

A R C H D I O C E S E O F S E A T T L E

PARISH FINANCIAL SERVICES NEWSLETTER



T Y P H O O N H A I Y A N

Thank you for your assistance in helping parishioners and students know of the U.S. Church's response through Catholic Relief Services (CRS). We hope

you received information and instructions sent out during the week of November 11. Those materials, and more as updated, are available at www.seattlearchdiocese.org/missions. For questions and other assistance, please contact the Missions Office: (206) 382-4580; (800) 869-7028; missionsoffice@seattlearch.org.

N O T E S F R O M P F S

*** IRA DONATIONS :** The provision that allows donors, 70 ½ or older, to donate as much as \$100,000 a year from their individual retirement accounts directly to eligible charities without having to include any of the transfer as part of their gross income is still available this year. The transfer must be made directly from the IRA to the organization. It would be a good idea to mention this as we approach year end.

*** NON-CERTIFIED STAFF :** We are finding more and more schools are using "Agreements" or "Covenants" for non-certified staff. Evidently there are some variations in the timing but as a reminder, if the agreement calls for payment over the end of the fiscal year (June 30), you need to accrue the salary and benefit cost the same way you do for teachers. In other words, if the agreement runs from September 1 to August 31, you need to accrue the amount of two months salary and benefit costs at June 30th.

*** VOLUNTEER MANAGEMENT :** Volunteers are still a major part of most parish/school operations. We couldn't accomplish anything close to what we do without those dedicated individuals and their donation of time and talent. In many parishes, Volunteer Management is one of the PAA's many duties; it is a responsibility that needs some attention. The Human Resources section on our website at <http://www.seattlearchdiocese.org/Archdiocese/HR/Default.aspx> (continued on pg 2)

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has an excellent summary of the relationship of the volunteer to the parish and volunteer selection. This section also points out the importance of having a signed Volunteer Agreement on file for every volunteer. Both the Volunteer Application and Work Agreement are included in the section. This section also provides the Safe Environment requirements for volunteers to have Background Checks if appropriate (e.g., working with vulnerable populations, working with money or other financial instruments, driving). The Office for Catholic Schools website <http://www.ocswv.org> has further volunteer information for School volunteers. In addition Property and Construction has a section in the Safety Manual (Appendix E) that provides guidelines and forms for volunteers doing minor repairs and maintenance projects at :

<http://www.seattlearchdiocese.org/Archdiocese/Property/manual.aspx>

We have also had a couple of instances where a volunteer has been the only person with a computer password or access to a computer program. It's essential that any parish program and/or password are available to appropriate parish staff. If your parish IT person or webmaster is a volunteer make sure he/she isn't the only one with access to the system. A little bit of effort when getting the volunteer started will possibly save a lot of problems down the road.

DECEMBER PAA TRAINING

Don't forget to sign up for the third PAA Training Session on December 11, 2013. The topics will be: Property & Construction and Budget & Taxes . Fill out the form attached and return by Tuesday December 3, 2013.

PARISH STEWARDSHIP

Increase Ordinary Income! Send Quarterlies Now!



Data consistently proves; parishes that send Quarterlies on a regular basis enjoy a much higher pledge fulfillment rate than those which do not.

This time of year, people appreciate a status report of their annual pledge as a reminder to get 'caught up' before the end of the year. Also, many people give more serious consideration to their charitable giving at the end of the calendar year.

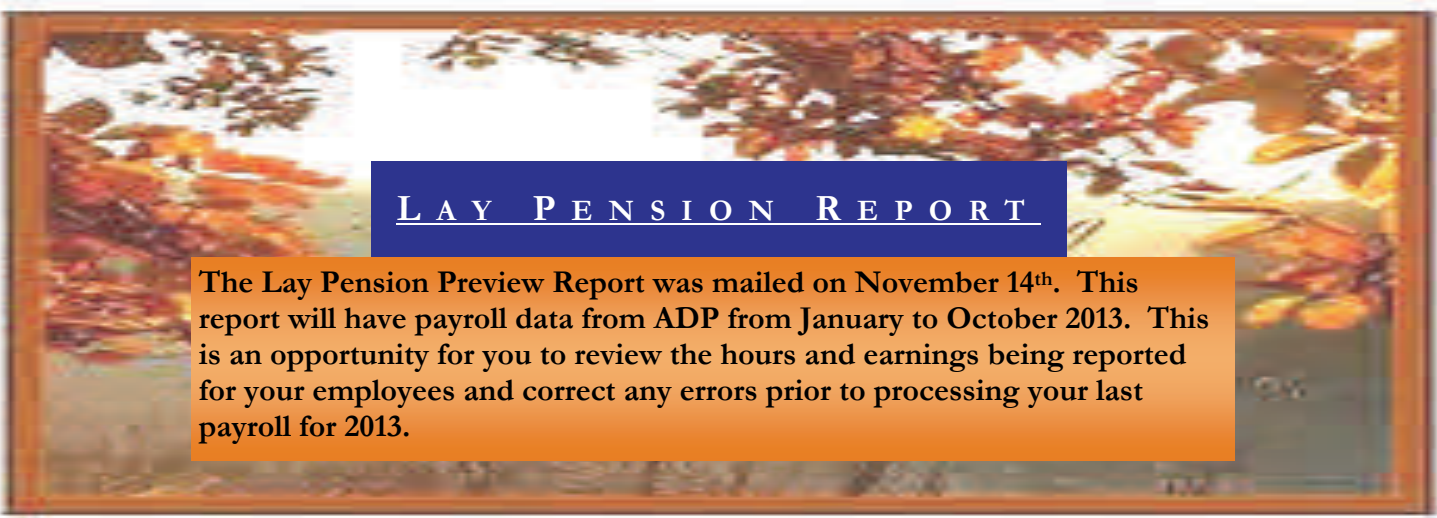
A 'best practice' recommended by our most successful parishes is to clarify that the Quarterly report is not an invoice, but merely a reminder of the parishioner's pledge status – such as this example from the Quarterly Letter Template provided by the Parish Stewardship office: *"This record is being provided for your information – it is NOT a bill."* You will see that the vast majority of parishioners appreciate these updates and are eager to honor their pledges.

And remember – sending the Quarterlies by EMAIL is FAST, EASY, and INEXPENSIVE!

If you haven't already done so, **NOW IS THE TIME** to send out your last Quarterly letters of the year!

For further information, contact Scott Bader at scottb@seattlearch.org 206.903.4619 or 1.866.381.2033.

Or Kathy Clark at kathy.clark@seattlearch.org 206.382.4271 or 1.866.381.2033



LAY PENSION REPORT

The Lay Pension Preview Report was mailed on November 14th. This report will have payroll data from ADP from January to October 2013. This is an opportunity for you to review the hours and earnings being reported for your employees and correct any errors prior to processing your last payroll for 2013.

REMINDER TO PAYROLL ADMINISTRATORS REGARDING BENEFIT DEDUCTIONS

This is a follow up reminder to the November 11 memo that we emailed to all payroll administrators regarding the timing of benefit deductions in the new payroll system. There is currently no standard for when dependent medical, dental, vision and optional group life benefits are deducted from employees' paychecks. Some parishes take the deduction for the current month's coverage and some take deductions for the following month. We need to standardize the timing of deductions across all payroll companies.

Beginning in January all benefit-related payroll deductions will be taken in the same month for which the coverage is being paid. In other words, the deductions taken from January paychecks will pay for January's benefit coverage's. We made this decision in an effort to lessen the impact on new employees who are frequently already one month behind in their benefit premiums by the time they get enrolled.

What you need to do

- * If you are now taking payroll deductions from employees' paychecks for their current month's benefits you don't need to do anything.
- * If you are currently taking payroll deductions from employees' paychecks for next month, you need to ***change your December payroll*** so that no deductions for benefits are withheld to pay for January benefits. We will set up their payroll deduction in January for their January benefits.

Payroll Services Personnel Action Form Revision & Reminder

Attached to this Newsletter is a revised version of the Payroll Services Personnel Action Form. The form must be completed for any changes to current employee information, new-hires, and re-hires. This form replaced the Benefits Personnel Action Form.

Please be sure to complete all sections of the form for New Hires and Re-Hires. If you are making a change to a current employee, please complete the top portion of the form, including employee name, and then complete only the section or sections being changed. Be sure to include a copy of the voided check if the employee is signing up for direct deposit.

CATHOLIC MUTUAL SAFETY CORNER

When is a Commercial Drivers License (CDL) required? We get this question all the time, especially concerning school buses. The answer in regard to school buses is simple: **always**. Any driver of a vehicle transporting students on behalf of a school must have a CDL, along with a **passenger endorsement** and a **school bus endorsement**. There has been some confusion in regard to small buses rated for 15 passengers or less. But the simple fact is that **all** school buses, **regardless of size**, require CDL drivers. Here is a link to a page on the WA State Department of Licensing website that clearly outlines who does and who does not need a CDL.

<http://www.dol.wa.gov/driverslicense/cdlrequired.html>

As always, if you have any questions, please feel free to call our office at 206-382-3494 or 1-800-809-4926.

ANNUAL CATHOLIC APPEAL PAYMENTS



- Still need to make your Annual Catholic Appeal payment by year-end for tax purposes? Planning on donating Stock or contributing through a Charitable fund or IRA? Any new gifts or payments you want credited to the **2013 calendar year for tax purposes** needs to be in the Annual Catholic Appeal office by December 31st. If mailing in the payment, the **postmark must be stamped by Dec 31, 2013 in order to be applied in the calendar year.**

For your convenience to make a payment, visit www.seattlearchdiocese.org/pp and use your debit or credit card for immediate processing.

For a new gift, visit www.seattlearchdiocese.org/donate

For stock, call 206-382-7316 or 800-422-5417.

Final payments for the campaign are due in April 2014.

* Please do not put ACA payments in the parish collection basket. Mail directly to: Annual Catholic Appeal, PO Box 14964, Seattle 98114

Your generous support is greatly appreciated – thank you!

2014 Leadership Sessions - Mark your calendar! 12:00-3:00pm. (Lunch will be included)

Registration will begin in early January.

February 21 Friday	St. Charles Borromeo, Tacoma
February 26 Wednesday	Sacred Heart, Lacey
February 27 Thursday	St. Thomas, Tukwila
February 28 Friday	Isaac Orr, Seattle
March 6 Thursday	St. Pius X, Mountlake Terrace
March 7 Friday	St. Joseph, Vancouver
March 12 Wednesday	St. Charles, Burlington
March 13 Thursday	St. Madeleine Sophie, Bellevue
March 14 Friday	Isaac Orr, Seattle

Annual Catholic Appeal 2014 Campaign Dates

- Appeal Kick-Off Weekend - April 26/27, 2014
- Presentation/Ask Weekend1 – May 3/4 2014
- Presentation/Ask Weekend2- May 10/11 2014
- Follow-up/Ask Weekend1 - May 17/18, 2014
- Follow-up/Ask Weekend2 - May 24/25, 2014

ARCHDIOCESE OF SEATTLE

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Seattle, WA 98104

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edw@seattlearch.org

Sarah Diamo: Assistant Director of PFS

(206) 382-4573

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Loretta Griffin: Savings & Loan Manager

(206) 382-4501

lorrettag@seattlearch.org

Justin Schrier: Savings & Loan Accountant

(206) 382-4845

justin.schrier@seattlearch.org



*Happy
Thanksgiving!*



ARCHBISHOP BRUNETT
RETREAT CENTER AT
THE PALISADES

Did you know?

- 1) All Parish and Chancery staff members receive a 10% discount on our weekend retreats! In gratitude for your service to our Lord and the Church, we are pleased to offer you a special price. The retreat center belongs to you, and we want you to feel free to visit any time, at a reasonable price.
- 2) Financial aid is available. No one will be turned away from the Retreat Center due to costs. Anyone in need of financial aid is encouraged to call our Welcoming Coordinator, Helen Nguyen, at (206) 748-7991.
- 3) It's about more than the money. The value of time spent with God and other people of faith in a beautiful, natural setting far outweighs the cost. If you have never attended a retreat, or if it has been a long time since you last attended, we invite you to set aside a weekend devoted entirely to your relationship with the Lord. Visit our website for a list of our upcoming retreats:

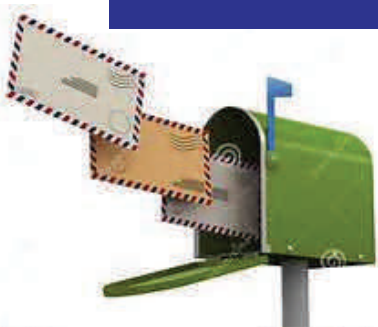
www.seattlearchdiocese.org/palisades

Discover. Deepen. Transform.

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FROM THE CHANCERY MAILROOM



Please be advised when mailing to the Archdiocese of Seattle, 710 9th Avenue, Seattle 98104, **to add a line for a department or name of individual personnel in addition to CCAS. This greatly assists in routing mail correctly.**

We appreciate your cooperation.

Jan Langum

Mailroom Services

Payroll Services Personnel Action Form

Please use this form to notify the Payroll Services Office of any newly hired, rehired and newly benefit-eligible employees, as well as changes to employee information, (address, etc.).

This form replaces the Benefits Eligibility Personnel Action Form effective October 1 and will be used temporarily between October 1 and December 31, 2013. Please complete the information below and fax or mail it to the **Payroll Services Office** immediately for any newly hired, rehired, newly benefit eligible employee, changes to current employee information and terminations. **Do not send the form via unsecure email.** The Benefits Services Office will send instructions to employees on how to log in and enroll in benefits. If you have questions, please contact us at 206-274-7662 or 1-800-348-9092.

Payroll Services Fax: 206-957-8898

Payroll Services Mailing Address: 710 9th Ave. Seattle, WA. 98104

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

(Check One) _____ New Employee _____ Re-hired Employee _____ Newly Eligible Employee _____ Current Employee

Social Security Number _____ Effective Date of Changes _____

Employee Information:

Prefix _____ (Example, Rev., Deacon, Sister, Mr. Miss, Mrs., Dr.) Suffix _____ (I,II,III,Jr.Sr.)

First Name _____ Middle Initial _____ Last Name _____

Address _____ Apartment Number _____

City _____ State _____ Zip Code _____

Personal Telephone Number _____ Work Telephone _____ Ext _____

Email Address _____

Date of Birth _____ Gender _____ Married (circle one) Yes / No

Dates/Salary

Date of Hire or Rehire _____ Date of Increase in Hours For Benefit Eligibility _____

Salary / Hourly (circle one) Scheduled Hours Per Week _____

Hourly Rate _____ Monthly Salary _____ Annual Salary (for Life & LTD Benefit Coverage) _____

New Job Code _____ Exempt _____ Non Exempt _____

Employee Termination

Last Day Worked _____ Term Reason (circle one) voluntary/involuntary/non-renewal

Eligible for Rehire? (circle one) No / Yes

Employee Medical Benefits Group

_____ Lay _____ Teacher _____ Principal _____ Active, not eligible for Benefits

_____ Central Agency _____ Cemeteries _____ Cemeteries Union

_____ Archdiocesan Priest _____ Extern Priest _____ Extern Priest Vowed Religious

_____ Senior Priest _____ Seminarian _____ Vowed Religious

Payroll Services, Personnel Action Form, Page Two

Employee Type (pick from the following and write in) Deacon, Extern Priest, Extern Priest Vowed Religious, Lay, Priest, Retired Priest, Seminarian, Temporary Lay, Temporary Priest, Vowed Religious

Direct Deposit Information – Also attach copy of voided check – or bank account verification form.

Bank Name _____

Routing Number _____ Account Number _____ Checking or Savings _____

Percentage of Check _____ Or Flat Dollar Amount _____

Bank Name _____

Routing Number _____ Account Number _____ Checking or Savings _____

Percentage of Check _____ Or Flat Dollar Amount _____

Taxes

Filing Status (circle one) Married / Single

Exempt From Federal Withholding? (circle one) Yes / No

Number of W4 Withholding Allowances _____ Extra Amount of Tax To Be Taken _____

Additional Earnings

Priest Car Allowance Amount _____ Housing Allowance Amount _____ Meal Allowance _____

Employee Extra Earnings: If so, what & amount (example, cell phone payment, stipends, etc.). **Please use description, not ADP code.**

What _____ Amount _____

What _____ Amount _____

Voluntary Deductions (excluding 403(b) and employee benefits)

Example: St. Vincent de Paul, Parish Stewardship, Annual Catholic Appeal Per month or Per Paycheck (please circle which one)
Please use description, not ADP code.

What is the deduction? _____ Amount _____ Effective Start Date _____

What is the deduction? _____ Amount _____ Effective Start Date _____

PTO Plan Eligibility (check if eligible)

_____ Vacation _____ Sick Time _____ Seattle Sick Time

Authorized By: _____

Date: _____

Your Phone Number: _____ **Your Email:** _____

For PSO Use:

Entered into Ultimate on _____ by _____

For BSO Use:

Entered into HRInTouch on _____ Benefit Package: _____ By _____

Notice to enroll sent to Employee on _____ by _____ HRInTouch Approval: _____

PAA TRAINING SESSION **REGISTRATION FORM**

WEDNESDAY, DECEMBER 11, 2013

10:00am-3:00pm
Isaac Orr Conference Room 10:00am-3:00pm
910 Marion St, Seattle 98104

Name: _____

Parish: _____

E-Mail Address: _____

Phone: _____

The agenda for this meeting will be Property & Construction and Budgets
& Taxes.

REGISTER BY: TUESDAY DECEMBER 3, 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