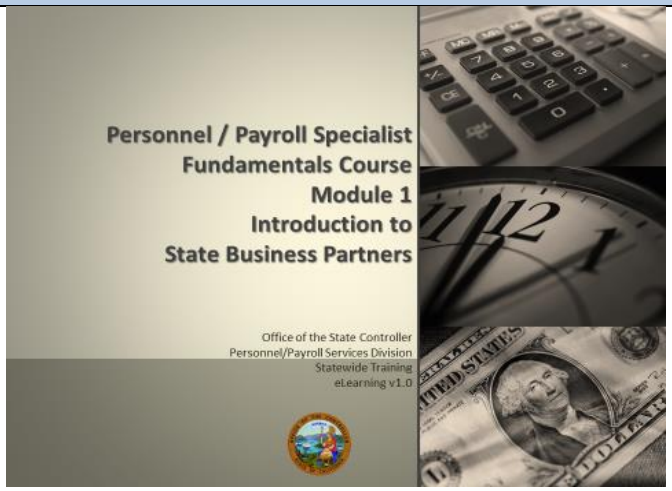
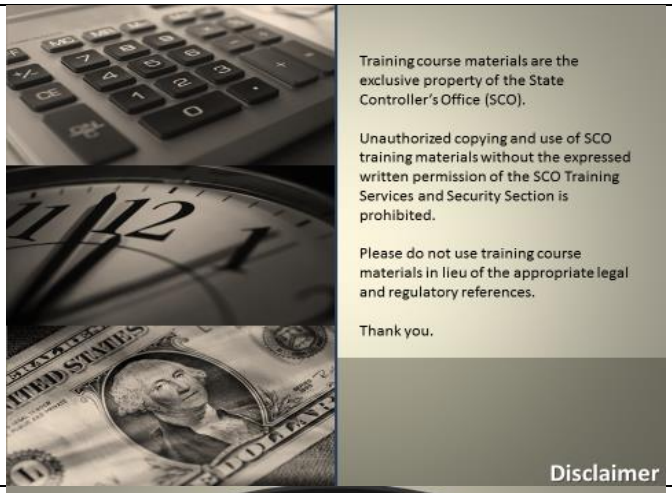
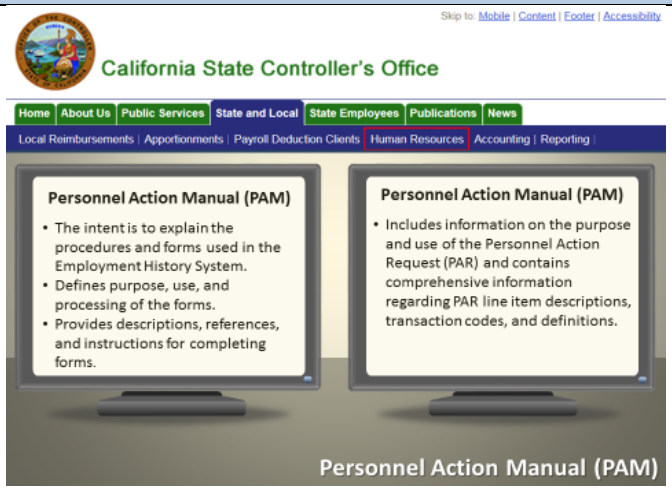
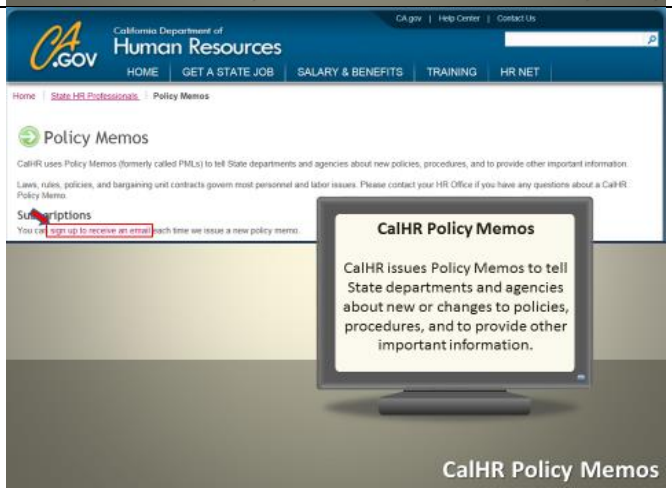
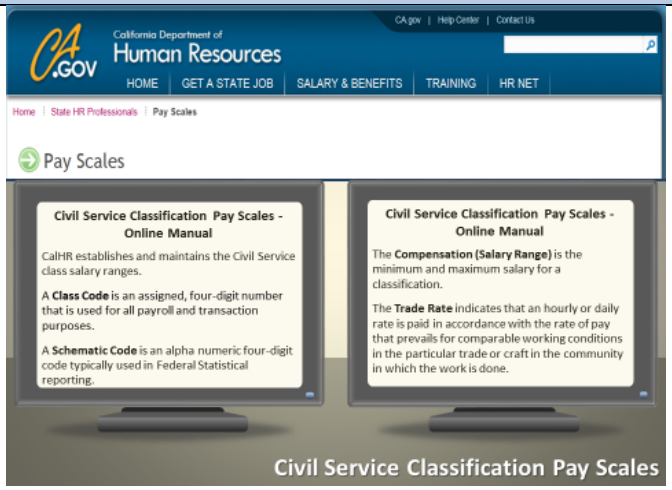
Pg	Slide	Content
1.		Welcome to the State Controller's Office Personnel / Payroll Specialist Fundamentals Course Module 1, Introduction to Your State Business Partners. This class is a prerequisite for all instructor-led classes offered by the State Controller's Office. We hope you find this eLearning beneficial and relevant. Should you have problems viewing or playing this eLearning program, please contact the Personnel/Payroll Services Statewide Training Unit at ppsdtraining@sco.ca.gov to request assistance.
2.		Training course materials are the exclusive property of the State Controller's Office (SCO). Unauthorized copying and use of SCO training materials without the expressed written permission of the SCO Training Services and Security Section is prohibited. Please do not use training course materials in lieu of the appropriate legal and regulatory references. Thank you.
3.		The purpose of this training module is to introduce you to your State agency business partners and their reference tools.

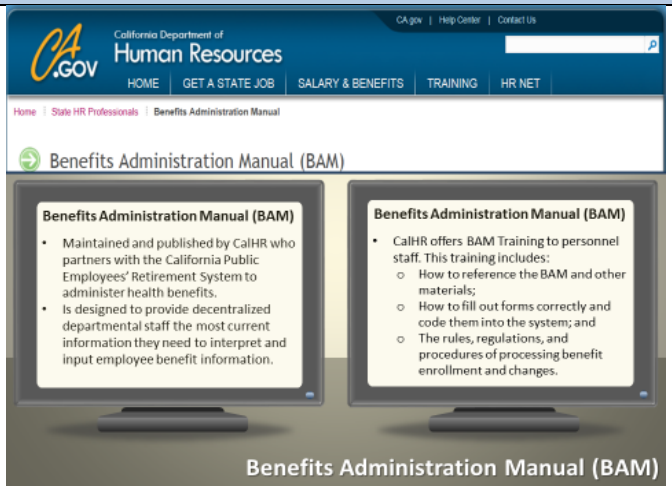
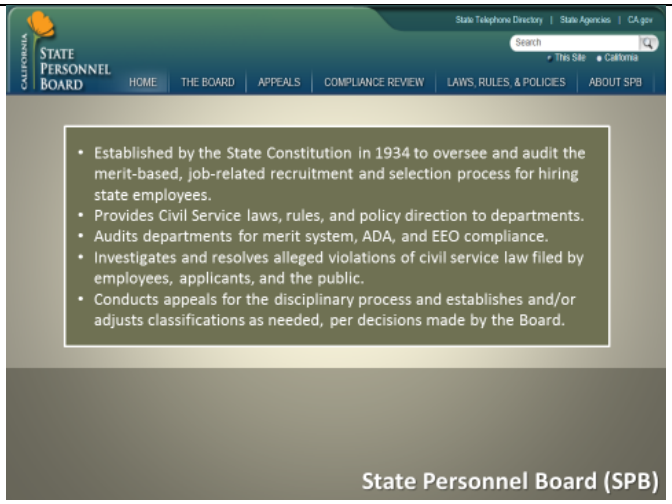
Pg	Slide	Content
4.		At the completion of this course, you will understand: • How the State agency business partners guide, enhance, and inform your job. • Know what business tools are available to you and where to locate them.
5.		Now let's get started! As a Personnel or Payroll Specialist, you will work with information from several business partners. In this training we will focus on six business partners that most affect your job as a Personnel or Payroll Specialist. These agencies are the State Controller's Office (SCO), Department of Finance (DOF), California Department of Human Resources (CalHR), California State Personnel Board, California Public Employees' Retirement System (CalPERS), and Department of General Services (DGS). The information these agencies produce comes in various formats. Some of the information may be in the form of how-to-manuals, reference guides, laws and rules, State or union regulations, and/or forms. Please note that all links shown in this training will be provided as a resource document at the completion of this course.
6.		The first Business Partner you will learn about today is the California State Controller's Office (SCO). Elected every four years, the California State Controller is the Chief Fiscal Officer of California. The State Controller's Office is comprised of six divisions, each with a unique fiscal responsibility for the State of California. They are: • The Division of Accounting and Reporting which, among other duties, provides periodic reports on the financial status of the State and administers various taxes. • The Administration and Disbursements Division, which prints 28 million warrants, the State's word for checks, every year. • The Audits Division, which investigates whether taxpayer dollars are being spent as the law intended.

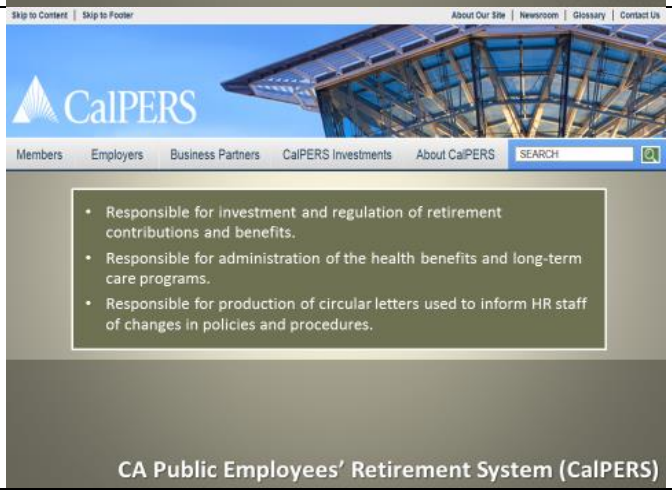
Pg	Slide	Content
		• The Personnel/Payroll Services Division (PPSD), which handles the payroll for all State employees and the California State University system. • The Information Systems Division, which uses information technology to help the Controller's Office run more efficiently. • And the Unclaimed Property Division, which is responsible for the State's unclaimed property.
7.		The Controller's Office has a statewide responsibility to ensure that decentralized human resources staff have the knowledge and training required to accurately enter source data and process transactions in the Uniform State Payroll System to manage the personnel resources of the State. The Controller's Office division you will interact with the most is the Personnel and Payroll Services Division, or PPSD. PPSD administers the Uniform State Payroll System, a decentralized system that agencies and departments are responsible for entering data into to provide for the accurate generation of personnel and payroll records. PPSD issues payments and processes adjustments to pay, processes mandatory and voluntary deductions, issues wage and tax statements, and provides the information required to manage the personnel resources of the State to properly account for salary and wage expenditures.
8.		PPSD publishes and maintains several valuable tools that Personnel or Payroll Specialists will reference daily in his or her job. These tools can be found on the Controller's Office website. The Payroll Procedures Manual, or PPM, provides information and instructions for completing and submitting payroll documents for decentralized keying. The PPM prescribes detailed payroll procedures not provided elsewhere and coordinates instructions of various authorities on specific payroll subjects. The PPM includes information on codes, position process, attendance reporting cycles/cutoffs/ and transfer dates, disability, miscellaneous payments, deductions, and general processes. This includes accounts receivable, warrant processes, direct deposits, PIP system instructions, IDL supplementation calculator instructions, and non-uniform State payroll system data.

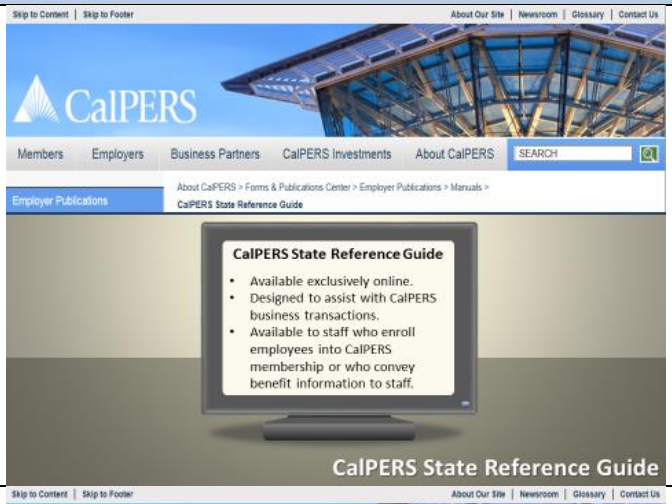
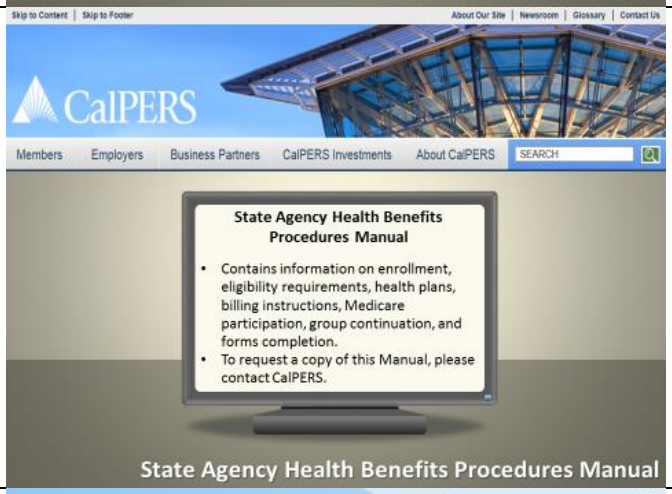
Pg	Slide	Content
9.		The next valuable tool, located on the Controller's Office website that a Personnel or Payroll Specialist would reference daily in his or her job, is the Personnel Action Manual, or PAM The intent of the Personnel Action Manual is to explain the procedures and forms used in the Employment History System. The PAM defines purpose, use, and processing of the forms. As well as descriptions, references, and instructions for completing forms. The PAM includes information on the purpose and use of the Personnel Action Request, PAR, and contains comprehensive information regarding PAR line item descriptions, transaction codes, and definitions. The PAM also provides information on: • The Employee Action Request, • The separation/disposition of PERS contributions, • Notice Of Personnel Action (NOPA), • And the processing of transactions. This includes corrections, out-of sequence, voids, and decentralized procedures.
10.		PPSD publishes and maintains State Controller's Office issued personnel, payroll, and leave accounting letters and memos. These letters and memos contain vital information regarding various personnel, payroll, and California Leave Accounting System letters, processes, and procedures. You can subscribe to receive notifications on the most current updates by signing up online to the Personnel and Payroll Services email subscription service.
11.		PPSD issues and maintains the monthly Controller's Office decentralized payroll calendars. These calendars provide valuable payday, cutoff, leave accrual, and green and no cycle dates information.

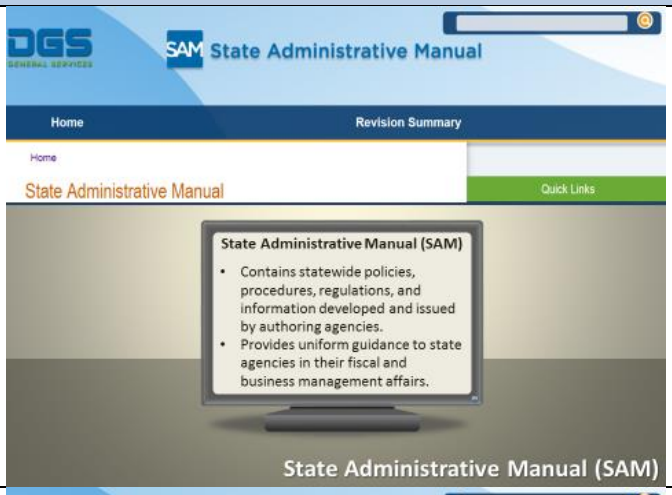
Pg	Slide	Content
12.		The second Business Partner we will discuss is the California Department of Finance. The Department of Finance serves as the Governor's fiscal policy advisor, promotes responsible resource allocations through the State's annual financial plan, and ensures the financial integrity of the State. The Department of Finance interacts with the Legislature through various reporting requirements. This includes presenting and defending the Governor's Budget and analyzing and testifying on legislation being heard before the Legislature. Department of Finance interacts with other State departments on a daily basis in terms of preparing, enacting, and administering the budget; reviewing fiscal proposals; analyzing legislation; establishing accounting systems; auditing department expenditures; and communicating the Governor's fiscal policy. Additionally, Department of Finance institutes hiring freezes, approves and funds State positions, and is involved in setting State Civil Service salaries.
13.		The next Business partner we will discuss is the California Department of Human Resources, or CalHR. CalHR represents the State in the collective bargaining process and the Governor as the "employer" in all California State personnel employer-employee relations matters. CalHR is responsible for all issues related to employee salaries, benefits, job classifications, position allocations, civil rights, training, exams, recruitment, and retention. For most employees, many of these matters are determined through the collective bargaining process managed by CalHR. CalHR also administers the state employees' 401(k) and 457 programs.
14.		CALHR publishes and maintains several valuable tools that Personnel or Payroll specialists will reference daily in his or her job. CalHR issues Policy Memos to tell State departments and agencies about new or changes to policies, procedures, and to provide other important information. Laws, rules, policies, and bargaining unit contracts govern most personnel and labor issues. Please contact your HR Office if you have any questions about a CalHR Policy Memo. If you would like to be notified when a new policy memo is issued, you can sign up online to CalHR's email subscription service.

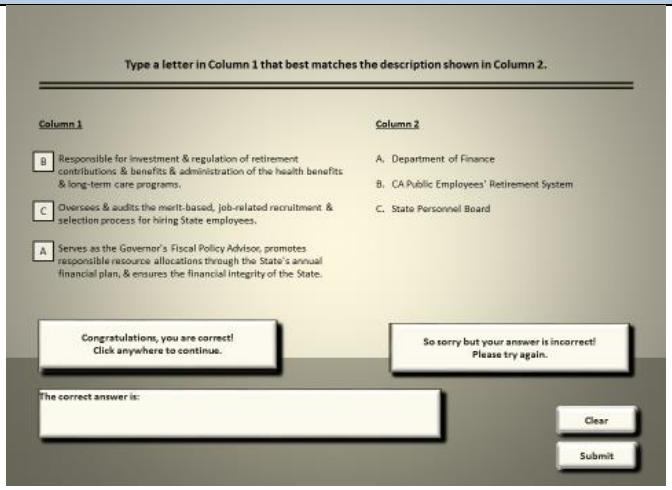
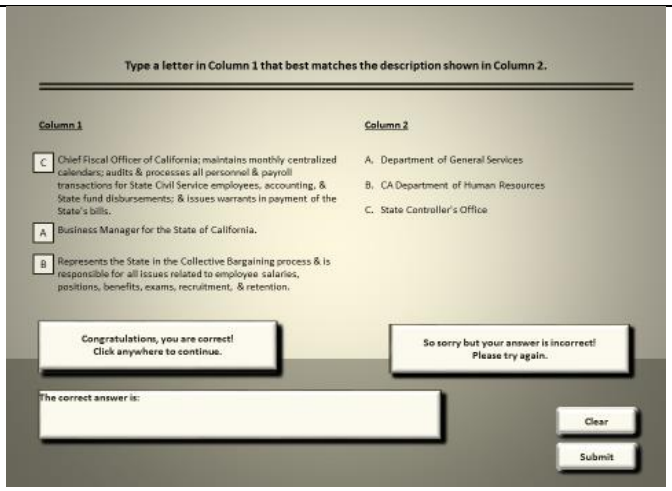
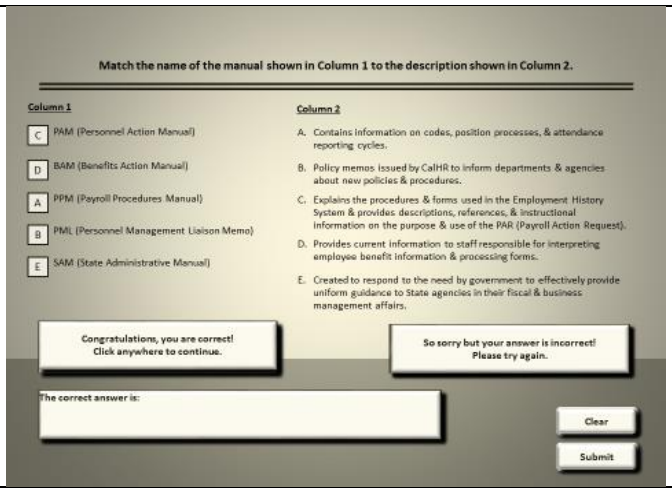
Pg	Slide	Content
15.		The California State Civil Service Classification Pay Scales - Online Manual is the next valuable tool that Personnel or Payroll specialists will reference daily in his or her job CalHR establishes and maintains the Civil Service class salary ranges. The Pay Scales manual contains information such as Class Code, Schematic code, Salary Range, trade rate, and compressed salary ranges. A **Class Code** is an assigned, four-digit number that is used for all payroll and transaction purposes. A **Schematic Code** is an alpha numeric four-digit code typically used in Federal Statistical reporting. The **Compensation (Salary Range)** is the minimum and maximum salary for a classification. The **Trade Rate** indicates that an hourly or daily rate is paid in accordance with the rate of pay that prevails for comparable working conditions in the particular trade or craft in the community in which the work is done.
16.		Since 1982, rank-and-file civil service employees in California State government have been covered by collective bargaining. Collective bargaining is a process for negotiating wages, hours, terms, and/or conditions of employment. The collective bargaining process is governed by the Ralph C. Dills Act (Government Code Sections 3512 through 3524). The Public Employment Relations Board administers and enforces the Dills Act. The State's rank-and-file employees are divided into 21 bargaining units and represent more than 200,000 civil service employees. Each bargaining unit is represented by a union; in some cases the same union represents multiple bargaining units. The goal of negotiations between CalHR and each bargaining unit is to reach agreement on a contract covering a specified time period. The contract, also called a memorandum of understanding, or MOU, spells out the terms and conditions of employment for that particular unit, including any pay or benefit increases.

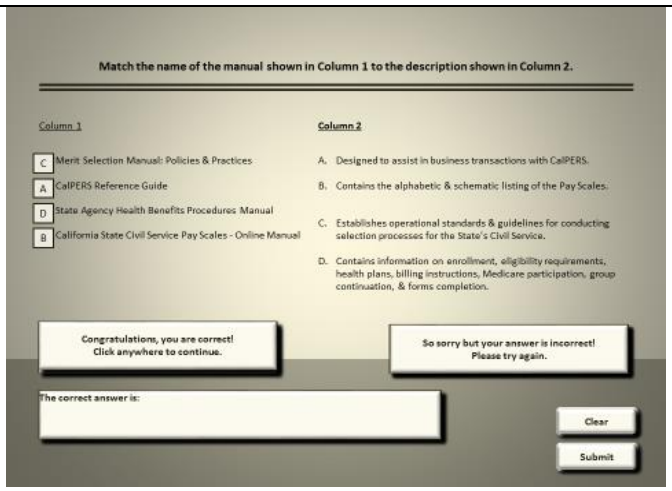
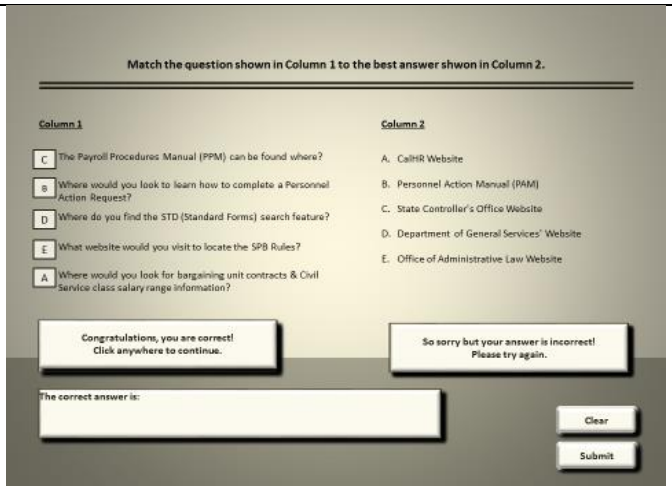
Pg	Slide	Content
17.		CalHR maintains and publishes the Benefits Administration Manual, or BAM, and partners with the California Public Employees' Retirement System to administer health benefits. The Benefits Administration Manual is designed to provide decentralized departmental staff the most current information they need to interpret and input employee benefit information. CalHR offers BAM Training to personnel staff. This training includes: • How to reference the BAM materials and other materials; • How to fill out forms correctly and code them into the system; and • The rules, regulations, and procedures of processing benefit enrollment and changes.
18.		The next Business Partner we will discuss is the State Personnel Board, or SPB. SPB was established by the State Constitution in 1934 to oversee and audit the merit-based, job-related recruitment and selection process for hiring state employees. This agency: • Provides Civil Service laws, rules, and policy direction to departments. • Audits departments for merit system, ADA, and EEO compliance. • Investigates and resolves alleged violations of Civil Service law filed by employees, applicants, and the public. • Conducts appeals for the disciplinary process and establishes and/or adjusts classifications as needed, per decisions made by the Board.
19.		A valuable tool, produced by the State Personnel Board that Personnel or Payroll Specialists may use, is the State Personnel Board Lawbook. The State Personnel Lawbook contains information on the laws that govern California State Human Resources.

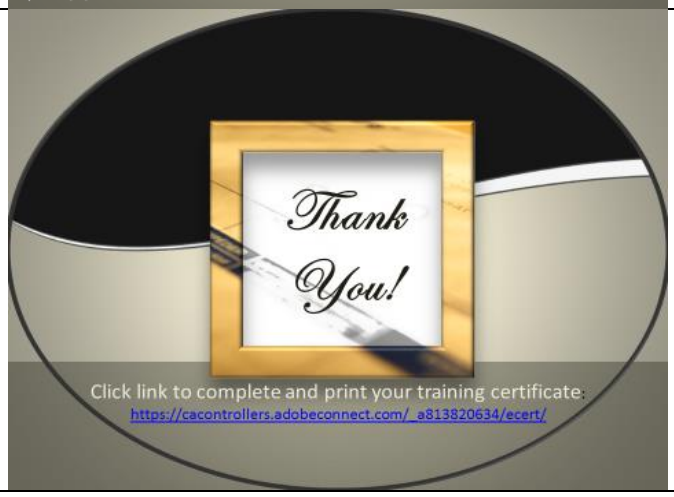
Pg	Slide	Content
20.		SPB publishes and maintains the Merit Selection Manual. This manual establishes operational standards and guidelines for conducting selection processes for the State's civil service, as well as documenting professional best practices. The manual contains discussions of key selection subjects, addressing the issues and factors that directly impact the efficiency and effectiveness of the State's selection program.
21.		You may now access current SPB Regulations via the Office of Administrative Law website under the California Code of Regulations, "Title 2. Administration", "Division 1. Administrative Personnel", "Chapter 1. State Personnel Board". The Office of Administrative Law website can be viewed at www.oal.ca.gov.
22.		The California Public Employees' Retirement System, or CalPERS, is responsible for the investment and regulation of retirement contributions and benefits and the administration of health benefits and long-term care programs. CalPERS is also responsible for the production of circular letters. Circular letters are used to keep HR shops informed of changes in policies and procedures when working on CalPERS-related issues.

Pg	Slide	Content
23.		CalPERS publishes and maintains several valuable tools that Personnel or Payroll specialists will reference in his or her job. The first reference guide we will discuss is the CalPERS State Reference Guide. The CalPERS State Reference Guide is available exclusively online. It should replace any previous editions of the State Handbook you may have. The Guide is designed to assist you in your business transactions with CalPERS. It is useful to specialists who enroll employees into CalPERS membership or who convey benefit information to staff.
24.		The next valuable tool published by CalPERS that we will discuss is the State Agency Health Benefits Procedures Manual. The State Agency Health Benefits Procedures Manual contains information on enrollment, eligibility requirements, health plans, billing instructions, Medicare participation, group continuation, and forms completion. If you do not have a copy of this manual and would like to request one, please contact CalPERS.
25.		The final Business Partner you will learn about is the Department of General Services, or DGS. • DGS serves as the business manager for the State of California. • DGS approves and publishes the State Administrative Manual, or SAM. • DGS also provides the State Forms Management Program to ensure consistency, uniformity, and economy of operations for all state agencies. • DGS stores and maintains the Standard forms repository used statewide for various program purposes.

Pg	Slide	Content
26.		The State Administrative Manual, or SAM, is a reference manual containing statewide policies, procedures, regulations, and information developed and issued by authoring agencies such as the Governor's office, DGS, DOF, and CalHR. It was created to respond to the need by government to effectively provide uniform guidance to state agencies in their fiscal and business management affairs in order to best serve the interests of the citizens of California.
27.		The Department of General Service's website contains a searchable database of standardized forms used throughout the state. Many of the forms utilized by Personnel and Payroll Specialists can be found by navigating through the standard forms search on the DGS website. The standard form search allows you to search for forms by number, by title or keyword, and by category. To access this search feature, locate the "Forms" link, on the DGS website.
28.		Now let's see what you've learned so far! At any time during this quiz, you may click the PLAY or NEXT button, located on the Playbar, to advance to the next slide.

Pg	Slide	Content
29.		**<u>Matching: State Agencies w/ Descriptions/Responsibilities</u>** Type a letter in Column 1 that best matches the description shown in Column 2. **Column 1** • Responsible for investment and regulation of retirement contributions and benefits and administration of the health benefits and long-term care programs. • Oversees and audits the merit-based, job-related recruitment and selection process for hiring state employees. • Serves as the Governor's fiscal policy advisor, promotes responsible resource allocations through the State's annual financial plan, and ensures the financial integrity of the State. **Column 2** • California Public Employees' Retirement System California Department of Human Resources • State Personnel Board • Department of Finance
30.		**<u>Matching: State Agencies w/ Descriptions/Responsibilities</u>** Type a letter in Column 1 that best matches the description shown in Column 2. **Column 1** • Chief Fiscal Officer of California; maintains monthly centralized calendars; audits & processes all personnel & payroll transactions for State Civil Service employees, accounting, & State fund disbursements; & issues warrants in payment of the State's bills. • Business Manager for the State of California. • Represents the State in the Collective Bargaining process & is responsible for all issues related to employee salaries, positions, benefits, exams, recruitment, & retention. **Column 2** • State Controller's Office Department of General Services • Department of General Services • California Department of Human Resources
31.		**<u>Matching: Resource Manuals</u>** Match the name of the manual shown in Column 1 to the description shown in Column 2. **Column 1** • PAM (Personnel Action Manual) • BAM (Benefits Action Manual) • PPM (Payroll Procedures Manual) • PML (Personnel Management Liaison Memo) • SAM (State Administrative Manual) **Column 2** • Explains the procedures and forms used in the Employment History System and provides descriptions, references, and

Pg	Slide	Content
		instructional information on the purpose and use of the PAR (Payroll Action Request). • Provides current information to staff responsible for interpreting employee benefit information and processing forms. • Contains information on codes, position processes, and attendance reporting cycles. • Policy memos issued by CalHR to inform departments & agencies about new policies & procedures. • Created to respond to the need by government to effectively provide uniform guidance to state agencies in their fiscal and business management affairs.
32.		**<u>Matching: Resource Manuals</u>** Match the name of the manual shown in Column 1 to the description shown in Column 2. **Column 1** • Merit Selection Manual: Policies and Practices • CalPERS Reference Guide • State Agency Health Benefits Procedures Manual • California State Civil Service Pay Scales – Online Manual **Column 2** • Establishes operational standards and guidelines for conducting selection processes for the State's civil service. • Designed to assist in business transactions with CalPERS. • Contains information on enrollment, eligibility requirements, health plans, billing instructions, Medicare participation, group continuation, and forms completion. • Contains the alphabetic and schematic listing of the Pay Scales.
33.		**<u>Matching: Resources Matching</u>** Match the question shown in Column 1 to the best answer shown in Column 2. **Column 1** • The Payroll Procedures Manual (PPM) can be found where? • Where would you look to learn how to complete a Personnel Action Request? • Where do you find the STD (standard forms) search feature? • What website would you visit to locate the SPB Rules? • Where would you look for bargaining unit contracts and civil service class salary range information? **Column 2** • State Controller's Website • Personnel Action Manual (PAM) • Department of General Services' Website • Office of Administrative Law • CalHR Website

Pg	Slide	Content
34.		
35.		As an additional job aid, we have provided a listing of the State Resource weblinks referenced in this training. This job aid, as well as additional job aides, are located on the State Controller's Office Statewide Training eLearning webpage.
36.		This completes the State Controller's Office Personnel / Payroll Specialist Fundamentals course Module 1, Introduction to Your State Business Partners. We hope you have found this training beneficial and relevant. We thank you for your participation.