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Maureen Donnelly Creedon
Executive Director of Finance and Treasurer

June 29, 2022

Dear Pastors, Administrators, Finance & Operations Managers and Business Managers:

Attached please find the FY2023 Parish Administrative Calendar. This calendar includes many of the key administrative events and due dates relating to the fiscal year. We hope that you find this helpful.

Please note that a separate payroll calendar will be issued in the near future due to the transition from PrimePay to Paylocity.

We've included a contact person and related telephone extension for each calendar event. Please note that the extensions are direct dials, unless otherwise noted. For example, x5688 can be reached by dialing 617-746-5688. Please feel free to contact those individuals with any questions or concerns.

The calendar is a collaboration of the following departments and entities within the Pastoral Center:

Boston Catholic Development Services, Inc.
Clergy Trust
Finance
Human Resources
Benefits Office
Parish Services
The Propagation of the Faith of Boston, Inc.
Property Services
Risk Management

As always, thank you for all you do for Christ and his Church.

Sincerely,

Maureen Donnelly Creedon
Executive Director of Finance and Treasurer

FY2023 PARISH ADMINISTRATIVE CALENDAR

FY2023 PARISH ADMINISTRATIVE CALENDAR								
JULY 2022			AUGUST 2022			SEPTEMBER 2022		
Date	Description	Contact	Date	Description	Contact	Date	Description	Contact
7/1	IFRM Monthly Tithe Billing Begins	Denise Biernat x5685	8/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	9/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731
7/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	By Appt.	Year End Questionnaire Support Session - by Appointment	Paul Dodd x5718	9/11-9/18	<i>Give Thanks for Priests</i>	Maryellen Barrett x5725
7/1	New Health and Dental Plan Rates in Effect/ New Health and Dental Deductions in Effect in PrimePay	Donna Porter x5641	8/10	FY2022 Parish Questionnaires Due	Paul Dodd x5718	9/15	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731
7/1	Updated Pension Billing Amounts Take Effect	Kerri Shorter x5671	8/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 8/10 with any Questions.	Vicky Keefe x5727	9/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 9/12 with any Questions.	Vicky Keefe x5727
By Appt.	Year End Questionnaire Support Session - by Appointment	Paul Dodd x5718	8/17	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	9/17-9/18	Clergy Trust Collection	Maryellen Barrett x5725
7/5	Promoting the Gospel Collection Proceeds Due	Vicky Keefe x5727	8/17	If Awarding Sick and/or Vacation Time on an Academic Year Basis, Evaluate Balances and Adjust as Necessary	HR x5825	9/30	Review Staff Pay for Equity for Substantially Similar Positions	HR x5825
7/15	Review/Update Policies and/or Staff Handbook. Distribute Notice of Changes to Staff as Appropriate.	HR x5825	8/31	Analyze Exempt Positions for Compliance with FLSA Regulations..Re: Minimum Salaries for Exempt Status	HR x5825			
7/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 7/11 with any Questions.	Vicky Keefe x5727	8/31	July Bank Statements Due	Paul Dodd x5718			
7/15	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731						
7/31	Review/Ensure Employee Posters are Complete and Up-To-Date	HR x5825						
OCTOBER 2022			NOVEMBER 2022			DECEMBER 2022		
Date	Description	Contact	Date	Description	Contact	Date	Description	Contact
10/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	11/1	Benefits Office Issues Annual 401k Safe Harbor Notice to Employees	Kerri Shorter x5671	12/1	Process Pay Increases Effective January 1 to Comply with State Minimum Wage Changes	HR x5825
10/1	Benefits Office to Distribute Employee Benefit Statements	Kerri Shorter x5671	11/2	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	12/1	Open Enrollment for the RCAB Health Savings Account (HSA) Opens	Donna Porter x5641
10/11	Clergy Fund Collection Proceeds Due	Maryellen Barrett x5725	11/2	Review Employee vs. Contractor Classifications. Changes, if necessary, should be effective January 1st.	HR x5825	12/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731
10/14	First 2022 Catholic Appeal Rebate Installment sent to Parishes	Arlene Dubrowski 617-779-3706	11/8	World Mission Sunday Collection Proceeds Due (send to Propagation of the Faith)	John O'Neill 617-779-3870	12/5	Catholic Appeal Abatement Applications Due	Denise Biernat x5685
10/14	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	11/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 11/9 with any Questions.	Vicky Keefe x5727	12/5	Retired Religious Sisters Collection Proceeds Due	Vicky Keefe x5727
10/17	Holy Father & Missionary Efforts Collection Proceeds Due	Vicky Keefe x5727	11/16	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	12/12	Verify 2023 Catholic Appeal Materials and Appeal Coordinator	Arlene Dubrowski 617-779-3706
10/17	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 10/11 with any Questions.	Vicky Keefe x5727	11/29	Distribute Sexual Harassment Policy (with Annual Updates from HR) and the Staff and Volunteer Codes of Conduct to All Staff and Volunteers	HR x5825	12/13	If Awarding Sick and/or Vacation Time on a Calendar Year Basis, Evaluate Balances and Adjust as Necessary	HR x5825
10/28	Catholic Appeal Abatement Application in Weekly Mailing	Arlene Dubrowski 617-779-3706				12/15	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731
10/31	Review Document Retention Guidelines/Purge Files as Appropriate	HR x5825				12/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 12/12 with any Questions.	Vicky Keefe x5727
						12/15	HIRD Filing Due	Kerri Shorter x5671
						12/16	New 401k Vendor	Kerri Shorter x5671
						12/24-12/25	Clergy Trust Christmas Collection	Maryellen Barrett x5725
						12/31	Open Enrollment for the RCAB Health Savings Account (HSA) Closes	Donna Porter x5641
						12/31	FY2022 Parish Annual Reports Due	Paul Dodd x5718

FY2023 PARISH ADMINISTRATIVE CALENDAR

JANUARY 2023			FEBRUARY 2023			MARCH 2023		
Date	Description	Contact	Date	Description	Contact	Date	Description	Contact
1/1	New IRS Maximums Take Effect (401k, HSA)	Kerri Shorter x5671	2/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	3/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731
1/3	3ABC Tax Exempt Form Included in Weekly Mailing	Lilly Charrette x5786	2/6	Church in Latin America Collection Proceeds Due	Vicky Keefe x5727	3/1	3ABC Tax Exemption Forms Due	Lilly Charrette x5786
1/3	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	2/14	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	3/1	Workers Compensation Renewals Take Place	Joanmarie Considine x5740
1/3	Vacation Accruals - If Awarding Vacation Annually with a "Use It or Lose It" Policy, Delete Old Balances and Add New Balances.	HR x5825	2/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 2/10 with any Questions.	Vicky Keefe x5727	3/1	Catholic Appeal Parish Billbacks Included in Monthly Invoicing	Arlene Dubrowski 617-779-3706
1/13	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	2/17	Final 2022 Catholic Appeal Rebate Installment sent to Parishes	Arlene Dubrowski 617-779-3706	3/3	IFRM Monthly Tithe Abatement Application in Weekly Mailing	Denise Biernat x5685
1/14	Christmas (Clergy Benefit Trust) Collection Proceeds Due	Maryellen Barrett x5725	2/28	Review I-9 Folder/Binder for Upcoming Recertifications Required for Soon to Expire Documents	Joyce Contrucci 617-779-3886	3/4-3/5	2023 Catholic Appeal Announcement Weekend	Arlene Dubrowski 617-779-3706
1/16-2/15	Catholic Appeal Training Sessions	Arlene Dubrowski 617-779-3706				3/11-3/12	2023 Catholic Appeal Parish Commitment Weekend	Arlene Dubrowski 617-779-3706
1/17	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 1/10 with any Questions.	Vicky Keefe x5727				3/13	Support of the Church around the World Collection Proceeds Due	Vicky Keefe x5727
1/31	Review/Ensure Employee Posters are Complete and Up-To-Date	HR x5825				3/13	Ash Wednesday (Catholic Charities) Collection Proceeds Due	Vicky Keefe x5727
1/31	Benefits Office Completes ACA Reporting - Issues 1095 Forms to Employees	Kerri Shorter x5671				3/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 3/10 with any Questions.	Vicky Keefe x5727
						3/15	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731
APRIL 2023			MAY 2023			JUNE 2023		
Date	Description	Contact	Date	Description	Contact	Date	Description	Contact
4/3	Catholic Appeal Parish Billbacks Included in Monthly Invoicing	Arlene Dubrowski 617-779-3706	5/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	6/1	Catholic Appeal Parish Billbacks Included in Monthly Invoicing	Arlene Dubrowski 617-779-3706
4/3	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731	5/1	Catholic Appeal Parish Billbacks Included in Monthly Invoicing	Arlene Dubrowski 617-779-3706	6/1	Monthly CIF Purchases/Redemptions	Jennifer Hwang x5731
4/8-4/9	Clergy Trust Easter Collection	Maryellen Barrett x5725	5/1	Review Leaves of Absence (LOA's) for Compliance. Check for Doctor's Notes, Return/Expected Return Dates, FMLA or other Non-FMLA Paperwork is Complete.	HR x5825	6/1	Review Job Descriptions/Roles to Ensure All Who are Classified As Salaried/Exempt Meet the Qualifications for Exemption. Update Job Descriptions as Necessary.	HR x5825
4/14	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731	5/8	IFRM Monthly Tithe Abatement Applications Due	Denise Biernat x5685	6/12	Lay Benefits Open Enrollment Closes	Donna Porter x5641
4/15	Distribute Annual Financial Conflict of Interest Policy and Questionnaire and collect the signed acknowledgment and disclosure pages	HR x5825	5/9	Easter Sunday (Clergy Benefit Trust) Collection Proceeds Due	Maryellen Barrett x5725	6/12	Pentecost Collection Proceeds Due	Vicky Keefe x5727
4/17	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 4/12 with any Questions.	Vicky Keefe x5727	5/10	IFRM Monthly Tithe Abatement Applications Due	Tom Duddy x5886	6/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 6/12 with any Questions.	Vicky Keefe x5727
4/24	Good Friday Collection Proceeds Due	Vicky Keefe x5727	5/15	Lay Benefits Open Enrollment Opens	Donna Porter x5641	6/15	If Awarding Sick and/or Vacation Time on a Fiscal Year Basis, Evaluate Balances and Adjust as Necessary	HR x5825
4/30	Necessary Information, for ex. Emergency Contact(s), and do not have Medical, I-9, or other Inappropriate Information.	HR x5825	5/15	Monthly "EFT" (Electronic Funds Transfer) Pull for the BAS Billing. Contact Finance by 5/10 with any Questions.	Vicky Keefe x5727	6/15	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731
4/30	Review Staff Pay for Equity for Substantially Similar Positions	HR x5825	5/16	Rice Bowl Collection Proceeds Due	Vicky Keefe x5727	TBD	Catholic Appeal Thankathon	Arlene Dubrowski 617-779-3706
			5/17	Notify Finance of Planned CIF Purchases/Redemptions for 1st of Next Month	Jennifer Hwang x5731			
			5/31	Verify/Update Vacation/Sick Accruals in Paylocity	Jenn Ho x5707			
			5/31	FY2024 Parish and School Budgets Due	Glenn Smith x5689			

Note: Extensions above are direct dials...Example...x5688....dial 617-746-5688 (unless noted otherwise)