

Diocese of  
Winona-Rochester

## FINANCE TIMES

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FALL 2020

For Parishes, Schools and Cemeteries throughout the Diocese of Winona-Rochester

### From the Desk of the Finance Officer

Andrew D. Brannon, CPA, Chief Operating & Financial Officer • [abrannon@dowr.org](mailto:abrannon@dowr.org)

Hello Everyone,

In March, what we thought would be a brief halt to our COVID-19 day-to-day lives is dragging into a serious long-term interruption. Let me express my gratitude to each of you for your commitment to your essential duty of helping your parishes survive this pandemic. In late August, Bishop Quinn asked me to write an article for the September Courier to let the Diocese know how our parishes were faring. The article is not doom and gloom. It recaps the tremendous financial support of parish members across the Diocese. In re-reading the published article, my thoughts turned to your vital role in parish administration. In case you haven't read the original article, I'm reprinting it within this column. It celebrates how, in difficult times, so many people have come together to further the mission of our precious church.



#### Article for: The Courier (Sept. Edition)

Author: Andrew D. Brannon

In times of uncertainty, it is easy to lose the clarity of what Jesus commanded us to do, "Go, therefore, and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, teaching them to observe all that I have commanded you. And behold, I am with you always, until the end of the age." (Matthew 28: 19-20)

Early on, the COVID-19 crisis deflected our focus from our mission as Catholics. The public celebration of Mass was suspended, and our schools and faith formation classes switched to distance learning. Even the celebration of sacraments such as First Communion, Confirmation and Diaconate ordinations were postponed. In the interest of public health, our nation's bishops responded to this crisis with numerous safety measures.

As we navigated the beginning of the COVID-19 pandemic, the change to our daily activity caused each of us to question how we would get through this crisis. How long will it last? What does this mean for our families, our churches, our towns, cities, and our country?

As the Chief Financial Officer of the Diocese, the number one question I received was, "With this pause in church life, how are our parishes, our pastors and our lay employees going to financially survive?" I'm happy to report that through your personal generosity, our parishes are surviving, and in many ways even thriving in new ways. To put things in perspective, your support through parish offertory giving has been uplifting, given the situation that we now face. In comparing parish giving between 2019 and 2020 for the months since COVID-19 hit, support in March and April dropped approximately 20%. This was not unexpected since those were the months that Mass was suspended. Additionally, parishes that did not offer online giving began to put that choice in place. By May, support was down 8.8% and in June, support was down only 4.0%. Despite the physical separation caused by this virus, you have not abandoned our parishes or our mission.

Here are some ways that our pastors, our lay staff, and you, our parishioners, have navigated the turbulence of this COVID-19 crisis. Parishes immediately began to put in place ways for people to work and communicate remotely. We emphasized that missionary discipleship will continue, just in a different way. Praying for one another became more intentional, as did just reaching out to each other. Pastors creatively thought of new ways to offer sacramental ministry. Many became experts in live streaming of Masses. Through it all and with the myriad of nationally televised Masses available, parishioners said, "It was so good to see my priest celebrating the live streamed Mass."

Entities like the Catholic Foundation of Southern MN and Catholic Charities of Southern MN have been instrumental in aiding the most vulnerable among us. They are able to do this because of your generous support of those entities. As Bishop Quinn mentioned in his recent video, you have chosen "trust over fear, generosity over grasping, faith over doubt." I join him in thanking you for your steadfast commitment to the mission of Jesus Christ present and active in His Church.

Life will go on. We will get through this crisis, and because of your prayers and generosity, we will come through this stronger and with a more defined understanding of what Jesus asks of each of us as Missionary Disciples. Jesus reminds us above all that He will not abandon us in that mission when he says, "And behold, I am with you always, until the end of the age." (Matthew 28: 20)

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Photo by Mateus Campos Felipe, free from Unsplash

*Amen I say to you, all things whatever you ask for in prayer, believe that you shall receive, and it shall be done to you.*  
**Mark 11: 24**

Dear Colleagues,

Our environment has certainly changed since the pandemic began, as Josh Applegate’s photo from Fort Collins, CO, indicates (free photo from Unsplash).

You are in our thoughts and our prayers. We will continue to navigate this path together. We will keep our faith, be hopeful, be charitable toward others, and have the courage to be the best humans we can be.



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**Catholic Mutual...”CARES”**

Ryan Christianson • [rchristianson@catholicmutual.org](mailto:rchristianson@catholicmutual.org)

Catholic Mutual strives to provide our members with resources to assist in reducing claims. It is noted that bullying continues to be a concern – whether at school or when our youth are attending other events. In an effort to help address this concern, anti-bullying materials have been developed and the following tools are available to support your anti-bullying programs:

- Anti-Bullying Training (Elementary School): That’s Really Not OK
  - Short online training video geared towards children under 10 years of age
- Anti-Bullying Training (Middle School): Stand Up
  - Online training video for middle school audience to help them know what to do when they encounter bullying
- Anti-Bullying Training (High School): Will You Do What’s Right?
  - Online training video geared towards children in high school
- Anti-Bullying Training (Adults)
  - Online training video for parents, teachers, and other adults working with children on how to recognize, respond and prevent bullying

These online training videos are available free of charge and are housed on our CMG Connect platform. Go to [www.cmgconnect.org](http://www.cmgconnect.org). (See the instructions below if needed.)

In addition to our online training videos, there are a number of bullying resources available on our Catholic Mutual website. Go to [www.catholicmutual.org](http://www.catholicmutual.org), click on Member Login and enter Username **0095win** and Password **service**. Once logged in, select Risk Management Info and scroll to the Bullying Resources button under Schools.

## CMGConnect

1. Go to [www.CMGconnect.org/](http://www.CMGconnect.org/) and select your Diocese. Click “Go”.
2. **Previously had an account?** If you have done training in the past and had an account, you can use that same username and password to Sign In at the top right of the page. You do not need to fill in the account creation boxes.
 

Sign In Here
3. **New to training?** Create a new account by completing all the boxes. This includes address, primary parish, and how you participate at your parish or school. If you have questions please contact your parish/school coordinator.
4. Your main learning dashboard will show you all of the requirements and optional training curriculums that have been customized for your role.
5. Locate the **Bullying-Adult Training video**, then click ‘Start Curriculum’.

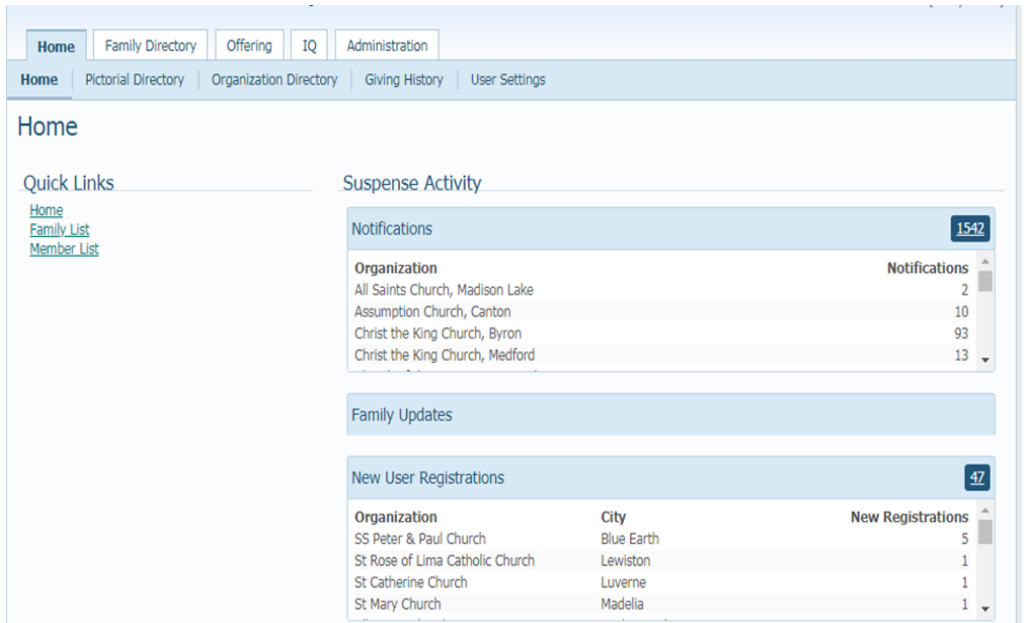
[www.CMGconnect.org/](http://www.CMGconnect.org/)

**ParishSOFT Family Suite**

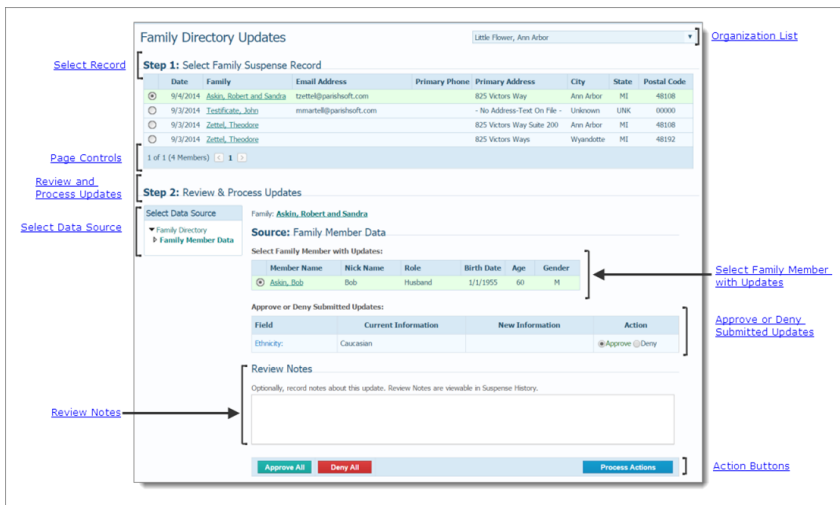
**Suspense Activity:** What exactly are we to do with the suspense activity notifications on the home screen in Family Suite? In many cases, I think they just sit there and accumulate but now is a great time to look at them. In the screen shot below, you see there are three types, Notifications, Family Updates and New User Registrations. There is also a fourth category for those of you using the Faith Formation/Religious Education module which is Pending Student Registrations.

**Notifications** are exactly that. They just let you know when something has been changed that affects someone in your database. This is most often the case when you have added someone as an unregistered member to record a contribution they made to your parish. If they moved and the home parish updates their address, you receive a notification letting you know that.

It may also indicate a change in registration status from one parish to the other. As you can see in the screen shot to the right, there are currently 1542 unread notifications across the Diocese. Take a few moments and take a look at your notifications and either mark them as read or delete them. I'd love to see that number drop!



**Family Updates** are updates submitted by your My Own Church users. There aren't any in my screen shot but this is an example of what you might see. These changes do not become final until you review them and approve them.



**New User Registrations** are messages letting you know that someone has signed up to view their information through My Own Church. My Own Church gives them access to their own family record in Family Suite so they are able to view their contribution history, update their information and add missing information. In order for them to be able to log into My Own Church, you need to approve their on-line registration. Once you approve it, they are sent their My Own Church temporary password and are able to log in. Please check these so they aren't out there hanging, waiting for approval. In some cases, it could be that someone was registering and inadvertently picked the wrong parish from the drop-down list. If that is the case, you are able to delete their registration and get it off the list. I just did my part for 22 of the 47 shown above. They were people registering for schools within the Diocese that do not have separate ParishSOFT licenses so they have no data.

## Office of Finance: Parish Accounting Support (continued)

Cindy Olson • [parishsupport@dowr.org](mailto:parishsupport@dowr.org)

The screenshot shows the 'User Registrations' wizard interface. Annotations on the left side point to various UI elements: 'Select Data Source' points to the top navigation tabs; 'Flexible and Responsive Columns' points to the table headers; 'User Registrations Grid' points to the table body; and 'Page Controls' points to the bottom status bar. On the right side, 'Organization List' points to the dropdown menu, 'Wizard Tabs' points to the navigation tabs, 'Action Buttons' points to the 'Delete' and 'Deny' icons, and 'Navigation Links' points to the 'Search Family Directory' link at the bottom.

Registered	Username	Full Name	Current Email	Primary Ph.	City	Postal
<input type="radio"/>	3/8/2012	SWare	Ware, Shelley	shelley36@aol.com	Ann Arbor	48108
<input type="radio"/>	3/8/2013	karln	Metzger, Karl	kmetzger@parishsoft.com		48116
<input type="radio"/>	11/22/2013	jpanshoft	Pisant, Jonathan	jpisant@parishsoft.com	7144186482	Casa Blanca 92594
<input type="radio"/>	1/9/2014	MaryLou	Lou, Mary	mlou@parishsoft.com	Ann Arbor	48108
<input type="radio"/>	9/5/2014	jrettel	Zettel, Jacob	jrettel@parishsoft.com	734-205-1000	Ann Arbor 48108

## ParishSOFT Accounting

### Vendor Cleanup:

Let's make our vendor records helpful to us as we enter bills. There are a number of features that you may not know about or you may not be using.

**General Information**—Make sure you put in account numbers, terms and other data on the general tab. The system uses much of this information when you enter a bill. Tip: For the Diocese of Winona-Rochester, abbreviate the Vendor name to: DOW-R Employee Benefits leaving the name spelled out for the check name. This will make it easier to differentiate the bills for the diocese, employee benefits, self insurance from the check screen. Entering the payment terms allows the system to automatically set the due date when the invoice date is entered *and* the account number will print on the check stub.

Vendor Name:

Check Name:

Vendor Code:

Address:

Address 2:

City:

State:

Zip Code:

Country:

Account Number:

Terms:

Type:

Contact:

Phone Number:

Cell Phone:

Fax:

Email:

**Vendor Distributions** fill in the amounts and account numbers that are typically used for a vendor. You have the choice of entering percentages or amounts. The amount can be zero if you have multiple accounts that are used (such as the list of special collection accounts for the diocesan collections). Information on this screen is automatically entered in a new bill.

The screenshot shows the 'Vendor Distribution' screen for 'Diocese of Winona - Rochester Employee Benefits'. It features a 'Quick Find' search box on the right. The main area has tabs for 'General', 'Account Distribution', '1099/Checks', and 'Comment'. The 'Distribution Method' is set to 'Amount'. A table below shows three rows for distribution, each with a red 'X' in the first column, a number in the second, an account number in the third, and an amount in the fourth. The total amount is 0.00.

#	Account	Amount
1		
2		
3		

Total: 0.00

Submit

Office of Finance: Parish Accounting Support (continued)

Cindy Olson • [parishsupport@dowr.org](mailto:parishsupport@dowr.org)

**1099/Checks:** On this screen you would enter the Federal Tax ID # for your 1099 vendors. You are also able to put in the name to use on the 1099 (so if Dick’s Electric Company is using Richard’s social security number instead of a business tax ID number, you can put Richard’s name in the 1099 Name box so the ID # is easily matched up with the individual in the IRS database). You are also able to tell the system to only print one check for this vendor no matter how many invoices there are or to print individual checks for each invoice (for example, when printing checks made out to cash for parish festival prizes).

Taking a few moments to update and add information will make bill entry go faster for you later. You also have the ability to combine vendors if you have created duplicates in the past through Process, Other Processes and Merge Vendors. Is your vendor list out of control? Using Process, Other Processes and Inactivate Vendors, you are able to have the system inactivate vendors not used since a date in the past.

**User Options:** Under Set up, User Options, you are able to set your default accounts payable account, default bank accounts, default payroll account and preferred way of listing accounts and projects along with a few other options.

Check it out!

**Please Note:** The IRS has created a new form for 2020: a 1099-NEC. NEC stands for Non-Employee Compensation. The 1099-NEC will replace the 1099-MISC for payments.

## Special Collections

- Parishioners are often confused when writing out checks for Diocesan (or other) Special Collections. They write the check out to the parish, the cause, or sometimes the purpose of the cause, which can result in issues with the bank in depositing the checks. The Diocese is not able to accept any checks other than a parish check made payable to the Diocese of Winona-Rochester for these collections.
  - Please take the following steps to help us get the word out:
    1. Put notices in the bulletin telling parishioners to make these checks payable to the parish.
    2. If possible, put information right on the offering envelope stating "please make checks payable to \_\_\_\_\_" to help clear up any confusion.
    3. Instruct your counters to be vigilant and check to make sure all the checks they deposit are written out to the parish only.
    4. Call the members who send in checks written out incorrectly to thank them for their donation and ask for a replacement check made out to the parish – or – inform them that you will be mailing their check to the organization directly, but that will mean that the parish will not list the contribution on a contribution statement.
    5. If you accept contributions on-line, encourage members to use this method to contribute to all parish collections.
- Funds collected for any Special Collections should be submitted to the Diocesan Finance Office in a timely manner, usually within two months of the collection date. Our office is a pass-through, and getting the money to us in a timely fashion helps us in meeting the deadlines we have on our end to submit the monies to the organizations that depend on these collections.
- Baby Bottle/Catholic Charities collections must be sent directly to Catholic Charities and not the DOW-R. These collections are handled independently by Catholic Charities and are NOT handled by the Diocese.

Reprinted from Issue 10 (Spring 2018 edition), authored by Sandy Todd ([stodd@dowr.org](mailto:stodd@dowr.org)) and Cindy Olson ([parishsupport@dowr.org](mailto:parishsupport@dowr.org)), updated by Ann Ringlien ([aringlien@dowr.org](mailto:aringlien@dowr.org))

## Remittance and Special Collection Forms for 2020

Ann Ringlien • [aringlien@dowr.org](mailto:aringlien@dowr.org)

Please make sure you are using the correct remittance form when sending in checks for Special Collections.

The Special Collections and DOW-R Remittance Forms (PDF & Excel formats) can be found on the DOW-R website under 'Finance Office, Frequently Requested Topics' or go to <https://www.dowr.org/offices/finance/frequently-requested-topics.html>

## CMA Appeal Shortages

This is the first year the diocese has handled the billing for the Catholic Ministries Appeal shortfalls. Here is some information you need to know.

1. If a member donates to the parish to help pay for the short-fall, this gift is **assessable income**. Once the foundation closes the appeal year, any subsequent gifts are handled at the parish level and are assessed since they did not come in during the appeal year.
1. You need to show the donation on the donor's contribution statement (versus having the foundation handle the tax statement). Many of us have the Catholic Ministries Appeal fund in ParishSOFT Family Suite set up as non-tax deductible since the foundation handles the donations. You might need to set up an additional fund to handle any payments that come in after the appeal is closed.
1. Encourage members to give those extra gifts before the appeal ends so that the parish never has a shortfall!



"Can you work a little magic with these figures, In fact, can you make them disappear?"

## Office of Finance: Parish Accounting

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www.glasbergen.com



"It says on your résumé that you were created in God's image. Very impressive."



Photo by Ricardo Gomez Angel—free from Unsplash

### Hi, it's me!

Beth Buswell • [bbuswell@dowr.org](mailto:bbuswell@dowr.org)

While we're always glad to hear from you, sometimes it's hard to know who sent an email if there is no signature or there's just a first name. An easy way to make sure the receiver knows who sent a message is to create an automatic email 'signature'.

#### **In Outlook:**

- 1) Open a new message.
- 2) On the **Message** menu, select **Signature**.
- 3) Under **Select signature to edit**, click **New**, and type a name for the signature in the **New signature** dialog box.
- 4) Under **Edit signature**, compose your signature.
- 5) Click **Choose default signature** to choose your default signature, select an email account to associate with the signature, and to apply the signature to messages you reply to and/or messages you forward.

(**Hint:** You can get more creative if you create the signature block in **Word** and paste it into **Outlook**.)

**Note:** If you use **Microsoft Outlook** and **Outlook in Microsoft Office 365**, you need to create a signature in both. In both programs, there is an option to **Manually add your signature**.

#### **In Outlook.com:**

- 1) Sign in and select **Settings**, then go to **View all Outlook settings**.
- 2) Select **Mail**, and go to **Compose and reply**.
- 3) Under **Email signature**, type your signature. Formatting options are right there to modify the appearance of the signature.
- 4) There are check boxes for **Automatically include my signature on new messages I compose** and **Automatically include my signature on messages I forward or reply to**.

(**Note:** In **Outlook.com** you can only have one signature per account.)

#### **In Gmail:**

- 1) Open Gmail.
- 2) In the upper-right corner of the **Mail** window, Click the **Gear** icon and then click **Settings**.
- 3) On the **General** page, go down to the **Signature** section and enter your signature in the box.
- 4) You can format your signature with the options provided. There are also **Signature default** choices there to so you can decide when your signature is added to your messages.

I know I may have missed the program you're currently using for email. If you need help or have questions, please call me and we can work though it together: **507-858-1241**.