

Funny You Should Ask...



A NEWSLETTER FROM PARISH & SCHOOL FINANCIAL CONSULTING · ARCHDIOCESE of MILWAUKEE

September, 2018 --- volume 7, issue 3

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.

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Staffing Changes

We are happy to welcome Chris Brown as the new Treasurer and CFO of the Archdiocese of Milwaukee. His first day was Tuesday September 4. His contact information is in the Contact Us section.

Gary Bennetts' last day was Tuesday, September 4. We wish him well in his future endeavors.

Lynn Vanchena is now working with Katie Esterle in the Parish & Schools Financial Services Office to assist with the review and processing of the Confidential Financial Statements. She is a contractor and expect her to be with us for the next two months.

Participants' Indemnity Program Irrevocable Trust (PIPIT)

If you were a participant in the Participants' Protected Self-Insurance Program, on August 1, 2018, you should have received an email containing the information below.

On July 1, 2018, a new entity, **Participants' Indemnity Plan Irrevocable Trust** ("PIPIT"), was created to replace the Participants' Protected Self-Insurance Program. The Archdiocese of Milwaukee Participants' Protected Self-Insurance Program ceases immediately.

All of your current property, liability, auto, and workers' compensation coverage remains in effect and unchanged.

Our relationship with Catholic Mutual Group remains unchanged. They continue to administer our program and Molly Hatfield, Jen Brokmeier, and Patrick Peyton are still in the local service office.

The only noticeable change to you is how the premiums are paid.

Effective immediately, all premium payments must be made payable to "Participants' Indemnity Plan Irrevocable Trust" (you may abbreviate it as PIPIT). The payment remittance address is:

Participants' Indemnity Plan Irrevocable Trust
PO Box 070912
Milwaukee, WI 53207-0912

Premium payments will no longer process through Catholic Mutual Group. Any checks received payable to Catholic Mutual will be returned to you to be reissued to PIPIT.

Statements will look much the same as they always have, but will have the new logo for the Participants' Indemnity Program and a different mailing address.

The new [Coverage Program Reference Guide](#) will be distributed to each location and is posted on the Archdiocese of Milwaukee website. All of your current property, liability, auto, and workers compensation coverage remains in effect and unchanged. Please note that you must log-in under My Archmil.

Please note that this change does NOT affect any of the Catholic Mutual platforms, including Safe Environment and background check processes.

If you have any questions, please contact Kim Kasten at 414-769-3326 or kastenk@archmil.org.

Special Events Coverage

Catholic Mutual will send you a new Special Events form with updated payment information. While the Special Events form will still process through Catholic Mutual, checks are payable to PIPIT and are sent to Catholic Mutual with the form.

Selection.com Billing – Background Checks

After a month of direct billing with Selection.com for the employee/volunteer background checks, we have noticed several instances where the employee/volunteer selects the incorrect site. When the incorrect site is selected, the background check is then billed to the incorrect

parish. Several of you have contacted the Safe Environment Office regarding background checks that have been billed to a parish for people that are not affiliated with their parish.

We are looking into what the options are to remedy this issue and if any processes need to be put into place to correct this billing issue when it occurs. Kim Kasten is graciously handing this responsibility over to Suzanne Nickolai in the Safe Environment Office.

While we are working on problem solving this issue, please email Suzanne at nickolais@archmil.org with the invoice listing the incorrect background checks once you have confirmed they are not an employee/volunteer of the parish so she can work on payment of the invoice. Feel free to contact Suzanne at 414-769-3449 with any questions.

Priest Professional Expenses

Beginning in 2018-19, priests can now be reimbursed for professional expenses when the expense is incurred, up to the allowable annual amount. So, if your priests submits a documented (and allowable) reimbursement request for \$1,500 in July, you can reimburse him that whole amount. There is no longer the need to pay him 1/12 of the monthly amount until he is fully reimbursed.

As a reminder, priests should only be reimbursed for professional expenses after they incurred the expense and they submit detailed information on their reimbursement request. The reimbursement must be professional in nature. You can find a list of allowable expenses on the Archdiocesan website, but you need to be logged in.

Feel free to contact Katie at 414-769-3377 with any questions.

Priest Pension – Parish Portion

The (gold) invoice addressed to the priest is his amount due to the pension plan for the applicable fiscal year. The pension deduction is a pre-tax deduction from the priest's payroll. This invoice will follow the priest if he changes parishes/employers during the fiscal year.

The (green) invoice addressed to the parish/employer is the amount due to the Priests' Pension Plan, from the parish/employer, for the applicable fiscal year. This invoice belongs to the parish and does not follow any priest(s) assigned to your parish. If a parish priest is reassigned, or otherwise leaves the employment of a parish, the invoice issued for that fiscal year is the responsibility of the parish.

The parish/employer portion contributed to the Priests' Pension Plan is not made on behalf of any one person and has never been intended to benefit any specific individual.

BAAM Schedule

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

2018-2019

September 19, 2018

October 17

November 7

January 10, 2019 – G3 (Gigs, Geeks and God)

February 20

March 20

April 10

May 15

Building Commission Schedule

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

2018

October 11

December 6

2019

February 14

April 11

June 13

August 8

October 10

December 12

Catholic Mutual Connection

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

The Quarter Ahead

September 2018

- 1st – First payment due on current year assessment based on Confidential Financial Statement
- 15th – Confidential Financial Statements due
- 19th – BAAM Meeting
- 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>

October 2018

- 11th – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- 17th – BAAM Meeting
- 31st – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 9/30
- Lay pension reports for July-Sept (3Q) mailed

November 2018

- Assessment bills for current fiscal year mailed
- 7th – BAAM meeting
- Lay pension information and payment for 3Q calendar year due

December 2018

- 1st – Second payment due on current year assessment
- 6th – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- 15th – Distribute budget information to staff and committees with budget responsibility
- 31st – Quarter End

Excel Tip

Here are some commonly used shortcuts in Excel:

Ctrl + N	Create a new workbook
Ctrl + O	Open an existing workbook
Ctrl + S	Save the active workbook
Ctrl + W	Close the active workbook
F12	Save the active workbook under a new name (Save As)
Ctrl + C	Copy the contents of the selected cells to Clipboard
Ctrl + X	Cut the contents of the selected cells to Clipboard
Ctrl + V	Paste the contents of the Clipboard into the selected cell(s)
Ctrl + Z	Undo your last action
Ctrl + P	Open the Print dialog box

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!](#)

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