

Funny

You Should Ask...



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

March 2021 --- volume 10, issue 1

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.

Featured Topics:

PIPIT Payments

Budget Information

Annual Workers' Comp Data Sheet

Status Animarum Filing Delayed

CRS Rice Bowl

The regular fare:

How Do I Make That Check Payable?

Cyber Scams and Phishing

BAAM Schedule

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Excel Tip

Contact Us

PIPIT

The invoices from the Participants' Indemnity Plan (PIPIT) were mailed on January 5. If you need a copy of the invoice, please contact [Kim Kasten](#).

We have been receiving a number of checks payable to Catholic Mutual, instead of PIPIT. Please verify that your vendor information for PIPIT is payable to PIPIT or Participants' Indemnity Plan, PO Box 070912, Milwaukee, WI 53207-0912.

Budget Information

Budgets are due to the [Parish & School Financial Consulting Office](#) by May 15 for deficit budgets; balanced budgets are due June 15.

Here are a few key items to assist you in the 2021-22 budgeting process:

- Assessment: Rate remains at 5% for revenue earned during 2020-21
- Priest Compensation Program: 2% increase to gross compensation, pension deduction and annual supplemental payment. The professional expense allowance will remain the same at \$6,859. The retreat allowance remains at \$480 and the continuing education allowance stays the same at \$1,000.
- St. Raphael Health Plan: Estimated 4% premium increase
- Participants' Indemnity Plan: Estimated 5% property & liability premium increase
- School Choice: State biennial budget is not yet final; prior year aid for each eligible choice student was \$8,300 for students in grades K-8, and \$8,946 for students in grades 9-12
- Church Unemployment Pay Program: administrative fees increasing to \$17.00 per employee.

Annual Workers' Comp Data Sheet

The annual Participants' Indemnity Plan [workers compensation data sheet](#) will be posted to the archmil website approximately April 19. **The due date for the completed forms is May 24, 2021.** An email with a link to the form will be sent the first week of May.

Please complete this form, even if you have no payroll to report. If your location did not have payroll last year, it is not presumed there is no payroll again this year.

Please verify now that you are on tagged in the Names listing for broadcast email. The distribution tags used for this email are Parish and School Business Managers/DAS, Bookkeepers, Pastors and Parish Administrators, and High School Principals.

Status Animarum Filing Delayed

From the Chancery Office:

With many parishes still working with more limited staff on site, and with the many challenges that parishes have so courageously faced this past year, we have made the decision to take one item off your agenda. The filing of the annual Status Animarum is being delayed. We will send notification when the filing will start and how to access the filing forms.

CRS Rice Bowl

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 and/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.

If you have checks directly payable to CRS, please mail those checks to:

Catholic Relief Services
ATTN: CRS Rice Bowl
P.O. Box 17090
Baltimore, Maryland 21297-0303

You should include the checks payable directly to CRS in your overall total on any reporting.

How Do I Make That Check Payable?

The [Check Issuing Guidelines](#) have been revised as of December 14, 2020.

Cyber Scams and Phishing

Contact [Dale Klein](#) (414-769-3440) in our Information Systems office if you need assistance or have any cyber security concerns.

[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 at 262-255-6906 immediately.

Scam and Fraud Resources

[Federal Trade Commission Consumer Information](#)

[Consumer Affairs](#)

[Identity Theft Resource Center](#)

[File a complaint with the Federal Trade Commission](#)

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

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

[Fraud.org](#)

BAAM Schedule

Meeting 9:00 – 12:00

2021

May 19, 2021 (virtual)

Building Commission Schedule

Building Commission attendance is currently by appointment only. In person meetings are suspended until further notice. Contact [Linda King](#) at 414-769-3340 for more information.

Upcoming Dates:

April 15, 2021

June 10, 2021

August 12, 2021

October 14, 2021

December 9, 2021

Catholic Mutual Corner

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*.

Catholic Mutual Group's coverages and policies apply only to those entities participating in the Participants' Indemnity Plan.

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.

The Quarter Ahead

March 2021

- 1 – Third payment due on current year assessment
- 1 – Deadline for filing PR-230, Property Tax Exemption Request to convert a property from taxable to tax exempt
- 17 – BAAM meeting - virtual
- 31 – Quarter End

April 2021

- 15 – Present budget to Finance Council for discussion and recommendation for approval
- 15 – Building Commission Meeting. Attendance by appointment only. Contact [Linda King](#) (414-769-3340)
- 19 - St. Raphael Health Plan Open Enrollment begins today through May 14
- 30 – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 3/31
- Lay pension reports for Jan-Mar (1Q) mailed

May 2021

- 5 – [PIP workers' compensation worksheets](#) emailed (form will be posted earlier)
- 15 – Submit deficit budget to [Parish & School Financial Consulting Office](#) for review
- 14 – St. Raphael Health Plan Open Enrollment ends today
- 19 – BAAM meeting
- 24 – PIP workers' compensation worksheet due
- Finance Committee to present balanced budget to Parish Council for review

June 2021

- 1 – Final payments for assessment, and priest pension due for fiscal year
- 10 - Building Commission Meeting. Attendance by appointment only. Contact [Linda King](#) (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

Excel Tip

What is the difference between clearing a cell and deleting a cell? When you want to remove the contents of a cell, you have a few options. You can use the **Clear tool** in the Editing group on the home tab ribbon, you can click on the cell(s) and hit the **Delete key**, or you can **Delete Cells**. The **Clear tool** gives you options to clear some or everything, (contents, format, comments and hyperlinks), but leave the cell in place. Using the **Delete key** to empty a cell is the same as *clearing contents* with the Clear tool, and will retain the placement of the cell, as well as the format and any comments for that cell. Using **Delete Cells** will delete the entire cell, and then shift the rest of the worksheet (you choose up, down, left, or right) to fill the gap left from the deleted cell(s).

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

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