



Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Thursday, October 2nd, 2025

Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Thursday, October 2nd, 2025
Holy Cross Church Hall
4112 East Genesee Street
Dewitt, N.Y. 13214

Agenda

9:00 AM Welcome & Prayer

Bishop Lucia

Plan for the Day

Tom O'Connor

► *Today's agenda*

9:15 AM Catholic Sun

Tami Scott & Mark Klenz

9:30 AM Diocesan Foundation

Beth Hoey

10:00 AM Risk Management

Brian McAuliffe

10:15 AM Payroll

Carol Rojek



Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Agenda ... Continued

- | | | |
|-----------------|--------------------------------------|---|
| 10:30 AM | Safe Environment | Jacqueline Bressette |
| 10:45 AM | Human Resources | Rosemary Smith & Taylor Wolfe |
| 11:00 AM | Information Technology | Justin Bartlett & Joelle Zarnowski |
| 11:30 PM | ----- Pizza & Salad ----- | |
| 12:00 PM | Parish Services | Tom O'Connor <ul style="list-style-type: none">▶ <i>6.30.25 Financials</i>▶ <i>Annual Pension Reports</i>▶ |
| 12:30 PM | Summation | |





PARISH BUSINESS ADMINISTRATORS MEETING — OCTOBER 2, 2025



Understanding the value of a diocesan newspaper

- ▶ Connection to the wider Diocese
- ▶ Faith formation and inspiration
- ▶ Coverage of local people, events
- ▶ Advocacy and awareness
- ▶ Trustworthy Catholic perspective



How can your parish office help promote subscriptions?



- ▶ Add information to bulletins
 - ▶ Remind parishioners at end of Mass
 - ▶ Offer complimentary copies
 - ▶ The Catholic Sun: Provide info in the paper on how to subscribe
 - ▶ The Catholic Sun: Provide blurbs to include in the bulletin or website
 - ▶ Add a separate insert inside bulletins
 - ▶ Unsure
-
- ▶ One parish offers annual envelopes for people to subscribe, and Father speaks about the importance of the Diocesan paper.

What kinds of coverage would your parish community like to see?



- ▶ Parish happenings
- ▶ All things volunteer and feel-good stories
- ▶ Sacramental announcements (Confirmations, Ordinations, etc.)
- ▶ Regional coverage
- ▶ Local stories that include a variety of parishes, not the same ones all the time
- ▶ History/Catholic Social Teaching/Social Justice
- ▶ Pope Leo IV
- ▶ Less Syracuse
- ▶ Catholic Q&A



Individual subscribers 2025

January	8,427
March	8,409
May	8,396
June	8,454
July	8,311
August	8,327
September	8,321

**# Registered
parishioners in
the Diocese:**
181,476

**Estimated # of
households:**
59,000

Loss of 106 subscribers from January to September.

We have a large potential market!

...So, how do we grow our audience?

- ▶ 26 issues for \$26
- ▶ Multiple-year discount (10% for two years, 20% for three years)
- ▶ Modernize website
- ▶ Parish Subscription Drive
- ▶ Priest Endorsement
- ▶ ... and so much more!



Does everyday news make you feel
BOXED IN?
Let the Good News set you free!



26 for \$26 in 2026
For just \$26, you'll receive 26 issues —that's only a dollar an issue.

As the official newspaper of the Roman Catholic Diocese of Syracuse, The Sun has been informing, educating, and evangelizing since 1892 — sharing Catholic news, views, and teachings that matter to our faith community.

By subscribing, you're also supporting our mission to continue spreading the Good News..

- ☐ Visit the CatholicSun.com
- ☐ Click Subscribe to see print and digital options
- ☐ Or call us at 315-422-8153

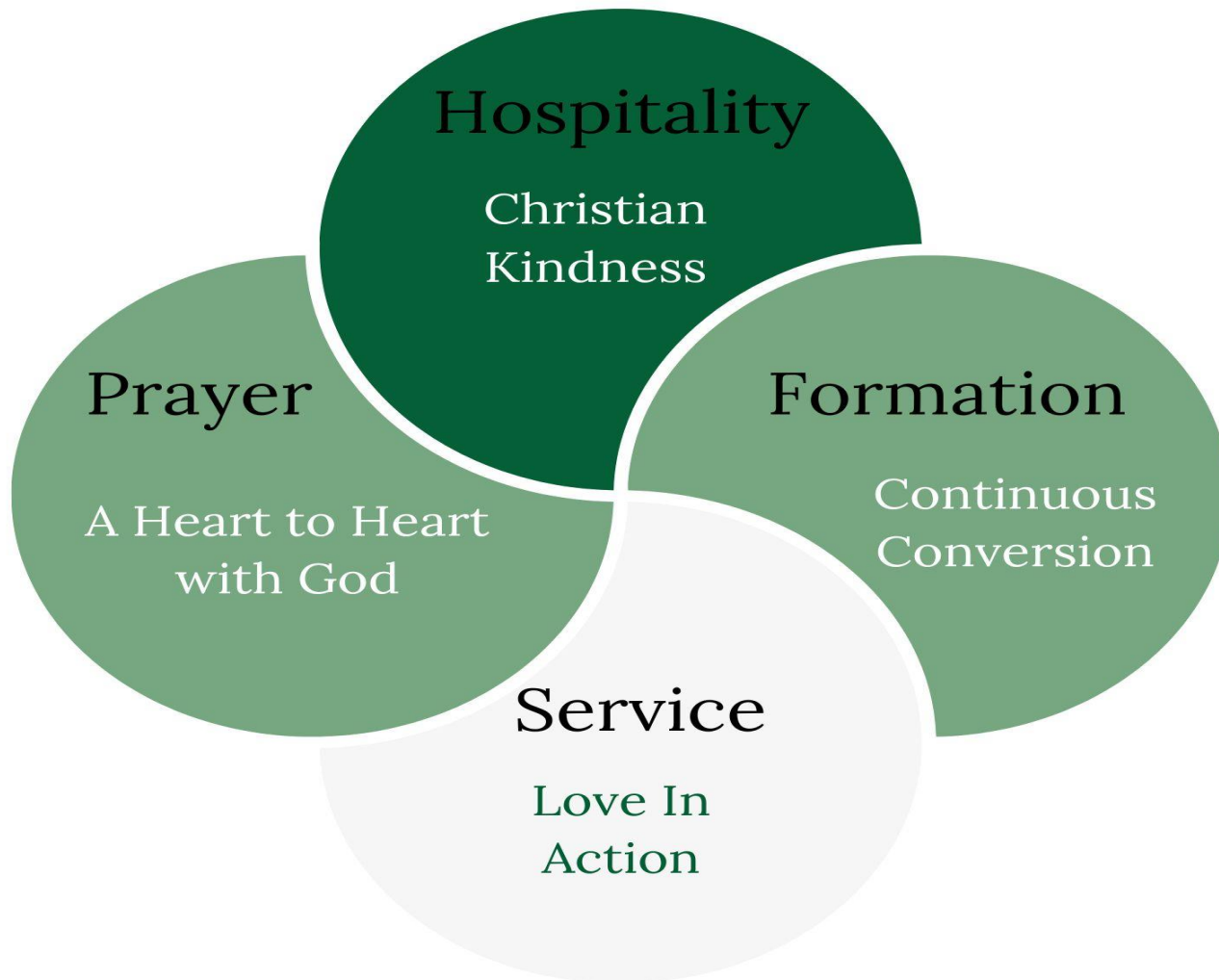
 **THE CATHOLIC SUN**

Diocesan Foundation

Beth Hoey

Stewardship

Stewardship is the response of a grateful heart for all the gifts bestowed on us by God. Stewardship is the willing return of the first measure of our time, talent, and treasure to God for all that He has done for us. The four pillars of stewardship are: hospitality, prayer, formation, and service.



Risk Management

- ▶ The Diocese of Syracuse Risk Management Office's mission is to enhance the safety and well being of all Diocesan parishes, schools, cemeteries, Catholic Charities and all of our ministries, through loss prevention, fair and timely claims handling, and effective management of all risks throughout the Diocese.
- ▶ Risk Management exists to serve the Diocese of Syracuse parishioners, volunteers, clergy and all employees throughout all 7 counties.
 - ▶ Team:
 - ▶ Brian McAuliffe, Sue Wuerthner and Bill Doran

Website Update

- ▶ Links to information on Risk Management main page

•Risk Management Menu

PROGRAM OVERVIEW	PROCEDURES	SAFETY	DIOCESAN GUIDELINES
FACILITIES MANAGEMENT	GUIDELINES FOR YOUTH PROGRAMS	HOLD HARMLESS AGREEMENTS	INSURANCE REQUIREMENTS
ONLINE TRAINING VIDEOS	OSHA	REPORT A CLAIM	SAFETY NEWSLETTERS
SCHOOL SAFETY	SECURITY GUIDELINES	SELF-INSPECTION LISTS	SPECIAL EVENTS INSURANCE
TRUSTEE RESOLUTIONS & BUILDING COMMISSION GUIDELINES	WORKERS' COMPENSATION		

Current Items

▶ *Parish Safety*

▶ *Awareness and Prevention:*

- ▶ *World is changing and seconds matter and save lives*

▶ Identifiable Ushers:

- ▶ Clearly visible and wear some kind of insignia identifying their role
- ▶ Visibility can be a deterrent to a possible threat
- ▶ **Usher-Staff Training** overview on the Risk Management Website in Security Guidelines section

▶ Perimeter Security:

- ▶ Before, during and after mass, early detection

▶ Cell Phones

- ▶ Team contact and calling 911

▶ Clearly Marked Exits

- ▶ Congregants know quick routes if a risk arises

▶ Locking Doors

- ▶ Use One Entrance if possible

▶ Website Information

- ▶ *Usher Training; Security Guidelines; Run Hide Fight* (September 2025 Safety Tip)

Reminders

▶ *Auto*

- ▶ *No Volunteers in Diocesan Vehicles*
 - ▶ *Volunteer Vehicle Requirements*
- ▶ *Sold Vehicles NYS FS-6T*

▶ *Property*

- ▶ *Trustee Resolutions*
 - ▶ *Donations*

Fall & Winter Maintenance

- ▶ Accessibility
 - ▶ Walkways, Parking Lots, Gutters
- ▶ Winter – Roof Snow Removal
- ▶ Vacant buildings (Guidelines on Risk Website under Facilities Management)
- ▶ Emergency Planning
- ▶ Tree Maintenance

Other Items

- ▶ Deferred Maintenance does not equal insurance coverage
 - ▶ Example - Mold
- ▶ Auto Accidents
 - ▶ **Please get a Phone number for other people involved**



See Something, Say Something

- ▶ Every incident debrief...thought he was off, saw that on the building, noticed people hanging around the back, etc.
- ▶ If it seems too good to be true, it most likely is...

If You Have Questions?

- Call me, email me, here to serve you and your parishes
 - Email: bmcauliffe@syrdio.org
 - Phone: 315-470-1494



Payroll Presentation

Holy Cross Church

Thursday, October 2, 2025

Year End, Calendars & Early Payrolls

- We have 5 holidays from October to December. These holidays all affect "A" Week payrolls this year.
- Depending how the holiday falls, we need to process payroll early – this applies to all 5 of the upcoming holidays.
- Payroll is working on 12/8 since it is a Monday and too close to the end of the year.
- We need 48 hours to ensure that direct deposit will update correctly for employee pay dates.
- We need everyone's cooperation with processing early payrolls to meet this direct deposit requirement.
- This will be essential in the month of December – we are processing 4 separate payroll runs in two weeks (A, B, A, B) - we normally do these 4 payrolls in four weeks!

2025 Year End

- We are going to send Clergy packets out this year the first week in October. This will give Father ample time to complete his necessary paperwork.
- Year End packets to parishes will go out around November 1st – this will include 2026 Payroll Schedules, new 2026 tax forms (if available), YE Newsletter and clergy information.
- Clergy housing updates this year for a priest living at your parish for the calendar 2025 year will be \$ 12,180.
- Minimum wage increases to \$16.00 this January. All January dated payrolls will reflect this change.

ADP TotalPay – Payroll Banking Feature

- An ADP feature that the Diocese uses – live payroll checks are written on an ADP Check and drawn on an ADP Bank Account.
- Reduces risk of stolen or misplaced checks
- Monthly reporting and reconciling done by ADP
- Eliminates Fraud Potential (becomes ADP's responsibility – not the client)
- Special pricing from ADP - \$.15 per employee.
- With 10 employees on payroll – a \$1.50 charge per payroll
- With 25 employees on payroll – a \$3.75 charge per payroll

ADP TotalPay – con't

- The following becomes ADP's responsibilities:
 - Stop Payments
 - Payment Inquiries
 - Voids
 - Reversals
 - Tracers and Check Copies
- The client sees three items on their bank reconciliation regarding payroll:
 - Taxes
 - Direct Deposit
 - ADP TotalPay for any live checks written on ADP's bank

Our 403B Benefit moved from Mutual of America to ADP

- With the change to ADP, we are seeing the amount for employee contributions, employer match and loan payments are coming out of your bank within two days of payroll. We are checking them each week – they are CORRECT!
- Payrolls that ran on August 28th & 29th were not sent to MOA. We held them for ADP to move to employees' accounts. All amounts were verified and balanced as well.
- The blackout period ends on October 15th.
- After this date employees can log into their ADP accounts to check their balances, verify beneficiary information, etc.
- Using WFN, employees can go to :
Myself – Benefits – Retirement Account

Key Changes with the 403b Change to ADP

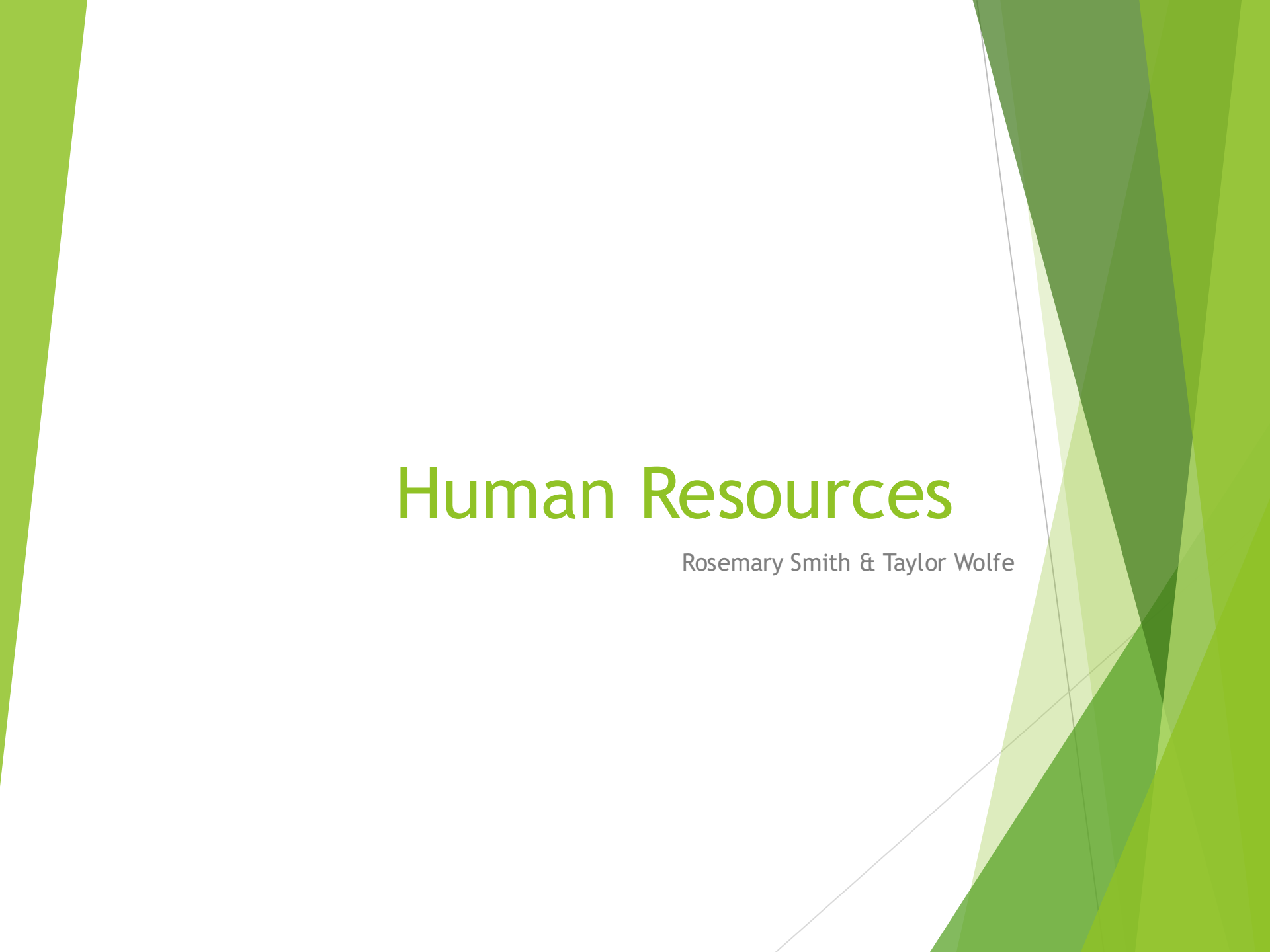
- Employees can make their own 403B deduction changes simply by accessing the portal to log on to their account.
- Employees who want to make a change and are not comfortable with the online method, they can call **1-800-695-7526** and have a customer service rep help them with the changes they want to make.
- There is no form available for 403B election changes with our move to ADP.
- Human Resources and the Payroll Department cannot make deduction changes for any employee. The change is made at ADP and then flows over to us for payroll.

Guidance on the One Big Beautiful Bill Act & Its Impact on Payroll

- The Act was signed into law on July 4, 2025.
- There are some key provisions effective retroactively as of January 1, 2025.
- The guidance covers the new tax deductions on certain tips and overtime pay.
- In August, the IRS announced that there would be **no changes** to tax withholding for 2025 and **no changes** to applicable IRS forms for 2025, including Form W-2, Forms 1099 and Form 941.
- The IRS instructs employers to continue using current procedures for withholding and reporting for Tax Year 2025.
- This will allow the IRS, businesses, and tax professionals sufficient time to implement changes required by the Act.

Safe Environment

Jacqueline Bressette

The background features abstract, overlapping green geometric shapes in various shades of lime and forest green, primarily concentrated on the right side and bottom of the frame. The main area is white.

Human Resources

Rosemary Smith & Taylor Wolfe

Agenda

- ▶ Sexual Harassment
- ▶ 403b – ADP Retirement Services
- ▶ Sun Life
- ▶ Handbook Updates
- ▶ Onboarding
- ▶ Covid Reminder

Sexual Harassment

- ▶ Your payroll team member will email you an employee listing/roster that you may use as a tracking sheet. You should receive this email **October 3rd**
- ▶ Employees can watch the video individually or in a group setting.
- ▶ Reminder, if an employee already watched the video for 2025, they do not need to watch it again.
- ▶ To ensure 100% completion in 2025; after the employees complete the training, please submit the completed form back to HR no later than **December 1st**
- ▶ [Sexual Harassment Prevention Training \(youtube.com\)](#)

ADP Retirement Services - 403b

- ▶ We have transitioned our 403b plan from Mutual of America to ADP Retirement Services!
- ▶ For employees who did not complete the transfer form, their account will remain with Mutual, but moving forward, contributions will be held with ADP Retirement Services.
- ▶ Employees can log into their ADP accounts and easily view their 403b information after the blackout period has lifted
 - ▶ Follow these steps to access account: Myself - Benefits - Retirement Account



YOUR JOURNEY TO RETIREMENT STARTS HERE...

Take the first step and enroll in your retirement plan



Your employer's retirement plan is a great way to save for retirement. Once you have met the eligibility requirements, there are several ways to enroll.



Text to Enroll

Text **Enroll Now** to **72408** to receive an enrollment link. Click on the link in the text message to enroll. If you are first time user, you will need to register using the "Register Now" button. The [Registration Guide](#) provides step-by-step instructions.

ADP Mobile Solutions App

Download the free ADP Mobile Solutions App from the app store to quickly access and manage your retirement plan account. The app allows you to make account changes, check balances, request investment changes, and receive important notifications about your retirement plan.

Download the app from the app store or scan the QR code with your camera or QR reader to download.



ADP Achieve Engagement Hub

You have access to retirement planning tools and resources, including videos.



YOUR JOURNEY TO RETIREMENT STARTS HERE



My.ADP.com

You can enroll through the website by using the information from the Welcome Letter you received in the mail. If you do not have your Welcome Letter, you can simply follow the prompts to register as a new user.

[Click here](#) or scan the QR code to start your enrollment.



Phone: 1-800-695-7526

You can complete your enrollment by speaking with an ADP Participant Services Team Representative. Representatives are available Monday through Friday, 8am to 9pm, Eastern Time.

Important Reminder: Designate a Beneficiary

Selecting a beneficiary is an important part of your overall financial wellness. It ensures the assets from your retirement savings account are distributed to the person, people, or entities you want it to go to after you pass away.

NOTE: If you are married and elect a non-spousal beneficiary, you will be prompted to complete and return a hard copy version of the Beneficiary Designation Form (**requiring spousal consent**).

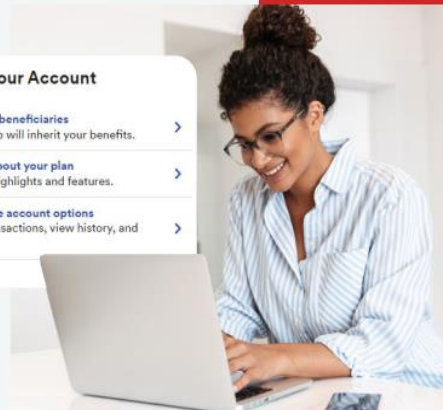
You can conveniently manage your beneficiary(ies) online at My.ADP.com or the ADP Mobile Solutions App. **Go to Retirement > Manage Your Account, Manage your beneficiaries.**

Manage Your Account

[Manage your beneficiaries](#)
Designate who will inherit your benefits. >

[Learn more about your plan](#)
Review plan highlights and features. >

[Discover more account options](#)
Complete transactions, view history, and more. >



Sun Life Updates

- ▶ New number to initiate claims: 833-576-3863
 - ▶ Monday - Friday 8am to 8pm
 - ▶ Employees will be connected to one dedicated representative, not multiple
 - ▶ Employees will call the number above to initiate their FMLA, STD, PFL.
- ▶ Employees can now submit their claim(s) online and view their claim(s) status!

DISABILITY, ABSENCE MANAGEMENT, PFML AND WORKPLACE ACCOMMODATION

How to submit your claim-Policy 976687

Sun Life provides easy access and steps to assist you with submitting your disability and absence claim¹ as well as your request for a workplace accommodation.

1. Submitting your absence claim or workplace accommodation online.

We have an easy to follow online tool that walks you through the claim submission process. To get started, sign in to your Sun Life account at www.sunlife.com/account and click on "Submit a claim."

Submitting your absence claim or workplace accommodation request by phone. Call our toll-free number, 833-576-3863 Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.



2. Review your acknowledgment packet.

After we receive your claim, we will send you an acknowledgment packet that will contain:

- Acknowledgment letter
- Certification form
- Instructions on next steps
- Rights and Responsibilities notice (absence only)



3. Send complete forms to us.

You will need to complete the forms provided in your acknowledgment packet. You can send them back to us using the methods below. Please be sure to include your name and claim number (e.g. NTN-12345).

Online: www.sunlife.com/account (absence only)

Email: myclaimdocuments@sunlife.com

Fax: 781-304-5599

Mail: Sun Life
P.O. Box 81915
Wellesley Hills, MA 02481-0011

Your case specialist will notify you if additional information, forms or certifications are required.



4. Claim management and review.

A case specialist will review your claim as soon as we receive all completed forms and paperwork.

For your absence claim:

- We will contact you with our claim decision as well as send a letter explaining the details of our decision.
- If you're taking an intermittent absence and you need additional time than originally approved, you need to re-certify your request.

For your workplace accommodation request:

- Your accommodation consultant will contact you to explain the process and next steps.



During the claim submission process, we will ask you for the following information:

- Why you're requesting an absence or workplace accommodation
- Whether your absence request is for a continuous, intermittent or reduced schedule
- Information about the treating healthcare provider(s)
- Dates expected to be absent from work, if applicable (estimated dates are ok)

For information about your claim, sign in to your Sun Life account at www.sunlife.com/account and click on "Track claim status" or call us at 833-576-3863 Monday through Friday, 8 a.m. to 8 p.m. ET.

When calling please reference your claim number.

¹ "Absence" includes Sun Life Absence and state paid family and medical leave administered by Sun Life.

Why create a Sun Life account?

Below are the different ways you can use your Sun Life account.



① **It's the easiest way to submit your claim!**

② **Upload claim documents** directly to your account—making it the fastest way to get your information to us.

③ **View your claim status, payment information, and other important information** about your claim in one spot.

④ **Report your return to work date** as well as time if you need to take an intermittent leave.

⑤ **Apply for Evidence of Insurability.** Our site leads you step by step through the process.

⑥ **Access Employee Assistance Program (EAP) resources, benefits information and more.**

⑦ **It's mobile friendly,** so you can do everything right from your smartphone or tablet!

Have Dental with us?

You can find your most recent dental visit history, view and print your personalized dental ID card, and search for an in-network dental provider.

Register for an account today at www.sunlife.com/createaccount



It's easy to submit your disability and absence claim online



We simplify online claims submission for various types of leave, including: sick leave, medical treatment, accident recovery, parental or bonding leave, pregnancy, family care, bereavement, jury duty.

24/7 easy online submission

Complete sections capturing:

- Information about you and reason for leave
- Employment details
- Time away from work needed
- Medical information

Personalized to you

The experience is personalized to you and your need for leave as each follow up question will be presented based on how you answered a preceding question.

Know what to expect next

- Review and confirm your responses
- Review a summary of next steps
- Note your claim number, which will be useful should you need to contact Sun Life
- Take advantage of online self-service functionality, such as taking action on outstanding requirements to progress the claim or viewing claims status and payment information.

Handbook Updates

We have made updates to our handbook effective on October 1, 2025. As a reminder, our handbook can easily be viewed on our website <https://www.syracusediocese.org/human-resources>

▶ Employee Worker Category Status Change

- ▶ If an employee has a status change from full time to part time, resulting in a change to the worker category that the employee is no longer eligible for vacation and/or personal, the employee will be paid out for any earned but unused vacation, sick time will remain in their sick back, and personal time will be forfeited.

▶ New York Paid Prenatal Leave

- ▶ In addition to sick time, employees are eligible for 20 hours of paid prenatal leave during any 52-week period. Paid prenatal leave can be used only by the employee receiving health care services. If an employee is using paid prenatal leave, that should be specified to their supervisor, and it needs to be coded as pregnancy sick time on their time sheet.

▶ Nursing Mothers

- ▶ Employers must provide 30 minutes of paid break time for employees to express breast milk for their nursing child when the employee reasonably needs to express breast milk. These lactation breaks are in addition to any regularly paid break or mealtime.

▶ Social Media

- ▶ Employees who wish to establish social media pages for their ministry, parish, group, or other diocesan entity must obtain permission from their supervisor (pastor, principal, administrator, or Director of Communications) and must comply with the guidelines set forth under the Technology Policy.

▶ Email Policy

- ▶ Email Policy - All emails sent with the intent of conducting work for the Diocese of Syracuse or affiliated entities must use an appropriate email address. Only authorized employees are permitted to access diocesan email accounts.

Onboarding

- ▶ Please try onboarding with your **new hires!**

- ▶ Locations who have used onboarding so far:
 - ▶ St Daniel's Church
 - ▶ Holy Cross Church
 - ▶ Our Lady of Sorrows Church
 - ▶ Diocese of Syracuse

- ▶ We will be reaching out to parishes in our Onondaga County to try onboarding with your new hires. If you are interested, please let us know!

- ▶ Items you will need for onboarding the new hires:
 - ▶ The HR set up form, pay notice, I9 form and identification(s)
 - ▶ The new hire will receive an email notification to complete onboarding through ADP.
 - ▶ Once the new hire inputs their personal information and selects submit, HR will receive a notification from ADP that their onboarding is complete. After, they will be added to our system for payroll
 - ▶ **Reminder: onboarding will not work for any current or past employee. Only brand-new employees to the diocese!**

Covid - Reminder

- ▶ Covid pay for NYS expired on 7/31/2025.
- ▶ What does this mean after 7/31?
 - ▶ If you have an employee that tests positive for Covid or they have Covid/flu like symptoms, they will need to use their sick time and Covid pay will not be issued to the employee. If the employee no longer has sick time, or vacation time, etc., they will need to take an unpaid day off if they are unable to work.

Questions?



IT and Communications

Joelle Zarnowski & Justin Bartlett



Communications Office

Communications Tools

- The Catholic Sun
- Diocesan Event Calendar
 - Submit your parish events online
- Wednesday Email
 - Submissions should be emailed to Danielle Cummings by Wednesday morning
- Thursday Email Newsletter (via Mailchimp)
- Catholic Conversations Podcast



Communications Office

Reminders & Opportunities

- NEW Bi-monthly Webinar Series
 - Begins next Wednesday, October 8th on Zoom, Noon – 1 PM
- NEW Bi-monthly Communications Office Hours
 - Next session is Wednesday, November 12th on Zoom, Noon – 1PM
- Social Media Email List
- Monthly Chancery to Parish Communications Email
- Online Parish Directory Update
 - Keep Parish Websites up-to-date (Mass times, Confession times, etc.)
 - Notify the Diocese if web address, phone, or mailing address changes.



Social Media Guidelines

Updates to the Employee Handbook

- Business accounts must be used. Personal accounts are prohibited.
- Page administrators must be at least 18 years old
 - Employee or volunteer
 - Must have current Safe Environment credentials

All social media must comply with current Safe Environment policies

- Connecting with children, young people, or vulnerable adults via personal accounts is prohibited
- Private messaging from these pages is prohibited
- Automatic messages with office contact information are recommended
- Photographs posted cannot tag personal accounts
- Written photo releases for minors are required before posting photos

**These social media guidelines are part of the Technology Policy in the Employee Handbook*

**Any social media/digital communication questions can be directed to
Joelle Zarnowski, Associate Director of Communications; 315-422-9061 or jzarnowski@syradio.org.**



Technology Policy Updates

Diocesan Email Policy Updates

- Only paid employees will receive an email with their name. Volunteer positions may receive access to an email assigned to the role of the volunteer
- **All emails sent with the intent of conducting work for the Diocese of Syracuse or affiliated entitled must use an appropriate email address.**
- Examples of acceptable accounts may include:
 - Any account ending with @syrdio.org (i.e. jsmith@syrdio.org or nameofparish@syrdio.org)
 - Any account with a parish or entity-associated domain that is approved and monitored by the Diocesan IT Department. (To confirm if your organization's domain falls under this category, please contact the IT Helpdesk at (315) 468-1231.
- Examples of email accounts that are no longer acceptable for diocesan, parish, or diocesan-affiliated business include:
 - Any personal account through Gmail, Hotmail, or other email services
 - An account created independently through a non-diocesan-affiliated email system using an individual parish domain
- If you are unsure if your email account falls under the acceptable accounts, or if you have concerns about transferring old emails, contacts, or other information from a non-approved address into a new address, please contact the IT Helpdesk at (315) 468-1231.



Technology Policy Updates (cont.)

Personal Property

- Personal computers and laptops are prohibited from being used to conduct business for a parish, school, or other diocesan entity unless inspected and approved by the IT department. Each location is responsible for providing a safe and secure computer for employees and volunteers to work from.



Firewalls

- Looking at vendors now
- Project expected to take place between January and June of 2026
- Looking to keep the yearly expense the same or less than what is currently paid



NinjaRMM

(remote monitoring and management)

What is it

- NinjaRMM is a tool that allows us to set up automatic Windows updates as well as other updates. It also allows us to remotely connect to computers to assist with issues.

Why

- NinjaRMM is needed so that we can quickly and efficiently support all of the diocesan locations with their computer and technology needs. We will also use it to provide up to date updates, ensuring a secure working environment for all employees.

When

- We will be traveling to each location across the diocese to install NinjaRMM on all computers that we will be supporting. While onsite doing the install we will also be conducting a technology assessment. We will gather information that will help us to better help and support your locations.

Cost

- The cost for NinjaRMM will be \$28.63 per machine per year. This breaks down to \$2.38 per machine per month.



New Printing Partnership

We have partnered with Electronics Business Products to assist us with our printing needs across the diocese.

As leases come up for renewal please feel free to reach out to Nick Mallaro at 315-491-0491

I have been able to negotiate a single rate for all of our locations across the diocese.

The cost for B/W will be .007 per page and Color will be .05 per page.

They use Ricoh printers which integrate with Docuware and Papercut/Mobility print





Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Thursday, October 2nd, 2025

Parish Services Update



Topics for Discussion

- Year End Financial Reporting
- Lay Pension Plan Valuation
- Employee Retention Credit Status



Year End Financial Reporting



Parish Services Update
Parish Business Administrators Meeting

6.30.25 Year End Financial Reporting Requirements

- Parish Financial Statements are required to be submitted by September 15th, two and a half months after the fiscal year end
- All parishes are required to submit the following:
 - Balance Sheet
 - Income Statement
 - Addendum to Annual Financial Statements
(Signed by Pastor, Trustees, and Finance Committee Chair)
 - Budget for the fiscal year ending June 30, 2026

***We have currently received 88 of an anticipated 117,
leaving 29 outstanding***



Parish Services Update
Parish Business Administrators Meeting

Financial Statement Submissions

Financial Statements that are still outstanding should be mailed or e-mailed as soon as possible to:

Parish Services
Diocese of Syracuse
240 East Onondaga Street
Syracuse, NY 13202

parishservices@syrdio.org



Parish Services Update

Parish Business Administrators Meeting

Questions?



Lay Pension Plan

June 30, 2025 Valuation



Parish Services Update

Parish Business Administrators Meeting

Lay Pension Plan Valuation

- Parishes are responsible for the pensions of their eligible current and former employees. This liability should be reflected in the parish financial statements
- Each Parish's liability is re-calculated annually by the plan actuaries and reports are forwarded to the entity
- Parishes should update their financial statements annually based on the plan actuaries' reports



Parish Services Update

Parish Business Administrators Meeting

Lay Pension Plan Valuation

The annual actuarial valuation as of June 30, 2025 was completed by BPAS Actuarial and Pension Services, LLC, the plan actuaries. Valuation reports have been distributed. The reports include:

- **Statement of Plan Assets and Liabilities at June 30, 2025**
- **Roster of Plan Participants**





Roman Catholic Diocese of Syracuse, New York
Lay Pension Plan

Statement of Plan Assets and Liabilities
at June 30, 2019

Pension Unit #100
Customer #701
Church of Sts. Mary & Joseph
Syracuse, NY

Plan Liabilities at June 30, 2019	\$ 411,205.43
Plan Assets at June 30, 2019	\$ 170,214.13
Unfunded Liabilities at June 30, 2019	<u>\$ (240,991.30)</u>

The Lay Pension Plan provisions, actuarial assumptions, and benefit calculation methods are contained in the **June 30, 2019 Year End Disclosure Report of the Roman Catholic Diocese of Syracuse, New York Pension Plan**. The report is available upon request from the Human Resources Department.

The annual funding requirement from the sponsoring entity is based on the amount needed to pay out the Unfunded Liability to plan retirees, discounted at a rate of 4.25% over a thirty year period. Accrual and payment of benefits and earnings on plan assets, are reviewed annually, as is the discount rate. The funding requirement is subject to adjustment periodically.

As of June 30, 2019, your parish had the following breakdown of plan participants:

Active Employees	2
Retired Employees in pay status	6
Beneficiaries of Former Employees in pay status	0
Former Employees with vested benefits, not in pay status	4
Total Plan Participants	<u>12</u>



Diocese of Syracuse

Lay Employee Pension Plan

Plan Year Ended June 30, 2019

Balances at June 30, 2019

Unit #	Pension Plan Provider	Status	Name	Liability	Plan Assets	Unfunded
100	Church of Sts. Mary & Joseph	A	Morgan, Frances	40,863.43	16,914.98	23,948.44
100	Church of Sts. Mary & Joseph	A	Smith, Robert	90,471.69	37,449.80	53,021.89
	Active Count	2				
100	Church of Sts. Mary & Joseph	R	English, Barry	32,597.23	13,493.28	19,103.95
100	Church of Sts. Mary & Joseph	R	Pocheski, Linda	69,554.02	28,791.15	40,762.87
100	Church of Sts. Mary & Joseph	R	Randall, Joyce	5,897.55	2,441.23	3,456.32
100	Church of Sts. Mary & Joseph	R	McPherson, Richard	75,276.30	31,159.83	44,116.47
100	Church of Sts. Mary & Joseph	R	Ingelato, Donna	8,635.43	3,574.54	5,060.88
100	Church of Sts. Mary & Joseph	R	Johnson, John	40,086.59	16,593.42	23,493.17
	Retired Count	6				
100	Church of Sts. Mary & Joseph	V	Young, Robert	10,574.66	4,377.27	6,197.39
100	Church of Sts. Mary & Joseph	V	Wagner, Vanessa	6,039.48	2,499.98	3,539.50
100	Church of Sts. Mary & Joseph	V	Tartaglia, Maria	9,471.69	3,920.71	5,550.99
100	Church of Sts. Mary & Joseph	V	Weld, Howard	21,737.36	8,997.95	12,739.41
	Vested Count	4				
	Total Count	12		411,205.43	170,214.13	41.4%
		0				
A	Active					
B	Beneficiary					
Y	Beneficiary of a deceased participant that is not yet in pay status					
R	Retired					
V	Vested					
F	Frozen					

Parish Services Update

Parish Business Administrators Meeting

Updated Actuarial Valuation

- Record annual adjustment of liability
 - Adjust to balance on Actuarial Statement
 - Any change from 6.30.24 to 6.30.25 should be recorded as:

A/C# 220 Long Term Pension Liability	\$ XX,XXX.XX	
A/C# 746 Pension Expense		\$ XX,XXX.XX



Parish Services Update

Parish Business Administrators Meeting

Questions?



Employee Retention Credit Status



Parish Services Update
Parish Business Administrators Meeting

Employee Retention Credit Activity to Date

- The ERC program began as an effort to help businesses during the pandemic, but as time went on, IRS review confirmed concerns that there was an extremely high rate of invalid ERC claims.
- To counter the flood of invalid claims, the IRS announced last fall a moratorium on processing claims submitted after Sept. 14, 2023, to give the agency time to digitize information on the large study group of ERC claims.



Parish Services Update

Parish Business Administrators Meeting

Most Recent IRS Communications

- On August 8th, 2024, the IRS announced it had sent out 28,000 disallowance letters to businesses whose claims showed a high risk of being incorrect.
- The IRS has also identified 50,000 valid ERC claims and is quickly moving them into the pipeline for payment processing in coming weeks.
- The IRS projected payments would begin in September with additional payments going out subsequently.
- The IRS anticipates adding another large block of additional low-risk claims for processing and payment in the fall.



Parish Services Update

Parish Business Administrators Meeting

Questions?





THANK
YOU