

Funny you should ask...

*Newsletter from Parish & School Financial Consulting, Archdiocese of Milwaukee
March 5, 2017 --- volume 6, issue 1*

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

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

Featured Topics:

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Staffing Changes

On January 16, we welcomed Catherine Gryniewicz as the director of the Office for Parish & School Human Resources. She may be reached via email at gryniewicz@archmil.org or by phone at 414-769-3370.

Brian Ammerman left the Office for Parish and School Financial Consulting on February 3. We wish him well in his future endeavors.

At this time, we are working on long-range planning for the Financial Consulting office and determining the best course of action to provide the best service we can to the parishes and schools. If you need assistance from this office, please contact Katie Esterle at 414-769-3377 or esterlek@archmil.org. Katie is not in the office on Fridays.

Boiler Inspection Alert - Damarc

We have learned that, once again, Damarc Quality Inspection Services LLC has been contacting parishes, schools, and agencies in the Archdiocese of Milwaukee trying to set appointments to perform the state-required boiler inspection. **DO NOT SCHEDULE AN INSPECTION WITH DAMARC! DO NOT LET THEM INTO YOUR FACILITY TO INSPECT YOUR**

EQUIPMENT. THEY ARE NOT APPROVED BY CATHOLIC MUTUAL TO INSPECT YOUR BOILERS.

Travelers Boiler RE is the company who should inspect your boilers as part of the Archdiocese of Milwaukee Participants' Protected Self-Insurance Program. The boiler inspection service is an important part of your coverage and there is no separate charge for it. The boiler coverage and inspection service is included in the cost of the protected self-insurance program. Please contact Catholic Mutual's local office at 262-255-6906 if you have any questions about the coverage.

If you need to contact Travelers about a boiler inspection the contact information is:

Traveler's Boiler Engineering Hotline
Ph. 800-425-4119
Fx. 877-764-9535
E-mail: boilinsp@travelers.com

When you contact Travelers, identify yourself as a Catholic Mutual client in the Archdiocese of Milwaukee and then your specific parish/school/agency. Thank you.

St. Raphael Health Plan Open Enrollment

The St. Raphael Health Plan open enrollment is moving to an on-line enrollment process! Open enrollment begins April 3 and closes May 12.

To make facilitate on-line enrollment, Mandi Bottomley requires information from all participating locations. On Thursday, March 2, you received an email from Mandi with an Excel form attached. Complete the form – list each employee, regardless of whether or not they are enrolled in SRHP – and return it to Mandi no later than **Friday, March 17, 2017**. **Since this form contains confidential information, be sure to password protect the form before sending it to her. Email the password to her in a separate email.** If you are a St. Raphael Health Plan participating employer and your benefit administrator did not receive the March 2 email, please contact [Mandi](#) as soon as possible.

Of course, there is an exception to this rule...If you already partner with BAS for the ACA reporting services, you do not need to submit the aforementioned Excel form.

Benefit sessions have been expanded to include an introduction to this new process. Lisa McGinnis from BAS and Mandi will provide sessions at five different locations; please attend the session that works best for you.

Tuesday, April 4 10:00 am – 12:30 pm
Tuesday, April 4 2:00 pm – 4:30 pm

St. Patrick Parish, 107 Walworth St., Elkhorn
St. William Parish, 440 N. Moreland Blvd, Waukesha

Wednesday, April 5 10:00 am – 12:30 pm
Wednesday, April 5 2:00 pm – 4:30 pm

Holy Family Parish, 271 Fourth Street Way, Fond du Lac
Lumen Christi Parish, 2570 W. Mequon Rd., Mequon

At Archbishop Cousins Catholic Center:
Thursday, April 6 10:00 am – 1:00 pm
Thursday, April 6 1:00 pm - 3:30 pm

General Benefit Session with Online Enrollment Process
Benefits 101/Refresher

We look forward to seeing you at one of our sessions and presenting this new and exciting process to help bring us Together in Benefits!

Protected Self-Insurance Data Forms

Data forms for the workers compensation coverage will be emailed to you this week. You may also find the form at [this link](#). The due date is April 5, 2017. Please watch for the form and return it prior to the deadline.

Good Friday/Holy Land Collection

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.

Checks should be made payable to and mailed to:

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

CRS Rice Bowl Collection

This collection should be submitted on a single check and not combined with other items.

Checks should be made payable to and mailed to:

Archdiocese of Milwaukee
ATTN: Kathy Shine
PO Box 070912
Milwaukee, WI 53207-0912.

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 [Kathy Shine](#) at 414-758-2285 with any questions.

BAAM Schedule

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

2016-2017

March 15, 2017

April 5, 2017 – BAAM Retreat

May 17, 2017

Building Commission Schedule

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

2017

April 6

June 8

August 10

October 12

December 7

Catholic Mutual Connection

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

The Quarter Ahead

March 2017

- 1st – Third payment due on current year assessment
- 15th – BAAM meeting (Our Lady of Lourdes)
- 31st – Quarter End

April 2017

- 5th – BAAM retreat
- 5th - Participants' Protected Self-Insurance [data forms](#) due
- 6th - Building Commission Meeting. Attendance by appointment only. Contact [Linda King](#) (414-769-3340)
- 15th – Present budget to Finance Council for discussion and recommendation for approval
- 30th – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 3/31
- Lay pension reports for Jan-Mar (1Q) mailed

May 2017

- 15th – Submit deficit budget to Archdiocese for review (parishfinance@archmil.org)
- 17th – BAAM meeting (at Our Lady of Lourdes)
- Finance Committee to present balanced budget to Parish Council for review
- Health Insurance Open Enrollment information sent out in early May
- Priest assignments announced
- Lay pension information and payment for 1Q calendar year due

June 2017

- 1st – Final payments for assessment, property and liability insurance, and priest pension due for this fiscal year
- 8th - 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 – Fiscal Year Ends

Excel Tip

Need to have several workbooks open, but they are cluttering the tray? **View > Hide** - to hide an open workbook. This will leave the workbook open, but hidden from view. **View > Unhide** - to view a hidden workbook. You can save changes to a hidden file. If you don't unhide the file before you close it, it will be hidden the next time you open it. You may unhide the file at any time.

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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