



It is the mission of the Personnel and Payroll Services Division to provide accurate and timely personnel and payroll services through quality customer service.

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Statewide Civil Service Payroll Program: Lump Sum Separation Peak Workload Season Is Almost Upon Us

At the end of each tax year, we see a significant increase in employees planning to retire. Retiring in November or December gives employees the option to defer taxes on accumulated unused leave time (lump sum deferral), as well as to maximize contributions to [Savings Plus accounts](#).

Here are suggestions to help prepare for year-end lump sum separation processing season:

- Encourage your employees to submit their [Lump Sum Separation Pay Election Form](#) 30–45 days prior to separation. This will allow time to prepare and review the Personnel Action Request (PAR) package before submitting it to the State Controller's Office (SCO). Please note that there may be longer processing times due to [COVID-19](#) related changes in the processing of PARs.
- [Use the Lump Sum Separation Guide](#) for the Departmental Human Resources Office to help guide you – and as a reference tool – when documenting and submitting forms. The Lump Sum Worksheet and Lump Sum Calculator (now called the Lump Sum Pre-Tax Calculator) have been updated.
- Review [current annual contribution limits](#), including 457 Traditional Catch-Up, for Savings Plus accounts.
- Be sure to review the lump sum separation pay and deferral contributions [payroll letter](#) which will be coming soon!
- Organize your own lump sum kickoff meeting to help prepare your human resources staff for timely completion and submission of lump sum separation PAR packages.
- Contact the [Statewide Customer Contact Center](#) at (916) 372-7200 with questions.
- If you have any suggestions, submit them to PPSDHRSuggestions@sco.ca.gov.

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