

FINANCE OFFICE UPDATE – March 6, 2026

Business Manager News...Resources, Information, Updates and Training Opportunities to help you!

EMPOWER 401(k)

Recording of March 2026 Empower Retirement 401k for Business Managers is now available on our website:

[Business Manager Resource - Archdiocese of Cincinnati](#)

Excerpt from the session: Beneficiaries' Importance:

- Crucial to directly designate who receives funds upon death
- Missing beneficiary: creates a time delay, set up of estate, attorney fees

If you would like to request a report of your employees that are missing beneficiaries in Empower Retirement, please send an email to mjones@catholicaoc.org with Subject Line containing your Paylocity ID# /Missing Beneficiary Request.

PAYLOCITY VIRTUAL TRAINING

Training for Business Managers

Name	Virtual Paylocity Day
Training Date	April 15, 2026
Training Time	9:00 am – 1:00 pm
Facilitator	Antoinette Allen
Registration Link	https://paylocity.zoom.us/webinar/register/WN_iRQLK8ASR6qPkZiYkbsKTA

Next Steps:

- Click the Registration Link above and complete the registration process.
 - You will receive an email invitation from Zoom with a link to the training. This invite can be placed on your calendar.
- Be sure to verify the time zone for your session as it typically defaults to Central Time.
- If others join you in the training, simply forward this email to them so they can register. It is important that each participant completes their own registration.
 - Once registered, they will each receive an email invite from Zoom with a link to the training.
- If you need to cancel your training, please email me with as much notice as possible.
- If you do not receive the email invitation or have questions, feel free to reach out to Mary Jones

Training Day:

- On the designated date and time of training, each participant should simply click on the "Join Zoom Meeting" link that is in the email invite you received from Zoom and "enjoy your training!"

Agenda will be shared on a future date. Questions: contact Mary Jones mjones@catholicaoc.org.

PAYLOCITY POINTERS

Benefit Class Code

When rehiring an employee or changing an employee's employment type in Paylocity, be sure to update the **benefit class code** using the **same effective date**. This ensures the information flows correctly to **MyEnroll** and **Empower**.

The **rehire date**, **position date**, and **benefit class code effective date** must all match.

For questions, contact Cheryl Engel cengel@catholicaoc.org.

Lay Employee Classification Grid

Refer to and keep handy the attached *Lay Employee Classification Grid* when entering any new hire employee **OR changing an employment type** in the Paylocity system. This is your "cheat sheet" to ensure that your employee is set up for the correct benefits, including 401k.

One common error is "Tea LT Sub" In this instance, LT stands for Long Term, and the Long-Term Substitute Teacher is Benefit Eligible. Other employment types with the LT stand for Less Than the number of associated hours. Example: Tea LT 12h = teacher working less than 12 classroom hours.

For clarification, questions or individual training, contact Mary Jones mjones@catholicaoc.org.

Employee Termination Request Form

When completing the Employee Termination Request form, **only** select "**Terminate**" from the drop-down menus for **Employee Status** and **Change Reason**.

Use the **Note** section to explain the reason for the termination (for example: retirement, voluntary resignation, accepted another job, etc.) and provide any additional information you feel is relevant.

Important: If the employee was **involuntarily terminated**, this **must** be stated in the Note section so the Finance Office can take appropriate action regarding benefits.

For questions, contact Cheryl Engel cengel@catholicaoc.org.

WORKERS' COMPENSATION

Instructions for Workers' Compensation Injuries

- When an employee incurs a workplace injury, the business manager/supervisor should prepare a [Supervisor's Report of Injury](#). This report is to be kept at the location for your records.
- As soon as the same day, the details of the injury must be reported/called into the Gallagher Bassett (GB) claims reporting number: [833.273.5479](tel:833.273.5479) in order to report and create the mandatory Workers' Compensation First Report of Injury (FROI).
- Follow this link for a [sample FROI – highlighted areas](#) indicate the information you may need to relay on the call. Also, you may be questioned about salary information of the injured worker, contact information of the witnesses, address and contact information of the fall location, transport ambulance service name.
- Same day calling is important because provider offices are very good about processing same day appointments. It is critical Gallagher Bassett Services as an incident for the employee already indexed, so that when that billing is received by Gallagher Bassett there is a record to match already present in their system. Even if the employee injury does not result in a visit to a provider, you should call the 833.273.5479 number. Zero dollar incidents are an important statistic that needs to be captured, and there are times when a visit happens later, or during a normal doctors visit, when the employee will mention the work related injury which may trigger health coverage denials.

Instructions for Injured Employee & Information To Be Shared with HealthCare Provider

- An employee that incurs a workplace injury should immediately seek medical attention.
- The injured employee needs to inform the healthcare provider upfront that the accident/incident is a workplace injury and claims are to be processed under Workers' Compensation. The injured employee who experiences a workplace injury does not need to provide the healthcare provider with their personal medical insurance carrier information.
- The employee's Workers' Compensation coverage is under the Employer Name: Archdiocese of Cincinnati and the Policy Number is: 20003119
- If the Archdiocese of Cincinnati Parish/School/Entity is unaware of the workplace injury the employee should inform their supervisor of the injury so the administration can initiate the necessary procedures to file the First Report of Injury.

FIFTH THIRD BILLER DIRECT

The Finance Office is in the process of implementing 2 new payment portals for parishes to use to process payments directly via ACH to the Pastoral Center for collections and invoices. These payment portals will eliminate the need for checks to the Pastoral Center and all the related shortcomings. The collections portal is live now (Archdiocese Quick Pay). A small group of

parishes have already been invited and are using the collections portal. This will be expanded to the entire archdiocese in waves. We will prioritize the enrollment of parishes that indicate an interest. The invoice portal is still being developed but will hopefully be live before fiscal year end.

Please reach out to Jenny Hansen, Mary Ann Beiter or Jodi Imsicke if you have questions or would like to be in the first group of users for these payment portals.



EMPOWER PROTECT YOUR RETIREMENT 401(K) ACCOUNT

Protect Yourself from Identify Theft by Registering your account. If you don't, a fraudster could register your account to commit fraud.

Register your account online if you haven't at: <https://participant.empower-retirement.com>

- Use a unique username and password for your account and do not share it with others. The longer your password is, the better.
- Ensure your contact information is up to date and provide all points of contact (such as your cellphone and email) so Empower can notify you in case of unusual activity on your account.

Contact mjones@catholic.org with questions/concerns. Please share this information with your employes!

NATIONAL NUTRITION MONTH

Emails were sent to employees through the BAS/MyEnroll email manager with the attached flyer which includes:

- **Health Spotlight:** Nutrition habits to help you make informed choices and have a healthier relationship with food.
- **Reward Opportunity:** Learn how you can earn \$30 in My Rewards.
- **Recipe of the Month:** Snack smarter and boost your energy with Homemade Protein Bars.
- **Benefit Perks:** Get tools* and support to take control of your health and decrease your diabetes risk with Lark, Anthem Diabetes Prevention Program.

** If they meet the qualifications for this benefit and enroll in Lark digital health coaching.*

Please print and share with your employes and/or post!

THANK YOU!