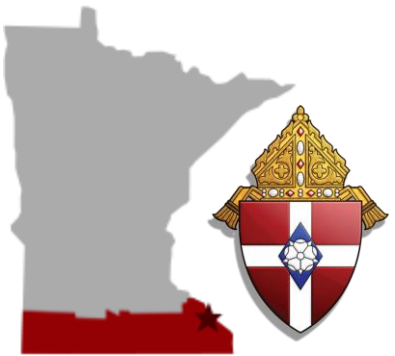


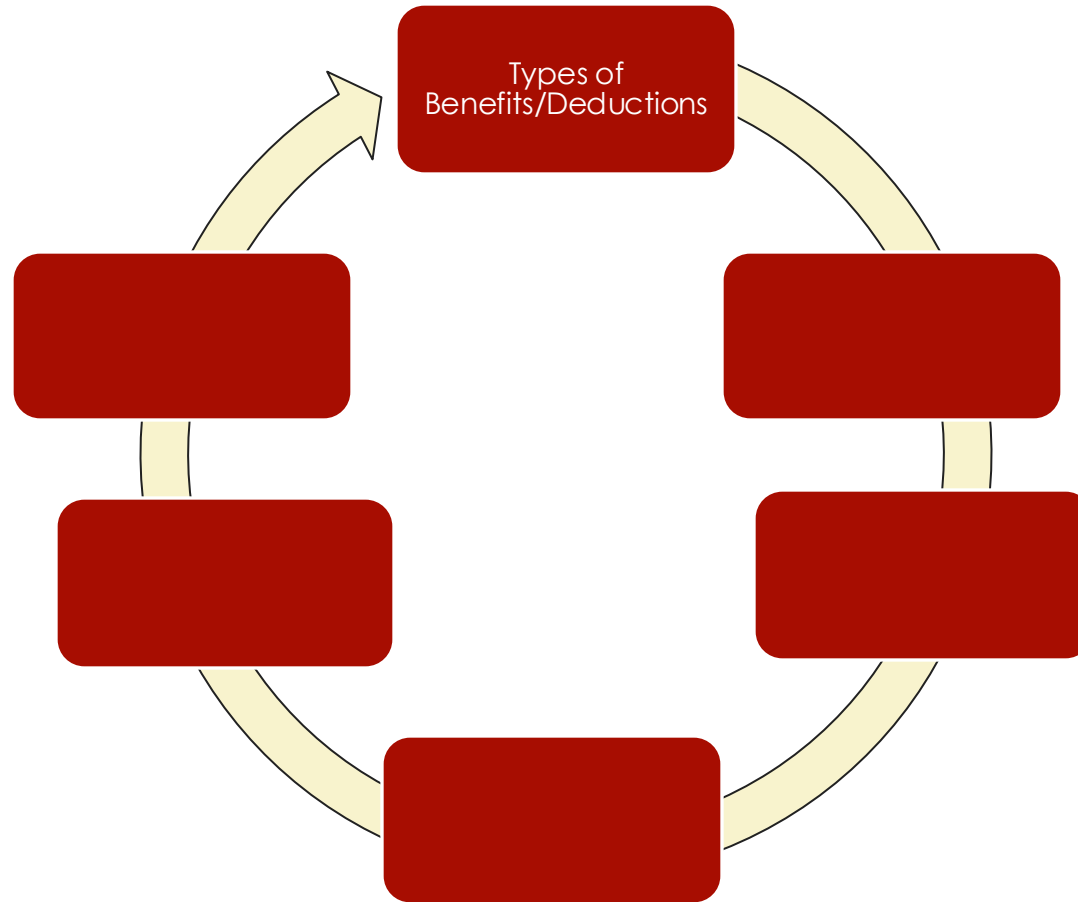
# 2026 New Benefit Accounting Information

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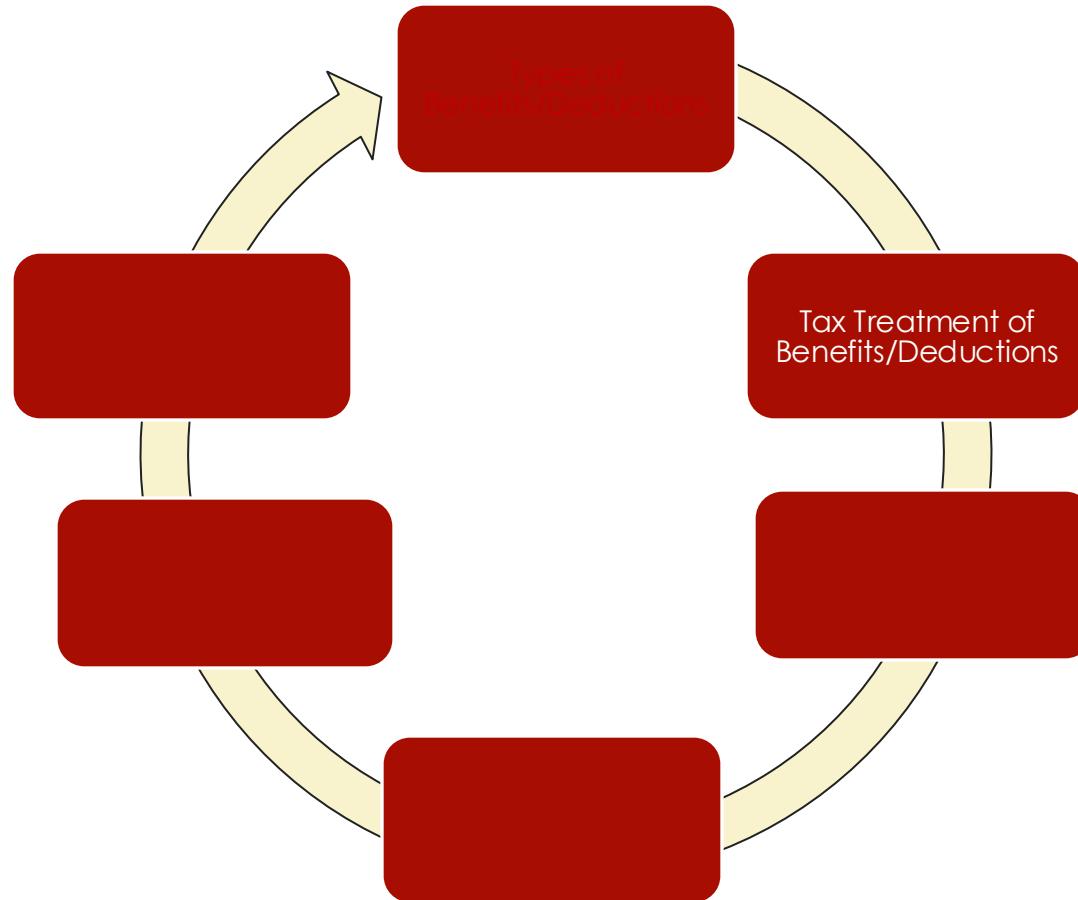
# Today's Agenda.....

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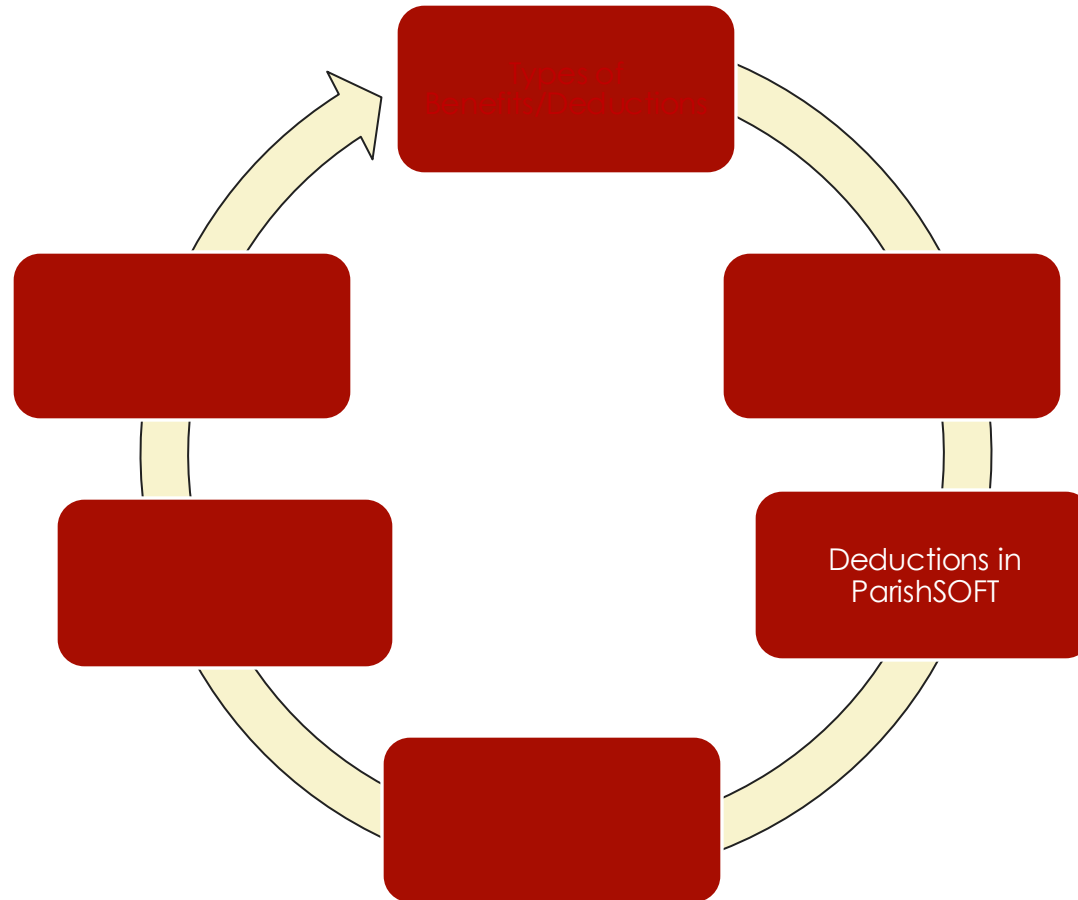
# Today's Agenda.....

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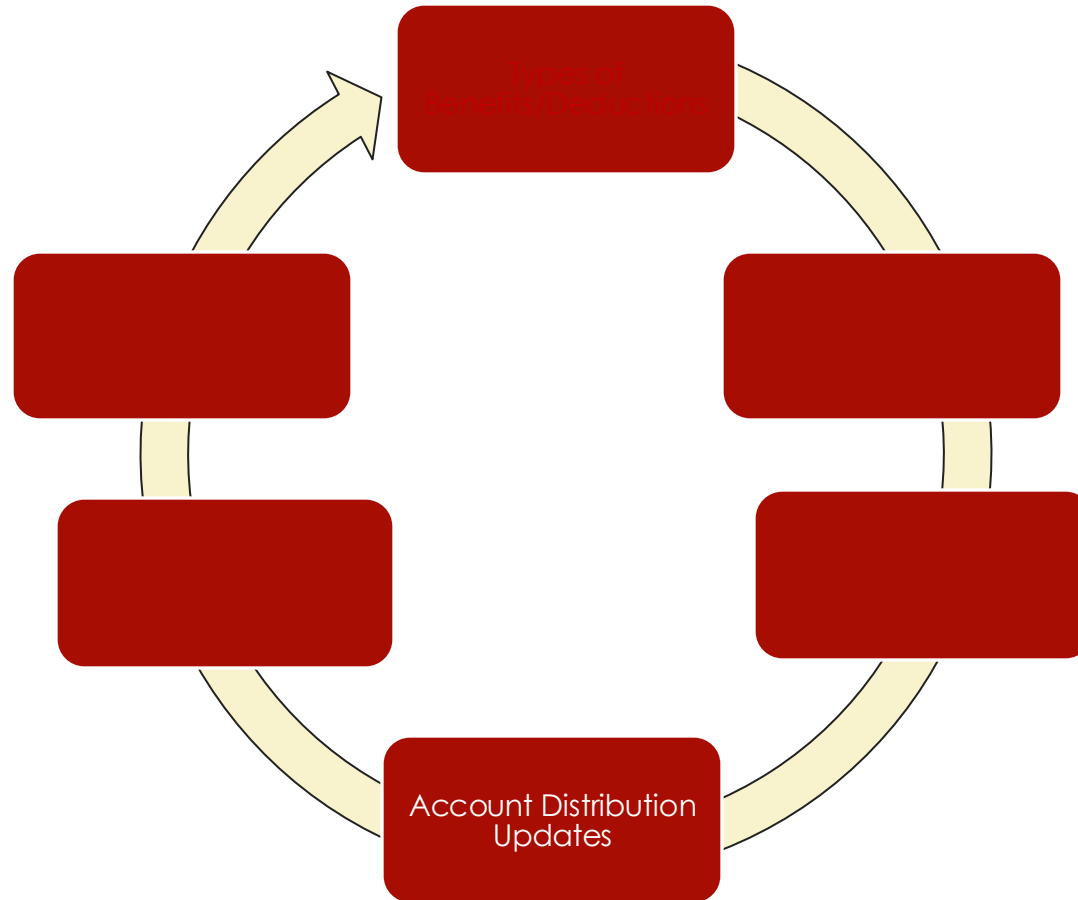
# Today's Agenda.....

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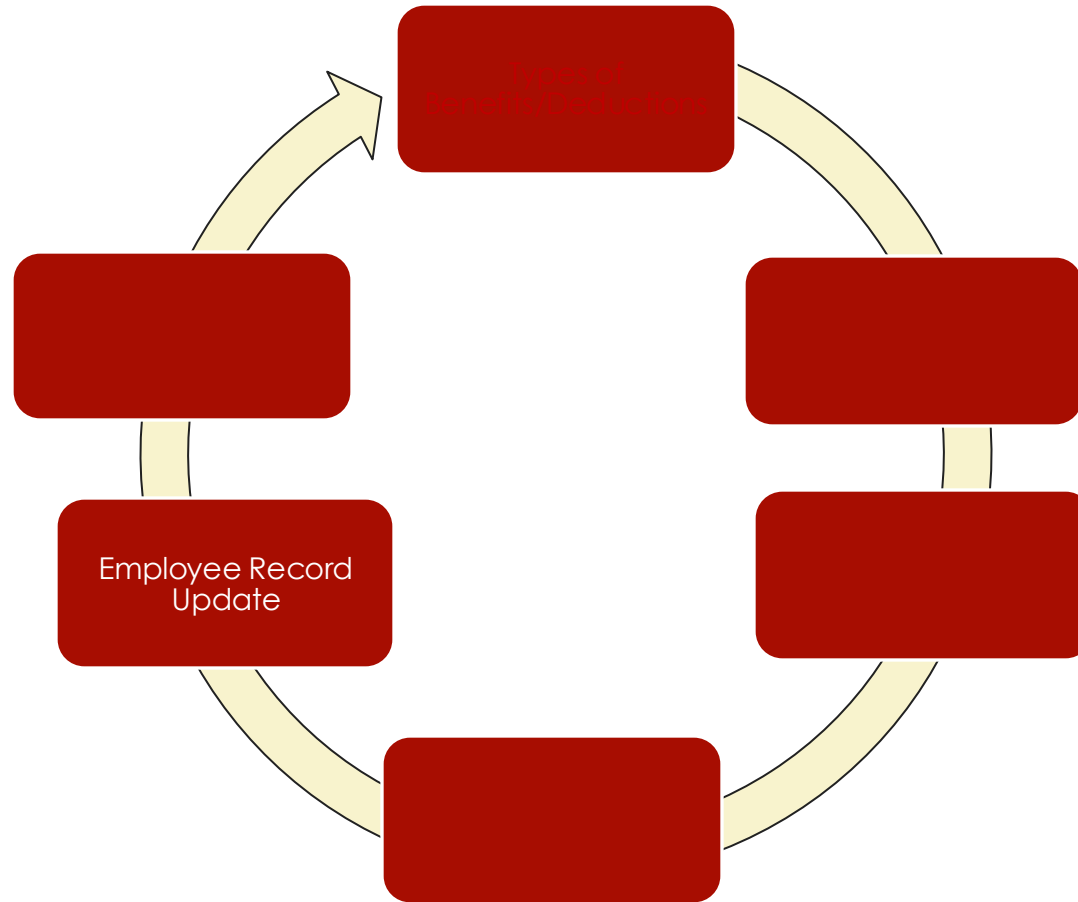
# Today's Agenda.....

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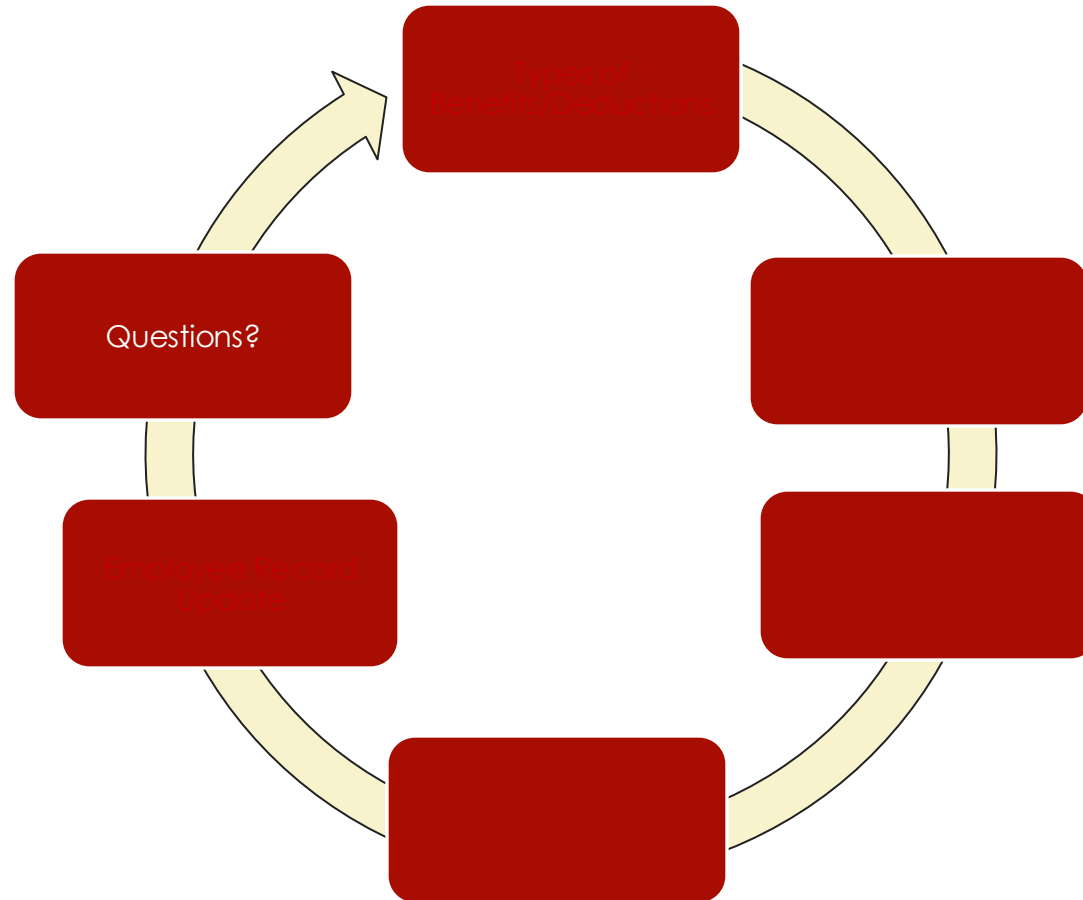
# Today's Agenda.....

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# Today's Agenda.....

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# Types of Benefits/Deductions

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Medical-Health Insurance

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- 
-



# Types of Benefits/Deductions

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Medical-Health Insurance

Health Savings Account (new)

- 
- 
-

# Types of Benefits/Deductions

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Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts

Health/Medical  
Dependent Care

- 
- 
-

# Types of Benefits/Deductions

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Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts

Health/Medical  
Dependent Care

Dental (new)

- 
- 
-

# Types of Benefits/Deductions

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Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts

Health/Medical  
Dependent Care

Dental (new)

Vision (new)

- 
- 
-

# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts

Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

- 
- 
-

# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts

Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

- 
- 
-

# Types of Benefits/Deductions

---

Medical-Health Insurance

▪Supplemental Health (new)

Health Savings Account (new)

Flexible Spending Accounts  
Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts  
Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

- Supplemental Health (new)
  - Accident



# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts  
Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

- Supplemental Health (new)

- Accident
- Critical Illness

# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts  
Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

- Supplemental Health (new)

- Accident

- Critical Illness

- Hospital Indemnity

# Types of Benefits/Deductions

---

Medical-Health Insurance

Health Savings Account (new)

Flexible Spending Accounts  
Health/Medical  
Dependent Care

Dental (new)

Vision (new)

Life/ADD

Long Term Disability

- Supplemental Health (new)

- Accident

- Critical Illness

- Hospital Indemnity

Supplemental Life Insurance

# Tax Treatment-Before or After

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## Pre-Tax

Health/Medical

Dental

Vision

Health Savings Account (HSA)

Flexible Spending

## After Tax

Accident

Critical Illness

Hospital Indemnity

Supplemental (Voluntary) Life

Life/ADD

Long Term Disability

# Setting up Deductions in ParishSOFT

---

The current deductions/Benefits will remain the same for:

- Health Insurance (remove dental from the name)
- Life/ADD Insurance (just change the name from Life/ADD/LTD to Life/ADD)
- Flex Medical and Flex Dependent Care
- Supplemental (Voluntary) Life Insurance

# Setting up Deductions in ParishSOFT

---

The current deductions/Benefits will remain the same for:

- Health Insurance,
- Life/ADD Insurance (just change the name from Life/ADD/LTD to Life/ADD)
- Flex Medical and Flex Dependent Care
- Supplemental (Voluntary) Life Insurance

There will be detailed instructions on the Diocese of Winona-Rochester Finance Office page under ParishSOFT, Payroll to set up the new deductions/benefits. (<https://www.dowr.org/offices/finance/connect-now.html>)

# Setting up Deductions in ParishSOFT

---

The current deductions/Benefits will remain the same for:

- Health Insurance,
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There will be detailed instructions on the Diocese of Winona-Rochester Finance Office page under ParishSOFT to set up the new deductions/benefits.

Please pay close attention to the type of deduction for each item.

# Setting up Deductions in ParishSOFT

---

The current deductions/Benefits will remain the same for:

- Health Insurance,
- Life/ADD Insurance (just change the name from Life/ADD/LTD to Life/ADD)
- Flex Medical and Flex Dependent Care
- Supplemental (Voluntary) Life Insurance

There will be detailed instructions on the Diocese of Winona-Rochester Finance Office page under ParishSOFT to set up the new deductions/benefits.

Please pay close attention to the type of deduction for each item.

Contact me with any questions-we want to get this done correctly from the start!



# Updating Account Distributions

---

Set up the new liability accounts first.

Follow the instructions found at the DOW-R website under Finance Department/ParishSOFT/Payroll.

<https://www.dowr.org/offices/finance/connect-now.html>

Let me know if you have questions!

# Updating the Employee Record

---

Each employee's record will need to be updated.

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---

Each employee's record will need to be updated.

You are not required to run Life/ADD and LTD deductions through the payroll system, since they have no effect for a W-2, they can be expensed from the bills if you desire.

# Updating the Employee Record

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Please take rounding into consideration for the amounts.

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Please take rounding into consideration for the amounts.

- An easy way to do this is to put all the rounding into the first deduction/benefit payroll and then set all the rest to the same amount.

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Please take rounding into consideration for the amounts.

- An easy way to do this is to put all the rounding into the first deduction/benefit payroll and then set all the rest to the same amount.
- Please always divide by the total number of payrolls for the calendar year. Do not use the edit paycheck screen to change deductions.

# Updating the Employee Record






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Each employee's record will need to be updated.

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Please take rounding into consideration for the amounts.

- An easy way to do this is to put all the rounding into the first deduction/benefit payroll and then set all the rest to the same amount.
- Please always divide by the total number of payrolls for the calendar year. Do not use the edit paycheck screen to change deductions.
- You are able to use the maximum amount field for each deduction cap it for the year which will keep you from withholding too much.

#	Deduction/Benefit Description	Amount	Percent	Limit
1	11 Benefit: 403(b) Employer Benefit - 	0.00	3.00	999999.99
2	12 Deduction: 403(b) Employee Dedu 	0.00	3.00	999999.99
3	13 Deduction: Tax-Free Health Insura 	107.80	0.00	1980.00
4	14 Benefit: Health Care Benefit 	608.68	0.00	10956.00
5	28 Benefit: 403(b) Employer Benefit - 	0.00	3.00	999999.99

# X. Recap and Q&A Session

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- Enable new liability accounts



# X. Recap and Q&A Session

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- Enable new liability accounts
- Rename current deductions that are changing names

# X. Recap and Q&A Session

---

- Enable new liability accounts
- Rename current deductions that are changing names
- Add new deductions

# X. Recap and Q&A Session

---

- Enable new liability accounts
- Rename current deductions that are changing names
- Add new deductions
- Update Account Distributions

# X. Recap and Q&A Session

---

- Enable new liability accounts
- Rename current deductions that are changing names
- Add new deductions
- Update Account Distributions
- Update Employee Ded/Ben screens

# X. Recap and Q&A Session

---

- Enable new liability accounts
- Rename current deductions that are changing names
- Add new deductions
- Update Account Distributions
- Update Employee Ded/Ben screens
- Put in the correct deduction and benefit amounts on employee records as needed.

# IX. Thank you and Conclusion

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- Questions?
- Thank you for Participating!

Invitation to Stay Connected and Continue the Conversation

Cindy Olson

Parish Support Coordinator

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Jon Briggs

Internal Audit Coordinator | Parish Support

Email: [jbriggs@dowr.org](mailto:jbriggs@dowr.org) Ph: 507-450-4084 (cell)