



**Diocese of Marquette**



MICHIGAN  
CATHOLIC  
CONFERENCE

  
Paycor®

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Diocese of Marquette  
Secretary/Bookkeeper  
Workshop  
May 1, 2013

**Secretary/ Bookkeeper Workshop**  
**Wednesday, May 1, 2013**  
**St. Peter Cathedral- Marquette, MI**  
**9:15 AM to 2:45 PM ET**

9:15 – 9:45 am	Gather & Light Refreshments
9:45 – 10:00 am	Welcome and Prayer – Msgr. Ronald Browne & Fr. Francis Dobrzanski
10:00 – 10:15 am	General Updates – Msgr. Browne/T. Thomas
10:15 – 10:45 am	Panel Discussion on Common Payroll Provider – Paycor T. Thomas, H. Reilly, Paycor Representatives, P. Nardi
10:45 - 11:00 am	Break
11:00 am – 12:00 pm	Payroll Demonstration – Paycor Representatives
<b>12:00 – 12:45 pm</b>	<b>Lunch provided by Makela, Toutant, Hill &amp; Nardi, P.C.</b>
12:45 – 1:30 pm	Payroll Conversion Process/Time Requirements – Beth Storie
1:30 – 1:45 pm	Break
1:45 – 2:30 pm	PDS Training (Church Management Resource) – Jeanne Penoyar
2:30 pm	Adjourn

# General Updates – Tim Thomas

How did we get here?

- MCC Technology integration with Benefits and Administration
- Bishops and MCC Board - how project started
- Why Paycor?
- Diocese of Marquette Archbishop and Finance Council directive
- No jobs lost and ease of use – Pam and Carol
- Costs
  - Transition costs – MCC
  - Ongoing payroll costs – Diocese through 06/30/14

Introductions:

**Hope K. Reilly, CEBS, SPHR, CCP - Vice President, Benefits & IT, Michigan Catholic Conference**

**Beth Storie – Manager of Implementation Services, Paycor**

**Katie Ziegert – Area Vice President of Sales, Paycor**

**Gary Carey – Regional Sales Director, Paycor**

## Why Are We Here Today? – Hope Reilly

### The future of MCC and related technology

- Benefits and Administration
- Uniformity and Consistency
- Efficiency Gains
- Compliance
- Cost Savings
- Better Service to Employees
- Timeline

## Rollout Strategy – MCC – Hope Reilly

- MCC will move forward first with implementation of all 3 products for a mid-June first processing date.
- Diocesan offices are being planned as July starts – products TBD
- The Diocese of Gaylord is ready to move forward with all units (26 units are processed by the office). A meeting with Business Managers and Priests has been scheduled for 5/7 to demo Paycor and review the implementation process.
- A Secretary/Bookkeeper Workshop has been scheduled with the Diocese of Marquette on 5/1 and will also include a Paycor demo and discussion about the implementation process and time requirements. All units will transition to Paycor.

## Panel Discussion – MCC, Paycor, MTH&N and Diocese

Open discussion...

...if you have a question there are others here that are wondering the same thing.

# Paycor Perform Payroll Demonstration – Gary Carey

## Founder led

Over 20 years ago, our CEO Bob Coughlin had a vision of starting a company that took care of the client first. Today, he continues to instill his vision in each of us.

## No call center

We match you with a dedicated specialist who gets to know you and your business needs. We even give you their direct phone number and email address.

## Proactive calls to every client

We believe in reaching out. Through Project Connect, we check in with each and every client to uncover ways we can help.



*“My clients Tracey & Melanie are great to work with! I enjoy helping them with payroll so they can focus more on Gorilla Glue.”*

Gigi  
Paycor Payroll Consultant

**Matthew Turner**  
Turner Tans  
I just cannot say enough good things about Perform... well I can use the word *supercalifragilisticexpialidocious!*

**Louis Boyd**  
Unity of Bloomington  
Entering new employees and updating employee information is MUCH easier. Thank you.

**Roy Velez**  
Square 1 Art  
Everything that you need is right at your fingertips. I especially like the reports feature; it makes life in the world of payroll much more efficient.

**Andy Gibson**  
Bruiter's Ice Cream  
Entering my payroll took me half the time it used to take.

**Carol Plezaska**  
The Rockwood Company  
Love the ease of being able to go back and forth between employee edits and payroll.



## Next steps & notes



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1.800.381.0053

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**PERFORM**

Payroll & employee administration in one intuitive application from anywhere you need to be.

—Christina

**Paycor**

# Benefits of Outsourcing – Gary Carey

## Compliance

Accurate and Timely  
Tax Reporting  
(Federal – Local)

Human Resource  
Documentation

Wage and Hour  
Documentation

## Efficiency

Online Processing

Online Access for all levels  
of the organization

Reduction in errors

Integrated with BenAdmin  
System

Integration with Accounting  
Systems

## Cost Savings

Group Rate across  
the state

Time spent on filing  
tax returns – Monthly,  
Quarterly, Annually

Time spent reporting  
wage information to  
MCC



# Direct Deposit – Gary Carey

**Direct Deposit** is an electronic payment deposited directly to an employee's checking or savings account(s). These deposits arrive and are made available to the employees more quickly than paper checks, and can be automatically divided among different accounts.

## Key features or benefits

- **Peace of mind:** Funds reach the employees bank account the day the check is issued.
- Employees do not have to be in the office to get their check or have to leave work to cash their check.
- **No checks to be lost or stolen:** Payments reach employee accounts the day the check is issued - even if the employee is out of town, sick or unable to get to the financial institution.
- **Simplifies banking:** Employees can disburse their net pay into multiple checking and/or savings accounts.
- **No Delivery Fees!**

# Paycor Overview – Beth Storie

## Paycor Diocesan Experience

- Archdiocese of Cincinnati
- Diocese of Evansville (IN)
- Diocese of Covington (KY)
- Archdiocese of Indianapolis (IN)
- Diocese of Columbus (OH)
- Diocese of St. Augustine (FL)
- Archdiocese of Louisville (KY)
- Diocese of Pensacola Tallahassee (FL)

# Overview of the Implementation Process – Beth Storie

## Paycor Implementation Process Milestones

- Introduction
- Implementation Review
- Configuration & Verification
- Training
- Database Installation
- Parallel Testing
- First Payroll Processing
- Ongoing Support

# Overview of the Implementation Process – Beth Storie

## Staff Requirements

- Parish with 10 employees or less
  - Total Time Commitment – less than 6 hours
- Parish with 10 employees or more
  - Total Time Commitment – less than 11 hours

# Overview of the Implementation Process – Beth Storie

## Training for Bookkeeper

There are 2 options for training:

- **Onsite classroom trainings hosted locally**
  - Must have at least 10 parish or school bookkeepers to book the training
  - Must have facilities to host the training – school computer lab
- **Live Perform webinar**
  - Paycor will be hosting live webinars specifically for Diocesan units
    - Web site training hosted by a Paycor trainer
  - There will be multiple dates and times to choose from
  - Sessions will be recorded for those who cannot make the live class or who want to use the recording for follow-up or future reference
  - Attendees who complete the webinar will be emailed a link to a test environment that will allow you to practice in the system

# Implementation Scheduling – Beth Storie

Proposed schedule:

- MCC – June 1, 2013
- Diocese of Gaylord Office plus 26 units – July 1, 2013
- Diocese of Marquette Office – July 1, 2013
- Archdiocese of Detroit Office – TBA
- Diocese of Kalamazoo – TBA
- Diocese of Lansing – TBA
- Diocese of Saginaw – TBA
- Remaining units for the Diocese of Gaylord – August through September
- Units in the Diocese of Marquette – July through September

# Who is Paycor

Based in Cincinnati OH

23,000 clients

93% client retention

## What makes Paycor's service different?

### Founder Led

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Over 20 years ago, Bob had a vision of starting a company that took care of the client first. Today "take care of the client first" is still our first guiding principle.

### No Call Center

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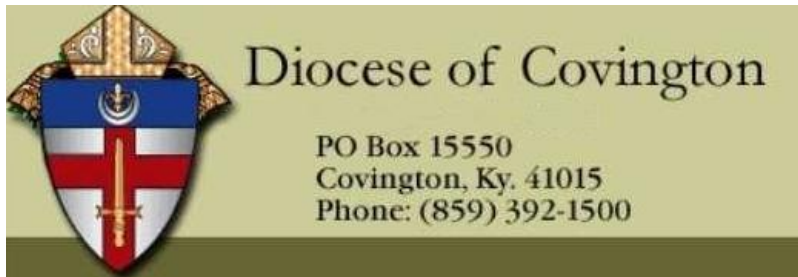
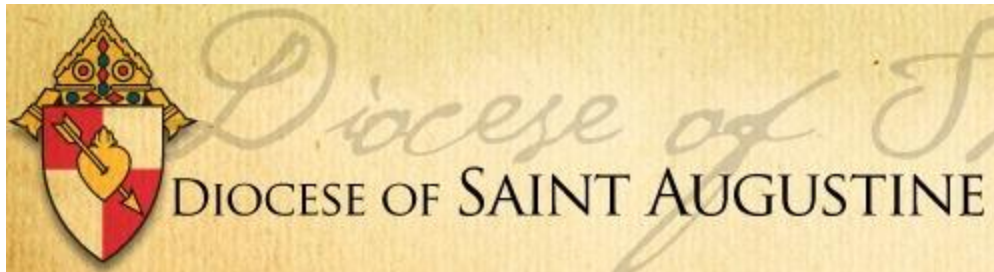
We match our clients with a dedicated specialist who gets to know them and their business needs. We even give them their specialist's direct phone number and email address.

### Proactive Calls to Every Client

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We believe in reaching out. Through Project Connect, we check in with each and every client to uncover ways we can help.

# Our Catholic Affiliations





# What's Next?

A survey will be sent to you via email from MCC.

- What is your unit name and number?
- Who is your current payroll provider/software?
- What is your payroll frequency?
- How many active employees are on your payroll?
- What best describes you?
  - Small parish
  - Large parish
  - School
  - Office
- What is your current Accounting system?
- What date you want to process your first payroll with Paycor?

What else will I need to do:

- Complete the Implementation Survey
- Provide tax documents



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Thank you!