



Biznotes

A newsletter for ADOM Business and Office
Administrative Staff

BIZNEWS

Welcome to BizNotes!

Published by the Archdiocese of Miami offices of Finance, Accounting / Payroll, and Human Resources, the purpose of BizNotes is to provide an easy-to-access, ongoing reference collection of news and information for archdiocesan personnel tasked with the business administration of our parishes, schools, and other entities.

Volume 2, Issue 8 is distributed to you in an electronic version, and will reside in the e-library along with the previous issues.

If you'd like to see a topic covered in a future issue, click on the link in the *Wish List Box* on page two. We are confident you'll find this publication beneficial in your everyday work.

Policy Corner

The Policy Corner in the last issue of BizNotes provided guidance for communicating the policy on absences during the days before and after a holiday. [Click here](#) for a BizBrief with additional clarification for schools.

Office of Accounting / Payroll

Year-End Guide

Year-end is already here! To ensure that you are doing everything required for payroll by the IRS for this tax year, please follow the 2018 Year-End Guide provided by Paylocity. [Click here to download.](#)



Forms W-2 for Terminated Employees

Paylocity will be printing all 2018 W-2 forms. Terminated employees who may have moved or are unable to get the printed form can get the electronic version themselves in Paylocity from their Self-Service Portal ([download handout here](#)). W-2s sent by the bookkeeper via e-mail must be protected by encryption or passwords due to the sensitive information in the form. To download the instructions with screenshots, [click here](#).

Office of Human Resources

Transamerica: New Hires, Percentage Changes, Auto-increase and Transferred Employees

A reminder that all new hires must register in Transamerica within 30 days of hire. Once they register, they can opt out by entering zero (0), or choose to participate by entering the percentage they would like to contribute. If the employee does not register within the first 30 days, the entity bookkeeper will receive an email notice from Angela Russo of the mandatory and automatic 3% deduction for that new hire. Per the stipulations of the Plan, the entity bookkeeper must enter that percentage manually in Paylocity; [click here](#) to view the guide on how to add the deduction.

Deduction Changes: Employees may make changes to their 403b deduction at any time and must do so themselves on the Transamerica Web site. Those processing payroll will need to enter changes in the employee's payroll setup manually, but only after receiving an email notification from Angela Russo specifically stating the change. [Click here](#) to see a sample of Angela's email notification of the changes.

Auto-increase: Employees who have opted for an auto-increase do not have to log in and change their percentage; however, the entity bookkeeper will have to enter the increase manually after receipt of the email notification from Angela.

Employees transferring to another ADOM entity: Employees who have been separated from the previous entity must show as "terminated" in Paylocity under the Company ID. Transamerica will not automatically know that an employee was terminated in one entity and hired in another; the system will just assume the employee is employed in two places.

For all employees: It is important that employees notify bookkeepers / HR persons of any changes they wish to make after going into their Transamerica account and entering the change themselves. Employees should give their bookkeepers / HR persons a printout of the change for the file, then enter the change after receiving the email notification from Angela. BizQ: When should the bookkeeper enter an employee's new 403(b) contribution percentage or percentage change into their payroll setup?

DID YOU KNOW?

Terminated employees can still have limited access to their Paylocity Self-Service Portal throughout the year and into the following year for tax purposes. [Click here](#) to learn how to enable or disable their access.

Office of Finance / Accounting

Tax Exemption

When reviewing vendors' invoices prior to payment, verify that Florida sales tax has not been charged because our entities are exempt from the payment of Florida sales tax. If a vendor has charged Florida sales tax, provide the vendor with your entity's Consumer's Certificate of Exemption ([click here to view an example](#)) and request that the vendor issue a credit for the Florida sales taxes charged. For example, if Florida sales tax has been charged on your Florida Power & Light invoice, phone FP&L customer service (number listed at the bottom of your FPL invoice) or phone 1-800-226-3545 to ask for your assigned representative, who will provide you with instructions as to how to submit your entity's Consumer's Certificate of Exemption.

Since the Consumer's Certificate of Exemption expires every five years, it is important to continually review all vendors' invoices for Florida sales tax because the certificate a vendor may have on file for your entity may have expired. BizQ: How often does the tax exemption certificate expire? If you need a copy of the certificate please email Yanel Koenitzer by clicking [here](#).

Office of Accounting / Payroll (continued)

Form W-2 for reporting Health Savings Account earnings

Box 12d of the W-2 will be populated with code W to report both employer AND employee contributions for the Health Savings Account, in one lump sum.

Employees with the HSA should be informed of the following pertinent tax forms:

Form 1099-SA, issued by Health Equity the first week of January. This form will report funds spent by the employee from the HSA.

Form 8889-SA, available on IRS.gov. This form should be filed by the employee to declare the amount contributed. Employees should enter amount from box 12d of the W-2.

Form 5498, issued by Health Equity in May 2019. This form reports the fair market value of the account and is NOT needed to file taxes. It is for recordkeeping only.

Wish List Box

What would you like to read in the next issue of BizNotes?

Click [here](#) to tell us.

ARE YOU IN FOR A SURPRISE?

Throughout the sections of the BizNotes, we have asked two BizQ questions. The first person to email the correct answers to [this email address](#) will win a \$25 gift card. The winner will be announced in the following issue of BizNotes.

BIZLITES:

- We have created two new Benefit Class codes: "Religious Order" for Religious Brothers and Sisters; and "FT TEMP" for temps working at least 30 hours/week and who may need an offer of coverage under ACA. The latter is for medical only and ineligible for the voluntary coverages, including dental and Davis vision.
- United Capital's CIO, Kara Murphy, published a new market commentary, [click here](#) to download it.
- New hires with benefit eligibility must complete the Health Plan Information Form; the completed form should be sent to Sugeily Trujillo via secure e-mail ([click here to access the site](#)), and she will create a profile that will allow the employee to register for health plan coverage and other benefits.
- Friendly reminder: Businessolver has a tech-support line that is available after business hours. Please call (877) 268-5129 or send an email to er@businessolver.com. Keep in mind that they will only be able to assist with technical issues, and not eligibility matters.

† "Therefore, gird up the loins of your mind, live soberly, and set your hopes completely on the grace to be brought to you at the revelation of Jesus Christ." [1 Peter 1: 13](#)

Office of Human Resources

Processing Employee Separations in Paylocity

After completing the Employee Separation Form ([click here to download](#)) the employment action must be reflected in Paylocity by changing the employee's profile to "Terminated User" on the employee's last day. However, the employee should have limited access for tax filing purposes during the following year. In order to help you process the separation of employment in Paylocity, we created a guide with a list of what needs to be done and screenshots to help you navigate through the software. [Click here to download the ADOM Employee Separation Guide](#).

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FMLA Tracking

Employees have a maximum of 480 hours each year and they must have worked 1250 hours in the previous 12 months to qualify for FMLA. Leave status must be entered in Paylocity in WebPay and WebTime in order for the leave to be recorded in BenefitSolver. It is very important to track every detail of the leave requests, approvals, and changes. In 2019 we will be hosting webinars to demonstrate how to track the FMLA in Paylocity. Stay tuned!