

Transaction Supervisor's Forum 1/21/2016

PPSD provided the following updates at the forum:

Personnel and Payroll Operations Bureau (PPOB) management team

The PPOB management team has had recent changes. Below are the current members of the management team and their areas of responsibility:

Debra Spellman – Bureau Chief

Lina Ayala – Operations Manager – Payroll Office I and IV

Melody Lyles – Manager – Payroll Office I (Civil service Audits and Payroll, Position Control)

Pliny Reynolds – Manager – Payroll Office IV (Disability: IDL, NDI, SDI, TD)

Veronica Gutierrez – Manager – Retirement Reconciliation Team

Jennifer Urban – Operations Manager – Payroll Office II and III

Samantha Vance – Manager – Payroll Office II (Civil Service Payroll, Stipulations, Garnishments, Premium Pay, Direct Deposit)

Rhonda Townsend – Manager – Payroll Office III (Civil Service and CSU Benefits, W-2, and Miscellaneous Deductions)

CS BENEFITS: R. Townsend

We have been diligently working on fixing the 5000+ open enrollment health errors we received from CalPERS that require manual processing. Since last month's Supervisors Forum, we have fixed 1,773 of those errors, and currently have 3,548 remaining. Due to staffing challenges, these forms are being processed as quickly as possible. Our anticipated completion date for fixing these errors is March 1st. We will continue to update you on our progress.

All Open Enrollment Dental and Flex documents were processed that were sent in timely. However, any documents that were returned after December's Master due to a Form Audit Irregularity (ding) Notice for corrections will be processed along with the regular Dental and or Flex work order by received date.

Payroll Letter #15-017 went out to departments regarding the Distribution and Billing of 2015 Form W-2 Wage and Tax Statement. W-2s are scheduled to be mailed on January 22, 2016. Agencies can access ViewDirect Report ID PDC9820 to view

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information in agency code order and will reflect their employees' name, SSN and mailing address. In an effort to clear up invalid address records, when distributing undeliverable Form W-2s to your employees, please attach an Employee Action Request and ask the employee complete the form to update the invalid address. Please direct employees to the SCO website to access the Frequently Asked Questions regarding their Form W-2.

CS PAYROLL: S. Vance

Departments need to make sure they change the Pay Period and Payment Type as well as Earnings ID when copying PIP batches. Using incorrect pay periods, payment types and EID when copying batches can lead to employee overpayments, direct deposit reversals and/or numerous Std. 674 A/R or STD 674's to transfer funds. See PPM Section K303 for instructions regarding copying batches.

To help to process documents faster, departments need to fill out required areas of the Std. 674/674 A/R, including earnings ID and Payment Suffix. Section Z of the PPM lists numerous examples for completing the Std. 674 and 674 A/R for departments to follow. Correctly completed documents will provide a faster processing timeframes and reduce the number of documents SCO returns.

To help establish Garnishments timely and correctly, departments need to complete all of the required information on the Std. 639. Section H300 – H334 of the PPM provides instructions and Section Z, Attachment H-2 provides examples of completing the Std. 638. Additionally, SCO has an eLearning module on the SCO public website that we encourage all personnel specialist and personnel supervisors complete. (I will provide the actual Link in the meeting notes).

Questions:

1. CS Benefits: Rhonda Townsend
 - If there's a dental document that hasn't been processed during open enrollment, can departments submit an inquiry notice? Yes, supervisors and managers can also submit their inquiries to our escalation mailbox to PPSDOps@sco.ca.gov. Please refer to the <http://sco.ca.gov/Files-PPSD/EscalationEmail.pdf> guidelines for utilizing the PPSDOps escalation e-mail address.

2. What date is PPSD currently working on as of 1/25/2016?

Unit	Workload Type	Oldest Date
Position Control	607	01/20/2016
Audits	PARs	01/14/2016
Disability	IDL Special/Complex	10/01/2015

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	IDL Regular	01/15/2016
	SDI Special/Complex	01/06/2016
	SDI Regular	01/20/2016
	NDI Special/Complex	01/05/2016
	NDI Regular	01/19/2016
	TD Special/Complex	01/06/2016
	4400	01/15/2016
	4800	01/19/2016
Payroll	EH Messages	05/05/2015
	674	12/22/2015
	674 A/R	12/31/2015
	Lump Sum PARs	01/05/2016
Benefits	Health	11/04/2015
	FLEX	10/23/2015
	Dental Appeals/Changes	09/08/2015
	Dental Cancels	09/11/2015
	Dental New	01/25/2016
Misc. Deduction/W-2	674	12/30/2015
	676	01/25/2016
	EH Messages	01/25/2016
	Group Legal	01/14/2016
	LTD	01/14/2016
Retirement	EH Messages	10/02/2015

3. Departments are receiving “ding” notices for duplicate documents.

SCO will review the procedures for sending documents back to department due to duplicate documents.

4. Is SCO aware of errors in the processing of Lump Sum PARs?

Yes. SCO is aware of some errors in the processing of Lump Sum PARs. For specific questions, please use the SCO Escalation Email process.

5. Is SCO aware that departments are experiencing long wait times when calling?

Yes. SCO is currently upgrading the Automated Call Distribution system and analyzing the current structure.

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6. SCO is returning 674 A/R's when the collection or refund is beyond 3 years.

SCO will review the procedures for incorrectly sending documents back to departments for A/R collections/refunds beyond 3 years.