period is May 1st through May 15th. Employees will receive their Open Enrollment letters the week of April 24th. To access **your** *Open Enrollment Employers Administrator Guide*, go to the [Archdiocese Human Resources/Benefits website](#). Employees may attend an Open Enrollment meeting in May at three different locations. The time and dates are stated in the online Open En-

rollment Benefits Guide.

• To access the [most recent Spousal Surcharge Policy](#) information, click on [The Employee Health Insurance Plan and the Spousal Surcharge Policy](#). There are recent revisions to the Frequently Asked Questions (FAQ). Encourage your employees who may be exempt from the surcharge fee to use the online [Spousal Surcharge Exemption Form](#). Once the employee submits the completed online exemption form, the employee receives an email confirma-

tion, and our HR office is notified immediately by email. You will be notified of employee exemptions at the end of June.

• Benefit eligible employees or their spouse may receive an annual Archdiocesan-paid mammogram screening at the Cardinal Rigali Center in June 2017. Employees can read the date/time/location information in their online Open Enrollment Benefits Guide.

Lawson Payroll Update

We welcome another six parishes to Lawson payroll this month: St. Agatha, St. Cronan, St. Pius V, St. Martin of Tours, St. Luke and Sacred Heart—Valley Park. This brings the total to 68 parishes with 4 more joining Lawson in June! Contact Jerry Amsler to join the parishes enjoying freedom from payroll reports, taxes and government deadlines.

Parish Support Contact Information

Blessed John Center
8300 Morganford Road
St. Louis, MO 63123
Fax: 314.792.7149

Sally Serbus - Parish Support Manager
Phone: 314.792.7716
Email: SallySerbus@archstl.org

Donna Bosch - Parish Support Representative
Phone: 314.792.7109
Email: DonnaBosch@archstl.org

Jerry Amsler—Director
Parish Support/Shared Accounting
Phone: 314.792.7111
JerryAmsler@archstl.org

Parish Support exists to serve both parishes and Curia. We serve St. Louis pastors, parish staff, Curia members, volunteers, USCCB and parishes outside of the diocese. It is our mission to provide training and support. We either have the answer, will get the answer, or refer you to someone who can help.

We are here to serve.

[Click here](#) for immediate access to back issues of PACT—including a comprehensive Index for all issues.

[Click Here To Visit Parish Support/Shared Accounting Web Page](#)