

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 of 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. The employee's election is irrevocable, and the form cannot be changed, amended, or revoked once submitted to their personnel office.
 - 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:
 - When separating **November 1-15, 2024**
 - 1st PAR must be received at SCO by 11/22/24
 - 2nd PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
 - When separating **November 16-30, 2024**
 - 1st PAR must be received at SCO by 12/02/24
 - 2nd PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
 - When separating **December 1-31, 2024**
 - 1st PAR must be received at SCO by 12/13/24
 - 2nd PAR (if applicable) must be received at SCO between 12/30/24 to 1/10/25
- 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 2024 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.

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:** Module 3 includes instructions for calculating the employee's leave accrual payout.

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 2024's Lump Sum Separation Pay and Contribution [Payroll Letter](#) as a team.
- Discuss the [2024 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 above.

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