



Transaction Supervisors' Forum

April 2021

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:** Permanent-Intermittent employees were eligible for benefits effective 02/01/21, however the premiums are to be deducted from the 01/2021 pay warrant. Should the employees receive the Stipend for 01/2021 since that is when the premium is to be deducted, or beginning with 02/2021 since that is when the benefits are Active?
 - **Answer (SCO):** If the employee's benefits are effective on 2021, the employee's lump sum payment for benefits would be issued in the 121 pay period. If the person who submitted this question has additional questions for me, please contact me at (Bryce Miller) bmiller@sco.ca.gov.
- **Question:** Accounts Receivable: Are you (SCO) going to stop offering A/R offset? The reason I am asking is A/R have not been processed in a while. I have some dating back 5 years and not worked. This option is not benefiting the state, the employee nor the agency. As your customers we need a better solution. Please re-evaluate this process.
 - **Answer (SCO):** The benefits unit is currently processing February 8th 2019. SCO cannot stop offering leave credit offsets as an option. We are making every effort to become current on this workload. Recently there was a large effort made to reduce the Flex backlog, which we are now currently within 90 days. Using the same strategy, we are now working on the alleviated the Leave credit offset backlog in the same way by training staff and asking for additional staff in other areas to assist in processing this workload. The benefits program only has 10 staff who are diligently working to reduce backlog.
- **Question:** Will SCO will be providing a specific code to be used in Leave Accounting System (LAS) in order to document the Administrative Time-Off (ATO) as it relates to this new legislation?
 - **Answer (SCO):** Yes. We are in the process of implementing a new code for this. It'll be under ATO. This won't go into effect until May 1st. Departments won't be

able to key until May 1st. We have a Leave letter that is being routed right now for approval and hopefully will be out within the next couple of business days.

- **Question:** When is the next Management Information Retrieval System (MIRS) training?
 - **Answer (SCO):** By the next Transaction Supervisors Forum I should have more details on when this will be available, but we are aware of this need and are currently putting this together. If you need someone urgently trained, please contact us (Sarah Huggins) SHuggins@sco.ca.gov.
- **Question:** In regards to the Employee Action Request (EAR) form can you confirm the following is correct: 1) Exempt from just Federal: put an E in box 2 (instead of S for single), write exempt in box 3, N on Higher Withholding in box 4 and 0.00's for the rest of the Federal boxes (5-7). 2) Exempt from State only: fill in Federal first; then in box 08 Marital Status put S in Single or Married, box 09 should be "95", box 10 should be blank
 - **Answer (SCO):** Yes I can confirm this. There is a scenario on our EAR keying guide that talks about the federal only. There is no need to put the E in box 2. This status is created by SCO to accommodate the change, not an actual Federal status. The rest is correct.
- **Question:** I am trying to get clarification on Military Leave (ML) short term leave under Title 38. Can I please get this confirmed? Do we pay the employee the salary differential in addition to crediting SS and leave upon receipt of their official release documents?
 - **Answer (CalHR):** If this is employees being deployed under the presidential proclamation or State of Emergency, it falls under Government code 19775.17. We've been getting a lot of victim government claims on this because departments haven't been paying it. We are trying to update our policy to make it clear. If it's for the Covid-19 deployment and it's due to presidential proclamation, then yes the employee is entitled to the difference of their state pay and military pay the same that they are for the war on terrorism. If this is unclear please email PSB@calhr.ca.gov with a copy of the order so I can assist you.
- **Question:** Are holidays and leave hours counted toward Actual Time Worked for Student Assistants and Graduate Student Assistants when it comes to SISAs, MSAs, and Range Changes?
 - **Answer (CalHR):** Yes, all hours that are paid count towards the SISAs, MSAs, and Range Changes.

- **Question:** Does CalHR have an update when the Leave Buy Back for 2020/2021 fiscal year going to be available to employees?
 - **Answer (CalHR):** I don't have any information at this time. What I can say is that we are working on it, looking to see if we're going to get approvals for it and I fully expect that we should have something within the next week to put out.

Project Updates

❖ California State Payroll System Project (CSPS) Stage Two Approval – Bill Harrigan (SCO)

- We've been working on the Project Approval Lifecycle (PAL) process through California Department of Technology (CDT) and have just completed our Stage 2 approval which is significant for our development.
- The PAL process is comprised of four stages, each stage prepares you for bringing on that implementation team in order to eventually get to that product. This is essentially a procurement activity to solidify a strong approach as you move forward in implementation of the project.
- In Stage 1 we identified some of the opportunities, looked at the business case, made that case, and then was able to transition to Stage 2.
- In Stage 2, the first step we needed to do was take a look at our current processes and identify where and how those current processes would fit into a future state (accessing of the existing processes).
- We've also started some market research activities. As we talked with others, we continued to identify exactly how different California is. We conducted a 2 pronged market research approach. The first one is the interviews with external entities, by identifying 8 different states and local governments. We reached out to the vendor community, conducted multiple sessions where we discussed some of those activities and challenges. Out of this market research we identified 5 primary alternatives for our alternative analysis. Our findings suggested that the platform based (COTS solution) would be the best, it allows us the flexibility for implementation and an integrated system that is needed.
- We've developed our mid-level requirements and in fact, as we were doing that, we took the time and effort to also document our detailed solution requirements.
- In addition, we've started to look at some of our business rules that would help us get to the challenges that California has the ability to present.
- We have not selected a vendor, and there is no solution established at this time. What we have is a concept of which approach we would like to go forward with, which brings us to Stage 3.
- Stage 3 is the gathering of the actual procurement documents (Specifically the Statement of Work and Proof of Concept). A Proof of Concept will be presented to vendors.

❖ **Cal Employee Connect (CEC) Connect HR Update – Liz James (SCO)**

- The CEC team has been working really hard on the deployment of Connect HR.
- The issue we're facing is the IP address. Some of you have been prompted by email to submit to us your agency's IP address. The reason we're asking for this is because we are whitelisting the access of Connect HR, meaning that whenever your users are using Connect HR they can only access it if they are using the approved agency's IP address. This is an extra step of security.
- We've originally received a secure listing from CDT, however this wasn't complete.
- If you have any additional questions, please email us at ConnectHRhelp@sco.ca.gov.

Benefits

❖ **Statewide Benefits Program Updates – Bryce Miller (SCO)**

- Benefits Program Reminders
 - Please ensure that when the benefits team is reaching out to the personnel specialists for additional information, correct information submitted on form. Please return the specialist's calls within a timely manner so we can expedite the processing of your documents or issue.
 - When leaving voicemails, please speak clearly and slowly; leaving the contact name, phone number, and email. Also please leave the employee's name, Social Security Number (SSN), and reason for your call so we can hopefully resolve the issue before we call you back.

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

- Reminder to personnel staff to contact Vision Service Plan (VSP) directly for vision inquiries other than appeals. Email VSP at stateofca@vsp.com. Be sure to include employee's name in the subject line.
- Reminder to assist prospective retirees in completing the CalHR 695 form if they wish to continue vision benefits into retirement, as they have 60 days to elect coverage. Send forms directly to VSP at stateofca@vsp.com.
- We are working on a Retiree Flier to be uploaded on CalHR's and VSP's websites during this year's Open Enrollment as a guide and resources for retirees. Stay tuned!
- Complete new vision forms for employees returning from a Leave of Absence and send to VSP at stateofca@vsp.com.
- Send vision appeals to CalHR at vision@calhr.ca.gov. This is the most efficient way to contact the vision program. Please be sure to include the employee's name in the subject line of the email. Please also attach the CalHR 774 vision form to the email for an appeal.

- Family Connect Portal update of the current and anticipated dependent types that will require to be entered onto the dental and vision forms: The dental and Basic Vision forms are updated on DGS's site and the Benefits Calculator has also been updated. The dependent codes/types are as follows:
 - S -Spouse
 - DP - Domestic partner
 - C - Child
 - SC - Step-Child
 - DPC - Domestic Partner Child
 - PCR - Parent-Child Relationship
- Vision backlog is caught up to March 15, 2021.

❖ **Dental, FlexElect and CoBen Program Updates - Chiara Galloway (CalHR)**

- Consolidated Appropriations Act of 2021 and Internal Revenue Services (IRS) Notice 2021-15
 - HR Announcement released on March 29, 2021
 - FlexElect BAM webpage includes a memo for departmental personnel offices as well as a template for employees
 - Grace period extension for 2020 and 2021 until December 31 of the following year (December 31, 2021 and December 31, 2022 respectively)
 - Claims filing extensions
 - 2020 plan year – until June 30, 2022
 - 2021 plan year – until June 30, 2023
 - Medical Reimbursement Account eligibility continuation for mid-year elections allows employees to continue to incur expenses through the grace period even if the cancel their elections mid-year.
 - Carry forward rule for Dependent Care Reimbursement Accounts extends eligibility to age 14
 - Mid-year election changes allows employees a one-time opportunity to make a mid-year election change without a permitting event utilizing permitting event code 43.
- American Rescue Plan Act of 2021
 - Provides optional guidance to increase annual maximum under Dependent Care Reimbursement Account for 2021
 - CalHR is still evaluating at this time
- Appeals
 - Dental turnaround time is approximately 30 days. FlexElect and CoBen turnaround times are approximately 60 days. Please allow this time before following up.
 - Please send all appeal requests to dental@calhr.ca.gov or flexelect@calhr.ca.gov.
 - The turnaround time for SCO to process approved appeals is approximately 3 weeks with SCO. Please allow this time before following up.
 - Provide complete appeals packages for faster response times including correctly completed forms matching the requested action.
 - Dental
 - Section E – Agency Use must be completed.

- Be sure to check for dual coverage
 - For PIs, continuing eligibility for dental is not a permitting event to change plans, must still complete the 24-month restriction
 - Only deletions may be signed administratively
 - CCPOA and CHP dues paying members must be enrolled in union sponsored plans
- FlexElect/CoBen
 - Prospective elections only, no retroactive changes due to IRS regulations
- General
 - For status of forms, please contact SCO – Statewide Customer Contact Center. CalHR does not have information in-house
 - Dental forms for retirees are processed by CalPERS, not CalHR
 - Please refer to BAM for resource
 - Forms that are within the 60-day eligibility window or are more recent than SCO's weekly processing times are not appeals (unless SCO confirms they do not have record)

❖ **Legal, Life Insurance and Long-term Disability Insurance – Monica Hernandez (CalHR)**

- This plan is only available to excluded employees.
 - Excluded employees can purchase supplemental life insurance at any time.
 - Employees can contact Metlife.
- Enrollment is automatic – The department personnel office should verify HIST after cutoff to verify enrollment
 - Deduction codes to verify are 200-003; 200-004; 200-005
- Department personnel office should notify employee to contact Metlife at (800) 252-8524, should the employee go out on a leave of absence (personal/medical), separate or transfer to a rank & file position.
- Current enrollees who are about to retire, should be advised they can continue their life insurance into retirement up to 60 days after retirement or lose the plan.
- Direct pay Agencies (California Exposition & State Fairs, California Fairs Services Authority, the Legislative Analyst's office, and Judicial council) must work with their department personnel office.
- Department personnel office can contact CalHR in regards to life insurance.

❖ **Affordable Care Act (ACA) Program on the Detailed Safe Harbor Outreach – Elaine Smith (CalHR)**

- Quarterly Compliance Review
- Notices sent to affected departments during first week in February
- Notices are due within 30 days of receipt

❖ **Affordable Care Act and Payment History – Sarah Huggins (SCO)**

- Affordable Care Act (ACA) Virtual Training Pilot
- April 26: 1 hour of ACA Policy (CalHR)
- April 27: 2.5 hours of ACAS training (SCO)
- Enrollment cutoff: April 22nd
- To enroll: ACA.Policy@calhr.ca.gov
- Additional Trainings coming
- Check website for information:
https://sco.ca.gov/ppsd_affordable_care_act_training.html
- SSA vacancy will be posted soon – HR background welcomed!
- Payment History
- Payment History request process has been updated on SCO website:
https://sco.ca.gov/ppsd_requesting_pay_history.html
- Streamlined process changes processing time from 3-5 weeks to 2-3 weeks
- New form released

❖ **Supplemental Paid Sick Leave – Kim Herlache (CalHR)**

- Supplemental Paid Sick Leave (SPSL)
- Payroll Program Updates

❖ **Supplemental Paid Sick Leave and Payroll Program Updates – Renee McClain and Christina Campbell (SCO)**

- Supplemental Paid Sick Leave (SPSL)
- Any questions regarding policy should go to CalHR. Christina and I (Renee) are here to guide you on submitting the related documentation.
- We are still working on our communication, this should be out in the next couple of days.
- It will be treated similarly to the EPSLA; we are going to require 215's be keyed for the PAR transactions to identify the effective date, the approved benefits start date, and the end date. This information will be posted in our SPSL FAQ. There is a toolkit on the SCO website with some information, but we will be updating it with additional information coming shortly. This will reference how to document your 215s as well as how to submit your 674s to SCO.
- Payroll Program Updates
- Recently we updated the escalation guidelines. We sent a blast out over a week ago, when we receive your escalation our team works very diligently to get your escalation acknowledged, responded to, and completed. We're noticing that HRs are sending these escalations, but unfortunately they are not responding to us

when we need additional items. We are now asking that within 2 business days you respond to us with the requested items that we need. If we do not hear that response per the guidelines, we will close the inquiry. Please look at our weekly processing dates.

❖ **Operational Backlogs Project – Veronica Encinas and Lisa Dean (SCO)**

- Operational Backlog Project
- Our current PPSD leadership team started working together in 2020.
- We inherited some long standing backlog reports, which we immediately collaborated and took the opportunity during our first year to pilot various workload strategies challenging ourselves with thought provoking ideas.
- Since January of 2020, we first reduced and have now eliminated several backlogs in our statewide programs such as retirement, disability, positions control, and direct deposit.
- We used our lessons learned from these pilot projects to kickoff both the operational backlog and program management project beginning January 1st 2021. We're running this through December 31st 2022.
- We're automating different workloads that are currently manual in order to expedite processing and reduce errors (Internally/Externally).
- We have also been working to clean up and reconcile multiple project lists that we have by pulling them into one tool to manage as a portfolio.
- We've also been working to deliver new training opportunities for our customers that include E-Learning options or virtual training options as a result of the pandemic.
- We're excited to move these things forward so we can reach more people.

❖ **Direct Deposit Automation – Jill Souza and Cameron DeLemos (SCO)**

- Direct Deposit Automation
- Allow agencies the ability to send direct deposit data electronically to SCO
- Access to the spreadsheet, Tool Kit and Security agreements will be available on the SCO website 05/03/2021
- Demonstration

❖ **Max Compensation Project Update – Arlene Bailey (SCO)**

- Max Compensation Project Update
- Implementing the annual limits to stop retirement withheld from when employee reaches the limit.

- Each employee will be assigned an enrollment level indicator. This will allow the system to determine the membership level that will work in conjunction with the retirement account code to apply the correct limits.
- On April 30th 2021, the SCO will process mass R01 transaction, effective 5/1/2021 to assign the enrollment level indicator and new account codes for employee that have a PEPPRA membership. A personnel and payroll letter will be released closer to the mass update date. PPM and PAM update will be released in May of 2021.

❖ **W-4 Updates, Retirement Enrollment Fees – Tracy Gutierrez (SCO)**

- 2020 Employee Action Request (EAR) Std. 686 Form and Federal Withholdings Toolkit:
- Link to Toolkit: https://www.sco.ca.gov/ppsd_2020fedwithholdings.html
- FAQ
- EAR Quick Start Guide – updated version in Toolkit next week
- EAR Keying Guide - recently updated
- Upcoming e-Learning:
- Currently in development
- Target Date - June 2021

❖ **Statewide Training Program Update – Michael Berlanda (SCO)**

- Virtual Learning Opportunities
- Current (PIP)
- Near Future (PAR Doc, Sal D – 4/29)
- Under development (FOPAY, GARN, WCD)
- Links
 - <https://ppsdstatewidetraining.gosignmeup.com/public/course/browse>
 - https://sco.ca.gov/ppsd_elearning_new.html
- CLAS/MIRS eLearning Opportunities
- Needs Assessment
- Hiring - Two trainer positions

❖ **CalPERS Membership Updates – Michelle Norris (SCO)**

- We've made some enhancements to CalPERS and how employers enter their information as it relates to service credit purchases arrears.

- We have released two different versions of our updates to the student guide that was posted and just recently we've made a lot of enhancements to make it as robust as possible.
- The student guide outlines what is needed to be able to perform those tasks. We divided the student guide into two main sections.
- We've also included two flow charts for each section.
- We've added in definitions and statuses.
- If we make a determination in the membership team for a 90-day violation we send the determination out, there is a button on one of the screens that you can click on to waive your 30 days (You won't have to wait 30 days).
- We have a new term called reconsideration, giving you an option to communicate why you want us to reconsider the determination (you can attach any additional documentation proving our determination wrong).
- You can also appeal.

Closings

❖ CalHR Benefits' Resources

- Websites
 - Human Resources: <https://www.calhr.vs.gov/state-hr-professionals>
 - State Employees: <https://www.calhr.ca.gov/employees>
- Contacts
 - ACA Program ACA.Policy@calhr.ca.gov
 - Dependent Re-verification Program DependentRe-verificationProgram@calhr.ca.gov
 - Dental Program dental@calhr.ca.gov
 - FlexElect/Coben Program FlexElect@calhr.ca.gov
 - COBRA COBRA@calhr.ca.gov
 - Vision vision@calhr.ca.gov
 - CalHR Suggestions and Feedback benefits@calhr.ca.gov

General Reminders

- ❖ Include specific program name in the subject line of emails to the PPSDTempOps@sco.ca.gov mailbox.
 - This inbox is not for questions or inquiries
 - Submit one email for each specific program area
 - Utilize secure email to send documents rather than fax or mail.
 - Include the complete social security number (SSN) when sending documents through secure email.
 - CEC – Do not send the full SSN to Connect HR
 - 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.
 - Update California Personnel Office Directory (CPOD).
- ❖ **SCO Resources – Nastassja Johnson (SCO)**
 - **Websites:**
 - Human Resources: https://sco.ca.gov/ppsd_state_hr.html
 - State Employees: https://sco.ca.gov/ppsd_se_payroll.html
 - **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
 - **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

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