Archdiocese of Miami

BizNotes

A monthly newsletter for ADOM Business and Office Administrative Staff

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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. We hope you enjoy our BizLites and Did You Know? boxes of brief, yet crucial, information. We hope you find our *BizLink of the Month* useful.

Volume 1, Issue 10 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* at the top of page two. We are confident you'll find this publication beneficial in your everyday work.

BizLink of the Month

IRS is providing a variety of tax relief for those affected by the recent hurricanes. The information in the IRS website is also available in Spanish, and can be shared with those that may need the assistance.

Tax Relief for Natural Disaster Victims at https://www.irs.gov/newsroom/tax-relief-in-disaster-situations

A bonus link to help you in your roles:

Many answers to your 403b questions can be found in the **Transamerica Bookkeeper Administration Manual** Click here for an updated copy.

DID YOU KNOW?

If you are constantly checking off "Trust this computer" when you login to Paylocity, it may be related to the computer's IP Address. Please contact your entity's IT Support Staff for assistance. Also, every time you delete the cookies from your web browser all your saved usernames and passwords will be erased.

From the Office of Finance:

Natural Disaster Recovery Resources

Many organizations have established ways to help those affected by the recent hurricanes. In this section you will find links to help Floridians recover from Hurricane Irma.

The IRS has granted relief to participants of retirement plans in the qualifying areas affected by Hurricane Irma. Plan participants may qualify for a hardship distribution between September 4, 2017 through January 18, 2018 without having to suspend contributions (and hence getting the employer match!). Hardship withdrawals will remain subject to taxation (plus a 10% penalty if the participant is younger than 59.5 years of age). For more information, you may contact Dan Rodriguez or Wilmer Fernandez. To view the IRS announcement, click here.

Some banks are offering mortgage and credit card payment deferments to those affected by Hurricane Irma. To find out what your bank is doing, click here. For mortgage assistance, please click here.

The Federal Emergency Management Agency (FEMA) is now operating a Disaster Recovery Center in Miami-Dade County to assist Floridians recovering from Hurricane Irma. Representatives from multiple government agencies will be available at the center to answer questions and help Floridians apply for assistance.

Location: Kendall Campus Building K
11011 SW 104th Street, Miami, Florida 33176

Monday - Sunday, 8:00 a.m. to 8:00 p.m.

You may also register for FEMA assistance online at: www.DisasterAssistance.gov or by calling 800-621-3362.

If your pastor has decided to give relief monies to employees, please process this in payroll and use the NONTX code in Paylocity. You may add the earnings code by clicking on the employee's name in the payroll batch. For any questions, please email us.

BIZLITES:

- *Default Hours:* Entering default hours in Paylocity for all your employees will help process payroll in emergency cases, during the 1095C processing, and other important reports. You may enter the default hours for each employee by going to *Payroll Setup > Rates > [Effective Date] > Default Hours box*
- We encourage all employees to complete their Demographics, Dependents, and Emergency Contact Information in Paylocity's Self-Service Portal.
- *Adjusted Seniority Date:* If new employees have transferred from another entity (see handbook for "transfer") you will need to enter an adjusted seniority date under two tabs: **Work** and **Time Off**. For the time off accrual codes, you will need to check the "Override?" box and enter the seniority date in the "Length of Service Date" box.

†*"Let us not grow tired of doing good, for in due time we shall reap our harvest, if we do not give up".* Galatians 6:9

Office of Accounting/Payroll:

W2 Preview Available

On October 1, Paylocity sent a message to all Company Administrators notifying that you can now preview Forms W2 for 2017. Their suggestion is to compare the 2017 W2 to the previous year W2 to make sure it meets your expectations. Try to select employees with various types of earnings or deductions.

To preview to Forms W2:

- Go to the Reports/Analytics Menu and select the Quarter/Year End link
- This will display your Quarter/Year End reports
- Select the W-2 Preview link

Tip: What to search for in a W-2?

- Retirement Plan box MUST be checked.
- 403b contributions should be reflected on box 12a Code E
- Box 1 Wages – medical deductions

Office of Human Resources:

Train-the-Trainer Workshop: *How to Present the Employee Handbook Effectively* Wednesday, October 31, 8:30 to 11:00 A.M., Monsignor Edward Pace High School Innovation Center. (Breakfast provided by the school!)

Who should attend: Anyone tasked with presenting the Employee Handbook to your entities.

This session will provide participants with the content and language to frame the archdiocesan personnel administration guidelines in alignment with our organization mission and culture.

Let's face it, the Employee Handbook isn't the most inviting content for readers; moreover, the policies and guidelines contained therein are often viewed as restrictive and prohibitive.

On the contrary, our personnel guidelines are intended to provide a framework for fair practices in everything from salary and benefits to work environment, to standards of conduct and more. Our personnel policies and practices strengthen the structure that needs to be there in order for the mission to flourish.

Click here to register.

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REMINDER ON SEVERANCE PAY:

Severance pay is only offered to employees separating due to a reduction-in-force, and contingent upon the employee signing a separation and release agreement. This document needs to be issued by the Office of Human Resources. The stipulations and procedures in the document are written according to our archdiocesan policies and labor law.

403(b) deductions should not be taken on severance pay, and need to cease with the last paycheck for time worked and/or vacation payout. This means that you will need to enter the effective date of termination immediately upon the employee's separation.

Click here for the 403(b) section in Paylocity's payroll setup, and here to view a screen shot on how to process pay after the effective date of termination.

SAVE THE DATE

You are invited to our next Bookkeeper / HR Meeting on December 6, 2017, 9:00 A.M. to 4:00 P.M. in St. Martha's Parish Center, 9221 Biscayne Blvd. Miami Shores, Florida 33138. Topics include: latest Paylocity updates (Meryann and Janet will have just returned from the annual conference at Paylocity headquarters and have lots to share); upcoming changes in Health Plan / Benefits administration; review of ADOM procedures for processing new hires and separations; FMLA; and more. Please click here to register.

Wish List Box

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

Click here to tell us.