



ARCHDIOCESE OF SEATTLE

PARISH FINANCIAL SERVICES NEWSLETTER

Volume 10, Issue 6

July 2013



PARISH STEWARDSHIP FALL COMMITMENT RENEWAL

The Deadline for Ordering your Parish Stewardship materials is fast approaching!! Friday, July 26th is the very last day you will be able to order.

Access the order site at:

<http://clients.printwest.net/customers/seattlearchstewardship/>

Choose your parish from the drop down menu.

Your password is:ps2013

Follow directions carefully as you order and/or customize your materials. If you need help contact Kathy Clark 206-382-4271/866-381-2033 or kathy.clark@seattlearch.org

NEW PAA TRAINING SESSIONS

For a number of years the Archdiocese has provided an orientation/training program for all new Pastoral Assistants for Administration. This year, we will be opening up the PAA training sessions to everyone, veteran PAAs included. We are asking that everyone register for each session individually. The registration forms will be sent out in the Newsletter in the month prior to the meeting.

The dates and tentative topics are as follows:

September 18, 2013-Introduction/Overview of Parish Finances and Benefits Services

October 16, 2013-Human Resources, Safe Environment and Finance Council

December 11, 2013-Budgets & Taxes, Property & Construction

January 15, 2014-Development/Stewardship and Catholic Mutual Group

February 19, 2014-Compliance

PAA Gathering-April 2-3, 2014

We highly encourage all new PAAs to attend every session. Those of you that feel you need a refresher in certain areas are welcome to register and attend individual sessions. If you have any questions, please contact Parish Financial Services at (206) 382-7316.

INSIDE THIS ISSUE:

PARISH ANNUAL REPORT	2
SEATTLE CRIMINAL EMPLOYMENT LAW	2
CHART OF ACCOUNTS UPDATE	2
ANNUAL PRIEST PENSION & PRIEST HEALTH PLAN	3
BENEFITS ENROLLMENT	3
ANNUAL CATHOLIC APPEAL UPDATE	3
PARISH RECORDS WORKSHOP	4
ANNUAL SIGNING AUTHORITY FORM	5
BENEFITS FORM	6
PAA SEPTEMBER SESSION REGISTRATION	7

ANNUAL SIGNING AUTHORITY FORMS

Thank you to those that have already turned in your Annual Signing Authority Forms. Archdiocesan policy requires annual reporting of your delegation of authority to sign PRF transactions, insurance transactions, etc., or of your decision not to delegate this authority. Please note that you should return the appropriate form even if you are not delegating this authority. This is to provide us with a sample of your signature. In completing the forms, please be sure to indicate which accounts or transactions are authorized and any restrictions you want to place on the delegation. The completed forms should be returned to **Parish Financial Services** as soon as possible, but by **September 1, 2013** at the latest. Please see the attached form, or you may download it at: <http://www.seattlearchdiocese.org/Archdiocese/PFS/Forms.aspx>.

Parish Annual Report 2012/2013

Thank you for your hard work on the Parish Annual Report. This is a friendly reminder that the report is due in a little over a month!

Remember, you will NOT receive a PAR packet in the mail since we have gone electronic.

The Parish Annual Report 2012/2013 is available to download from the Archdiocese of Seattle Archives Website:

<http://www.seattlearchdiocese.org/Archives/PAR.aspx>

The PAR is due Friday, August 16, 2013

As always, we recognize that this can be a challenging project and we want to be of assistance. If you should have any questions or concern, please contact:

Liz Madsen in the Chancellor's Office

Archdiocese of Seattle	Phone: 206-654-4655
710 9th Ave	Fax: 206-274-3110
Seattle, WA 98104	Email: Elizabeth.madsen@seattlearch.org



SEATTLE CRIMINAL EMPLOYMENT LAW

The City of Seattle has enacted a new ordinance that affects the way employers deal with criminal history information in employment decisions.

In order to comply with this new law, we will be making changes to our employment application and revising our recruiting and selection process across the entire Archdiocese.

Please do the following for all new hires:

- * Destroy any old versions of employment applications and use only the current application (without criminal history questions) available on our website:

http://www.seattlearchdiocese.org/Assets/HR/106_EmploymentApp2013Parish.pdf

- * Perform background checks only after an employment offer is made.
- * Do not ask an applicant about their criminal history during recruiting.

We are confident that by following our best practice model for recruiting and employee management along with continued full compliance with our Safe Environment Program we will be able to meet the law and keep our parishes and schools safe. If you have any questions please call or email Human Resources.



CHART OF ACCOUNTS UPDATES

PFS has updated the Chart of Accounts contained in the Parish Accounting Manual and the CCAS website. Important updates include the following:

NEW Account: 5235 – Benefits Administrative Fee

DELETED Accounts: 5211 – Other Benefits – Religious and 5212 – Other Benefits – Lay. (These accounts have been consolidated under 5210 – Other Benefits).

REVISED Accounts: 4402 – Bequests – references to accounts 5989 and 2207 were changed to 6680 and 2127, respectively; 4503 – Interest Income-ARF definition has been revised; 6622 – Sacrificial Giving has been renamed Parish Stewardship.

If you have any questions regarding these updates, please contact Sarah Diama at (206) 382-4573 or sarah.diama@seattlearch.org.

ANNUAL PRIEST PENSION & PRIEST HEALTH PLAN

The annual billings for the Priest Pension Plan and the Priest Health Plan were mailed on July 9th and are due upon receipt. Please contact Benefits Services at 206-382-4566 or 800-950-4904 if you have questions. Thank you.

REMINDER FROM THE BENEFITS SERVICES OFFICE: NEW PROCESS FOR BENEFITS ENROLLMENT

New Employees: The benefits enrollment process has changed. Please use the new Benefit Personnel Action form (copy attached) to tell us when you hire a new employee who is eligible for benefits or when an existing employee becomes eligible for benefits due to an increase of hours. After you do that, we will send enrollment instructions directly to the employee and follow up as needed to confirm their enrollment.

Enrollment Changes: Employees need to log onto the new enrollment website at www.SeattleArchBenefits.HRInTouch.com to change their benefit enrollment due to life status changes.

Benefits Information: The enrollment website contains all of our enrollment and eligibility information as well as details about each plan and plan booklets. And, as always, Benefits Services is available to assist you and your employees, Monday through Friday from 8:00 a.m. to 4:30 p.m. at 206-382-4566 or 800-950-4904.

ANNUAL CATHOLIC APPEAL UPDATE



The Annual Appeal office will continue to send a campaign status report and a detailed donor report weekly until the end of July. Thereafter, we'll send reports on a monthly basis or by request at any time. Email your requests to aca@seattlearch.org or call us at 206-382-4274 or 800-809-4921. If there is someone in your office that should be on our ACA email list but isn't, please email aca@seattlearch.org and let us know who to add –provide first and last name, parish name, job title and email address.

Rebate Checks

The first monthly rebate check will be coming out to you in August! A check this early indicates your pledge fulfillment is proceeding nicely!

Note: Continue to send discrepancies or omissions you find on your donor report as these can affect rebates – send an email to maggies@seattlearch.org and include parish name and ID, donor name, Arch ID# if known and description for research.

New Gifts

New pledges/payments are still coming in –process these as they come in and send to us **with your summary report on a weekly basis to** our office. **Please do not hold for any length of time.** Checks need to be cashed, credit cards and EFTs need to be set up when donors have requested, and we need to thank the donors in a timely manner.

Matching Gifts

We encourage you to put this in your bulletin and/or on your website to educate your parishioners on how to maximize their gift to the Annual Appeal:

Thank you to those who have already fulfilled their pledge! If you would like to help maximize our Annual Catholic Appeal Rebate this year for our parish project, please check if your employer has a **Matching Gift** program.

Once your gift has been paid in full, you can apply for the match per your employer's instructions. The Annual Catholic Appeal, Archdiocese of Seattle, is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. Tax ID # 91-0778147. Call 206-382-4274 if you have any questions. Mailing address: Annual Catholic Appeal, PO Box 14964, Seattle 98114

Contact Us!

We are here to serve and help you – call us if you need assistance:

Maggie Stiles: 206-382-4274 **Monica Lewis:** 206-382-4353 or Toll Free: 800-809-4921

Presenters:

Very Reverend Anthony Bawyn, JCD, Judicial Vicar
Mary E. Santi, JCL, Chancellor



A workshop for Pastors, Parochial Vicars, Priest Administrators, Pastoral Coordinators, Pastoral Assistants, Parish Secretaries and anyone involved in the maintenance of Parish Records.

Monday, August 5, 2013

11:00am-2:30pm

Registration begins at 10:45am

Immaculate Heart of Mary Parish
Parish Hall

2200 Allen Street, Kelso, WA 98626

The workshop will provide an overview of the Archdiocese of Seattle's Records Policies and Procedures as well as current issues relating to the creation and maintenance of parish records with an emphasis on sacramental records. The workshop will be highly interactive and fun!

Refreshments and Lunch will be provided.



Chancellor's Office
Archdiocese of Seattle
710 9th Ave
Seattle, WA 98104
Phone: 206-654-4655
Fax: 206-274-3110

Email Liz Madsen elizabeth.madsen@seattlearch.org
by Friday, July 26, 2013

Please include the following information:

- Name
- Position
- Parish
- Phone and Email

Parish Financial Services
710 9th Ave
Seattle, WA 98104

Phone: (800) 422-5417
Fax: (206) 382-4279

Ed Williams

Director of PFS

(206) 382-4585

edw@seattlearch.org

Sarah Dama

Assistant Director of PFS

(206) 382-4573

sarah.dama@seattlearch.org

Loretta Griffin

Savings & Loan Manager

(206) 382-4501

lorettag@seattlearch.org

Erin Karalus

Savings & Loan Assistant

(206) 382-4845

erin.karalus@seattlearch.org

Emily Lee

Administrative Assistant

(206) 382-7316

emily.lee@seattlearch.org

**ARCHDIOCESE OF SEATTLE
ANNUAL SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

Note: Please complete either Section A or B.

**SECTION A
AUTHORIZED SIGNATURE**

I am not delegating signing authority at this time:

(Please Print your Name)

Signature

Date

**SECTION B
NOTICE OF DELEGATION OF SIGNING AUTHORITY**

I have authorized the following staff member(s*) to sign for the parish:

(Print or Type Name & Title)

(Signature of Appointee)

(Print or Type Name & Title)

(Signature of Appointee)

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions:

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1 or 2).

This authorization is valid until further notice.

(Signature)

(Date)

**SECTION C
AUTHORIZED REVIEWERS**

I authorize the following individuals to request/receive PRF/ARF transaction information and account balances:

1. _____ 2. _____ 3. _____

(Please Print your Name)

Signature

Date

Chancery Approval:

(Signature)

(Date)

**ARCHDIOCESE OF SEATTLE
TEMPORARY TRANSFER OF SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

During my absence from the Parish, I have authorized*:

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1, 2 or 3).

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions: _____

This authorization is valid from _____ to _____
(beginning date) (ending date)

(Signature)

(Date)

Chancery Approval:

(Signature)

(Date)

Benefits Eligibility Personnel Action Form

For benefits effective July 1, 2013 and later

Please use this form to notify Benefits Services of newly hired, re-hired and newly benefit-eligible employees

To Parish, School and Agency Administrators:

This form is temporary and replaces the Benefit Enrollment Form. It is part of our interim process to enroll employees in their benefits until the new payroll system goes live. Please complete the information below and fax or mail it to Benefits Services immediately; **do not send via unsecure email**. Benefits Services will enter this information into **HR InTouch**, the Benefits Enrollment System, and send instructions to the employee on how to log in and enroll in their benefits. To notify Benefits Services of employees who are terminating from benefits or transferring please continue to use the current forms. If you have questions, contact us at 206-382-4566 or 800-950-4904. Thank you.

Benefits Services Fax: 206-382-3493

BenefitsServices Mailing Address: 710 9th Ave, Seattle, WA 98104

Parish/School/Agency ID#: _____ Name: _____ City: _____

(Check one) _____ **NEW Employee** _____ **RE-HIRED Employee** _____ **NEWLY ELIGIBLE Employee**

Please complete the following Employee Information:

Last Name _____ First Name _____ Initial _____

Employee SSN _____ Employee Birth Date ____/____/____ Gender M / F

Married (circle one) Yes / No Job Code _____

Address: House # Apt# Street Name City State Zip

Date of Hire or Rehire ____/____/____ Date of Increase in Hours ____/____/____ Original Date of Hire ____/____/____

Annual Salary (for Life & LTD Benefit coverage) \$ _____

Check One:

_____ Lay Employee (not a teacher) _____ Lay Employee (teacher) _____ Lay Employee (Principal/Vice Principal)

_____ Vowed Religious _____ Extern Priest _____ Deacon _____ Seminarian

_____ Cemetery (union) _____ Cemetery Standard

Authorized by: _____ Date: _____
Parish/School/Agency Administrator

Your Phone Number: _____ Your Email: _____

For BSO Use:

☐ Entered into Hr InTouch on _____ Benefit Package: _____ by _____

☐ Notice to enroll sent to Employee on _____ by _____

PAA TRAINING SESSION **REGISTRATION FORM**

WEDNESDAY, SEPTEMBER 18, 2013

Isaac Orr Conference Room 10:00am to 3:00pm
910 Marion St

Name: _____

Parish: _____

E-Mail Address: _____

Phone: _____

The agenda for this meeting will be an Introduction & Overview of Parish
Finances and Benefits Services.

REGISTER BY: TUESDAY SEPTEMBER 10, 2013

Please return this form to: Emily Lee
Parish Financial Services
710 – 9th Avenue
Seattle, WA 98104

Questions, Concerns and Cancellations (please notify us of cancellations 24
hours prior to the session.

Phone: (206) 382-7316

Email: emily.lee@seattlearch.org