



February 2023

## Transaction Supervisors' Forum Notes

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### **SURVEY QUESTIONS:**

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

#### **Question:**

1. I received the Deployment instructions for the new Connect HR Accounts Receivable (A/R) 035 feature. Is this being rolled out statewide, or just some departments? How accurate is it?
2. If our department has some pending payroll deductions that have yet to be set up by SCO, can I use this feature or just wait until SCO processes my initial 674 request?

#### **Answer:**

1. The A/R 035 (Change Method) feature is slowly being rolled out to select departments initially and will eventually be rolled out statewide. This feature has been thoroughly tested and has consistently provided accurate results.
2. If your department has the access to process the A/R 035 and has STD. 674 change methods waiting to be processed, your department may use the ConnectHR A/R 035 process to complete your pending documents. The ConnectHR A/R 035 has a built-in program that prevents duplicate payments. Therefore, there is no need to resend, rescind, revoke, or cancel the previously submitted requests. Doing so will create unnecessary workloads for PPSD that can create further delays for your employees.

**Question:** Our personnel specialist are sending 674AR forms requesting payroll deduction but when its established it is for agency collect. Is there something we are doing incorrectly?

**Answer:** If the Accounts Receivable (A/R) is established incorrectly, please contact the Statewide Customer Contact Center (SCCC) at 916-372-7200 and they will assist you with relaying the error to the specialist who processed the document.

**Question:** Is there a video tutorial on how to verify on the new Dependent Re-Verification (DRV) Notifications for the family connect portal? The PDF presentations aren't too helpful for me.

**Answer:** The purpose of the PDF presentations was to provide a general overview of the Family Connect Portal (FCP). Though we currently do not have a video tutorial, all Dependent Re-Verification (DRV) & FCP procedures manual (step by step guide), and FAQs have been posted in the DRV section of the Benefits Administration Manual (BAM) on CalHR Benefits Website.

Resources:

[FCP Manual for State HR Professionals](#)

[DRV – Benefits Administration Manual \(BAM\)](#)

The password for the State HR Professionals page is [2021StateHRP](#) (**this password and page are confidential, please do not share outside of State HR Professionals groups**).

**Question:** When are we going to receive Corrected W-2's?

**Answer:** Please refer to the SCO website for more information regarding Corrected W-2's. [Form W-2C: Corrected W-2 FAQ \(ca.gov\)](#).

A Corrected W-2 produces as a result from changes of payroll/NON-USPS documentation received from your department's personnel/payroll and/or accounting office and corrections made by the State Controller's Office. Corrected W-2's usually issue within two (2) months from the time changes are processed in the payroll system.

**Question:** Will the permanent-intermittent open enrollment forms be prioritized and expedited as it was for full-time employees? According to the benefit processing dates, dental forms are 5 months backlogged and 1 month for vision.

**Answer:** We are in the process of assessing and strategic blitzing workloads to try and work through our backlog. Dental Permanent- Intermittent is part of that scope and will be part of this blitzing process. Your patience is appreciated as we work through our backlogs. For urgent issues, please contact the [Statewide Customer Contact Center](#).

**Question:** If we completed all the courses required for the new personnel specialist certificate program within the last year, do we need to retake it in order to get a certificate?

**Answer:** The certificate program will not consider training already completed prior to the start of the program, January 2, 2023. All foundational training completed from that point forward, within the one-year timeframe, will be used to certify completion of the program. Also, specialists may not substitute any training for the core curriculum.

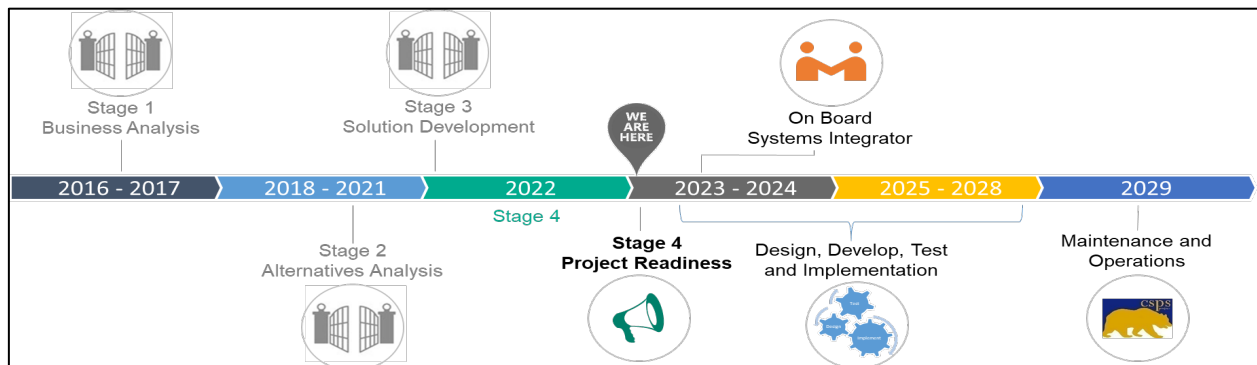
## SCO KEY INITIATIVES:

### SCOConnect: Cal Employee Connect (CEC) Project/ConnectHR – M. Robinson ([ConnectHRhelp@sco.ca.gov](mailto:ConnectHRhelp@sco.ca.gov))

- CEC Phase II – Employee Service features
  - Multifactor Authentication (MFA) is now available to all Cal Employee Connect (CEC) users.
    - As of 2/13/23: 6,930 employees have enabled MFA.
  - Direct Deposit feature:
    - Wave I (107 civil service and 8 CSU campuses), and Wave II departments (47 civil service and 8 CSU campuses) have been deployed.
    - Wave III deployment is underway
    - As of 2/13/23: CEC has received 3,446 direct deposit transactions.
  - Address Change feature demo

### SCO – California State Payroll System (CSPS) Project – Jeana Smith ([CSPSHelp@sco.ca.gov](mailto:CSPSHelp@sco.ca.gov))

- OCM-The People Side of Change
  - Helping the people affected by the change transition from the way we do HR and payroll today to the way we will do it in the new system.
  - Focus on getting people ready.
  - Communication and engagement is the key to success.
  - OCM brings needed awareness of the project to enhance understanding of the changes it will bring.
  - OCM leverages the Department Agency Readiness Teams (DARTs) to facilitate project readiness, acceptance and commitment to using the new system.



- Project Information:
  - **Objective:** To modernize and integrate the State’s Human Resource and Payroll systems
  - **Goals:** Manager and Employee Self-service, Reduction in manual/paper submissions, Improved reporting capabilities, Efficiencies in processes/workflow
  - **Scope:** Personnel, Benefits, Position Control, Time & Attendance, Travel & Business Expense and Payroll
  - **Why CSPS:** Current system is 50 years old and not integrated; current system does not reflect or incorporate IT, HR, PR innovations over past 50 years.
  - **Who will this impact:** State HR and Payroll staff and all state employees

- Status Updates:
  - We are currently evaluating bids from potential vendors for the CSPS Project
  - We are holding a meeting with the DART Sponsors in Liaisons in early February to help them better understand the DART Coordinator and SME roles
  - The OCM Agency Change Experts will be conducting initial outreach meetings with their departments in late February/early March

**BENEFITS ADMINISTRATION:**

**Affordable Care Act Program – Corey Cummings ([acasupport@sco.ca.gov](mailto:acasupport@sco.ca.gov))**

- 2022 Form 1095-C Distribution: The distribution of the 2022 Form 1095-C to employees will be completed by March 2, 2023. The 1095-Cs are mailed to the employee’s address listed in the Employment History database as of December 31, 2022.
  - The SCO will release a communication once the mailing process is complete, and the 2022 ACA 1095-C Issued report is available on View Direct and Mobius View
  - The SCO pre-printed the SCO address as the return address for all 1095-Cs
  - Undeliverable 1095-Cs returned to the SCO will be forwarded to the agency
  - Human Resources (HR) staff are responsible for forwarding any 1095-Cs returned by the SCO to the employee. HR staff should ensure that each employee’s most current postal address is on file by having the employee submit a corrected Employee Action Request Form (STD. 686)
- How to Request a Duplicate 1095-C Form: HR offices are to verify each employee requesting a duplicate was issued a 1095-C by accessing the PDA1782 (ACA 1095-C Issued report) located on ViewDirect or Mobius View (once available) prior to contacting the SCO

Once their employee has been found on the ACA 1095-C issued report, HR offices should contact ACA Support at [acasupport@sco.ca.gov](mailto:acasupport@sco.ca.gov) and include the following information:

- Full name
  - Last 4 SSN
  - Year that is being requested
  - Current address if it is different from what is on file in the system
- Training – Training Requests ([ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov))
    - Upcoming training dates... February dates are Full (All trainings are held virtually on Microsoft Teams)
      - ACA Policy Training - Part 1
        - Tuesday, February 21, 2023: 9:00 - 10:00 a.m.
        - Tuesday, April 4, 2023: 9:00 - 10:00 a.m.
      - ACAS Training - Part 2
        - Wednesday, February 22, 2023: 9:00 - 11:30 a.m.
        - Wednesday, April 5, 2023: 9:00 - 11:30 a.m.
      - [Affordable Care Act \(ACA\) Training](#)

## CalHR – Benefits Division

### – Benefits Programs:

- Dental
  - Program is current and within 30 days.
  - Reminder about 24-month PPO restriction
    - Employees need to complete the full 24 months before they are eligible to enroll in a PPO dental plan. For example, an employee hired in December 2020 is not eligible to enroll in a PPO plan until January 2023.
  - Appeals Issues
    - We continue to receive incomplete/incorrect STD 692 forms. Please review and audit forms prior to submission to CalHR.
    - With retroactive enrollments, prior to submitting appeals to CalHR, departments must ensure that employees are aware of the responsibility to pay retroactive premiums and that accounts receivables will be established to recover these premiums if applicable.
    - Enrollment is not on a current basis.
  - Request for additional information
    - Respond to existing appeal email.
    - Do not send a new email. A new email will be paced in the cue for processing.
  - A Complete Appeals Package includes:
    - Justification memo explaining appeal
    - Complete and error free STD 692
    - Written confirmation that the employee acknowledges accounts receivables will be established for retroactive enrollment (if applicable)
      - Once an appeal is approved by CalHR and processed by SCO, we will not cancel or reverse the appeal.
- Third Party Pre-Tax Parking Reimbursement Account
  - Program is current and within 30 days.
  - Reminders for personnel specialists:
    - Use the SCO database to check the status of an approved refund prior to emailing CalHR to inquire on the status.
    - Prior to enrolling an employee in PTP, the personnel specialist needs to ensure the employee is not already paying into a state-sponsored parking program.
    - When submitting the required memo for a refund request, please include ALL of the information requested within the memo requirements, including the cancellation form submitted to SCO.
      - Incomplete memos without the proper cancellation form will delay processing.
  - Special announcements:
    - The 2023 Monthly Deduction Amount - HR Announcement was released on December 9, 2022. For 2023, the monthly deduction limit for qualified parking is \$300. This amount is an increase of \$20 over the limit of \$280 in effect for the year 2022.

- Vision
  - Program current and within 30 days.
    - Form submission: Send forms directly to VSP
      - CalHR 774 (Premier Vision Enrollment)
      - COBRA
      - CalHR 695 (Retiree Enrollment)
      - STD 703 (Direct Pay Authorization during leave of absence)
    - Do not send multiple enrollments in one email; this can cause errors with data entry for VSP.
    - Recommendation for form submission email subject
      - Premier Vision Enrollment\_Employee Name (Last Four)
      - Retiree Vision Enrollment\_Retiree Name (Last Four)
  - Appeals
    - Prior to sending an appeal, confirm employee information in SCO miscellaneous deductions.
    - Complete Appeals Package includes:
      - Justification Memo explaining appeal
      - Copy of completed forms submitted and any confirmation documents that were received at time of submission.
      - Written confirmation that the employee acknowledges accounts receivable for retroactive enrollment (if applicable).
  - Leave of Absence – Vision BAM
    - Please review the Vision BAM for the leave of absence process for vision benefits particularly Premier Vision.
    - If an STD 703 (Direct Pay Authorization during form) is not completed during an leave of absence or off pay status situation, then Premier Vision benefits will be dropped because the employee will not be on the deduction report.
    - An STD 703 is also required to re-establish Premier Vision benefits upon the employee's return. Departments must notify VSP the employee is back to pay status so VSP can re-establish warrant deductions.
    - Confirm if employee is willing to direct pay premiums or does not want to pay premiums while off pay status.
    - Additional information in the Vision BAM.
- Vision Dental Authorization Portal
  - Program is current and within 30 days.
  - The new template requires departments to provide their agency code and in the exact format provided within the template.
  - Requests to add, update, or delete employees must come from a supervisor or manager listed in SCO's California Personnel Office Directory
- FlexElect
  - FlexElect is currently at 60 days for processing appeals.

- For questions regarding an employee's ASI account, the employee should contact ASI directly via phone at (800) 659-3035 or email at [asi@asiflex.com](mailto:asi@asiflex.com).
- General Program Updates or Reminders
  - Training Recommendations:
    - Benefits Administration Manual Training – Online CalLearns
    - Employee Benefits Orientation Training – Online CalHR Webpage
  - Reminders for Open Enrollment Changes
    - Check pay history to verify open enrollment changes were processed.
    - Employees should check their pay warrant for Vision, Legal, and LTD open enrollment changes.
  - Benefits premiums cannot be waived for months where services are not used.
  - We continue to receive calls and emails from employees stating their personnel office directed them to call CalHR. Do not refer your employees to CalHR, employees must work with their personnel office regarding their benefits.

– State Engagement Program Updates

While you may be familiar with the Merit Award, Employee Assistance, and Statewide Wellness programs, the CalHR Benefits Division is relaunching these programs as the newly established Statewide Engagement Program, under one cohesive initiative to holistically support the well-being of the state's workforce. The program services you are familiar with for each of these programs will remain in tact, we will be adding an Employee Engagement Program.

As we prepare to officially launch this new initiative, *CalHR consultation services for the Statewide Engagement Programs will be on hold through March 1, 2023*. We will not be taking any general inquiries to program email boxes during this time.

We thank you for your patience as inquiry response time is delayed for these programs as we work through the restructuring of these programs, however we encourage you to continue to utilize the program resources available to support your roles in driving these initiatives in your departments.

Employee Engagement Program: Program information Coming Soon

- Statewide Wellness Program: Program information and Department Coordinator tools can be found on the [HealthierUConnections site](#).
- Employee Assistance Program: Program information and Department Coordinator tools can be found on the [CalHR EAP website](#).
- Merit Award Program: Program information and Department Coordinator tools can be found on the [Merit Award Programs page on the CalHR Benefits website](#).

– Benefits Campaign

In support of the Statewide Engagement Program, the CalHR Benefits division is excited to announce the Benefits Campaign that will provide monthly bulletins to State Employees designed to enhance the state's ability to support the well-being of our employees, with topics related to wellness, employee assistance, engagement, and benefit provider perks.

To view the current Statewide Engagement Employee Bulletin please visit the Benefits Website, Benefits Campaign page: [Benefits Campaign | Cal HR \(benefitsprograms.info\)](#).

– Dependent Re-Verification (DRV)

- What is DRV: The Dependent Re-verification (DRV) is the process of re-verifying the eligibility of your employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health and dental benefits.

Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental benefits. The bargaining unit contracts specify that family member eligibility for dental benefits shall be the same as that prescribed for health benefits.

- DRV Updates
  - CalHR automated the DRV process for Dental and Premier Vision effective January 2023
  - CalHR will continue to mail out DRV notices to employees with dependents enrolled in dental and/or premier vision who require re-verification at 90, 60 and 30 days before the employees' birth month
    - CalHR contracts with DGS to mail out DRV notices
    - March 2023: 90-day Dental and Premier Vision Initial DRV notices will be mailed out for June 2023 birth month cycle
  - Department Personnel Offices have started processing dental and premier vision dependent re-verifications through the Family Connect Portal (FCP)
  - The current health DRV process through CalPERS will remain unchanged
  - With this launch, department compliance with DRV regulation will be monitored through Family Connect Portal (FCP)
  - The DRV Unit at CalHR will continue to monitor and adjust processes while remaining aligned with the DRV regulations and policies. Family Connect Portal (FCP) is an interim solution to CSPS.
  - The DRV Unit will provide HR offices with guidance and assistance with the Family Connect Portal and all tasks related to DRV
- DRV Resources for State HR Professionals
  - All DRV & FCP procedures, manuals, and FAQs have been posted in the DRV section of the Benefits Administration Manual (BAM) on CalHR Benefits Website.
    - [FCP Manual for State HR Professionals](#)
    - [DRV – Benefits Administration Manual \(BAM\)](#)
- Contact
  - Department Personnel Offices can send DRV related questions via email to [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)
  - Current response time is five (5) business days



- Affordable Care Act (ACA) – ([ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov))
  - Quarterly Compliance Review
    - The February Affordable Care Act (ACA) Quarterly Compliance Review is currently underway.
    - Departments who were notified of their outstanding errors have until March 17, 2023, to certify that all outstanding errors were corrected by returning the “Quarterly ACA Compliance Notification” document to [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov).
    - Departments should refer to the State Controller’s Office (SCO) “ACAS User Guide” and “Scenario-Based Job Aid for Updating the ACAS,” available on the SCO’s website for information on how to correct the errors.
  - Open Enrollment
    - 2022 Post OE Surveys
      - CalHR has posted the Open Enrollment Survey links on the [Benefits Division Website](#) and the links were up for 3 weeks.
      - We have asked for feedback from all department HR offices and employees.
      - We would like to thank all the HR Professionals and Employees for taking the time to take the survey.
      - 2022 Post OE Survey – Employees: 1100 completed responses.
      - 2022 Post OE Survey – HR Professionals: 86 completed responses - Out of 171 Departments, 43 Departments took the survey.
    - Contact
      - If you have any questions, please contact the CalHR Open Enrollment team at [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)
      - Current response time is two (2) business days
  - CalHR Benefits’ Resources
    - Websites
      - Human Resources: [calhr.ca.gov/state-hr-professionals](http://calhr.ca.gov/state-hr-professionals)
      - CalHR Benefits Website: <https://calhr.benefitsprograms.info/>
        - Password for State HR Professionals: **2021StateHRP**
        - This password and page are confidential. Please do not share outside of State HR Professionals groups
      - Healthier U Connections: <https://www.calhrwellness.com> (Registration Code: **Wellness2021**)
      - State Employees: [calhr.ca.gov/employees](http://calhr.ca.gov/employees)
      - HR Manual: [hrmanual.calhr.ca.gov/Home/ManualItem](http://hrmanual.calhr.ca.gov/Home/ManualItem)
    - Contacts
      - ACA Program [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)
      - BAM Training [BAMTraining@calhr.ca.gov](mailto:BAMTraining@calhr.ca.gov)
      - COBRA [COBRA@calhr.ca.gov](mailto:COBRA@calhr.ca.gov)
      - Dental Program [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)
      - Dental/Vision Authorization Portal [VisionDental.Authorization@calhr.ca.gov](mailto:VisionDental.Authorization@calhr.ca.gov)
      - Dependent Re-verification (DRV) Program [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

- FlexElect/CoBen Program [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)
- Group Legal [Grouplegal@calhr.ca.gov](mailto:Grouplegal@calhr.ca.gov)
- Life Insurance [Lifelsurance@calhr.ca.gov](mailto:Lifelsurance@calhr.ca.gov)
- Long Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)
- Third Party Pre-Tax Parking Reimbursement Account [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)
- Vision [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)
- [Open Enrollment OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)
- [Virtual Benefits Fair BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)

**SCO – Statewide Benefits Program** – Ryan Baughman ([ppsdcsbenefits@sco.ca.gov](mailto:ppsdcsbenefits@sco.ca.gov))

– Updates

- Weekly Processing Dates – Civil Service Benefits
  - We are catching up! STD 701R, STD 701c, & STD 702 forms expected to reach within 30 days of current date by end of next week.
  - Going to be focusing on Dental and STD. 674AR workloads. Higher volume but progress will be seen.
  - Please have Specialists check [Weekly Processing Dates](#) prior to calling Statewide Customer Contact Center.
  - For emergent inquiries, please use the [Escalated Email Instructions](#) found on SCO website.

## PROGRAM UPDATES:

### System Activities Coordination and Support (SACS) – Chuck Lucas ([ppsdsacs@sco.ca.gov](mailto:ppsdsacs@sco.ca.gov))

- Schedule 8 File Transfer Protocol Sign- Ups And ViewDirect Report
  - Schedule 8 is coming up fast. Fiscal Year-End (FYE) 23-001 is the first of 5 memos that will be posted to listserv to help agencies complete their SCH 8 process
  - Agencies can receive only the Regular SCH 8 files via the FTP portal, the supplementary file is not available via FTP. You can receive a test file in May and the production file in July (each file cost is \$72.00)
  - Agencies can also get the files through [ViewDirect \(Mobius\)](#). File PD59 for Regular file and file PD60 for Supplementary file (This is Free)
  - [FYE Letter #23-001: Schedule 8 File Transfer Protocol Sign-Ups and ViewDirect Report](#)
  - Return filled out forms to [ppsdsacs@sco.ca.gov](mailto:ppsdsacs@sco.ca.gov)
  - To sign up for the notifications go to [https://sco.ca.gov/ppsd\\_email.html](https://sco.ca.gov/ppsd_email.html)
  - Information on ViewDirect or Mobius: [https://sco.ca.gov/ppsd\\_viewdirect.html](https://sco.ca.gov/ppsd_viewdirect.html)

### Business Systems Enhancement (BSE) – Pliny Reynolds (SCCC (916) 372-7200)

- Shift Differential Project
  - SCO implemented a change in the payroll system that will allow departments to lock in shift earnings IDs for Bargaining Unit 13 and 19 beginning with the January 2023 pay period for eligible employees.
  - Shift differential payments can still be keyed via [Payroll Input Process \(PIP\)](#) if the shift earnings ID is not locked-in Employment History (EH) and will issue as a supplemental payment (payment type 2).
  - Please refer to [Personnel Letter #23-004](#) for additional information.
- Labor Code 4800
  - SCO also implemented system modifications to transition Bargaining Unit 8 employees from Industrial Disability Leave (IDL) to [Labor Code 4811](#) benefit.
  - PPSD is currently working on PPM revisions for the new benefit change and will send out an email notification once the revisions have been completed.

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

- Fee Letters from CalPERS
  - PPSD is aware of departments receiving fee letters from CalPERS
  - PPSD is developing a Frequently Asked Questions (FAQ) page to address fee letters
  - It will include:
    - Answers to questions we have received
    - Samples of fee letters you may receive
    - Tips and Tricks for avoiding fees
    - Contact information for assistance with resolution
    - Links to resources

- Under Government Code (Gov. Code) [section 20283](#), employers have 90 days to establish membership and report retirement contributions to CalPERS.
  - Enrollments later than 90 days result in liability for both member and employer contributions, as well as a \$500 administrative fee.
- Under Government Code (Gov. Code) [section 21220](#), an employer shall enroll a retired member within 30 days of the effective date of hire.
  - Enrollments later than 30 days result a fee of two hundred (\$200) dollars will be assessed per month until the retired annuitant is enrolled in [my|CalPERS](#).
- If your department needs SCO assistance with an invoice, please provide it as an attachment to the PPSD Civil Service Retirement Inbox; the address is in the chat.
- [Circular Letter #200-009-20](#) has details regarding Gov. Code 20283
- [Circular Letter #200-049-21](#) has details regarding Gov. Code 21220
- It is a best practice to verify that new appointments have been added to [my|CalPERS](#) the day after they are keyed, as part of your appointment routine.
  - If a transaction did not result in a record being added to [my|CalPERS](#), please contact the [Statewide Customer Contact Center \(SCCC\)](#) at (916)372-7200.
  - This will assist in avoiding late assessment fees.
- It is critical to address fee letters as soon as you receive them.
  - Response beyond 30 days can result in additional fees and the inability to request a waiver.
  - If you have concerns about the accuracy of fees, contact SCO at the SCCC as soon as possible.
- Retired Annuitant (RA) Reporting Reminders
  - Please make sure to separate ([S31](#)) any RA that is no longer working.
  - RA pay must be keyed by the 15th of each month to avoid late reporting fees.

**Executive Office (EO) Inquiries** – Shelley McCarthy ([ppsdeoinquiry@sco.ca.gov](mailto:ppsdeoinquiry@sco.ca.gov))

- What are EO Inquiries?
  - Inquiries that constituents send to SCO using the [Contact Us](#) webpage on the SCO website
    - [Email Inquiry Form](#)
- Top inquiries—January 2023
  - Taxes & W-2: 24
  - Paycheck: 12
  - Benefits: 8
  - Update Address: 7
    - 49% of our January inquiries were sent back to the HR office
- Top inquiries—2022
  - Paycheck: 171
  - Taxes & W-2: 142
  - Verification of Employment: 79
- How can you help?

- Inform your employees by sharing [employee bulletins](#)
  - We ask that HR offices make employees aware of resources available to them such as [SCO State Employees Webpage](#), [California Public Employees' Retirement System](#), [California Department of Human Resources](#), and [Cal Employee Connect](#).
- Our responses
- We provide the employee with contact information for a Personnel Specialist/Supervisor within their departmental HR office. We copy Transactions Managers and the HR Chief. BCC the department's universal email box (Personnel Transactions)
    - Encouraged to review/update the [California Personnel Office Directory](#) (CPOD)
  - Access the [Statewide Customer Contact Center](#) (SCCC) and [Escalation Email](#) should you need assistance from the SCO

### **Human Resources (HR) Suggestions**

- We received 13 HR suggestions in the last three (3) months
- We were unable to implement any of the suggestions, however if we can implement any of these suggestions we will share at the forum
- Remember to submit your HR suggestions to the SCO's HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)

### **PPSD General Reminders**

- Utilize ConnectHR to submit documents or upload data – include SSN
- Include the employee's complete social security number (SSN) when sending documents through ConnectHR
- Check [Weekly Processing Dates](#) before sending inquiries
- Update [California Personnel Office Directory \(CPOD\)](#)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out recommended Human Resources [subscriptions](#)
- Review Communication from State Policy and Instructional Departments for Business Process impacts
- It is recommended that the Human Resources (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 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](mailto:PPSDHRSuggestions@sco.ca.gov).

## SCO RESOURCES:

- Websites:
  - Human Resources (HR): [https://sco.ca.gov/ppsd\\_state\\_hr.html](https://sco.ca.gov/ppsd_state_hr.html)
  - State Employees: [https://sco.ca.gov/ppsd\\_se\\_payroll.html](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](mailto:acasupport@sco.ca.gov)
- [Cal Employee Connect \(CEC\) - Help and Feedback](#)
- [ConnectHR - Help and Feedback](#)
- California Leave Accounting System (CLAS) Email [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Decentralized Security & ViewDirect Access - (916) 619-7234 or [DSA@sco.ca.gov](mailto:DSA@sco.ca.gov)
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- Management Information Retrieval System (MIRS) Email [ppsdmir@sco.ca.gov](mailto:ppsdmir@sco.ca.gov)
- [Statewide Customer Contact Center](#) (916) 372-7200

## FORUM QUESTIONS:

The following questions were submitted during the forum:

**Question:** What type of documentation or substantiation do departments require for employees requesting bereavement leave? Do departments require jury duty certification - including dates of service for employees requesting jury duty leave?

**Answer:** Please review the following policies for further information.

- [Bereavement Leave policy 2115](#)
- [Jury Duty policy 2117](#)
- [MOUs](#)

**Question:** Our agency is interested in switching our Official Personnel File's (OPF) to a digital/electronic filing system. Can you tell me the names of agencies that have switched over to electronic Official Personnel File's or has there ever been a poll taken to get this information? Can you give me any guidance if there are any legal requirements that are required before switching over to an electronic Official Personnel File system?

**Answer:** Please review the Secretary of States' website for the requirements. Here is the [base link to Athena](#). You can find some agency schedules by searching "Personnel" or "Human Resources."

**Question:** How are departments planning to handle monitoring compliance with Leave Reduction Plans?

**Answer:** Please review HR manual policy 2124, [Human Resources Manual - CalHR](#).

**Question:** How do we process Dental, dependent reverification? Is there a pay letter or tool kit? I have been researching the CalHR/HRNET/HR Manual. Is there a list Supervisors can obtain to distribute to their staff?

**Answer:** Please refer to [CalHR Human Resources Manual 1424-Dependent Re-verification \(DRV\)](#), [FCP Manual for State HR Professionals](#), and [DRV-Benefits Administration Manual \(BAM\)](#) for further clarification. The password for the State HR Professional page is 2021StateHRP. **This password and page are confidential, please do not share outside of State HR Professionals groups.**

**Question:** To meet the 24 months, does the employee need to be a continuously active employee? What if they were out on leave of absence for a portion of the 24 months?

**Answer:** As long as the employee is not permanently separated from state, it should be ok.

**Question:** How does an employee re-verify their Dental and Vision on a triennial basis?

**Answer:** Please refer to [Dependent Re-verification | CalHR \(benefitsprograms.info\)](#) for further clarification.

**Question:** Direct Pay even though the employee is supplementing?

**Answer:** If they are supplementing enough, then their benefits should be covered.

**Question:** What is the process for an employee who is retired but showing up on Family Connect Portal (FCP)? Retiree is receiving mail from CalHR to contact HR office to verify their dependents. Should they be deleted from FCP?

**Answer:** Retiree accounts have been removed from Family Connect Portal (FCP).

**Question:** I requested access to the Family Connect Portal (FCP); however, I have yet to receive a confirmation email. How can I obtain a status update?

**Answer:** If you requested a Family Connect Portal (FCP) Department Admin account, you have to be at a supervisory level and have to also submit a FCP Security Agreement. Family Connect Portal Department Admin accounts are reviewed and approved by CalHR's Dependent Re-Verification (DRV) Unit. Family Connect Portal Department User accounts requests are approved by each HR office's FCP Department Admin.

**Question:** Dependent Re-Verification (DRV)-Can you confirm that this portal does or does not interface with SCO when DRVs are keyed into Family Connect Portal (FCP)? If not keyed, will the employee's deductions be changed?

**Answer:** Family Connect Portal (FCP) does not send information to SCO or the carriers. However, SCO and the carriers do send data files to FCP on a regular basis. If the re-verification is not keyed timely, CalHR will contact the HR chief for a resolution.

**Question:** When reviewing Dependent Re-Verification (DRV) how can we change the name on the dental? Do I submit a new 692 to dental or just call dental provider? I see that this has happened at our agency more than 4 times this month.

**Answer:** All name and demographic changes must be made with SCO/carrier directly. Please refer to page 27 of the Family Connect Portal (FCP) manual for additional details on how to correct demographics information for dependents.

**Question:** All of my employees that were verified were still mailed cancellation notices. Was this an error or will they get all notices even after verified?

**Answer:** CalHR contracts with DGS to mail out Dependent Re-Verification (DRV) notices and the employee data file is due to DGS on the 15th of the month prior to the mailing date. For this reason, the file would include employees whose dependents were re-verified between the 15th and the end of that month. You can advise your employees who have already submitted all their DRV docs to disregard the subsequent notice they receive from CalHR. We are working on updating FAQs for both HR and Employees and future notices with similar verbiage.

**Question:** R06 staff are showing as pending and dependents are not showing, will this be updated?

**Answer:** CalHR is currently working with CCPOA and CAHP and their dental enrollment data will be in Family Connect Portal (FCP) in the near future. CalHR will let the departments know when that update takes place.

**Question:** Do we need to delete the spouse via SCO if the employee did not provide the verification or the system will automatically drop the dependent?

**Answer:** Inform CalHR Dependent Re-Verification (DRV) that employee was separated from State Service.



**Question:** If we see a dependent not listed with the employee in Family Connect Portal (FCP), how can the dependent be added? The dependent was added during open enrollment.

**Answer:** Family Connect Portal (FCP) receives all employee, dependent and enrollment data from SCO and the carriers. Enrollment issues must be addressed and resolved with SCO and/or the carrier(s).

**Question:** At what point is an Accounts Receivable (A/R) generated if the employee doesn't get Dependent Re-Verification (DRV) form in on time?

**Answer:** Most of the time a payment is actually issued for when dependents are dropped due to Dependent Re-Verification (DRV). This is expected after the employee's birth month. Accounts Receivables (A/R) for adding dependents back would depend on when the Personnel Specialist (PS) sends in the Dental Change to add them back and Weekly Processing dates.

**Question:** Our agency has over 560 items on the Exception Report. Most often the info in Family Connect Portal (FCP) is wrong, but when we follow up with the carriers they are showing correct info. Our team only has two analysts available for the Dependent Re-Verification (DRV) process and 560-plus is a very daunting number. Is there any way to streamline a solution to this error?

**Answer:** CalHR's Dependent Re-Verification (DRV) Unit is monitoring data and system processes and will adjust processes for efficiency while remaining aligned with the DRV regulations and policies. Family Connect Portal (FCP) is an interim solution for CSPS.

**Question:** Is there an update for BU 5 for CAHP Blue Cross dental being entered into Family Connect Portal (FCP)?

**Answer:** CalHR is currently working with CCPOA and CAHP and their dental enrollment data will be in Family Connect Portal (FCP) in the near future. CalHR will let the departments know when that update takes place.

**Question:** Can you send out a notice regarding BU6 to Department of Corrections regarding the dental verification issue?

**Answer:** CalHR is currently working with CCPOA and CAHP and their dental enrollment data will be in Family Connect Portal (FCP) in the near future. CalHR will let the departments know when that update takes place.

**Question:** If I need to correct a re-verification of a dependent how do I do that?

**Answer:** Corrections can be made on the Dependent Re-Verification (DRV) Alert page. Corrections can only be made to the type(s) of documents selected. Once you have selected the correct documents, save your work by clicking on the "Save" button.

**Question:** We recently had a situation where a new to state employee worked for two hours and walked out prior to completing their New Employee Orientation. Our department was able to obtain their Social Security Number; however, we do not have their date of birth or oath, and are unable to key the employee. The employee is also unresponsive and reluctant to provide us additional information. What would be the recommended guidance to process the employee without this information?

**Answer:** The department has shown good faith to attempt to collect the necessary information to key the employee and provide compensation. Personnel Services Branch (PSB) suggest running this by your

legal office to see if there would be any department ramification for not providing pay to this employee. If a salary advance was provided without appointment, you would not be able to clear the salary advance.

**Question:** We have an employee who wants to cancel a payroll deduction who has said they spoke with the company who receives the deductions, and said they are not able to cancel the deduction, and provided the employee a generic form requesting our HR to stop the deductions, with the employee's signature and date.

Per the PPM H015, it states that if an employee writes to Payroll Operations to request the cancellation of payroll deduction(s) not listed (which the employee's deduction code is not listed) the cancellation request will be returned to the employee. It also says employees must contact either the organization through which the deduction(s) is/are withheld or their personnel/payroll office.

**Answer:** Employees may cancel voluntary deductions via an administrative cancel per [PPM Section H 014](#). The requirements to do so are listed in Section H 015. The employee will need to contact the vendor directly to cancel any other deductions not listed in Section H 014. At that time, the vendor will submit the cancelation.

**Question:** If an employee separates after reaching 12 qualifying pay periods for an Merit Salary Adjustment (MSA), but the separation date is prior to the MSA effective date, are they still entitled to the MSA?

**Answer:** If their lump sum takes them to when they would have received their Merit Salary Adjustment (MSA), it should be included in their lump sum if they met the 12 qualifying pay periods. Example, the employee hits 12 qualifying pay periods into their 12 month of employment after 11 days into that 12 month, but they separate prior to the first of the following pay period. If their lump sum takes them beyond the first of that following month, the MSA would be included in the lump sum.

**Question:** Regarding Pay Differential 240 Recruitment and Retention (R & R) - If a Personnel Specialist (PS) meets 12 consecutive qualifying pay periods as of 3/1/23 and then separates from State service eff 3/3/23, is the HR office able to key the pay on 3/1/23? The Pay Differential states the pay is payable 30 days following the completion of 12 consecutive qualifying pay periods.

**Answer:** Although the Memorandum of Understanding (MOU) and Pay Differential state payable 30 days following the completion of 12 qualifying pay periods, the employee is terminating from state service and has met the 12 qualifying pay periods and therefore due the payment upon termination. Had the employee not completed the 12 qualifying pay periods they would not be due any payment upon termination.