

Funny you should ask...

*Newsletter from Parish & School Financial Consulting, Archdiocese of Milwaukee
June 21, 2018 --- volume 7, issue 2*

This newsletter is sent electronically to parish and school directors of administrative services, business managers and bookkeepers. If you have suggestions for topics, please [let us know](#).

[Click here](#) to view the *Funny you should ask...* page on our website.

Featured Topics:

Background Check – Billing Process Changing
Good Friday/Holy Land and CRS Rice Bowl Collections
Unclaimed Property

The regular fare:

BAAM Schedule
Building Commission Schedule
Catholic Mutual Connection
The Quarter Ahead
Excel Tip
Index of Funny You Should Ask... Articles
Contact Us

Background Check – Billing Process Changing

As you are aware, all background checks are run through CMG Connect (Catholic Mutual) using Selection.com.

Over the past few years, the practice for paying these invoices has been that the Protected Self-Insurance Program pays all the invoices throughout the year and then a line item is added to the invoices from the Protected Self-Insurance Program. This line contains the total of the previous 12 months of fees for background checks. These fees are billed to locations retroactively. A list of all the background checks, by name, is included with the invoice.

As in years past, the 2018/2019 invoice from the Protected Self-Insurance Program will contain the background checks processed between July 1, 2017 and June 30, 2018. This invoice will be sent to you earlier than the rest of the Protected Self-Insurance items.

The billing process is changing on July 1, 2018.

Beginning July 1, 2018, Selection.com will directly invoice each location twice a month. Selection.com sends invoices only via email. Each location may set up multiple email addresses to receive the monthly billing. It is important that you keep Selection.com updated with current, appropriate email addresses.

Background checks run from the first of the month through the 15th are billed on the 16th. Background checks run on the 16th of the month through the last day of the month are billed on the first of the

following month. Invoices are due within 30 days. You will only receive an invoice if background checks have processed for your location.

Because this is the transition year, you will have the full prior 12 months (7/1/2017-6/30/18) of background checks on your 2018/2019 PSI invoice AND you will receive real time invoices from Selection.com, beginning with the first billing on July 16, 2018. The email is from accounting@selection.com.

In the 2019/2020 fiscal year, you will only receive invoices from Selection.com.

Please note that these changes apply only to the billing process, and do not apply to the platform or other processes.

Good Friday/Holy Land and CRS Rice Bowl Collections

If you have not already done so, please remit these collections.

The Good Friday collection for the Holy Land should be submitted on a single check and not combined with other items. 100% of these donations are transferred to the Commissariat of the Holy Land. Good Friday/Holy Land checks should be made payable to and mailed to:

Archdiocese of Milwaukee
ATTN: Kim Kasten
PO Box 070912
Milwaukee, WI 53207-0912

The CRS Rice Bowl collection should be submitted on a single check and not combined with other items. Be sure to note "CRS Rice Bowl" on the check or check stub, AND indicate if you are submitting 75% or 100% of the alms. Along with your donation, please complete and submit the [25% Designation Form](#). Contact [Rob Shelledy](#) at 414-758-2286 with any questions. Checks should be made payable to and mailed to:

Archdiocese of Milwaukee
ATTN: Social Justice Ministry
PO Box 070912
Milwaukee, WI 53207-0912.

Unclaimed Property

It is a good idea to check the [Unclaimed Property](#) for the State of Wisconsin on an annual basis. You may be surprised at what you find! Also, check under various spellings and common misspellings of your parish name. Look under 'Saint' as well as 'St.' when searching the site; also check any nicknames the parish may have. Claim forms are easily downloaded.

BAAM Schedule

Unless otherwise noted, BAAM meetings are held at Our Lady of Lourdes parish (3722 S. 58th St., Milwaukee).

2018-2019

Schedule is pending.

Building Commission Schedule

Building Commission attendance by appointment only; contact [Linda King](#) at 414-769-3340.

2018

August 9

October 11

December 6

Catholic Mutual Connection

[Click here](#) for the most recent Catholic Mutual Connection newsletter and other information from the Catholic Mutual website.

The Quarter Ahead

June 2018

- 14th - Building Commission Meeting. Attendance by appointment only. Contact [Linda King](#) (414-769-3340)
- 15th – Priest compensation form due to employer
- 15th – Submit balanced budgets to Archdiocese for review
- 30th – Final payments for assessment and priest pension due for this fiscal year
- 30th – Fiscal Year Ends

July 2018

- 1st – Fiscal Year Begins
- 1st – Confidential Financial Statement forms available
- 31st – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 6/30
- Lay pension and group life reports for April-June (2Q) mailed
- Continuing Formation for Clergy bills mailed

August 2018

- 9th – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- Lay pension and group life information and payment for 2Q calendar year due

September 2018

- 1st – First payment due on current year assessment based on Confidential Financial Statement
- 15th – Confidential Financial Statements due
- 30th – Quarter End
- Priest pension bills for both priest and parish portions mailed
- Check unclaimed property site <https://www.revenue.wi.gov/ucp/index.html>

Excel Tip

Do you have a spreadsheet that uses some of the same text on a recurring basis, but maybe you can't remember exactly how you worded it the last time? Take advantage of AutoFill by right-clicking on the cell where you want to enter information and choose Pick From List (or Pick From Drop-down). Excel displays a drop-down list that shows the other items you have entered in the column, and allows you to select from the list. For faster access, hold down the ALT key and press the Down Arrow. Excel displays the same list of items.

For more tips, try *ExcelTips*, a free, third party, email newsletter containing lots of tips on using Excel. To subscribe or just check it out, click this link: <http://www.tips.net/subservices.html>

Do you need an Excel tip or have one to share? [Let us know!](#)

Index of *Funny You Should Ask...* Articles

The index is the first item on the [Funny page](#). It is a searchable Word document with links to take you to the appropriate issue. Just use CTL F (find) and type in your key word(s).

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