



August 2022

Ad Hoc Committee on Human Resources Forum Notes

Table of Contents

[SCO KEY INITIATIVES](#)
[BENEFITS ADMINISTRATION](#)
[PROGRAM UPDATES](#)
[SCO RESOURCES](#)
[FORUM QUESTIONS](#)

SCO KEY INITIATIVES:

Project Updates

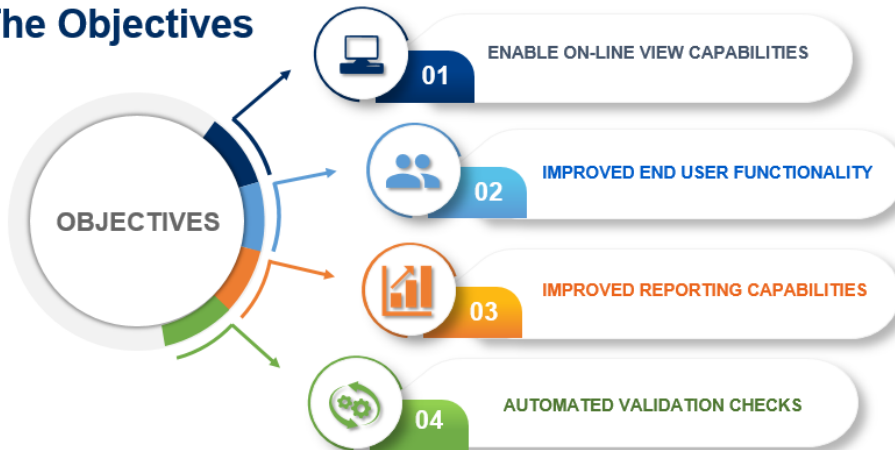
California State Payroll Project – (CPSHelp@sco.ca.gov)

The Vision Modernize the human resource management, travel and business expense, and payroll systems used by 300,000 state government employees in order to provide accurate and timely personnel and payroll service with quality customer service.

California State Payroll System | CSPS



The Objectives

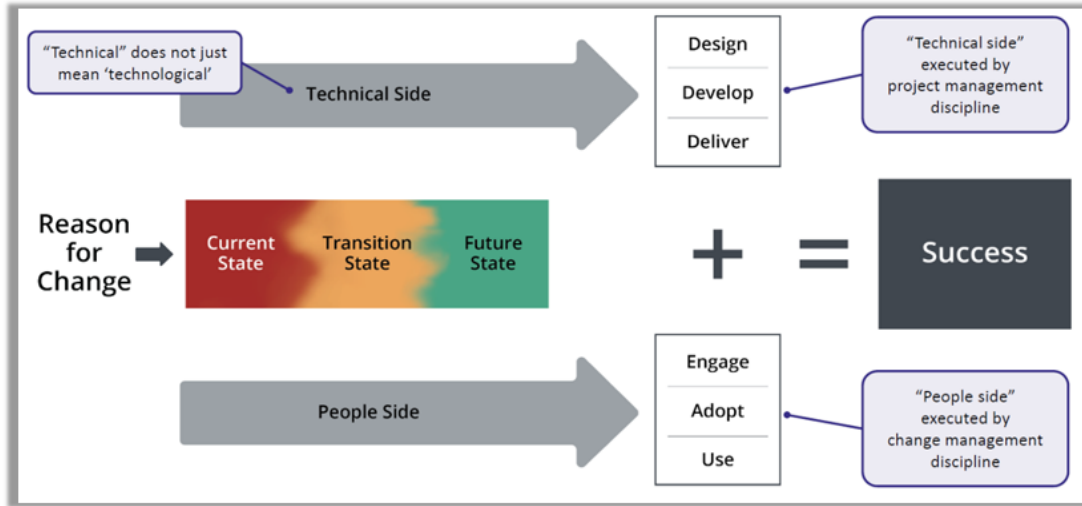


Organizational Change Management

Organizational Change Management (OCM) is a discipline focused on helping individuals, teams, and organizations transition to desired new ways of doing work using methods intended to significantly reshape a company or organization.



Technical + People Sides = Successful Change

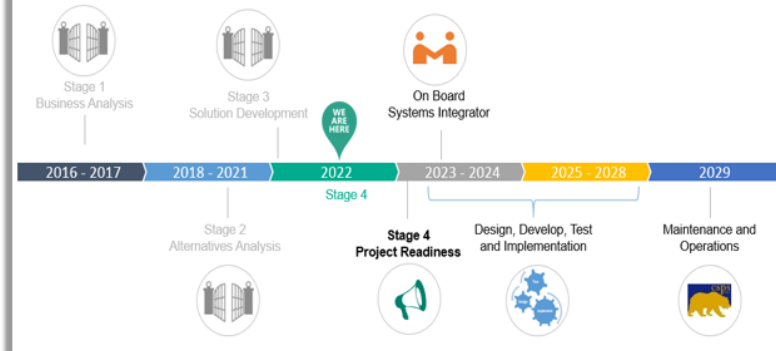


The Technical Side of Change is executed by the Project Management function. The main goal is to:

1. Design
2. Develop and
3. Deliver

a new technical system for the State.

Technical / Project Management Timeline



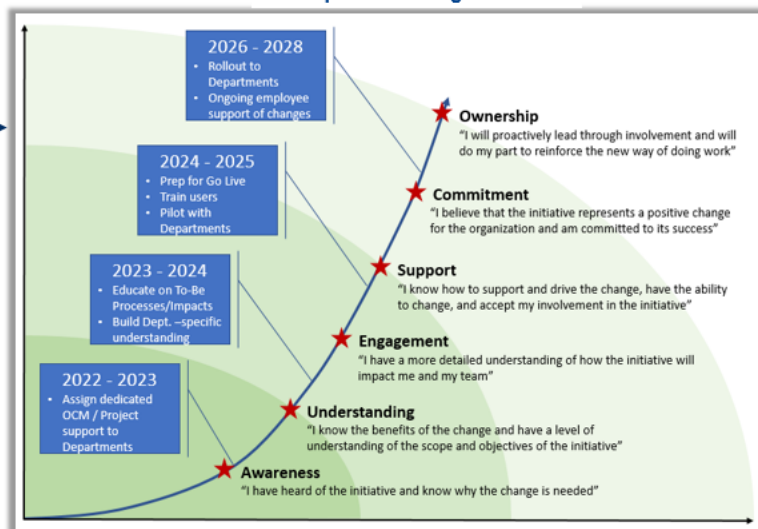
The “Speed of Change” Curve



The People Side of Change is executed by the OCM function. The main goal is to influence:

1. Engagement
2. Adoption and
3. Use

the new system.



For more information:

OCM mailbox: CSPSHelp@sco.ca.gov

CSPS Website: <https://sco.ca.gov/csps.html>

SCOCONNECT: CAL EMPLOYEE CONNECT PROJECT/CONNECTHR

ConnectHR – Moe Adam (connecthrhelp@sco.ca.gov)

- Telework Stipend update
 - During the month of July:
 - 157,156 payments were issued
 - To 60,876 employees
 - More than 84% were the result of data submitted via ConnectHR rather than the Payroll Input Process (PIP)

Cal Employee Connect (CEC)

- Pseudo-Interactive features: Multifactor Authentication, Direct Deposit, Address change and Withholdings
- Demonstration of Multifactor Authentication and Direct Deposit

SCO – Statewide Training Program – Siobhan Hallinan (ppsdtraining@sco.ca.gov)



- [Intro/PAM Section 1](#)
- [PAM Sections 2 & 3](#)
- [PAM Sections 4 thru 10](#)
- Virtual PAR Documentation Workbook (To be completed prior to Virtual Documentation class - online)
 - [PAR Documentation Workbook](#)
- PAR Documentation (Comprehensive Archive)
 - [LEARNING MODULE 1: PAR Purpose/Use Appointment Transactions Overview](#)
 - [LEARNING MODULE 2: Miscellaneous Change Transactions and Separation Transactions](#)
 - [LEARNING MODULE 3: Use of PAM Section 2 to look up PAR line items 1-9 when documenting your Padded or Turnaround PAR](#)
 - [LEARNING MODULE 4: PAR Documentation practice](#)

Paycheck Tutorial

- eLearning: <http://cacontrollers.adobeconnect.com/p25cvunxtcf/>
- Printable Version: <http://cacontrollers.adobeconnect.com/pbop0xul4pir/>

Retirement

- [Item 505 Retirement Codes](#)

SCO Workers' Compensation

- [Module I - Introduction, general understanding, and key forms](#)
- [Module II - Employee history scenarios and communication](#)
- [Module III - Supplementation and payable documents](#)
- [Module IV - Personnel Specialist resources](#)

Stipulations

- [How to Process Stipulations](#)

BENEFITS ADMINISTRATION:

SCO – Civil Service Benefits and Retirement - Ryan Baughman (PPSDCSBenefits@sco.ca.gov)

Tips for a Smooth 2022 Open Enrollment Season

- Encourage employees to fill out all [benefits forms online](#).
- All documents must be uploaded through ConnectHR. This includes any changes or PR250 responses.
- HR staff only need to upload once to ConnectHR. Verification email proves SCO has received it.
- For any questions or concerns please reach out to the Statewide Customer Contact Center (916) 372-7200.

2022 Open Enrollment SCO Resources

- [Open Enrollment Form Checklists](#)
- [Open Enrollment Forms Examples & Common Errors](#)
- [Open Enrollment FAQs](#)

PROGRAM UPDATES:

Employee Retirement Guide – Christina Campbell (SCCC at (916) 372-7200)

- **Purpose:** The Employee Retirement Guide was created to help employees who are preparing for retirement. It includes Lump Sum steps, benefits, and other important information. Please share with your employees.

EMPLOYEE GUIDE TO RETIREMENT

STEP 1: FILE FOR RETIREMENT

File your retirement with CalPERS, preferably through their online portal. **Log into [myCalPERS](#)**, go to the **Retirement** tab and select **Apply for Retirement**. CalPERS will allow you to file your application up to 120 days before your retirement date. Call CalPERS at (888)225-7377 for more information.

Important Note: Section 9 on CalPERS Health Coverage

Section 9 in the CalPERS Retirement Application determines if you want to *decline* continuation of your CalPERS health coverage into retirement (shown below). Do not select the check box (highlighted in blue) if you want to keep your current CalPERS health coverage into retirement.

Section 9 **CalPERS Health Coverage**

If you are currently enrolled in your own right for CalPERS health benefits, you can continue your health enrollment into retirement with no break in coverage.

If you do not want health coverage, you must cancel retiree health coverage by declining coverage below. You may be eligible to enroll in health coverage during the next Open Enrollment period.

I decline continuation of my CalPERS health coverage into retirement.

Review **[Step 4: Enroll for Retirement Benefits \(Health, Dental, Vision and Legal\)](#)** in this guide or contact your Personnel Specialist to learn more about your Retirement Health Coverage options.

STEP 2: INFORM PERSONNEL SPECIALIST OF RETIREMENT DATE

You must initiate the retirement process with your Personnel Specialist as soon as possible. CalPERS does not inform your Personnel Specialist that you filed for retirement. Your Personnel

Disclaimer: This publication is intended for reference only. It does not supersede current applicable laws or regulations, and it is not intended for purposes of providing legal advice.

SEPARATION CHECKLIST FOR PERSONNEL SPECIALISTS

- **Purpose:** The [Separation Checklist for Personnel Specialists](#) was created to aid Personnel Specialists (PS) through an employee's (EE) separation process.

Covers Lump Sum Steps.

This is to complement existing department specific separation processes, and must always be reviewed in collaboration with HR Policy.

SCO SEPARATION CHECKLIST FOR PERSONNEL SPECIALIST	
This checklist is based on SCO separation requirements for Personnel Specialists. Use this checklist to complement existing department-specific separation processes. Do not use this checklist when separating exempt positions. When separating exempt positions, defer to this checklist: reference the Exempt Salary Schedule .	
1. VERIFY INFORMATION AND PROCESS DOCUMENTS FOR SEPARATING EE	
<input type="checkbox"/>	Verify Separation Dates (resignation letter, retirement notice, etc.) <ul style="list-style-type: none">○ Retirement: Verify with CalPERS (ref. 1.1).○ IMPORTANT: The EE's separation date is one day before their retirement date.
<input type="checkbox"/>	Update STD 672

2. DETERMINE FINAL PAYMENT OF UNUSED COMPENSABLE LEAVE	
IF EE IS CASHING OUT UNUSED COMPENSABLE LEAVE UNITS:	
<input type="checkbox"/>	Calculate Lump Sum Payout using SCO Lump Sum Worksheet and STD 640 <ul style="list-style-type: none">○ You must calculate on both and verify totals match.
<input type="checkbox"/>	Key PAR(s) (STD 680A) <ul style="list-style-type: none">○ If EE is cashing out into two tax years, you submit two (2) PARs – one for each tax year. Only EEs with separation dates after November 1st (or retirement dates after November 2nd) are eligible to cash out into two tax years.
IF EE IS DEFERRING INTO 401(K)/457(B), SUBMIT LUMP SUM PAR PACKAGE TO SCO:	
Necessary Preparation	
<input type="checkbox"/>	Review SCO Lump Sum Toolkit, specifically Lump Sum Processing Guide and FAQ
<input type="checkbox"/>	Calculate Lump Sum Balances

Business Analysis & System Coordination – Tracy Gutierrez (SCCC at (916) 372-7200)

Processing Separations:

- When separations are processed with salary advances that are corrected later, it can create retirement reporting issues.
 - Some separating employees accept refunds of CalPERS contributions
 - If their final pay is overstated, they receive overpayments from CalPERS
 - CalPERS does not collect on these
 - It becomes the agency's responsibility
- Please monitor my|CalPERS to ensure separating employees' records are accurate
- If you have this situation, please work with the SCO Retirement Reconciliation Team

PPSD General Reminders

- Remind HR staff to use ConnectHR to submit documents or upload data
- Update [California Personnel Office Directory \(CPOD\)](#)
- The [PPSD Register](#) – PPSD’s Monthly Newsletter
- Recommended [subscriptions](#)
- Review Communication from State Policy and Instructional Departments for Business Process impacts
- Review personnel and payroll reports to ensure accuracy of data
- It is recommended that the HR staff follow [Section M](#) of the Payroll Procedures Manual (PPM) for certifying payroll, which requires HR staff to validate that both mandatory and voluntary deductions have been withheld appropriately and to certify the employee’s payroll is accurate.
- Share this information with your Human Resources Team!

SCO RESOURCES:

- Websites:
 - Human Resources (HR): https://sco.ca.gov/ppsd_state_hr.html
 - State Employees: https://sco.ca.gov/ppsd_se_payroll.html

SCO KEY INITIATIVES:

- [SCOConnect](#)
- [California State Payroll System Project](#)

CONTACTS:

- Affordable Care Act (ACA) Email acasupport@sco.ca.gov
- Cal Employee Connect Email connecthelp@sco.ca.gov
- Cal Employee Connect Feedback Email connectfeedback@sco.ca.gov
- California Leave Accounting System (CLAS) Email Clas@sco.ca.gov
- ConnectHR Email (All HR Staff) connecthrhelp@sco.ca.gov
- ConnectHR Feedback Email (All HR Staff) connecthrhelp@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email ppsdmirs@sco.ca.gov
- [Statewide Customer Contact Center](#) (SCCC) (916) 372-7200

FORUM QUESTIONS:

The following questions were submitted during the forum:

- **Question:** Can you share the human resources email again please?

Answer (SCO): We ask HR offices to contact the Statewide Customer Contact Center at 916-372-7200.

- **Question:** For the old school employees who want to continue sending their direct deposit forms to us, are we able to still upload for them? Is the self service only for change or for new enrollment?

Answer (SCO):

- HR offices can still accept documents and send via ftp.
- Yes, they can still send paper forms. This process will not change the current process, it will be another option.

- **Question:** Will there be a tutorial for HR offices to send to employees?

Answer (SCO): We will send some communication resources once we begin deployment in the 4th quarter of this year.

- **Question:** Is there a way, after cancelling direct deposit, to prevent the employee from signing up again until we have cleared what we need to?

Answer: HR's will receive a Carbon Copy and give the opportunity to deny the request.

- **Question:** Is approval required as well? If the notification is not responded to, will the DD Enroll still take place?

Answer: There will be a lifetime period. It will be held for 2 (two) business days to give HR offices to intervene if needed. If 48 hours or 2 business days pass without HR denying the request, then the direct deposit will be processed.

- **Question:** Will employees have the option to change and cancel as well? Will they receive ding notices for incorrect checking numbers?

Answer (CHP): They can change, we have to cancel.

- **Question:** On the paycheck calculator how do you make the calculator calculate only SS or Med when an EE has reached the limit.

Answer: SSN Max: the retirement will need to be coded as NM or N (depends on what the employee is paying into). The retirement amount withheld would need to be entered in the voluntary section field.

Medicare at \$200,000: The percentage amount of 2.35% will have to manually entered in the voluntary section field.

- **Question:** Why does my paycheck say I'm contributing to the Black employee or Filipino employee associations, when it really is a contribution to AFLAC or Washington national? We get a lot of those questions. If it said AFLAC or Washington Mutual on the checks, it might cut down on the multitude of questions.

Answer: I believe you are talking about a deduction. Please send those questions to deductionsprogram@sco.ca.gov.

- **Question:** When will or with their be a SDI/NDI training?

Answer: There are 4 SDI training modules on the eLearning page. There are a few NDI ones as well but we don't have a timeline as to when a virtual training will take place.

- **Question:** Regarding pre-tax parking. I have an EE that left another agency approximately 1 year ago and parking has not been cancelled yet. Who can we go to for assistance with this? We tried reaching out to prior department.

Answer: Please email Pre-Taxparking@calhr.ca.gov.

- **Question:** Is there a timeframe on when we'll be notified if the employer contributions are increasing for 2023?

Answer: Hi, this information is currently posted on the CalHR Benefits website. You will find the employer contributions within the employee announcement that is currently on the HR Professionals Open Enrollment resources page.

- **Question:** Is there an ETA on Flex Elect and CoBen info and handbooks for 2023?

Answer: Hi, as mentioned the CoBen handbook is in final stages and will likely be active on the CalHR Benefits website by Monday, August 22. The FlexElect handbook is currently on the website. You can locate handbooks on the Virtual Bookshelf that is located on the Open Enrollment page.

- **Question:** Are the webinars going to be captioned for ADA?

Answer: The webinar recordings shared on the Virtual Benefits Fair will be close captioned.

- **Question:** Is there an email list to receive information when updates are made in the CalHR Benefit Webpage?

Answer: Hi, we do not currently send out emails regarding website updates. We share updates during Trans Sup and Ad Hoc Meetings. Thank you.

- **Question:** ACA question, not in training materials, what is the code for an employee in a 2nd position?

Answer: https://www.sco.ca.gov/Files-PPSD/acas_userguide.pdf.

- **Question:** Is there a timeframe on when we'll be notified if the employer contributions are increasing for 2023?

Answer: You can find employer contribution information for 2023 by reviewing the Open Enrollment resources provided by CalHR. The Open Enrollment 2023 Plan Highlights and Changes document, as well as the Employee Announcement, will provide information regarding Employer Contributions as well as the link to the Benefits Calculator. All HR Professionals can view Open Enrollment resources using this link - [Open Enrollment Resources | Cal HR \(benefitsprograms.info\)](#). As a reminder this link is on a password protected page and may only be accessed by departmental personnel offices.

- **Question:** Sorry, I may have missed this but is there a timeline on when can we expect further information/instructions for the \$260/FlexElect?

Answer: CalHR will release information soon.

- **Question:** To encourage employees to submit electronically, will SCO accept a PDF signature?

Answer: Since 2020 we have accepted electronic signature.

- **Question:** Will there be an open enrollment document checklist as in previous years?

Answer: The checklist is active right now on the SCO website.

- **Question:** When will the benefits calculator be updated for Open Enrollment per CalHR?

Answer: In the next few weeks.

- **Question:** Christina, would you put those OE links in the chat?

Answer: https://www.sco.ca.gov/ppsd_oe_forms_examples_and_common_errors.html.

- **Question:** Is there a maximum # of EE's we can enroll in CLAS?

Answer: You can enroll as many employees as you want as long as there are available "seats."

- **Question:** We have received DINGS late in the afternoon. Do you start your 48 hours the next morning?

Answer: DING @ 2pm, you will have Monday at 2PM to get back to us.

- **Question:** Prior to being a supervisor, I sent over an A/R reversal three times and to this day has not been worked. If we are not supposed to upload more than once, who do we contact? Sometimes nobody picks up the phones and wait times have been over 40 minutes, and I just hang up.

Answer: Do not submit inquiries via ConnectHR. Please contact Statewide Customer Contact Center at (916) 372-7200.

- **Question:** Has the 505 table been updated? We have called and been told SCO is working on it. We have employees we need to key and cant until the table is updated.

Answer: This is being worked on.

- **Question:** Will the agencies be notified once the 505 is updated?

Answer: As I mentioned in my presentation, that update is under review currently. We will post the changes as soon as that process is complete. Thanks!

- **Question:** Is there going to be an answer to the 505 table question?

Answer: As I mentioned in my presentation, that update is under review currently. We will post the changes as soon as that process is complete. Thanks!

- **Question:** Will connect HR soon have a dropdown for the retro report?

Answer: Not at this time as that document does not come from PPOB. We will add to suggestions.

- **Question:** Is there a dropdown in ConnectHR for Retroactive charges dispute?

Answer: Not at this time.

- **Question:** CLAS question: If we need to make a correction to an employee's leave accrual (PLP or VPLP) due to SPSL usage but the employee is now with another agency, how would we go about getting this done? We no longer have access to the employee's LAS and the new agency can't make changes for a pay period that the employee was with us.

Answer: There needs to be communication between the old agency and new agency for it to be done correctly.

- **Question:** Do you know when the 2023 Consolidated Benefits (CoBen) Allowances and Employer Health Benefit Contributions by Bargaining Unit will be uploaded onto CalHR?

Answer: It will be posted soon.

- **Question:** Circling back to the Dental Vision Authorization Portal, how do we receive access to this? My manager is not familiar with this resource and we would love to be able to utilize it.

Answer: Email the vision dental portal mailbox.

- **Question:** Will information on the Batch Option be available in OE FAQs that SCO is providing soon?

Answer: Yes, the BATCH will be in the FAQ.

- **Question:** CalPERS once indicated that the departments will need to enter into their system the sick leave the employee had upon separation. We have not yet been able to do this, and have then subsequently confirmed with CalPERS it has been received by completing the PAR. Can we get an update on this? Thank you.

Answer: If you do not have access to that, you need to look at your current access capability.

- **Question:** Can SCO please attach the most current 674D to the NDI Calculator? The current one is still from 09/2019 and doesn't have all the options that the current one has.

Answer: This is being worked on.

- **Question:** How are dental forms submitted to the dental programs? We have found that there are a lot of blank forms being sent to them or erroneous information (i.e. wrong birthdate). Additionally when is the information for basic vision sent to VSP?

Answer: Receive the dental form, process it and gets sent electronically to the carrier. There are still some carriers being mailed, but most are electronic. Vision is processed by a different team. Carol Ormonde is working on the blank forms.

- **Question:** If we need to request pay history for pay that issued from previous agency but the employee is not available to sign the request form due to being on LOA, can the employee's signature be waived?

Answer: We will not advise you on how to do that (PSD003).

- **Question:** Have there been any complaints about Delta Dental? Several of the dentist in our area no longer accept Delta due to problems with billing.

Answer: We contract with Delta Dental, and not with individual Dentists. Delta Dental contracts with the Dentists.

- **Question:** Met Life has told us that they receive the form blank sometimes and yes VSP had birthdates in the early 1900s.

Answer: The SCO Basic Vision Report is sent monthly (possibly bi-weekly, I can check). The SCO report does not include the employee's DOB so VSP uses a placeholder DOB. Once an employee uses benefits DOB is updated for their account. Authorized personnel office can contact VSP directly to have employee information updated.

- **Question:** We have an employee who did not provide the copy of SDI payments for us to verify period is eligible for SDI and no longer has those notices. How are agencies dealing with this?

Answer: The employee can contact SDI and request that the payment history be re-sent, or if they have an online account they can also access their payment history.

- **Question:** This is regards to Fiscal – I was wanting to know from the departments that are here today if they can tell me who puts the employees into Fiscal to generate an employee ID when they are new to the State? Is HR doing this or is Accounting do it?

Answer: Accounting

- **Question:** Christina are they sharing the ENDI process link?

Answer: We do not have an e-training for ENDI at this point.

- **Question:** Will there be an online trainer to lead SDI and NDI class?

Answer: Not instructor lead.

- **Question:** When an employee is out on sick dock for 5 days and then they call FMLA for 3 and then are out sick dock for an additional 10 days, can we break the continuity of dock and use leave for the 3 days of FMLA?

Answer: Contact CalHR Personnel Services Branch (Kim).

- **Question:** Thank you, employee was not able to figure out how to obtain the notices online. Who can we suggest the employee to contact to guide them through the process? Trying to call EDD is a nightmare.

Answer: The State Employee number is (866) 352-7675. I don't know exactly how to get to the online history, but they may want to try contacting Tech Support at (800) 480-3287.

- **Question:** We have a question in regards to advanced salary determination. Is there someone who can be reached out to directly at SCO or CalHR to confirm our previous training is correct? Yes, we have the e-learning and training; however, having issues with "understanding" of DPA rules and interpretations. We have employee going from non deep to deep, only Range A eligible.

Answer: I can help you, I'm at eedwards@calstrs.com.

- **Question:** Will the STD forms be updated soon, to make the email address section bigger, in order for the larger universal emails to fit in the space?

Answer: At this time no. We will take your suggestion back.