

Talking Points and Activities for a Lump Sum Peak Workload Kickoff Meeting

Prepared for the Departmental Human Resources Office

These talking points and activities are provided to the departmental human resources office to aid in planning a kickoff meeting for staff in preparation for the lump sum peak workload season.

Key Points

1. Important dates

- **5-Day Rule** - The Savings Plus Lump Sum Separation Pay Contribution Election Form ([Election Form](#)) must be signed, dated, and officially submitted by the employee at least 5 workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to the separation effective date. No changes will be accepted after the five day threshold has passed.
- To meet requirements around processing lump sum pay and tendering payment to the employee's Savings Plus account(s), PARs must be submitted using ConnectHR according to the dates below:

Separation Month	1st PAR received at SCO no later than...	2nd PAR received at SCO between the following dates...
October	ASAP	NA
November	12/8/23	12/11/23 to 12/22/23
December	12/8/23	12/28/23 to 1/12/24

Note: PAR packages received by SCO after the dates specified will be processed; however, there may be charges assessed by CalHR to the agency (as stated in [section 1802 of the CalHR Manual](#)) and/or a corrected W-2 for the 2023 tax year.

2. Suggested procedures and timeline around lump sum separations

- Reach out to retiring employees early (5-6 weeks if possible) with information that includes: (1) the Savings Plus Lump Sum Separation Pay Contribution Election Form; (2) their year-to-date accrued leave and contributions made to their Savings Plus account(s) and their lump sum leave accrual payout amount available at separation; (3) and the [Civil Service State Employee Guide to Retirement](#).
- Encourage employees to submit their completed Election Form and other separation documents 30 days prior to their separation date.
- You will receive a confirmation email upon submission of the PAR package using ConnectHR. Do not send a duplicate or inquiry PAR at any time, as this may significantly impact processing time.

3. Take the eLearning course on processing lump sum separation pay

- SCO's Statewide Training provides [eLearning](#) courses on multiple topics for personnel specialists. One of those topics is how to process lump sum separation pay. Over [eight easy-to-follow modules](#), the personnel specialist will learn the lump sum separation process. The eLearning should be used along with the relevant manuals and classroom training documents, and is intended as a refresher course.
- **Tip:** Modules 3 and 4 include instructions for calculating the employee's leave accrual.

4. Activities for your team

- Examine the [Lump Sum Toolkit](#):
 - As a team, review the [Separation Checklist for Personnel Specialists](#), as well as [A Guide for Avoiding Common Errors: Lump Sum Documentation and Processing](#).
 - As a team, search the [FAQ](#) for answers to common questions.
 - Review the [Lump Sum Worksheet](#).
 - Try the [Lump Sum Pre-Tax Calculator](#).
- Review [Payroll Letter 23-015](#) as a team.
- Discuss the [2023 contribution limits](#), as well as how employees include their 457(b) Catch-Up amount on the election form.
- Discuss your plan to meet the PAR submission deadlines.

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