Transaction Supervisors Forum

December 2020

SURVEY QUESTIONS:

The following questions were submitted via the Transaction Supervisors' Forum survey. If you would like to submit a question for the next forum, please use the survey link that will be provided with the invite.

- **Question:** For those agencies on CLAS, do you find the completion of the STD 612 necessary? Should the STD 612 only be used when corresponding with agencies that do not utilize CLAS?

  - **Answer (Sarah Lever):** We do advise to always complete the STD 612. This document acts as communication of an employee's leave benefit and payroll status. This can be important when it comes to leave information contained in CLAS. Once the appointment part is keyed by the receiving agency, all CLAS access is removed from the previous agency. So any LEAVE updates need to be communicated through the STD 612 for processing and it also acts as a double check to confirm that the information within CLAS is accurate.

- **Question: Will SCO provide a fringe benefit report for agencies?**

  - **Answer (Alita Rivas)** Tax support program is not currently providing this report. Please reach out to PPSDSTSP@sco.ca.gov so we can help you with information.

- **Question:** Our department has noticed that if an employee comes to our department after being separated (or may currently teach at a CSU) their health employee out of pocket is not being deducted from their monthly payroll check. Of course, this causes AR's. When we contacted someone form the Benefits area was able to reverse it—but when this occurred again SCO Payroll and Benefits liaison, they could not do anything. Is there some instructions on this that we are missing? We would hate to see the employee receive AR's for out of pocket costs.

  - **Answer (Bryce Miller):** This is called dual-positions. If employees are eligible for health benefits, if they have a permanent appointment or limited term appointment of more than 6 months, at least 6 months-and the time base of a half-day or more; if the positions are available for benefits EE must choose which benefits (Dental or Health) they want from either the state or CSU.

- **Question:** FTB and CDTFA have employees located out of state, and we were provided this notice to give our employees when we offer benefits. Can this be added to the agenda

for the Sup Forum to see when the 20201 sheet will be published? I believe it came from CalHR, but it could be CalPERS. Also, there are other forms in the HRA Portal (CalHR) that are for the SHCP program. When will the 2021 letters be available there as well?

- **Answer (Chiara Galloway):** I'll communicate with those departments directly. Information should be readily available next week. Emails will be sent out as a follow up.

o **Question:** We have been receiving questions from employees about the CARES Act. We can't find anything on CalHR's website to confirm whether or not the state participates in this program.

- **Answer (Kim Herlache):** This would be something that would have to be negotiated through the bargaining process. It would also require finance and legislative approval. As far as I know, we're in a bit of a budget crisis and everyone's receiving PLP right now so I don't think it's something that the state plans on pursuing at this time.

o **Question:** How are departments handling receiving I-9 documents for new to state employees? Are departments reviewing the I-9 documents before hiring brand new to state employee or is it being completed on employee's first day of employment? Since employees are teleworking due the pandemic, how are departments verifying the I-9 documents (SSN, driver's license, passport etc?)

- **Answer (Kim Herlache):** The I-9 document is a federal requirement, not a state form. There is information, from the Department of Labor Homeland Security's website that regards the stay-at-home order. What is recommended is that you access the information available and work with your legal office to confirm if criteria listed affects you and your department.

o **Question:** NEW EAR form as of 12/01/2020 - would like to have a presentation on it and discuss the new fields and what they mean to the EEs...detailed if possible. Also, what if a second appointment is keyed into the SCO system; example: EE works a swing shift at first agency then applies to the second agency as P/FT but did not disclose the first job to the second agency during the interview. What are the implications of this IF the EE is keyed into the second agency?
- **Answer (Rehana Kausar):** We have a quick start guide coming up. We also have the FAQ published on the SCO's website for the new EAR regarding the most common questions.

- o **Question:** We are getting lots of questions from employees on how to complete the new EAR. Will there be an FAQ and/or instructions provided to departments to include with the EAR when sending to employees?

  - **Answer (Rehana Kausar):** The quick start guide on the SCO website can be used for departments to assist their employees in completing the new EAR form.

- o **Question:** Will SCO provide samples on how to process the new EAR form? For example: Exempt from state and federal, married filing jointly at higher rate, single federal and state but increase federal taxes to be taken out. Will SCO send a sample employee notice letter to inform of the new Federal changes? Something like the fringe benefits sample letter that was sent out with payroll letter 20-024.

  - **Answer (Tracy Gutierrez):** Yes, we are working on samples for all of these scenarios. In fact we're going through our final review process right now. There will be a quick start guide for employees to review to determine how to fill out their EAR. We're also doing a document that is a keying guide for departments that go through the various scenarios when an EAR is filled out a particular way.

- o **Question:** For Leap appointments, the PAM states Item 455, Disability Code is required. In order to obtain that information we would need the Disability Questionnaire completed; however, we are unable to locate that form. Is there somewhere the form can be located for use? Or how are we supposed to be obtaining the disability code information?

  - **Answer (Pliny Reynolds):** We found out that item 455 is no longer required for LEAVE appointments. We will be updating the PAM to reflect this information. Code 8 can be used until we can relax the audits for item 455. I have been informed that the disability survey is included in the new employee's survey link that is provided to all new employees. You can access link at eservices@calhr.ca.gov/survey.

- o **Question:** I am in search of a spreadsheet used to track and pay out Compensating Time Off (CTO). Would you ask other departments if they have a spreadsheet created?

  - **Answer:** This question is for departments who are not on CLAS or an automated time keeping system. If you have a spreadsheet you would like to share please email it to SCOTransactionSupervisors@sco.ca.gov and we will share it. Also note, for agencies on CLAS, the CTO Aging Report is available through View-Direct.

- o **Question:** When will the Sal D modules be completed?

- **Answer (Michael Berlanda):** We have a new trainer in place, his name is Craig Ortega. Currently lead trainer on the garnishment modules. He'll be taking over the Sal D modules. All of our trainers are shifting towards virtual-style training opportunities.

- **Question:** Will SCO revamp the Garnishment classes?

  - **Answer (Michael Berlanda):** We are in the process of creating new virtual opportunities for training, and with that comes a revamp of all of our courses.

- **Question:** Can you provide an update on the direct deposit excel sheet?

  - **Answer (Karin Johnson-Anderson):** We are making progress and provided an overview of the spreadsheet to our internal human resources team. Most agencies had good feedback, we've taken it back to our developer. Our plan is to present the whole process in January.

- **Question**: Is there a fax number to send Stipulation (Do Not Key) for processing?

  - **Answer:** Please send to PPSDTempOps@sco.ca.gov with the subject "Stipulations."

- **Question:** If we have an employee separate from State Service on 10/11/2020. Should we manually key in the $260 for the month of October?

  - **Answer:** Please refer to the items below to determine eligibility and keying instructions:
  - [Payroll Letter: #20-017](#)
  - [Pay Differential 440](#)

Program Updates

- ❖ **Holiday Informal Time Off and Annual Purge – Sarah Lever (SCO)**

  - Annual Purge Process - [Leave Letter #20-012](#)
  - Holiday Informal Time Off – [Leave Letter #20-013](#)

- ❖ **Updated myCalPERS Employment Functionality Student Guide and New myCalPERS System Functionality for Appeals - Kristi Bozzo-Baldenegro (CalPERS)**

  - o What is a late enrollment? Employers have 90 days to establish membership in CalPERS.
  - o MyCalPERS Employment Certification Functionality Student Guide has been established.
  - o CalPERS documents and applicable scenarios are listed.
  - o Scenario overview of new screens implemented.
  - o Scenario 4 review
    - • Waive and reconsider determinations: This is a new appeal process
    - • Scenario 1: We request agencies complete amend 1344 online.
    - • Scenario 2: For payroll staff, if you follow directions in guide there shouldn't be any issues.
    - • Scenario 3: For file uploads regarding payroll.
    - • Scenario 4: Viewing the arrears determination in myCalPERS.

  - o **Question**: How long before the letter comes out once the intermission is complete?

    - • **Answer:** It's a nightly batch, letters are triggered the next day. If it's in PIMS which transfers to MyCalPERS that's when it would trigger there.

- ❖ **Revised COVID Executive Order Process – Christina Rollins (CalPERS)**

  - o This will be a review/reminder of the Covid-19 executive order process
  - o This gives a lifting of some of the requirements for retired annuitants, allowing them to work over 960 hours if they are working in a capacity that's providing relief to an agency due to Covid or the wildfires.
  - o If you have an employee or retired annuitant that would fall under this exemption, that you submit those requests to CalHR.
  - o This will require information such as a date of when they will come back to work, a justification for their work, and as much detail as possible when you submit requests.
  - o CalHR then sends these requests to us, we complete a review of the details to ensure that is in compliance. We've had some issues where CalPERS is asked for more information from the employers regarding a retired annuitant coming back to work, and we haven't received it in a timely manner.
  - o Going forward we will give two weeks, if there is no response we will send a letter to the employer and retired annuitant letting them know that if they work it can result in reinstatement if they are not in compliance of the executive order.

- ❖ **Direct Deposit Program Updates – Karin Johnson-Anderson (SCO)**

  - o Statewide Direct Deposit Enrollment Initiative:

- As of November our overall participation is 83%. These numbers are up slightly since October. We are working on survey results and determining next steps on the project.
- Department Specific data is available, please contact Jill Souza at jsouza@sco.ca.gov.
- We have updated the Direct Deposit enrollment form STD699 to include a printed name box and an email address box of the HR Specialist completing the authorization. It should be posted on DGS soon.
- Please remind staff to contact their banking institution for questions about what day their institution actually deposits their monthly pay check.
- Coming Soon! New process to submit Direct Deposit Enrollment data. In the coming months SCO will formally introduce a new option to submit Direct Deposit Enrollment data.
- We have provided an overview of the spreadsheet and process to our internal Human Resources team and one external Human Resources team. Both agencies had good feedback that we have taken back to our developer. Our plan is to present at January or February forums
- A very high level overview of the new process:
  - SCO will provide an Excel spreadsheet and toolkit for each agency
  - HR Offices/Personnel Specialist will key enrollment data into the spreadsheet
  - Transmit the spreadsheet through secure File Transfer Protocol to SCO for processing
  - Update California Personnel Office Directory (CPOD)
  - Do not submit duplicate documents
  - Importance of the correct email subject line
  - Emailing vs faxing and mailing
  - Provide the complete social security number when sending documents to SCO, including secure email documents.
  - 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 adding an email address box for the specialist. This allows SCO to contact the specialist in a timely manner vs. mailing Ding Notices/PR250's

❖ **Lump Sum Separation Reminders – Renee McClain (SCO)**

- Lump Sum Separation Reminders:
- Refer to Payroll Letter 20-021 and the Lump Sum Toolkit
- Please use the PPSDTempOps@sco.ca.gov mailbox to submit Lump Sum Separation Payroll Action Requests (PARs)
- Be sure to include Lump Sum PAR or Lump Sum Separation PAR in the subject line

Tax Season

❖ **W-2 and Miscellaneous Deductions Reminders – Monique Perez (SCO)**

- Document cutoff dates for 2020 calendar year-end are processing.

- Reminder: Document submitting - All undeliverable W-2s will go to the employee's department, not SCO.

❖ **W-4 Updates Due to Tax Cuts and Jobs Act of 2017 – Tracy Gutierrez (SCO)**

- Employee Action Request (EAR): There is a keying guide regarding how to properly fill out, currently available now on our site. Additionally we are making improvements on the paycheck calculator.
- Tax Withholdings Process: If there is no reason to make a change, you will continue on the results until there is a reason to make a change.

Benefits

❖ **Affordable Care Act (ACA) Updates- Elaine Smith (CalHR)**

- Reminder: All errors on the ACA monthly compliance form must be corrected and keyed in SCO's Affordable Care Act System (ACAS) by December 30th. This information will be reported to the IRS by SCO to demonstrate the State's ACA compliance.

❖ **Dependent Re-Verification Updates – Wendy Yang (CalHR)**

- Reminder: We are going to be moving into our next re-verification due dates.
- CalPERS reminder notices will all be updated and effective by January 2021.
- Employees do not need to provide a birth certificates for children or marriage certificates if marriage is still current.
- If you have any further questions contact us at dependentre-verificationprogram@calhr.ca.gov or me directly at wendyyang@calhr.ca.gov.

❖ **2021 Active Benefit Summary and Dental, FlexElect and CoBen Updates/Reminders- Chiara Galloway (CalHR)**

- For 2021, CalHR will be coming out with a benefit summary for active state employees. This is a combined document and resourceful tool that talks about all of the programs under CalHR to provide to your employees. This will launch January 1st on the CalHR website.
- As for the programs specifically the appeals status for dental has no backlog.
- For FlexElect and CoBen appeals we're still at 60 business days, working on this currently. Please refrain from sending duplicate requests as it can cause further delay.
- There are 10 business days you'll have to respond to follow up requests, or it'll remain in an open status.

❖ **Vision Program – Lisa Hatten (CalHR)**

- o Reminders: Retiring employees must complete a vision form within 60 days of the retirement in order for vision plan to continue.
- o The vision backlog is caught up to November 1st 2020. Please send inquiries to VSP directly. Remember to only send vision appeals to CalHR at vision@calhr.ca.gov.

❖ **Open Enrollment - Bryce Miller (SCO)**

- o Information: The benefits staff are near completion with the processing of these documents (9,680 Dental forms & 7,832 FlexElect forms), & we are on track to having a successful enrollment period.
- o Reminder: To avoid encryption issues please send in your documents with the last 4 of the social security number for agencies using Proof Point. Contact your IT department for further information.

Closings

❖ **SCO Resources – Nastassja Johnson (SCO)**

- o **Websites:**

    - •Human Resources: https://sco.ca.gov/ppsd_state_hr.html
    - •State Employees: https://sco.ca.gov/ppsd_se_payroll.html

- o **Contact:**

    - 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
    - Cal Employee Connect Email connecthelp@sco.ca.gov
    - Cal Employee Connect Feedback Email connectfeedback@sco.ca.gov

- o **SCO Key Initiatives:**

    - Cal Employee Connect Project
    - CalATERS Replacement Project
    - California State Payroll System Project

CUSTOMER RELATIONS SURVEY:

Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov