



Biznotes

A monthly 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. 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 11 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.

BizLink of the Month:

Did you know that employees have the option of choosing 403(b) investments that are environmentally and socially responsible?

Effective January 1, 2018, GuideStone Funds Equity Index will replace the Neuberger Socially Responsible Fund as an option for Plan participant 403(b) investments. Our United Capital advisors informed us that "GuideStone Funds utilizes an investment policy designed to support biblical values through the protection of the health, safety, and emotional well-being of those they serve." Although all of our funds must not derive revenues from companies engaged in missions contrary to our Catholic values, GuideStone Funds will not invest in companies that derive revenues from any of 10 criteria ([click here](#)).

Equally important for our Plan participants, the fund is performing well, with a robust investor return!

Find out more about GuideStone Funds at <https://www.guidestone.org/AboutUs/WhatWeStandFor/Morals>

Office of Accounting/Payroll: *Reminder*

Year-End important dates :

Dec. 22: Final 2017 W-2 Previews (Although Paylocity updates the W-2 previews on periodically, the bookkeeper may regenerate them often and at any time).

Dec. 29: Last day to process 2017 payroll

Jan. 5: Any 2017 payroll adjustments MUST be made prior to January 5. Any adjustments after that will be subject to amended returns. There are fees for amended returns.

Jan. 16: 4th Quarter annual tax returns available

Jan. 19: Tax Forms will be available on WebPay

Jan. 25: Tax forms will be delivered

Year-End Tips, Guides, and Checklists

- ◆ Review the Year-End Dashboard (Tools > Year End Dashboard) and check the "Errors" section.
- ◆ Retirement Plan box: Must be checked for benefits-eligible employees as well as for those contributing to their 403(b) Plan.
- ◆ For the 2017 Year-End Checklist [click here](#).
- ◆ We encourage you to provide your employees with the 2017 Year-End Checklist for Employees. This list will help with the details of all the year-end forms. [Click here](#) to download the checklist for employees.
- ◆ To ease the process of the reconciliation of the Forms W-2, please follow the steps in the W-2 Reconciliation Tips guide. [Click here](#) to download.
- ◆ Need help understanding Forms W-2? Paylocity created a W-2 Box Descriptions, as well as one for Employees! [Click here](#) to download the guide for bookkeepers. Download the guide for employees [here](#).

DID YOU KNOW?

The Help button in every Paylocity page will also show the reports connected to the page you have open. For example, if you click the Help button while on the Payroll Deductions page, you will be able to see the Reports relating to the Deductions by scrolling down to the bottom of the Help page.

BIZLITES:

- ◆ Going Paperless: Entities and Employees can choose to receive their forms electronically. For company setup go to: Company > Options > Payroll Printing & Delivery > Print Setup & Sort.
- ◆ Training: Paylocity's Administrator Training Documents has upgraded! You will find On-Demand Training, Instructor-Led training, New Client Resources and much more. In WebPay, go to Home > Administrator Training Documents .
- ◆ Transferred Employees: If an employee transfers to your entity, their adjusted seniority date* must be entered in two tabs, the *Work* tab and the *Time Off* tab. *Adjusted seniority dates may be entered if the employment was not interrupted for 30 days or more (45 days for school employees). Date of Hire is the date employee begins at the new entity.

† *"The Eucharist is a sacrifice of thanksgiving to the Father, a blessing by which the Church expresses her gratitude to God for all his benefits, for all that he has accomplished through creation, redemption, and sanctification."* [CCC 1360](#)

Health Plan / Benefits Office

Employee Life Events

The Member Status Change Form should be sent to the Health Plan / Benefits Office in a secure mode and must be used for **all** of the following reasons:

- ◆ Employee changes in work schedule (from part-time to regular part-time or vice versa), even if the employee has opted out of benefits.
- ◆ Employee changes in their home address
- ◆ Separations (all separations—voluntary or involuntary)
- ◆ Employee marital status change
- ◆ Employee dependent change
- ◆ Employee loses or gains coverage through spouse

Kindly remember that the Effective Date of Change is when the change first occurs. Your Health Plan bill will reflect the new amounts in the following month.

FRIENDLY REMINDER: BOOKKEEPER MEETING

Our next Bookkeeper / HR Meeting is 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, year end forms and practices; 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.

We hope everyone enjoys a peaceful and joyful Thanksgiving Day!

Office of Human Resources:

Job Titles

It is very important for all employees to have their job title entered in Paylocity. To do so, please click on the employee's Last Name and go to Work > Dept & Position > Supervisor / Position. Once you change the Position, the Job Title will generate automatically. We have a list of job titles available in Paylocity; [click here](#) to download.

Having the job titles in Paylocity will facilitate reporting for many purposes, including liability insurance. Also, the Office of Human Resources will be working on developing salary scales for non-instructional positions in the parishes and schools. We need your help in populating the job titles in order to proceed with this project.

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When Employees Exhaust Sick Time

Employees should be compensated from their sick-time hours bank for sick days.

If non-exempt employees do not have hours available in their time-off bank, their pay should be docked for time not worked. Paying sick time is not the same as docking pay. Docking pay reduces the amount of money in the paycheck. Sick time pays absences for medical reasons. As stated in the 2017 Employee Handbook, pg. 19:

"Sick leave may be used only for the illness of the employee or when it becomes necessary for an employee to care for a son, daughter, or spouse who is ill and unable to take care of him/herself. In addition, sick leave may be used when an employee requires time off for a medical appointment. [...]"

The procedure to follow when absent and other important guidelines are set forth in the discussion of absenteeism and tardiness in this handbook."

Exempt employees' compensation cannot be docked for sickness or disability. If an exempt employee excessively reports absent, FMLA or an ADA accommodation should be offered. If ineligible for either, a disciplinary warning may be issued. Page 31 of the 2017 ADOM Employee Handbook states the policy on Absenteeism.

Wish List Box

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

Click [here](#) to tell us.