

# Funny You Should Ask...



A NEWSLETTER FROM PARISH & SCHOOL FINANCIAL CONSULTING · ARCHDIOCESE of MILWAUKEE  
September 2021 --- volume 10, issue 3

*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:**

**Business Manager Meeting Materials (8/19/2021)**  
**Real Estate Taxes – Inquiries from Milwaukee Assessor**  
**COVID-19 Financial Relief Program Updates**  
**Priest Compensation Reminders**  
**Church Unemployment Pay Program (CUPP)**  
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## **Business Manager Meeting Materials (8/19/2021)**

The Parish Finance Office hosted a Zoom meeting on Thursday, August 19, 2021 to provide business managers with a number of updates, including CFS template changes, PPP and other COVID-19 relief reminders, and an update on the Love One Another campaign. The Zoom recording and Power Point presentation has been posted on the [Archdiocesan website](#). Please contact the Parish Finance Office if you have any difficulties accessing the information.

## **Real Estate Taxes – Inquires from Milwaukee Assessor**

The Parish Finance Office has received a number of calls from parishes in Milwaukee regarding inquiries from the City of Milwaukee Assessor's Office. The City Assessor's Office is requesting inspections and tours of parish properties. The assessor's office is reviewing the properties listed on the PC220 to ensure they still meet the exemption requirements of Wisconsin State Statute 70.11. Parishes should cooperate with the Assessor's office to avoid a partial or complete loss of the exemption. If the Assessor's office has requested a tour of your parish property or is requesting documents supporting your exemption, please contact [Katie Esterle](#).

## **COVID-19 Financial Relief Program Updates**

### **Employee Retention Tax Credit**

The Parish Finance Office continues to hear that parishes are confused about the Employee Retention Tax Credit (ERTC) and business managers believe their parish isn't eligible. Every parish should be eligible for the Employee Retention Tax Credit due to the Wisconsin Safer at Home Order that went into effect on March 17, 2020. If your parish hasn't applied for the credit or believes they aren't eligible, please contact [Katie Esterle](#) in the Parish Finance Office (414-769-3377) to determine what your parish's credit should be and also to discuss next steps.

Additional ERTC Resources:

[Employee Retention Tax Credit IRS FAQ](#)  
[ERTC Zoom Meeting from February 24, 2021](#)

### **Emergency Paid Sick Leave (EPSL)**

Parish & School Human Resources and the Parish Finance Office recently sponsored a zoom meeting to discuss EPSL under the American Rescue Plan Act (ARPA). Agatha Raynor, attorney from Crivello Carlson S.C., presented information on the EPSL and discussed some of the pros and cons for employers to consider when offering this optional program to employees. Contact [Jenny Moyer](#) with any questions on EPSL.

### **Wisconsin EANS Program – Upcoming Deadline**

Schools who applied for and received funds available under the EANS program have until September 30, 2021 to submit for a Past Reimbursement (which is an allowable reimbursement for purchases made between March 13, 2020 and June 1, 2021). Direct Services and Future Reimbursements are still eligible to be submitted, but prior approval is needed under either of these circumstances.

### **Other COVID-19 Related Materials**

[COVID-19 Relief Accounting Manual](#)  
[PPP-1 Forgiveness Proxy Request Template](#)  
[PPP-2 Loan Acceptance Proxy Request Template](#)  
[PPP-2 Forgiveness Proxy Request Template](#)  
[Wisconsin EANS Program](#)

## **Priest Compensation Reminders and Tips**

- A completed priest compensation workbook should be signed by both the priest and a representative from the parish (preferably a Trustee). The signed workbook documents should be kept with your employee records in a secure location.

- Priests are considered self-employed for Social Security and Medicare purposes. In other words, the parish should not pay FICA taxes for the priest. Parishes should contact their payroll provider to ensure that priests are properly set up in the system as FICA tax exempt clergy.
- In most cases, priests who are part of a religious order should not be paid via payroll. Instead, the parish should pay their religious order outside of the payroll process.
- Priests who live in the parish rectory (church provided housing) should be charged market value for the property they are living in. This should be documented through a rental agreement. The rent that the parish receives should be recorded as rental income in the parish financials.
- Priests who do not live in a rectory should fill out the Priest Compensation Workbook using their documented housing expenses for whatever their living arrangement is.
- Priests may only claim one residence for housing purposes, even if they sometimes stay or sleep at a different location. This is in accordance with the IRS Code Sec. 107 which notes that clergy may have a “home” not “homes.”
- If you have any questions, please do not hesitate to contact the Parish Finance Office.

## **Church Unemployment Pay Program**

### **New On-line Application**

All claims must be filed on-line at the new [CUPP web-site](#). Eligible former employees must use this online portal to apply for CUPP unemployment benefits.

### **Discard All Paper Applications for CUPP Unemployment Benefits**

Any Program brochures dated prior to June 2021 (06/21) should be discarded. Instead of utilizing brochures, it is recommend that you direct all inquiries and potential applicants to <https://cuppwi.org/>, as the website maintain the most up-to-date Program information. The Program will be phasing out the current brochure altogether in the coming months.

### **New Resources**

Catholic employers can also find great new resources at the new [CUPP web-site](#), including a first-ever Program handbook and poster. The poster may be displayed onsite and used in lieu of the Program brochure to provide notice to employees of their potential eligibility for CUPP unemployment benefits.

Please also visit the [CUPP Support](#) page, which lists how each contracted provider serves CUPP employer participants. The [Support](#) page also lists contact information for each CUPP service provider. For employees with questions, use the “Frequently Asked Questions” at the [CUPP website](#) or use the contact links provided for the CUPP Informational Clearinghouse at the Wisconsin Catholic Conference.

Please note that the Wisconsin Catholic Conference and the CUPP information Clearinghouse have moved. These entities are now located at:

Church Unemployment Pay Program, Inc.  
 c/o Wisconsin Catholic Conference  
 106 E Doty St., Suite 300  
 Madison, WI 53703

## **New Administrative Fee Rate for 2021-2022**

CUPP employer participants are subject to a per employee annual fee, as determined by the CUPP Board, for the costs of Program administration. Since fiscal year 2012-2013, this fee has been \$15 per eligible employee as reported to the Program in an annual employer-submitted count. In response to increased administration costs, the CUPP Board is instituting a \$2 per employee increase in the administrative fee for fiscal year 2021-2022. The new annual administrative fee for employer participants is \$17 per eligible employee.

## **Safe Environment**

Starting this year, the Circle of Grace Curriculum will be the only acceptable training to be given to minors. The Circle of Grace Curriculum and resources are available to Safe Environment Coordinators, Principals, Teachers, Directors of Religious Education, Catechists and Youth Ministers on the [Archdiocesan website](#).

Just a reminder, applicants must pass a background check prior to being offered a position. After the applicant accepts the position, they must complete all Safe Environment requirements (training, code of ethics, etc.) in [CMG Connect](#) prior to the start date.

## ***The Regular Fare***

### **How Do I Make That Check Payable?**

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

### **Cyber Scams and Phishing**

[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, at Our Lady of Lourdes, 3722 S. 58<sup>th</sup> Street, Milwaukee

### **2021**

September 15

November 17

### **2022**

January 19 (Technology Conference, at OLOL)

March 16

May 18

## **Building Commission Schedule**

Building Commission attendance is currently by appointment only. In person meetings are suspended until further notice. Contact [Brad Berghouse](#) at 414-769-3360 for more information.

Upcoming Dates:

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**

### **September 2021**

- 1<sup>st</sup> – First payment due on current year assessment based on Confidential Financial Statement
- 15<sup>th</sup> – BAAM meeting
- 15<sup>th</sup> – Confidential Financial Statements due
- 23<sup>rd</sup> – Safe Environment event: mass for survivors of abuse, followed by presentation on “Más allá de la sobrevivencia” (Beyond Survival)
- 30<sup>th</sup> – Quarter End
- Priest pension bills for both priest and parish portions mailed
- Check unclaimed property site <https://www.revenue.wi.gov/ucp/index.html>

## October 2021

- 14<sup>th</sup> – Building Commission Meeting. Attendance by appointment only. Contact [Brad Berghouse](#) at 414-769-3360
- 31<sup>st</sup> – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 9/30
- Lay pension reports for July-Sept (3Q) mailed

## November 2021

- Assessment bills for current fiscal year mailed
- Lay pension information and payment for 3Q calendar year due
- 17<sup>th</sup> – BAAM meeting

## December 2021

- 1<sup>st</sup> – Second payment due on current year assessment
- 9<sup>th</sup> – Building Commission Meeting. Attendance by appointment only. Contact [Brad Berghouse](#) at 414-769-3360
- 15<sup>th</sup> – Distribute budget information to staff and committees with budget responsibility
- 31<sup>st</sup> – Quarter End

## Resources

- [Church Unemployment Pay Program](#)
- [IRS Form 8822-B for Change of Address or Responsible Party](#). Parishes and schools must use Form 8822-B to notify the Internal Revenue Service if there has been a change in responsible party. Therefore, any parish who has been assigned a new pastor or administrator should complete [Form 8822-B](#) within 60 days of the transition.

## Excel Tip

Want to reference a specific location within your workbook, a file from the web, or your local network? Hyperlinks are here for you! To start, select the cell in which you want to insert the hyperlink. From the Insert tab on the ribbon, select Hyperlink and the Insert Hyperlink dialog box will open. You have options to link to an existing file or web page, a place within the worksheet, an email address, or you can have it create a new document. In the *Text to display* box, you can either type in what you want the link to say in the cell, or it will display whatever text is in the cell. The *Look in* box is for links to items within your network or computer (this will populate the *Address* box for you). If you are linking to a web page, the URL must go into the *Address* box (in this case, the *Look in* box is not relevant). It is most accurate to copy the URL from your browser while the web page is open, but you also have the option to browse the web from the dialog box. Keep in mind that if you are sending the workbook to someone outside of your organization/network, they will not be able to open a document from your network. Once you have completed the hyperlink, you can edit it by selecting the cell (don't click it, or you'll activate the link!) and choose Hyperlink just as above. From there you can modify the link, or remove it without disturbing the contents of the cell. The hyperlinks will remain in place if you save the worksheet as a pdf.

The dialog box is the same in Word, just highlight the text you want to make a hyperlink, right click, and select Hyperlink from the menu.

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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