

Funny

You Should Ask...



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

June 2023 --- volume 12, 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](#).

[View the Funny you should ask... page](#) on our website.

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Staffing Updates

Best Wishes Suzanne Nickolai

Suzanne Nickolai, Safe Environment Manager for the Archdiocese, will be leaving us July 7. She's not going far, though. Suzanne will be joining the team at Catholic Mutual Group working with Molly Hatfield. After July 7, please reach out to Cynthia Rivera-Garcia in the Safe Environment office at Rivera-GarciaC@archmil.org, or (414) 769-3447.

Welcome Tom Fredrickson

Please join us in welcoming Tom Fredrickson to the HR office for Parish and Schools where he will serve as the HR Director. Tom and his wife Dana have two grown children, Nathan, and Megan. They are active members of St Mary Parish in Hales Corners where he serves on the Pastoral Council, has traveled to their sister parish in Haiti and served as a RCIA sponsor for several individuals. Recently, he had the pleasure of leading the St Mary Dynamic Men's Group.

Tom recently retired from the Air Force after a 36-year career. His final role with the Air Force was with the 128th Air Refueling Wing at Mitchell Field, where he served as the Wing Command Chief, the Senior Enlisted leader. His work in that capacity was in the areas of employee engagement, leadership development, organizational development, and compliance. He was also an active leadership coach and mentor. He can be reached at fredricksont@archmil.org and 414-769-3370.

Job Opening - Bookkeeper

The Archdiocese has been asked to provide accounting services to several parishes. We are currently seeking an accountant who will be responsible for accounts payable, accounts receivable, payroll, and other monthly general ledger activities, including journal entries, reconciliations, fund balancing and reporting. Interested candidates may find more information at <https://www.archmil.org/Jobs/Careers-central-office.htm> or by contacting Anne Levendoski at levendoskia@archmil.org.

Priest Help Out Fee Changes

Effective 07/01/2023, the help-out compensation for priests in the Archdiocese of Milwaukee would be as follows:

Weekend Masses \$70 plus stipend and mileage (determined by the IRS)

Weekday Masses \$50 plus stipend and mileage (determined by the IRS)

Reconciliation, Funeral Vigil, etc., \$40 per session plus mileage (determined by the IRS)

Mandatory PIPIT Trainings

In September 2022, we introduced two training curriculums utilizing the CMG Connect platform. To date, we have had over 4,700 people complete these trainings, but we still have a significant number of employees who have not yet started the process.

[Workplace Safety Training](#)

[Cyber Security Training](#)

This training is required for all paid staff and appropriate volunteers at your location(s). Please read the linked notices (click the training items above) to determine which volunteers should take the individual training; the requirements are different for each.

Both trainings are located on the CMG Connect website. The links in this sentence provide instructions for accessing the [Workplace Safety Training instructions](#) and [Cyber Security Training instructions](#).

In addition to existing employees and volunteers, all new employees and volunteers are expected to complete these trainings within 30 days of the start of their employment or volunteer services. Both trainings require annual recertification.

The **Workplace Safety Training** should take no more than 5-10 minutes.

The **Cyber Security Training** is longer but consists of 6 videos which can be completed in approximately 40-45 minutes. They may be completed one after the other or viewed over several sessions.

The staff and appropriate volunteers at every location participating in the Participants' Indemnity Plan (PIPIT) are required to complete these trainings. If you are at a non-archdiocesan parish or school, or other non-participating location, you may still take these trainings, but they are not required.

If you have any questions, please contact Molly Hatfield at 262-255-6906 or mhatfield@catholicmutual.org, Chris Brown at 414-769-3325 or brownc@archmil.org, or Kim Kasten at 414-769-3326 or kastenk@archmil.org.

Annual Workers' Comp Data Sheet

If you have not already done so, please complete the [Workers' Comp Data Collection form](#). The due date was May 31.

Special Collections/Combined Collections Report

It is heartwarming to see the generosity of our Catholic faithful to others in need. Following is an update on the Special Collections for the current fiscal year, as of May 31, 2023. These funds are in addition to what is collected through the Combined Collections Program.

Special Collections	7/1/22-5/31/2023
Holy Land (Good Friday)	\$115,184.29
CRS Rice Bowl	\$76,621.59
Hurricane Relief	\$17,175.92
Ukraine Relief (Church in Central & Eastern Europe, restricted)	\$57,859.95
Archbishop's 2023 Lenten Collection	\$51,184.22

Combined Collections 2022 Collection Summary:

Catholic University - \$104,592.92

Black & Indian Mission - \$143,477.76

Catholic Campaign for Human Development, National Office - \$118,609.38

Catholic Campaign for Human Development, Local Needs - \$39,536.46

Catholic Communications, National Office - \$52,792.33

Catholic Communications, Local Needs - \$52,792.33

Religious Retirement Fund - \$260,160.63

Catholic Relief Services - \$186,604.59

Home Missions - \$155,902.49

Peter's Pence - \$104,366.76

World Mission - \$112,594.99

Church in Eastern Europe - \$112,250.76 (does not include the Ukraine relief collection)

Annual Safe Environment Compliance Documentation

Each year, all parishes and schools in the Archdiocese of Milwaukee complete a Safe Environment Compliance Report verifying their compliance with the USCCB Charter for the Protection of Children and Young People. The report covers the audit period from July 1, 2022, through June 30, 2023.

This annual Safe Environment Compliance Report documents in numerical and anecdotal data that the parish and/or school is meeting the requirements of the Charter and affirms that documentation is on file to verify this data. This report must have all of the necessary signatures indicated on the report, and a copy of the signed and completed report should be kept with your parish and/or school safe environment records.

An email was sent to your parish and school's on-site safe environment coordinators providing the template and instructions to complete your parish and/or school's annual safe environment compliance documentation. Please discuss with your safe environment coordinator to confirm that they received the email and have everything they need to complete the required documentation by July 1, 2023, in order to ensure that your site's report is submitted on time.

Templates and instructions for the Annual Safe Environment Compliance Documentation are also available here

(<https://www.archmil.org/offices/safeguarding/coordinators/compliance.htm>).

The report must be completed and returned to the Safe Environment Office by July 1, 2023, in one of three ways:

1. Email the scanned and signed PDF to nickolais@archmil.org or riveragarcia@archmil.org
2. **Mail the original signed PDF to
Safe Environment Office
3501 South Lake Drive
Milwaukee, WI 53235**
3. Fax the report to (414) 769-3408 with ATTN: Safe Environment Office.

If you have any questions or concerns, please contact the Safe Environment Office at 414-769-3449 or via email at nickolais@archmil.org.

Section 125 Plans and Pre-Tax Premium Withholding

All St. Raphael Health Plan (SRHP) Participating Employers must have a Section 125 plan in place in order to deduct employee health, dental and vision insurance premiums on a pre-tax basis. Without a Section 125 plan in place, IRS rules prohibit you from deducting insurance

premiums on a pre-tax basis, therefore you may only deduct insurance premiums on an after-tax basis. Your participation in SRHP does not automatically enroll you in a Section 125 plan.

There are some very robust Section 125 plans available. At a minimum, you must offer a Section 125 Premium Only Plan (“POP”) in order to deduct premiums from employees on a pre-tax basis.

You may choose to offer a full Section 125 Plan in which you offer Flexible Savings Accounts and other “cafeteria” plan options to your employees. A full plan also allows you to deduct premiums on a pre-tax basis.

Your Section 125 Plan documents need to be updated at least every 5 years. To ensure that you are compliant with Section 125:

- Locate your Section 125 document. If you cannot locate it in your office, it may be on file with your payroll provider.
- Check the date on this document. If it is older than 5 years, it needs to be updated with your provider.

If you can't locate your Section 125 documents, or you wish to change vendors for any reason, now is the time to set up a new plan. St. Raphael Health Plan has collaborated with Diversified Benefit Services (DBS) of Hartland to manage your Section 125 POP plan. If you wish to engage DBS, please call (800) 234-1229 and ask for client services or email them at clientservices@DBSBenefits.com. The initial set-up cost is \$385, and the annual renewal is \$160.

The Regular Fare

How Do I Make That Check Payable?

The [Check Issuing Guidelines](#) revised April 1, 2023.

Cyber Scams and Phishing

Scam Alert!

Cyber scams are on the rise. In the Archdiocese, here are a few of the scams that have been reported to us recently – don't fall for these!

- **Phishing scam targeting teachers.** An email is sent to the teacher by a scammer pretending to be the parish. “In appreciation for all of your hard work and dedication, please accept this gift card on behalf of the parish.” If you are not expecting a gift card, please do not click on the link or you may be opening your computer to security issues. Always confirm with your parish leadership before clicking a link that is too good to be true.
- **Vendors offering services that should be free.** We saw this with PPP loan forgiveness, but now vendors are trying to charge for Unique Entity Identifier (UEI) renewal. Renewing UEI is a free process, please steer clear of vendors trying to charge for this.
- **Requests for wire transfer or ACH payment.** In this case, a pastor's email account was hacked and the request was coming from his correct email account. In cases of spoofing, the request may come from an email account that is very similar but not exactly the same as the one the imposter is pretending to be. Watch for indicators like sense of

urgency, use of bad grammar, or language that is not typical for the sender. Confirm with the sender directly to determine whether the request is real.

[Cyber Incident Reporting](#) is a useful, one page tool to keep handy. We recommend printing this and having it readily available to walk you through the appropriate reporting protocol in the event of a cyber incident. If you have a cyber incident, contact Catholic Mutual immediately at 262-255-6906.

Scam and Fraud Resources

[Federal Trade Commission Consumer Information](#)

[Consumer Affairs](#)

[Identity Theft Resource Center](#)

[USA.gov common scams and fraud](#)

[Clark Howard advice on scams and other fraud](#)

[Fraud.org](#)

BAAM Schedule

Meetings 9:00 a.m. – noon, at Our Lady of Lourdes, 3722 S. 58th Street, Milwaukee

2023 Upcoming Schedule

(Summer Hiatus)

September 21

Building Commission Schedule

Building Commission attendance is currently by appointment only. Contact [Jane Ore](#) (414-769-3340) for more information.

Catholic Mutual Corner/PIPIT

Catholic Mutual Group's coverages and policies apply only to those entities participating in the Participants' Indemnity Plan ("PIP" or "PIPIT").

Catholic Mutual Group publishes a quarterly on-line newsletter, [Catholic Mutual Connection](#), which focuses on timely loss prevention and safety topics. It is found on the [Catholic Mutual website](#) under *Newsletters*.

Information and forms specific to locations within the Archdiocese of Milwaukee are located on the [Catholic Mutual website](#). You must log in to access this information. The Archdiocese of Milwaukee username is *0065mil* and the password is *service*.

Questions about the Catholic Mutual Group website or specific articles in the newsletter can be directed to the Catholic Mutual Milwaukee Service Office at 262-255-6906.

PIPIT Mandatory Trainings – recertify annually

[Workplace Safety Training end user instructions](#). Read the [Workplace Safety Training Mandate](#).
[Cyber Security Training end user instructions](#). Read the [Cyber Security Training Mandate](#).

Church Unemployment Pay Program

[CUPP Website](#)

Church Unemployment Pay Program, Inc.
706 S. High Point Road, Unit 6
Madison, WI 53719
608-821-3027
cuppwi@madisondiocese.org

The Quarter Ahead

June 2023

- 1 – Final payments for assessment, and priest pension due for fiscal year
- 1 – Building Commission Meeting. Attendance by appointment only. Contact [Jane Ore](#) (414-769-3340)
- 15 – Priest compensation form due to employer
- 15 – Submit balanced budgets to [Parish & School Financial Consulting Office](#) for review
- 30 – Fiscal Year Ends
- 30 – Final payments for assessment, priest pension, and PIPIT due for fiscal year

July 2023

- 1 – Fiscal Year Begins
- 1 – Reminder to update payroll deductions for new insurance rates
- 1 – Safe Environment Annual Compliance Documentation due
- 31 – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 6/30
- Lay pension reports for April-June (2Q) distributed

August 2023

- Confidential Financial Statement forms available
- Lay pension information and payment for 2Q calendar year due
- 10 – Building Commission Meeting. Attendance by appointment only. Contact [Jane Ore](#) (414-769-3340)

September 2023

- 1 – First payment due on current year assessment based on Confidential Financial Statement
- 15 – Confidential Financial Statements due
- 30 – Quarter End
- Check [State of Wisconsin unclaimed property site](#)

Resources

- [IRS Form 8822-B for Change of Address or Responsible Party](#). Parishes and schools must use Form 8822-B to notify the Internal Revenue Service if there has been a change in responsible party. Therefore, any parish who has been assigned a new pastor or administrator should complete [Form 8822-B](#) within 60 days of the transition.

Reminder: Rectory Lease Template Available

If your parish provides housing to any priest, please be reminded that there must be a lease in place to document the arrangement. As a reminder, the Archdiocese now has a [template](#) available for priests living in a rectory. A few other reminders:

- The parish must charge the priest fair market value for the property they are renting. We recommend that the parish seek professional guidance to determine what the fair market value is. In addition, the IRS requires that the parish must have documentation to support how the rent amount was determined.
- All lease agreements must have proxy approval, including rectory rentals.
- **NEW!** The Archdiocese now has a [new template](#) available for **non-priests** living in a rectory.

[Employee Assistance Program](#)

The [Employee Assistance Program](#) (EAP) is a free service offered by the St. Raphael Health Plan (SRHP). We encourage all employers who offer SRHP benefits to share [this link](#) with their employees to access a detailed program brochure. You must be logged in to the [archmil.org](#) website to access this document. Benefits of the EAP program include no-cost short term mental health counseling, financial and legal advice, and many additional online resources to support the mental health and well-being of employees and their families. The EAP services are confidential; providers do not share information with employers. **This benefit is available to all employees, and their household members, of locations participating in the SRHP.** Employee enrollment in SRHP is not required to access EAP benefits, only employment at a participating location.

[Excel Tip](#)

Excel has many keyboard shortcuts available. Check this site for Excel hot keys!
[Keyboard shortcuts in Excel - Microsoft Support](#)

For more tips, check out [ExcelTips](#), a free, third party, email newsletter containing lots of tips on using Excel. Do you need an Excel tip or have one to share? [Let us know!](#)

[Contact Us](#)

parishfinance@archmil.org

Mailing address:

PO Box 070912

Milwaukee, WI 53207-0912

Katie Esterle, Director
Parish and School Financial Consulting
esterlek@archmil.org
414-769-3377

Denise Montpas, Parish Finance Consultant
Parish and School Financial Consulting
montpasd@archmil.org
414-769-3336

Michael Waddell, Parish Finance Consultant
Parish and School Financial Consulting
waddellm@archmil.org
414-769-3335

Chris Brown, Treasurer and CFO
Office for Financial Services

brownc@archmil.org

414-769-3325

Kim Kasten

Treasury Analyst

kastenk@archmil.org

414-769-3326

Samantha Wright

Administrative Assistant

wrights@archmil.org

414-769-3327

Bridget Fischer

Lay Pension Coordinator

fischerb@archmil.org

414-769-3317

Tom Frederickson

Parish and School Human Resources

fredericksont@archmil.org

414-769-3370

Maureen Wurster

HR and Benefits Administrator

wursterm@archmil.org

414-769-3423

Suzanne Nickolai

Safe Environment Program Manager

nickolais@archmil.org

414-769-3449

Donna Steffan

Priest Pension Billing

steffand@archmil.org

414-769-3318