



# Parishes And Curia Together

## Parish Support Newsletter

VOLUME 3, ISSUE 6

JUNE 2018

### June To-Do List

- Complete work on FY19 budgets
- Attend yearend meeting

### Schedules: Updates, Training & Meetings

- 6/10 & 7/1: QB updates—no access to files from 7pm-8pm
- Fiscal Yearend meetings (all times are 9-noon)
  - May 29-CRC
  - May 30-All Saints-St. Peter's
  - May 31-Our Lady of Lourdes-Washington
  - June 12-St. Sabina
  - June 13-St. Agnes

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## Fiscal Yearend Meetings

Last call for Fiscal Yearend meeting RSVPs! Thank you to all the secretaries, bookkeepers and business managers who have responded. The positive feedback from prior year attendees reinforces our belief that these annual meetings are an important and valuable service. Five of the six meetings still have seats available. We urge everyone who has not RSVP'd to do so. Dates, locations and times are in the left margin of this page in the Schedules: Updates, Training & Meetings.

Curia members from Parish Administrative Services, Communications, St. Louis Review, Archives, Arthur J. Gallagher and others will be present to inform you of their services and answer your questions. It's much more than yearend accounting and Status Animarum being discussed.

There is always information given at the meetings that does not appear in handouts so please plan on attending.

Invitations, with specific details, were emailed in mid-April to all Secretaries, Bookkeepers and Business Managers who have current email addresses in PHOL. If you did not receive your invitation,

1. Verify that your email address is correct in PHOL
2. RSVP to [Karen.Mueller@archstl.org](mailto:Karen.Mueller@archstl.org) with parish name and number; attendees' names; date and location.

The chart at the right shows the date, location and number of attendees for the remaining sessions. The attendees represent both parishes and Shared Accountants. Please remember that although your Shared Accountant is in attendance, you should still attend. There is much more covered than accounting issues in the yearend meetings.

Seating is limited in all locations so please RSVP to save your seat!

### Current Confirmations

Date	Location	Attendees
5/29	CRC	34
5/30	All Saints-St. Peters	33
5/31	OLL-Washington	25
6/12	St. Sabina	17
6/13	St. Agnes	13
6/21	CRC	full

## Special Collections - End of Year

As part of 'closing' the fiscal yearend, parishes are asked to remit all Special Collections balances of \$100+. The funds may be submitted through NetTeller Online Banking.

For information on NetTeller, please contact Carrol Biddle at 314.792.7104 or Pat Griffaw at 314.792.7123.



# PACT Index



Have you used the PACT Index? It's designed to assist you in finding answers when you need them.

The index, located on the [PACT Newsletter webpage](#), can always be accessed easily by clicking the link on page 4 of every issue of PACT. It includes a com-

prehensive list of all issues and articles.

The index is a PDF searchable document. Once opened, simply type in 'CTRL F' and a Find box appears in the upper right-hand corner. Enter what you want to find and click 'Next' to locate every occurrence.

Thanks to a recent enhancement, you can easily retrieve the

needed issue by clicking on the appropriate blue link. The link takes you to page 1 of the issue. Simply scroll down the issue to the needed page/article and you've got your answer.

The index grows with each issue putting more and more answers readily accessible at your fingertips. Enjoy!

*"Parish Support strives to deliver accurate information when and where it's needed. hence, PACT and the new text Alerts."*

*- Sally*

## Houston, We Have a Problem

May 15th was a memorable day for anyone trying to contact the Archdiocese and/or work through Citrix. The phones, email and all servers were down. A One Call phone message was sent to all parishes. Many received the message. Parishes whose phone systems are programed to only record a message after an extension is entered did not receive the message resulting in many 'dead end' emails and phone calls coming into Parish Support. It's very frustrating when things aren't working and you're unsure whether it's you or them that is causing the problem.

We are asking for your help to improve emergency communications to parishes. Emergency text messages can be sent explaining outages and/or closures. For this to work, parishes **MUST** have current contact information in Parish Helper OnLine for their Business Manager, Bookkeeper and Secretary. This can be 1-3

separate people but all three assignments must be designated. For Shared Accounting parishes, please remember that the bookkeeper position/assignment is the person who communicates with the Shared Accountant. The Bookkeeper position is **NOT** the Shared Accountant.

The required contact information is name, email address and a phone number that can receive text messages. The deadline for entering the information is June 15, 2018. Once we have all the contact information, you will receive an email (at the address provided) with instructions on how to activate the text alerts.

Parish Support will be contacting all parishes that do not have the needed information in PHOL. We appreciate your pro-active participation.

## It's Time for Multi-User Mode!

Please verify that you are in multi-user user mode while working in QuickBooks. Multi-user mode allows Parish Support to gain access to the file and assist in answering your questions. It is crucial to complete yearend reviews.

## CLOVER Update

There is a cost increase for purchasing CLOVER. The price has increased \$5.00 from \$60.00 to \$65.00. The new price is effective immediately.



## Recording Sacraments



Now's the time to finish recording ALL sacraments in both the official registers and Parish Helper OnLine (PHOL). If everything is entered and current completing the Status Animarum is an easy task.

It's important that all parishes keep PHOL up-to-date. All parishes have access to the complete file and, if a sacra-

ment is missing, the record is incomplete. This can be a problem when a current Baptismal Certificate is needed.

Please remember that keeping the sacramental record current not only gives you peace of mind but affects the ability of other parishes and Curia offices to service the faithful effectively.

## QuickBooks Payroll Reminder

Parishes that are still running payroll through QB (parishes on Lawson are not affected) are reminded to verify the following before/after each payroll run.

1. Enter a Released Date and check Inactive on employee files **immediately** after processing their final paycheck. Failure to do so results in problems with government reports and Prudential records.
2. Update the required custom fields in the QB employee file when an employee returns or is changed from 'inactive' status to 'active' status. The fields are located on the Additional Info tab in the Employee Information window. The fields include; Marital Status, Employee Status and Title. Remember that the Social Security Number, Date of Birth and Date of Hire fields must also be completed. Failure to do so results in non-compliant government reports.
3. Verify that all religious (sisters, order priests, etc.) employees working 19+ hours a week are eligible for and are receiving Long Term Disability through UNUM. Many parishes are unaware these employees are eligible for the benefit. Failure to do so results in denied disability benefits if the need arises.

## MOST 529

As a follow-up to March's and April's articles which included information and clarification regarding the MOST 529 program, we have completed the procedure and worksheet for schools and parishes for the 2018-2019 school year. It is important that ALL schools use the same calculations and worksheet to inform parents of tuition costs.

The worksheet is created so only the name of the school and tuition rates need be entered. Formulas in the

worksheet determine the cost per child per semester while it is the parent's responsibility to manually enter credits (discounts, scholarships, grants, etc.) to complete the form.

[Click here](#) to download the MOST 529—Full School Year Staff Instructions and the MOST 529 Tuition Worksheet—Full School Year. The documentation and accompanying worksheet is for the entire 2018-2019 school year AND all future years.

“An excuse is worse and more terrible than a lie, for an excuse is a lie guarded.”

- Pope John Paul II

**M O S T**

**MISSOURI'S 529 SAVINGS PLAN**

## From the Curia—HR Reminders



The Archdiocese Office of Human Resources thanks you for your support during Open Enrollment (OE). As a reminder of the next OE steps in June, please note the following:

1. Employees will receive their Open Enrollment Benefits Confirmation letter around the first week of June at their home address. The letter will confirm only the Health Insurance and Flexible Spending Account (FSA) enrollment, changes, or waivers effective July 1, 2018. Employees may make OE corrections at that time via paper forms. Employees sometimes ask why their life insurance, LTD, or Retirement plan is not mentioned, but those plans are not Open Enrollment related.
2. Your parish/school will then receive a complete Open Enrollment report around the third week of June listing all your active employees who have elected, changed or waived the Health Insurance Plan and the FSA plans, effective July 1, 2018.

3. The 2018-2019 Employee Benefit Booklets are now available on the website. [Click here](#) to access the booklets.

*Do you know* retirement plan (403b) beneficiary assignments did **NOT** transfer from Transamerica to Prudential at the fall 2017 plan conversion? Participants who have not assigned beneficiaries risk having loved ones waiting for confirmation of their right to account proceeds, or worse, the account proceeds may be accessible only through probate court. [Here's a link](#) to a flyer for you to *PLEASE* post wherever staff congregates (e.g.; rectory/business office/agency break room, teacher's lounge) as a reminder of this important duty we all have as retirement plan participants. And if you are one of the *many* who have not yet set up your beneficiaries, lead by example and get it done by calling 1-877-778-2100!



## Lawson Update

We welcome St. Paul—Fenton and St. Charles Borromeo to Lawson payroll this month with three more joining in July! Currently 101 parishes/schools are enjoying the benefits of using Lawson Payroll. With the total cost to parishes only \$1.25 per paycheck, what's not to like? No more worries about missing tax and remittance deadlines are just two benefits.

To discuss Lawson payroll and specific information regarding the conversion process for your parish or school, please contact Darlene Doerr at 314.792.7117 or Barb Sandell at 314.792.7082.

### Parish Support Contact Information

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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 help.

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

[Click Here to Visit Parish Support Web Page](#)