



October 2021

Transaction Supervisors' Forum Notes

SURVEY QUESTIONS:

The following questions are submitted prior to the forum via [Survey Monkey](#).

- **Question:** We submitted a Std. 674 to issue payment (\$260 cash payment in this case) and it was not processed timely for the current pay period. We submitted an inquiry and the original documents were processed. Then a day later the inquiry was processed causing a duplicate payment. Is there a process when submitting inquiries to avoid duplicate payments?
 - **Answer:** (Christina Campbell – SCO) We ask that HR offices do not send duplicate documents. Please contact the Statewide Customer Contact Center (SCCC) at (916) 372-7200 and our staff will pull a document to be worked. Further, please refer to the [Weekly Processing Dates](#) to identify if we are working that date.
- **Question:** Now that we cannot fax documents to SCO for processing, what is the process for establishing Accounts Receivable (AR) for employees who are separating? We used to call and let SCO know that we were faxing over the AR for immediate processing.
 - **Answer:** (Christina Campbell – SCO) Now that we cannot fax documents to SCO for processing, what is the process for establishing Accounts Receivable (AR) for employees who are separating? We used to call and let SCO know that we were faxing over the AR for immediate processing.
- **Question:** How will SCO handle kick-back forms that are being uploaded to ConnectHR?
 - **Answer:** (Christina Campbell – SCO) We will send a PR 250 email notice. More information will be released soon.
- **Question:** We have a total of 60 ARs - Change Method of Collections that we submitted (Std 674 ARs) from year 2020 that have not been processed by SCO. However the Civil Weekly Processing Dates is showing SCO is currently processing workload dated September 23, 2021. Can you please explain this process this and if possible provide the contact person name and number so we can reduce our AR list?
 - **Answer:** (Christina Campbell – SCO) Depending on the AR type each units weekly processing dates are different. If it has been determined that SCO has passed your received date you may reference the [Escalation Email Instructions](#).
- **Question:** If an employee resigns (S01) in September and elects to defer their leave to 401/457 and now in October decides to return to another state agency and would like to stop the deferral and keep the leave on the books. Can the employee do this action of S01 and keep leave on the books?

- **Answer:** (Christina Campbell) We need additional information. Please reach out to me directly. Ccampbell@sco.ca.gov.
- **Question:** Extension of Limited Term (LT) Transactions. Per Statewide Personnel Q&A: In order to extend the LT appointment, the Personnel Specialist (PS) must receive a completed RPA (Request for Personnel Action) packet to key the additional appointment (A02). The extension shall be keyed with a current effective date. The original appointment should not be corrected. Line item 215 should be documented to identify the transaction as a LT extension. Per Personnel Action Manual (PAM), Section 2.53, item 415: Per CalHR - Effective 06/16/07 - 24M Max on LT certification list. Departments are delegated the responsibility to make 12M LT appointments and extend them to 24M when the statutory requirements have been met. These extensions do not require an additional appointment recertification. Departments should correct the original appointment to extend the LT Appt. Which is correct?
 - **Answer:** (Christina Campbell – Renee McClain – SCO) The original appointment should be corrected. When an employee is LT they are entitled to CalPERS Membership after six months and one day. To ensure that the employee doesn't accidentally get shorted on their retirement contributions the original appointment should be corrected.
- **Question:** An employee is approved for Supplemental Paid Sick Leave (SPSL) 8 hours (1 day). Since this does not change the Personal Leave Program (PLP) hours and the employee is entitled to the full 16 hours, do we need to submit a STD. 674 to adjust pay?
 - **Answer:** (Renee McClain – SCO) If the employee is entitled to additional pay the SCO will need to issue it. For further information, please reference broadcast email July 23, 2021 . [SCO | July 23, 2021 \(ca.gov\)](#)
- **Question:** Effective 10/01/21, when an employee is on disability, we can include the \$260 cash payment (pay diff 440) on the Std. 674D. It is mentioned for Industrial Disability Leave (IDL), Non-industrial Disability Insurance (NDI), and Temporary Disability (TD). It did not mention for State Disability Insurance (SDI). My first question is, are we able to include the \$260 cash payment on a Std. 674D for SDI? If an employee is on SDI with no supplementation but entitled to the \$260, do we submit it on a Std. 674D or a normal Std. 674 and checkmark disability?
 - **Answer:** (Karin Johnson-Anderson) An updated broadcast email will be sent. The \$260 Healthcare Affordability Pay Differential requests will need to be sent separately on a Std. 674 because it is not included in the Disability payment calculations.
- **Question:** Employee changing supplemental leave balances while on the benefits of State Disability Insurance (SDI) and/or Non-Industrial Disability Insurance (NDI). Specifically, does the employee have the ability and discretionary latitude to alter their leave supplemental leave types while collecting the benefits of mid-term of SDI benefit period?
 - **Answer:** (Kim Herlache – CalHR) There is no harm in changing the type of leave, but the employee cannot change the supplementation amount.

- **Question:** A retirement employee has decided to cash-out a large amount of lump sum, and has asked that it be distributed in current and future tax years similar to deferring lump sum. Can the department delay the cash out to accomplish the employees request and not violate any labor codes?
 - **Answer:** (Kim Herlache – CalHR) Departments may not delay Lump Sum distribution except when the Lump Sum can be rolled over into a future calendar year. If the time frame is outside of being allowed to do that, it cannot be done.
- **Question:** When determining military supplementation, do we use only the military base pay or the military base pay and allowances? The military leave worksheet states Base Pay (does not indicate allowances); however, the HR Manual indicates to that its' the military base pay and allowances. Can an employee return from military leave prior to the military leave ending date on the DD214? When an employee voluntarily deletes a dependent, is a Consolidated Omnibus Budget Reconciliation Act (COBRA) letter required? Does CalHR have a sample COBRA letter for Medical Reimbursement Account - no template can be found in the Benefits Administration Manual (BAM).
 - **Answer:** (Kim Herlache – SCO) The department designated contact should email CalHR Personnel Services Branch (psb@calhr.ca.gov).
- **Question:** Is someone going to look into Delta Dental having dependents dropping off of the benefits once they have signed up and payments are coming out of their payroll warrant months later? The dependents that have already been deleted are showing back up on benefits. During open enrollment for the past few years paperwork has been processed effective the new year, three to six months later the dependent falls off without no one's knowledge and the employee receives an AR for prior months. Proof of the dental form was sent in and shows processed.
 - **Answer:** (Carol Ormode – CalHR) More information is needed. Please contact Carol.Ormonde@calhr.ca.gov.
- **Question:** Does SCO have any plans to create Std. 672s that can be forwarded to Department's via email versus through the mail? Does SCO have any plans to convert the Std. 672s to a document that can be filled out online versus handwriting information on hard copies?
 - **Answer:** (Nastassja Johnson – SCO) SCO has no plans to deliver the Std. 672s via email. SCO is currently investigating how the Std. 672s may be delivered electronically.

POLL:

- **Question:** Would your HR Office be interested in a Lump Sum Calculator demonstration from PPOB Audits and Payroll Team?
 - **Results:** 72 Yes responses.

PROGRAM UPDATES:

- **SCO - Statewide Tax Support Program – Monique Perez (MPerez@sco.ca.gov)**
 - Direct Mailing of 2021 W-2's & 2021 FORM 1095-C Return Address:

related questions from an HR, we will reach out to the HR office and offer training assistance.

- **SCO – Statewide Customer Contact Center – Christina Campbell**
(CCampbell@sco.ca.gov)
 - Frequently Asked Questions:
 - Why did my pay not issue?
 - Verify employees name, social security number, position number, time be paid is not more than allowable, and check Employee History (EH).
 - I keyed pay on a no cycle date and no pay issued the following day?
 - Use the [Decentralized Payroll Calendar](#) to verify cycle and no cycle days.
 - When will SCO work my document?
 - Please remind staff to view the [Weekly Processing Dates](#).
- **CalHR – Savings Plus – David Bolognesi (David.Bolognesi@calhr.ca.gov)**
 - Lump Sum Deferral Guidelines and Resources

BENEFITS ADMINISTRATION

- CalHR - Affordable Care Act Program
 - All errors on the monthly and quarterly Affordable Care Act (ACA) compliance reports need to be corrected in the Affordable Care Act System (ACAS) by December 30, 2021. If the errors are not corrected timely and the state reports incorrect information to the Internal Revenue Service to demonstrate its ACA compliance, the state could be at risk for information reporting penalties.
 - Departments are expected to review their ACA compliance reports in ViewDirect at the beginning of each month and correct all errors on the reports within 30 days.
 - In November, CalHR will notice departments with outstanding errors in the ACAS as part of its November Quarterly Compliance Review. Departments who are notified of their outstanding errors have 30 days to correct and certify that the errors were corrected in the ACAS by returning the *Quarterly ACA Compliance Review Notification* document to: ACA.Policy@calhr.ca.gov.
 - During Open Enrollment, if employees elect to enroll in health benefits or cancel their health benefits, an update in the ACAS is required. o For employees who elect to enroll in health coverage during Open Enrollment, departments should key a 3A in the ACAS with an effective date of January 1, 2022.
 - For employees who elect to cancel their health coverage during Open Enrollment, departments should key a 5B in the ACAS with an effective date of December 31, 2021.
 - CalHR and SCO will facilitate ACA Trainings in November and December. Departments should send their requests for training to SCO at: ppsdacatraining@sco.ca.gov.
 - ACA Part 1 and 2: November 3 (9am-10am) & 4 (9am – 11:30am)

- ACA Part 1 and 2: December 1 (9am – 10am) & 2 (9am – 11:30am)
- CalHR - Open Enrollment
 - Open Enrollment Season has ended as of October 15
 - Subscribe for Benefits Updates:
 - We have added two subscription boxes on the CalHR Benefits Division Website, one on the State HR Professionals page and one on the State Employee page, to collect emails for future updates and announcements that CalHR sends out in regards to Open Enrollment. We are working to build better communication between departments.
 - Open Enrollment Inbox: OpenEnrollment@calhr.ca.gov
 - CalHR Benefits Division has established an Open Enrollment inbox. You can email this box with questions related to Open Enrollment. We do ask that you still email program specific questions to the program email boxes. You can find program emails on the CalHR Benefits Division Contact Page: <https://calhr.benefitsprograms.info/state-hr-professionals/hr-pp-contact-list/> . I have added the Open Enrollment Inbox to the list.
- CalHR - Dental Program
 - Appeals status - Dental is current, no backlog.
 - We continue to receive appeals with incomplete or incorrect Std. 692 forms. Incomplete or incorrect forms will be returned to the personnel office for corrections which results in processing delays for employees. Specifically, we are seeing the following:
 - Outdated versions of the Std. 692 form.
 - Employee elected to enroll in a plan they're not eligible for.
 - Section E of the form is either blank or incomplete.
 - Dental appeals should only be submitted to dental@calhr.ca.gov. Please do not copy SCO or individual employees at CalHR when submitting appeals.
 - Departments must contact SCO regarding the status of regular dental enrollment forms.
 - Personnel offices must inform employees regarding any account receivables (AR) for retroactive dental premiums. When submitting an appeal to CalHR, you must confirm in the memo that you have informed the employee about the AR's.
 - We are receiving emails or calls from employees who say they have been directed to CalHR by their personnel office. Do not route employees to CalHR as we will simply direct them back to their personnel office.
- CalHR - Vision Program
 - Appeals status – backlog is approximately 10 days.
 - Contact Vision Service Plan directly for vision inquiries other than appeals at stateofca@vsp.com. Include employee's full name in the subject line.
 - Remind employees to contact their own department personnel staff directly with benefits inquiries.
 - Assist prospective retirees in completing the CalHR 695 form to continue vision benefits into retirement, as they have 60 days to elect coverage.

- Complete new vision forms for employees returning from a Leave of Absence and send to Vision Service Plan at stateofca@vsp.com.
- Vision Service Plan's mailstop has changed to MS 229. Use the latest forms on the CalHR website.
- Send vision appeals to CalHR at vision@calhr.ca.gov.
- CalHR - FlexElect and CoBen Programs
 - Appeals status - backlog is approximately 10 days.
 - For escalated appeals, please indicate "Escalation" in the subject line.
 - We have been receiving Flex appeals in our dental inbox. Flex appeals should be submitted to flexelect@calhr.ca.gov.
- CalHR - COBRA
 - Information regarding the COBRA premium subsidy relief is available in BAM section 400 at Consolidated Omnibus Budget Reconciliation Act (COBRA) – CalHR.
 - Third Party Pre-Tax Parking Reimbursement Account Program
 - Refund requests status - backlog is approximately two weeks.
 - Refer to the HR Online Manual and the BAM for information and processing details for this program.
 - Enrollments or changes are effective the first of the pay period after SCO processes the CalHR 682 form. Retroactive enrollments or changes are not allowed.
 - Submit refund requests electronically to pre-taxparking@calhr.ca.gov.
 - Refund requests must be submitted on department letterhead and include the following:
 - Name of Employee.
 - Last four numbers of the employee's Social Security number.
 - Detailed reason/justification for the refund.
 - Total refund amount.
 - Pay periods and monthly deduction amounts for which the refund is specified.
 - Pay periods and amounts of double deductions, if applicable.
 - Indicate if the refund is full or partial.
 - Attach a copy of the CalHR 682 cancellation form submitted to SCO.
 - Employees cannot request a refund if they are enrolled in the program. Departments must confirm that the PTP deduction (361-001) has ceased before submitting a refund request.
- CalHR Benefits' Resources
 - Websites:
 - Human Resources: calhr.ca.gov/state-hr-professionals
 - CalHR Benefits Website: <https://calhr.benefitsprograms.info/>
 - HealthierU Connections: <https://www.calhrwellness.com/en/welcome-california-state-employees/>

- State Employees: calhr.ca.gov/employees
- HR Manual: hrmanual.calhr.ca.gov/Home/ManualItem
- Contacts:
 - ACA Program ACA.Policy@calhr.ca.gov
 - COBRA COBRA@calhr.ca.gov
 - Dental Program dental@calhr.ca.gov
 - Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov
 - Dependent Re-verification Program DependentRe-verificationProgram@calhr.ca.gov
 - FlexElect/CoBen Program FlexElect@calhr.ca.gov
 - Group Legal GroupLegal@calhr.ca.gov
 - Life Insurance LifInsurance@calhr.ca.gov
 - Long Term Disability LTD@calhr.ca.gov
 - Vision vision@calhr.ca.gov

- **SCO – Statewide Civil Service Benefits Program – Bryce Miller (BMiller@sco.ca.gov)**
 - Open Enrollment Reminders:
 - Send documents through ConnectHR
 - Ding Notices (PR 250)
 - Select appropriate dropdowns in ConnectHR
 - Ensure Open Enrollment forms are completed thoroughly
 - Send Open Enrollment documents on a flow basis

SCO KEY INITIATIVES: PROJECT UPDATES

- **SCO – Connect Human Resources Portal – Liz James (LJames@sco.ca.gov)**
 - ConnectHR Update:
 - ConnectHR has been fully deployed
 - Add/delete users update
 - Additional updates
- **SCO – California State Payroll System Project – Bernie Schultz (BSchultz@sco.ca.gov)**
 - In Process:
 - Ancillary procurement activities for SFY 21/22
 - Recruiting for multiple project positions

- Data cleansing
 - Finalize solicitation and submit to CDT by November
 - Recent Progress:
 - SCO Legal completed solicitation review and found no issues
 - Obtained SCO/CalHR approval and signatures for Stage 3 Part A
 - Process Advisory Committee (PAC) kickoff
 - Union Town Hall complete
 - Positive and collaborative meeting
 - Evaluation of Phase 0 Bidder's Survey
 - Conducted bidder's conference
 - What's Next:
 - Submit Stage 3 Part A to CDT with updates to Stage 1 and Stage 2
 - Executive Steering Committee meeting
 - Initial Legislative Analyst's Office briefing
 - Meet with CalATERS team and DGS to discuss CSPA project status and incorporating Travel and Expense management functions into project scope
 - Our Ask:
 - Participate in "In Process" activities
 - Provide SME support for questions
 - Provide SME support for data cleansing sessions
- **SCO – General Reminders – Nastassja Johnson (NxJohnson@sco.ca.gov)**
 - Include your name on all documents submitted to the SCO.
 - Utilize ConnectHR to send documents rather than fax, email or mail.
 - Include the employees complete social security number (SSN) when sending documents through ConnectHR.
 - Visit Department of General Services (DGS) website for updated Standard (STD) forms that allow for a digital signature.
 - STD674 and STD674 A/R have been updated to allow for an email address for the specialist. This allows SCO to contact the specialist in a timely regarding PR250's (dings).
 - Update [California Personnel Office Directory \(CPOD\)](#).
 - The [PPSD Register](#) – PPSD's Monthly Newsletter
- **SCO – Resources – Nastassja Johnson (NxJohnson@sco.ca.gov)**
 - Websites:
 - Human Resources: https://sco.ca.gov/ppsd_state_hr.html
 - State Employees: https://sco.ca.gov/ppsd_se_payroll.html
 - Contacts:
 - [Statewide Customer Contact Center](#) (916) 372-7200
 - HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov

- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- SCO Key Initiatives:
 - [Cal Employee Connect Project](#)
 - California State Payroll System Project

COVID-19 UPDATE:

- The Personnel and Payroll Services Division (PPSD) is monitoring the [COVID-19](#) pandemic closely. At this time, PPSD is open for business as usual. PPSD will continue to stay on top of the latest COVID-19 information and update departments of any changes that may impact services to our customers. PPSD is updating the State Controller's Office (SCO) [State Human Resources](#) and [State Employees](#) webpages with service information as it becomes available. These webpages will be updated regularly, as necessary.
- SCO has developed [streamlined processes](#) to expedite financial transactions and to report.
 - PPSD will accept electronic signatures. Please follow your electronic signature protocol.
- Updates have been made to the [COVID-19 Emergency Family Medical Leave Act \(E-FLMA\) calculator](#). Please be sure to use the most up to date version of the calculator.
- The State Controller's Office (SCO) has made a permanent decision to no longer impose restrictions identified in the Personnel and Payroll Services Division's (PPSD) [Decentralized Security Program Manual](#) and [Decentralized Security Guidelines](#) below:
 - Access and use of SCO's systems shall only be initiated from workstations that are owned or leased by the state agency and that are physically located within a facility that is owned or leased by the state agency and;
 - Access and use of SCO's Human Resource Management Systems shall only be initiated from workstations that are owned or leased by the state agency and that are physically located within a facility that is owned or leased by the state agency.
 - Instead, agencies and campuses should review and adhere to the following policies and procedures for remote access to information systems.
 - [State Administrative Manual \(SAM\) 5305.5](#)
 - [State Administrative Manual \(SAM\) 5360.1](#)
 - [Statewide Information Management Manual \(SIMM\) 5360-A](#)
 - Updates to PPSD's Decentralized Security Program Manual and Decentralized Security Guidelines to reflect this change in policy will be made as soon as practical.
- For more information, please access our [COVID-19 FAQs](#).

SCO EMAIL SUBSCRIPTION SERVICE:

- To ensure you're receiving essential PPSD notifications, please subscribe to our email subscriptions listed below. Also, we invite you to share this information with anyone who would be interested in PPSD notifications.
 - [California Leave Accounting System \(CLAS\) Letters](#)
 - [State Controller's Office Letters \(Personnel / Payroll Operations\)](#)

CUSTOMER RELATIONS SURVEY:

How would you like to receive information from us during this time? Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov.

CONTACTS:

- Transaction Supervisors' Forum SCOTransactionSupervisors@sco.ca.gov
- [SCO - Personnel and Payroll Services Division \(PPSD\)](#)
- [California Department of Human Resources \(CalHR\)](#)
- [California Public Employees' Retirement System \(CalPERS\)](#)
- [California Personnel Office Directory \(CPOD\)](#)
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov

SCO Key Initiatives:

- [Cal Employee Connect](#)
- [California State Payroll System Project](#)

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