

STATE CONTROLLER'S OFFICE
PERSONNEL/PAYROLL SERVICES DIVISION
P.O. Box 942850
Sacramento, CA 94250-5878

DATE: September 3, 2003

PERSONNEL LETTER # 03-014
CIVIL SERVICE ONLY

TO: All Agencies in the Uniform State Payroll System

FROM: JOHN R. HARRIGAN, Chief
Personnel/Payroll Services Division

RE: **STATEWIDE TRAINING POLICY CHANGES AND WINTER 2004 SEMESTER TRAINING CATALOG**

This memo provides the latest information regarding the State Controller's Office, Personnel/Payroll Services Division's Statewide training classes for January through March, 2004.

PLEASE NOTE THE FOLLOWING IMPORTANT CHANGES TO STATEWIDE TRAINING CANCELLATION/NO SHOW AND TRAVEL POLICIES

REVISED CANCELLATION/NO SHOW POLICY

Since the inception of the Statewide Training Unit during the mid-1970's, the State Controller's Office has maintained a goal of providing, at no cost to departments, personnel/payroll training to Human Resource staff. Although the State Controller's Office will maintain this goal, recent budget reductions coupled with a dramatic increase in last minute training class cancellations and no shows, has limited our training staff resources and impacted our ability to maximize our training effectiveness.

Historically, the demand for Statewide training classes has exceeded the amount of training that can be provided with the training resources available. For 2002/2003, 3,617 training requests were received, with 2,155 (60%) trainees scheduled for training. Also during 2002/2003, an increase in last minute cancellations/no shows resulted in over 200 training class vacancies. This increase in vacancies has further inhibited our ability to meet department training needs.

For the current fiscal year, the State Controller's Office will continue to provide the existing 12 Statewide training courses. However, given the reduction in our training resources and the increase in class vacancy rates, it is necessary to begin charging for late cancellations and no shows. The following "Cancellation/No Show" policy is designed to maximize our training effectiveness and reach as many trainees as possible:

Cancellations received more than five (5) working days in advance of the first day of class will be accepted without charge. For each late cancellation or no show, departments will be charged \$100.00.

REVISED STATEWIDE TRAINING TRAVEL POLICY

Budget reductions in the area of travel funds have limited the State Controller's Office ability to provide training at locations outside of Sacramento. In order to continue to travel and deliver Statewide classes outside of Sacramento, it will be necessary to charge departments a nominal fee per trainee. The following is the new "Statewide Training Travel" policy:

Departments will be charged \$25.00 per trainee for all Statewide training classes held outside of Sacramento.

TRAINING ENROLLMENT

Our focus on enrollment will be new Personnel Specialists who meet class prerequisites, followed by those Personnel Specialists who have not had training for a given class within the past "one" year. We are aware that special circumstances may exist that necessitate enrollment for Personnel Specialists who do not meet these requirements, and we will work with you to accommodate your needs.

On Tuesday, September 9, 2003 a Needs Assessment form will be sent to all agencies via electronic mail. In order to create an equitable process for all agencies when responding to the Needs Assessment, we request that the agency Training Coordinator complete the form and return it no earlier than 8:00 AM on Tuesday, September 16, 2003 and no later than the close of business on Monday, September 22, 2003. Please return the form to the Training Administrator at ppsdtraining@sco.ca.gov, or via FAX at (916) 324-7293. Please note that no phone calls will be accepted in lieu of this procedure.

By Tuesday, October 21, 2003 the Winter 2004 Training Schedule will be published via electronic mail. On Monday, October 27, 2003 the Training Administrator will begin contacting each agency's Training Coordinator in the order that the Needs Assessments were received.

We will make every effort to place Personnel Specialists who meet the enrollment requirements into the programs and dates requested. However, if placement is not possible at that time, the Training Administrator will offer other alternatives, dates, or suggest a direct contact with the appropriate instructor to discuss on-site consultations or a special request training program.

CONFIRMATION OF ENROLLMENT

Each scheduled Personnel Specialist and the agency Training Coordinator will receive an electronic mail confirmation letter approximately 30 days prior to the class date. This letter will contain important enrollment information including class dates, duration of the class, times and location.

CANCELLATION/NO SHOW

Cancellations received more than five (5) working days in advance of the first day of class will be accepted without charge. For each late cancellation or no show, departments will be charged \$100.00.

To cancel an enrolled Personnel Specialist, contact the Training Administrator at (916) 322-1245, via e-mail at ppsdtraining@sco.ca.gov, or the California Relay Service at 1-800-735-2929 (TTY).

ENROLLMENT SUBSTITUTIONS

Substitutions will be accepted provided the substituting Personnel Specialist meets the prerequisites set for the program.

STATEWIDE TRAINING TRAVEL

Departments will be charged \$25.00 per trainee for all Statewide training classes held outside of Sacramento.

CONSULTATIONS/SPECIAL REQUESTS

To request consultations or a special request training program, contact the appropriate instructor listed in the course descriptions.

COURSE REQUIREMENTS

Prerequisites ensure that each Personnel Specialist succeeds in comprehending the subject matter offered in the class. Personnel Specialists who lack the required experience may have difficulty with the material and detract from the class. Therefore, if a Personnel Specialist is unable to maintain the pace of the session, the instructor may request that he/she return to his/her department.

COURSE DESCRIPTIONS AND PREREQUISITES

Please note that our training program information is listed alphabetically by program name followed by the level (e.g., Advanced Salary Determinations class is listed as "Salary Determinations, Advanced"). For each program, the course description is listed followed by the course prerequisites.

CORRECTIVE ACTIONS (2 Days)

Rhonda Riley, Instructor
(916) 324-7274
E-mail: rriley@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is a must for Personnel Specialists who need instructions in properly documenting Corrective Actions and Out-of-Sequence (O/S) PAR transactions. Personnel Specialists will be provided a step-by-step method of reconstructing Employment History (EH) for O/S transactions.

In-depth coverage of the Personnel Action Manual (PAM) Section 9 will be provided in the following areas:

- Corrects
- Voids
- Voids/Re-Enters
- Adding a Transaction O/S
- Reconstructing EH

Through the use of the PAM, and with a variety of comprehensive practical exercises and transaction situations, Personnel Specialists will be able to correctly determine the appropriate steps and procedures necessary to complete corrective action documentation.

PREREQUISITES

Must have completed the PAR Documentation course and have an additional four months of experience preparing a variety of PAR transactions.

EMPLOYMENT HISTORY OVERVIEW (1 Day)

Rhonda Riley, Instructor
(916) 324-7274
E-mail: rriley@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course has been designed to provide instructions on updating and interpreting the information on the EH database. Through the use of PAM Section 10 and practical exercises, Personnel Specialists will be able to:

- Utilize the decentralized forms
- Follow instructions for entering information onto the database
- Identify and access the five EH inquiry categories
- Analyze error messages and demonstrate methods to resolve each condition

PREREQUISITES

Must have a minimum of two months of personnel/payroll experience.

FUNDAMENTALS OF PAYROLL (3 Days)

Sally Durante, Instructor
(916) 322-1121
E-Mail: sdurante@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides information necessary to correctly and confidently document basic payroll transactions in today's personnel office. The class outlines appropriate procedures, processes and regulations governing a variety of payroll functions. These include completion of forms: STD. 672, Time and Attendance, for both negative and positive attendance employees; STD. 603, Report of Absences without Pay; STD. 666, Report of Exceptions to the Payroll; STD. 674, Payroll Adjustment Notice; STD. 671, Miscellaneous Payroll/Leave Actions;

STD. 966, Employee Time Certification; and STD. 683, Pay Adjustment Request. Personnel Specialists will learn how to reconcile Master Payroll, use the Master Payroll Certification (MPC) system, and read suspended payment and suspended transaction listings. They will also receive a general overview of the account receivable process. This course emphasizes important cutoff dates and the consequences when transactions are not processed on or before those dates. Personnel Specialists learn and acquire processing skills through a variety of practical exercises and group problem-solving activities.

PREREQUISITES

Must have a minimum of five months of personnel/payroll experience and have certified at least two Master Payrolls for negative attendance employees that included exceptions to the payroll.

FUNDAMENTALS OF PERSONNEL (3 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is designed for Personnel Specialists new to the personnel field. Personnel Specialists will learn how to process EH appointments and separations. They will also learn to ascertain the difference between permissive and mandatory actions on personnel issues and to compute state service, anniversary dates and probationary periods. The program provides information on terminology, control agency information and reference materials used in personnel. The information in this course is essential for accurately completing specific Items while documenting PAR transactions.

PREREQUISITE:

Must have one month of personnel/payroll experience.

GARNISHMENT DOCUMENTATION (1 Day)

Blanca Hoffmann, Instructor
(916) 324-7203
E-Mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides instruction on appropriate documentation methods used to correctly process all types of garnishments. This includes legal requirements placed on departments by the courts, Internal Revenue Service and the Franchise Tax Board. Earnings withholding orders for support, arrearages, Federal and State tax levies, student loan defaults, and on-going support garnishments are explained. This class reviews the redeposit of support garnishment warrants, multiple garnishments and bankruptcies. Personnel Specialists learn the essential elements for Garnishment Documentation through practical exercises, examples and by using the Payroll Procedures Manual (PPM).

PREREQUISITES

Responsible for completing garnishment documentation and must have five months personnel/payroll experience, and at least three months experience processing garnishments.

NON-INDUSTRIAL DISABILITY INSURANCE (NDI) PROGRAM (2 Days)

Blanca Hoffmann, Instructor
(916) 324-7203
E-Mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides a complete overview of the NDI benefit program including laws, rules, regulations, policies and procedures. The Employment Development Department (EDD) claim process, collective bargaining

considerations and personnel/payroll documentation requirements are also covered. The course examines the different NDI and calculation methods used for computing regular NDI and annual leave benefits. Worksheets are provided to assist in annual leave NDI computations. Practical exercises include PARs; form STD. 674D, Industrial/Non-Industrial Disability Pay/Adjustment Request; form STD. 671, Miscellaneous Payroll/Leave Request; EDD claim forms and annual leave calculations.

PREREQUISITES

Must have a minimum of four months personnel/payroll experience, including responsibility for documenting NDI transactions. Must have successfully completed the PAR Documentation training course, or have at least four months of experience documenting PAR transactions.

PAR DOCUMENTATION (2 Days)

Rhonda Riley, Instructor
(916) 324-7274
E-mail: rriley@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

For those new to the personnel field, the course provides an introduction to the PAM. The primary emphasis is on the organization and use of the PAM. Personnel Specialists are provided a complete review of the PAM, completion of EH documents, PAR Item definitions and the selection and use of the appropriate PAR Required/Conditional transaction charts. Practical exercises enable Personnel Specialists to become familiar with the PAM and completion of personnel documentation.

PREREQUISITES

Responsible for documenting PAR transactions and have a minimum of two months experience documenting PARs.

PLEASE NOTE: This class is a mandatory prerequisite for the Corrective Actions course.

PAYROLL INPUT PROCESS (PIP) (1 Day)

Sally Durante, Instructor
(916) 324-7256
E-Mail: sdurante@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

Payroll Input Process (PIP) is a class designed for new Personnel Specialists who are processing pay transactions; e.g., overtime, positive pay and miscellaneous payments. Personnel Specialists will be provided a program overview of the PIP application and keying experience for the five PIP screens: TA - Time and Attendance; MIS - Miscellaneous/Leave Actions; DCK - Dock; ETC - Employee Time Certification; and ADJ - Pay Adjustment Request. Instructions for the available commands and Inquiry screens will be reviewed.

PREREQUISITES

Must have a minimum of two months experience at the Personnel Specialist level and at least two key entry experiences on the PIP system.

SALARY DETERMINATIONS, ADVANCED (2 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course is designed for Personnel Specialists who frequently use the salary rules and regulations. It provides practical experience in determining the correct salary rate in a variety of deep class movements. Emphasis is

placed on discretionary movements between deep classes, the Personnel Management Policy/Procedures Manual Section 315 and consecutive transfers. Laws, rules, DPA and SPB memoranda regarding deep class movement are discussed.

PREREQUISITES:

Must have completed the Introduction to Salary Determinations course and have active involvement on a regular basis in the completion of salary determinations.

SALARY DETERMINATIONS, INTRODUCTION TO (2 Days)

Elizabeth Edwards, Instructor
(916) 324-7296
E-Mail: eedwards@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

Supervisors/Training Coordinators, PLEASE NOTE:

While this class is an introductory class, it is not for Personnel Specialists new to the personnel transactions field. It is designed for Personnel Specialists with a working knowledge of personnel transactions. Prior to enrolling staff, please refer to course prerequisites (shown below) for the minimum number of required months of Personnel Specialist experience.

This course provides the essential steps to correctly compute salary rates on new appointments, promotions, transfers and demotions. The primary focus is on the laws and rules pertaining to salaries and anniversaries, as well as the formulas used to determine the appropriate salary rule. Additionally, Personnel Specialists learn to apply information contained in the Civil Service Pay Scales and the rules and policies which are used to determine accurate salary rates and anniversary dates. Personnel Specialists will gain a working knowledge of methods used to determine salary rates and anniversary dates with the use of practical exercises for new appointments, movement between alternate ranges and movement between non-deep classifications.

PREREQUISITES:

Must have six months of personnel transactions experience and have completed the Fundamentals of Personnel course, or have ten months of personnel transactions experience and be able to accurately determine qualifying pay periods for all time bases, and for accelerated and standard anniversary dates.

PLEASE NOTE: This course is a mandatory prerequisite for the Advanced Salary Determinations course.

WORKERS' COMPENSATION: THE BEGINNING STEPS (1 Day)

Blanca Hoffmann, Instructor
(916) 324-7203
E-mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides valuable information to Personnel Specialists directly responsible for providing Workers' Compensation guidance to line-supervisors, managers, and/or employees. In-depth discussions include explaining Workers' Compensation benefits, eligibility requirements and the initial forms to be completed for injured employees. State Compensation Insurance Fund's (SCIF) role and responsibilities and the completion of various SCIF forms and form STD. 618S, Employee Benefit Options, are included. Personnel Specialists will learn each area of responsibility for the injured employee, the line-supervisor and the personnel office.

PREREQUISITE

Must have a minimum of four months of personnel/payroll experience.

PLEASE NOTE: This class is a mandatory prerequisite for the Workers' Compensation Documentation course.

WORKERS' COMPENSATION DOCUMENTATION (3 Days)

Blanca Hoffmann, Instructor
(916) 324-7203
E-mail: bhoffmann@sco.ca.gov or the
California Relay Service at 1-800-735-2929 (TTY)

This course provides current information regarding Industrial Disability Leave (IDL) including Enhanced IDL, IDL with Supplementation and Temporary Disability (TD). Personnel Specialists learn to use a variety of reference materials to become familiar with the laws and rules governing Workers' Compensation. They research, discuss and apply regulations through networking, group problem-solving and independent study. Practical exercises include how to document personnel/payroll records for several disability cases. Added course features are written instructions and samples for abatements and SCIF payments calculated on the wage loss concept. Personnel Specialists will receive the most up-to-date information in the area of Worker's Compensation.

PREREQUISITES

Must have completed the PAR Documentation course or have six months of personnel/payroll experience documenting PAR transactions. Must have completed the Workers' Compensation: The Beginning Steps course. The Personnel Specialist should be responsible for completing Workers' Compensation transactions.

Should you have questions regarding this letter, please contact Ron Hutcheson at (916) 445-6983, or via e-mail at rhutcheson@sco.ca.gov.

JRH:gmd