



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

February 15, 2024

Survey Questions





Question

Presenter: Christina Campbell

Contact: [Statewide Customer Contact Center](#) 916-372-7200

What is the ding notice policy when SCO and staff are communicating before cancelling the upload? For example, if staff is communicating with an SCO representative and it is not finalized within the next 24 hours, then will the SCO representative stop the process and ask for the staff to re-upload?

Answer: HR offices have two (2) business days to respond to the PR250 (ding) notice. HR offices must attach the ding notice with the corrected document.

If an HR office is in constant communication with an SCO staff member, we will not cancel the document. However, if the HR offices fails to communicate timely, then we will cancel the document.



Question

Presenter: Liz James

Contact: ConnectHRhelp@sco.ca.gov

Is there any way that the Employee Detail screen in Cal Employee Connect (CEC) can display whether an employee has Direct Deposit active? Specifically, whether the employee sets it up themselves or the department uploads the STD. 699? We only find out whether it is active the next time pay runs. It would be awesome if this information could display, and we do not have to call in to try to find out. It is also helpful when employees change departments and reinstate to state service before issuing a salary advance.

Answer: Currently CEC is unable to display the status of the employee's direct deposit submission. We will add your suggestion to our enhancement list for future consideration. If you have any additional questions, do not hesitate to reach out directly to CEC via ConnectHRhelp@sco.ca.gov.



SCO KEY INITIATIVES

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Phase II – features:

- **Multifactor Authentication (MFA):**
 - Now available to all Cal Employee Connect (CEC) users
 - As of 2/12/2024: 64,855 employees have enabled MFA
- **Direct Deposit:**
 - 96% of departments statewide have been deployed
 - As of 2/12/2024: CEC has received 26,318 direct deposit transactions
- **Address Change:**
 - 95% of departments statewide have been deployed
 - As of 2/12/2024: CEC has received 6,646 address change requests
- **Withholdings Change:**
 - Wave A and B departments have been enabled
 - As of 2/12/2024: CEC has received 5,389 withholdings change requests



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Phase II – features:

- **eTimesheet Feature:**

- As of 2/12/2024: 21 agencies have been using this feature
- Note:
 - This feature is available to agencies who do not have a Time and Attendance system or wish to decommission their current system.
 - Limited work schedules and leave benefits. Please email us for additional information.

- **2023 W-2 Paperless Feature:**

- As of 2/12/2024: 69,355 employees have opted-in (19% adoption rate)
 - The W-2 Paperless enrollment period runs yearly from February 1st to November 30th and allows employees the opportunity to receive their Form W-2 Statement electronically via CEC. The next opportunity to enroll in Form W-2 Paperless started February 1st and will allow users who have opted-in the ability to download PDF copies of all Form W-2s listed within CEC.





SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Help & Feedback:

- Did the employee select the appropriate Problem Type?

Still need assistance or want to leave feedback?

I need assistance or have questions I have feedback or would like to leave a suggestion

Help Submission Form

Problem Category:

Problem Type:

- Did the employee read the information provided and followed CEC instructions to turn off MFA?

To turn off MFA on your account, visit the [CEC Help & Feedback](#) form. Under Problem Category select "Login/Account" and the problem type "Use only if instructed by CEC team" on the form dropdowns.

Help Submission Form

Problem Category:

Problem Type:

- Did you provide a valid email address?

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

Accounts Receivable (A/R) 035 Deduction Collection Feature:

- 100% departments/agencies have been enabled
 - As of 2/5/2024:
 - **Total of 67,066** A/R 035 deductions have been processed via this feature
 - **Total of \$15,287,248** has been collected
- SCO is unable to cancel or modify submitted and worked A/R 035s. HR offices will need to send a STD. 674 to either reverse or refund the deduction after monthly payroll.



CSPS Status – February 2024

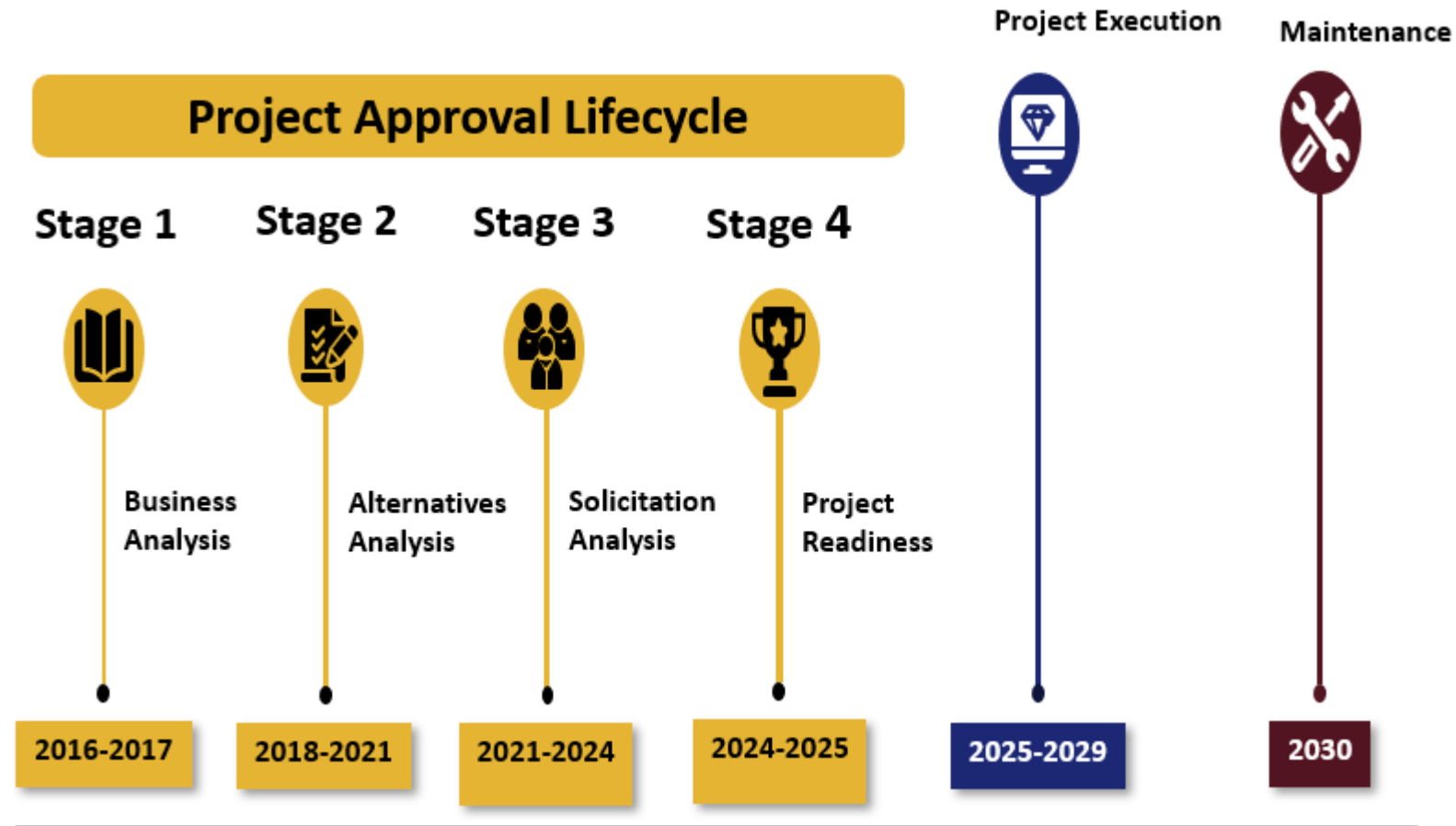
Presenter: Jeana O'Ferrall

Contact: CSPSHelp@sco.ca.gov



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





CSPS Status

Presenter: Jeana O' Ferrall

Contact: CSPSHelp@sco.ca.gov

Updates

- State Controller's Office Legal and California Department of Technology completed review of Addendum five (5) documents
- Project Management Office finalized master project schedule framework
- Organizational Change Management (OCM) team continues to make updates to the Modernizing Pay Day (MPD) communication plan and presentation
- OCM continues work toward a CSPS website and Modernizing the Bear campaign



STATEWIDE BENEFITS ADMINISTRATION



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

What are Information Reporting Penalties?

- The State is subject to the Information Reporting Penalties (IRPs) based on the retroactive changes in the Affordable Care Act System (ACAS) that cause a change in benefit status data reported on the Form 1095-C to the Internal Revenue Service (IRS) and the employee through the SCO correction process

What is changing?

- Starting with corrections for the 2021 reporting year, the IRS is no longer providing relief to employers for incorrect reporting
- 2021 IRP Amount
 - \$280: Failure to file a correct 1095-C record to the IRS
 - \$280: Failure to provide a correct 1095-C to the employee
 - Total: \$560 per corrected 1095-C

What is the importance?

- Departments are responsible for maintaining accurate and timely information in the ACAS
- IRPs will be passed down to the department at fault
- Penalties compound over time



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

IRP Phased Approach

SCO plans to pull data to begin 2021 corrections process in late April or early May of this year. This leaves just under three (3) months to process retroactive changes in the ACAS for reporting year 2021. The IRP workgroup developed a concept that provides additional relief to departments. To encourage HR offices to increase their efforts in making these changes, the IRPs will be assessed to departments in a Phased Approach.

IRPs will be passed down to departments at fault as follows:

- **Corrections Reporting Year 2021:** Departments will be responsible for paying 50% of the total penalty amount
- **Corrections Reporting Year 2022:** Departments will be responsible for paying 75% of the total penalty amount
- **Corrections Reporting Year 2023 and moving forward:** Departments will be responsible for 100% of the total penalty amount



Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

Benefits of the Phased Approach

- Gives HR offices additional time to prioritize their ACA workload
- Provides additional time for HR offices to reduce future penalty costs and increase ACA compliance
- Allows HR offices to pay reduced penalty amounts for reporting years 2021 and 2022
- Allows HR offices more time for ACA training
- Keep in mind – making these retroactive changes now impacts corrections processes for multiple years, while preventing future year IRPs



Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

IRP 2020 Corrections Data – 50% Penalty

For the 2020 reporting year, SCO processed and mailed 6,993 corrected 1095-Cs. Based on the corrected data for 2020, if the state were to be assessed IRPs, the total penalty assessed would be approximately \$2,193,480.

- The penalty breakdown in the table below is based on 2020 corrected data for the top 3 departments, and the 2020 IRP amount
 - \$270: Failure to file a correct 1095-C record to the IRS
 - \$270: Failure to provide a correct 1095-C to the employee
 - Total: \$540 per corrected 1095-C

2020 Corrected Penalty Data

Department	# Of Penalties Assessed	Total Penalty	Total Penalty at 50%
A	161	\$86,940	\$43,470
B	83	\$44,820	\$22,410
C	78	\$42,120	\$21,060



Affordable Care Act Program

Presenter: Rebecka Calvert

Contact: ACASupport@sco.ca.gov

What Can Your Department Do To Reduce The IRP Liability?

- Correct any retroactive data in ACAS back to 2021
- ACAS updates must be part of the regular personnel and payroll processing
- Register staff to attend the ACA Training class
- Utilize Compliance Reports on [Mobius View](#) or ViewDirect to correct errors. Below are four helpful compliance reports:
 1. **PDA2050B** "Employees Permanently Separated Without A Health Benefit Cancellation ACA Code 6A"
 2. **PDA2050C** "Employees Without ACA Status Code"
 3. **PDA2050L** "Active Employee With Separation Code"
 4. **PDA2056M** "Employee With 350 Deduction Code Without a 3A, 3B or with a 6A"
- Departments heavy with Permanent Intermittent (PI) employees should utilize the compliance report: PDA2065 "PI Employee Reflected As Not Eligible"



Affordable Care Act Program

Presenter: Rebecka Calvert

Contact: ACASupport@sco.ca.gov

2023 Annual 1095-C Reporting

- All 2023 1095-Cs will be printed and mailed to the employee address on file as of December 29, 2023, by March 1, 2024
- All 1095-Cs are printed with the SCO return address, undeliverable 1095-Cs will be returned to the agency for forwarding to the employee
- Employees must reach out to their Human Resources (HR) office if they do not receive their 1095-C to determine eligibility
- HR offices can determine 1095-C eligibility by checking the 1095-C Issued report on [Mobius View](#) or ViewDirect once posted, prior to requesting a duplicate 1095-C from ACA Support

Outreach

- ACA Helpdesk consultants are available to assist you with questions, contact:
 - ACASupport@sco.ca.gov or 916-322-3770

Education

- Access ACA tools and resources available on the [SCO ACA Training Page](#)

CalHR Transaction Supervisors' Forum Update



CalHR Benefits Division

February 15, 2024

CalHR Benefits Division

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by CalHR offered to state employees, retirees and dependents. Our goal is to ensure access to competitive, quality and affordable benefits. Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and maintaining a top-performing workforce.

Benefit Project Updates

CalHR Benefits Division

February 15, 2024



Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Quarterly ACA Compliance Review

- The February ACA Quarterly Compliance Review is currently underway.
- Departments who were notified of their outstanding ACAS errors are to correct and certify the errors were corrected by returning the Quarterly ACA Compliance Notification to ACA.Policy@calhr.ca.gov by **March 15, 2024**.
- Departments are encouraged to utilize the [ACAS User Guide](#) and [Scenario-Based Job Aid for Updating the ACAS](#) on SCO's website for information on how to correct these errors.

Note: There were approximately 675 errors on the February Quarterly compliance reports that were not corrected by December 29, 2023. If any of these errors were for the state's full-time employees, the state may be assessed a \$620 penalty for each incorrect statement filed with the IRS and provided to the employee (\$620 x 700 errors = \$418,500)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Observations from January Monthly ACA Compliance Reports

- The compliance report that reflects employees with a 350 health deduction in pay history without an offer of health coverage in the ACAS experienced a 340 percent increase in the total number of errors on this report compared to December (Open Enrollment Transactions).
- The “Health Event Transaction” COGNOS Report in myCalPERS can be helpful to identify ACAS updates for employees that have elected to enroll in health benefits and the effective date of coverage.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Observations from January Monthly ACA Compliance Reports

- Departments are not updating the ACAS records timely for employees that transfer to another department.
- The Employee Transfer Data Worksheet (STD 612) was updated in 2018 to include the employee's current ACA status code. For transferring employees, please be sure to review the employee's pay deductions and ACAS record prior to them leaving to ensure the ACAS record for the employee is accurate.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

- Employee has a Health (350) deduction
- Current ACAS Status Code is 4A (Code indicates employee declined health coverage)
- The employee is enrolled in health benefits
- Employee's ACAS record needs to be updated to reflect a 3A to indicate the employee is enrolled in health benefits – verify the correct effective date of coverage

STD. 612 Employee Transfer Data

STATE OF CALIFORNIA — CALIFORNIA DEPARTMENT OF HUMAN RESOURCES
EMPLOYEE TRANSFER DATA
(As of Date of Departmental Separation)
STD 612 (Rev. 10/2019)

[Clear](#) [Print](#) SEE REVERSE FOR INSTRUCTIONS

SECTION I

TO (NEW APPOINTING DEPARTMENT) **FROM (RELEASING DEPARTMENT)**

ATTENTION: TELEPHONE NUMBER (Public) PERSONNEL SERVICES SPECIALIST / PAYROLL TECHNICIAN TELEPHONE NUMBER (Public)
(ATSS) (ATSS)

EMPLOYEE NAME SOCIAL SECURITY NUMBER BIRTH DATE CB ID

TO (PROPOSED CLASS)	APPOINTMENT DATE (PROPOSED)	TENURE	TIME BASE	FROM (CURRENT CLASS)	SEPARATION DATE	TENURE	TIME BASE
	March 1, 2024	P	FT		February 29, 2024	P	FT
	CLASS CODE	CLASS TITLE			CLASS CODE	CLASS TITLE	
	5393	Associate Governmental Program Analyst			4870	Staff Service Analyst	

PAYROLL DEDUCTIONS (If employee has deduction code 25, 38, 39, 47, or 339, attach a copy of STD 458, STD 459, or STD 639)

CODE NUMBER	AMOUNT	CODE NUMBER	AMOUNT
350	964.15		
475	8.64		
351	50.83		

TAX WITHHOLDING (ENTER MARITAL STATUS CODE AND NUMBER OF EXEMPTIONS)
(FEDERAL) (STATE) (ADDITIONAL STATE)

IS EMPLOYEE ENROLLED IN:

	YES	NO	NOT ELIG.	SPECIAL COMMENTS
Direct Deposit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HAS BEEN CANCELLED
Health Benefit Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dental Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vision Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ENHANCED
State-sponsored Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Long-term Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Deferred Compensation/Tax Sheltered Annuity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
FLEXELECT Program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PRE-TAX MED REIMB. CASH OPTION DEP. REIMB.

LAST PAY PERIOD NET PAY BASED ON SALARY RATE TIME PAID (Days) (Hours)
 STANDARD OR

ACAS Status Code 4A

Benefits Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment Updates

- The 2023 Open Enrollment season has officially closed and preparations for the 2024 Open Enrollment season has begun.
- During Open Enrollment, state employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, COBRA, and legal insurance.
- All changes made during the 2024 Open Enrollment will be effective January 1, 2025.

Benefits Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Post Open Enrollment Survey

- The CalHR Benefits Division released the Post Open Enrollment survey on November 22, 2023 and closed the survey January 8, 2024.
- In this survey, we asked for your opinion on the 2023 Open Enrollment season. The CalHR Benefits Team values the project collaboration with HR Professionals therefore, the feedback you provided us will be beneficial information to see what is working well and what we can do to improve our communication and collaboration to deliver high quality products during our annual Open Enrollment season.
- To sign up for future surveys, Open Enrollment information and updates, please subscribe to the Open Enrollment subscription list on the Benefits website. You can find the subscription box on the HR Professionals webpage: [State HR Professionals | Cal HR \(benefitsprograms.info\)](#)

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Contact

- Department Personnel Offices can send OE related questions via email to OpenEnrollment@calhr.ca.gov.
- Current response time is five (5) business days.

Resources

- [CalHR Benefits website](#)

Benefit Program Updates



CalHR Benefits Division

February 15, 2024

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor

Contact: DRV@calhr.ca.gov

What is DRV

The Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and premier vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.

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 and premier vision benefits. The bargaining unit contracts specify that family member eligibility for dental and vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor

Contact: DRV@calhr.ca.gov

DRV Updates

- CalHR automated the DRV process for Dental and Premier Vision effective January 2023.
- The current health Dependent Eligibility Verification (DEV) process through CalPERS and the MyCalPERS system will remain unchanged.
- Departmental personnel offices are required to update Dental and Premier Vision dependent re-verifications through the Family Connect Portal (FCP).
- All state agencies must establish an administrative account, who is at the supervisor or above class, in the Family Connect Portal (FCP) to manage each agency's authorized user accounts to update DRV transactions.
- Department compliance with DRV regulation will be monitored and addressed by Health Benefit Officers and FCP Department Administrators.

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor

Contact: DRV@calhr.ca.gov

DRV Updates continued

- March, June, September, and December 2023 birth month cycles: departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- January 2024 birth month cycle: departmental personnel offices have until the end of February to process all DRV documents accordingly in FCP.
- April 2024 birth month cycle: 60-day reminder notice was mailed February 2, 2024.
 - Please note that for employees to avoid receiving additional notices their DRV alerts must be keyed into FCP prior to the next notice generating for the cycle.
- The CAHP and CCPOA enrollment data in FCP is still pending.

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor

Contact: DRV@calhr.ca.gov

Total notices mailed to date:

Birth Month Cycle	1 st Notice 90 days before end of birth month	Total Mailings of 1 st Notice	2nd Notice 60 days before end of birth month	Total Mailings of 2 nd Notice	3 rd Notice 30 days before end of birth month	Total Mailings of 3 rd Notice	Total Mailings
March	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
June	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
September	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
December	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
January	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
April	Jan-2024	8,195	Feb-2024	7,862	Mar-2024	N/A	= 16,057

*90 notice for March birth month cycle only included DRV notices for Health benefits.

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor

Contact: DRV@calhr.ca.gov

Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources from BAM, FCP Manual, and Human Resources Manual.
- Contact the DRV Unit at CalHR with questions and processes related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or Premier Vision benefits only.
- Departmental personnel offices can send DRV and FCP related questions via email to DRV@calhr.ca.gov.
- Current response time is five (5) business days.

Benefit Programs Reminders for Departmental Personnel Offices

Presenter: Kristin Wilsey

General Program Updates

- Open Enrollment – Voluntary Plan Benefit Changes.
 - Life, Legal, LTD, and Vision are the programs where employees could make their own changes directly with the vendors.
 - Employees should review their December 2023 pay warrant to confirm if open enrollment changes for Life, Legal, LTD, and/or Vision took effect.
 - Each program provided confirmation receipts during open enrollment. Employees should provide this to departmental personnel if an appeal is required because open enrollment changes did not take effect.
 - A demonstration for how to review miscellaneous deductions to confirm open enrollment changes was given at the Transaction Specialist Educational Forum on February 1, 2024, to provide training to Personnel and Transactions Specialists.

Benefit Programs Reminders for Departmental Personnel Offices

Presenter: Kristin Wilsey

Program Reminder Regarding Appeals

- A complete appeals package includes:
 - Justification memo explaining appeal.
 - Complete and error-free forms.
 - CalHR 774 Premier Vision Plan Enrollment [Premier Vision Plan Enrollment \(ca.gov\)](#)
 - CalHR 695 Retiree Vision Plan Enrollment [Retiree Vision Plan Enrollment \(ca.gov\)](#)
 - STD 692 Dental Plan Enrollment Authorization [Dental Plan Enrollment \(dgs.ca.gov\)](#)
 - Written confirmation that the employee acknowledges an accounts receivable will be established for retroactive enrollment (If applicable).
 - A refund request or no change in deduction would not be applicable.
 - Once an appeal is approved by CALHR and processed by SCO, we will not cancel or reverse the appeal.
- Training Recommendations:
 - Benefits Administration Manual Training – [online CalLearns](#)
 - Employee Benefits Orientation Training – [online CalHR Webpage](#)
- Benefit Premiums:
 - Premiums cannot be waived for months when services are not used.

Benefit Programs Project Updates

Presenter: Kristin Wilsey

Customer Service & Support Section Project Updates

- Improving VSP Membership Profiles for Basic Vision
 - VSP now receives a demographics file for Basic Vision employees.
 - Approximately 18,000 Basic Vision profiles have been updated to include:
 - Full Name
 - Date of Birth
 - Address
 - SSN
 - The hope is this will improve access to services. This will also give Basic Vision employees access to Eyeconic, VSP's online store.

Dental Program

Presenter: Kristin Wilsey

Contact: Dental@calhr.ca.gov

Dental Program Updates

- Program is current within 30 days.
- Total Inquiries received to date:
 - 228 Dental benefit questions in January 2024.
- Appeals
 - 171 Appeals received in January 2024.
 - 64 Incomplete appeal packages submitted and returned.
- Top Two Reasons for Incomplete Appeals Package
 - Multiple errors with appeals justification packages.
 - No forms / incomplete Forms / errors on forms.
- Top Three Reasons for Appeals
 - 134 Appeals - Departments did not submit paperwork timely.
 - 13 Appeals – Ding notice related.
 - 7 Appeals – Departments gave incorrect information during OE.

Vision Program

Presenter: Kristin Wilsey

Contact: Vision@calhr.ca.gov

Vision Program Updates

- Program is current and within 30 days.
- Total Inquiries received to date:
 - 156 Benefit questions in January 2024.
- Appeals
 - 6 Appeals received in January 2024.
 - 50% Were incomplete appeal packages submitted.
 - Missing confirmation to accept ARs for missed premiums.
- New Vision Handbook Arriving in Spring 2024!

Pre-Tax Parking Program

Presenter: Kristin Wilsey

Contact: Pre-taxparking@calhr.ca.gov

Third Party Pre-Tax Parking Reimbursement Account (PTP) Updates

- Program is current within 30 days.
- Total Inquiries received to date:
 - 42 Benefit question inquiries in January 2024.
 - 4 Claims submissions.

CalHR Benefits' Resources

Websites:

Benefits Website:

<https://calhr.benefitsprograms.info/>

BAM Training Questions:

BenefitsInquiries@calhr.ca.gov

HealthierU Connections:

<https://www.calhrwellness.com/en/welcome-california-state-employees/>

Human Resources:

<https://calhr.benefitsprograms.info/state-hr-professionals/>

State Employees:

<https://calhr.benefitsprograms.info/state-employee/>

HR Manual:

<http://hrmanual.calhr.ca.gov/Home/ManualItem>

CalHR Benefits' Resources Cont.

Contacts:

- ACA Program ACA.Policy@calhr.ca.gov
- BAM Training BAMTraining@calhr.ca.gov
- COBRA COBRA@calhr.ca.gov
- Dental Program dental@calhr.ca.gov
- Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov
- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov
- FlexElect/CoBen Program FlexElect@calhr.ca.gov
- Group Legal Grouplegal@calhr.ca.gov
- Life Insurance LifeInsurance@calhr.ca.gov
- Long Term Disability LTD@calhr.ca.gov
- Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov
- Vision vision@calhr.ca.gov
- Open Enrollment OpenEnrollment@calhr.ca.gov
- Virtual Benefits Fair BenefitsInquiries@calhr.ca.gov



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Reconciling Employee Health Deductions with SCO

- CalPERS Cognos Report - *State Active health Enrollment and SCO Health Deduction Discrepancy Report*
- Any actions taken in myCalPERS are sent automatically to SCO:
 - Retroactive adjustments are either done automatically by Mainframe or;
 - Civil Service Benefits Team processes transactions that require additional verification.
 - Late Dependent Eligibility Verification
 - Rescinding of a previous health transaction
- If myCalPERS is accurate, however Cognos / Mainframe is showing health plan discrepancy
 - [Payroll Letter #18-017](#) - Form STD. 674 A/R Processing For Missing Health Deductions
 - [Payroll Procedures Manual \(PPM\) Section H 722](#)
 - Submit STD. 674 A/R via ConnectHR for associated pay periods
 - ConnectHR dropdown: Benefits – STD. 674 A/R Benefits Accounts Receivable



BREAK



5 MINUTES



STATEWIDE PROGRAM UPDATES



Statewide Training Program

Presenter: Siobhan Hallinan

Contact: PPSDTraining@sco.ca.gov

- Second Trimester Needs Assessment Revamp Underway!
- eLearning and Virtual Class Development:
 - Employment History Overview eLearning Module
 - Salary Determinations: The Beginning Steps; Mandatory Movement; Alternate Range Movement; et al.
 - Virtual Fundamentals of Personnel Training Series (eLearning): Accruals; Appointments; Probation Period; Anniversary Dates
 - Virtual Fundamentals of Payroll



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

Nonresident Alien Compliance and Form W-2 Reminders

- Revised [Personnel Letter #24-001](#): Verification of Employees Identified as Nonresident Alien
 - Documents should be uploaded via ConnectHR
 - Any inquires, please contact PPSD Tax Support Team at PPSDSTSP@sco.ca.gov



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Form W-2 Reminders and Exempt Employees

- Form W-2 Reminders
 - All Form W-2s have been mailed as of January 2024
 - Form W-2s are on Cal Employee Connect (CEC) as of 1/22/24
 - New look of Form W-2s
- Duplicate Form W-2s
 - Fee waiver until March 1st
 - Student Assistants
 - Any inquiries about Duplicate Form W-2s contact PPSDW2DupCor@sco.ca.gov
- Exempt Employees
 - New Employee Action Request (EAR) by February 15th



Statewide Payroll Program

Presenter: Renee Menefee

Contact: [Statewide Customer Contact Center](#) 916-372-7200

Savings Plus Election Form

- Five (5) day Threshold – The Savings Plus Election Form must be signed at least five (5) days prior to the employee’s separation date; excluding Saturdays, Sundays, and legal holidays
 - Refer to the [Lump Sum Separation Toolkit](#) for assistance with determining the date the employee would need to sign the Election Form
 - A Guide for Avoiding Common Errors - (STD. 640 State Pay Period Calendar)
 - Separation Checklist for Personnel Specialists
 - Civil Service State Employee Guide to Retirement
 - Human Resources Forums
 - [Transaction Specialists’ Educational Forum Notes – October 2023](#)



Statewide Payroll Program

Presenter: Renee Menefee

Contact: [Statewide Customer Contact Center](#) 916-372-7200

Civil Service Audits Ding Notice

- Please read the ding notice and follow the instructions.
- Include the ding notice as the first page when resubmitting a PAR package so it can be worked when it is received by the staff that sent the notice.
- Select the appropriate drop down in ConnectHR for Civil Service (CS) Audits.

Contacting SCO Program Areas

- Resources to assist with contacting the appropriate program area.
 - Statewide Customer Contact Center – Call Directory
 - [Processing Task by Civil Service \(CS\) Program Area](#)
 - CS Weekly Processing Dates
 - ConnectHR CS Directory Document Processing Needs



Statewide Payroll Program

Presenter: Renee Menefee

Contact: [Statewide Customer Contact Center](#) 916-372-7200

Lump Sum Special Processing

- Departments are redepositing lump sum payments when Special Processing is completed without notifying SCO.
- After the lump sum issues, a “K” Accounts Receivable (A/R) is established for the employee’s Savings Plus contributions so the deductions can post to the employee’s Savings Plus account(s) and the lump sum that issues must be used by the department to clear the A/R.
 - The employee will not receive a correct Form W-2 for the tax year until the lump sum issues and the K A/R is established, so it is very important that these transactions are completed.
- Departments must notify the SCO specialist they have been working with when they are redepositing lump sum payments for special processing and why.
 - If there is no communication with SCO for the redeposit, SCO will confirm with CalHR the funds are still in the employee’s account and reverse the K A/R for the contributions until the department resubmits documentation for the separating employee.



Business Systems Support and Maintenance Section

Presenter: Arlene Bailey

Contact: [Statewide Customer Contact Center](#) 916-372-7200

Improving Affordability and Access to Health Care – [Pay Differential 440](#)

- Automated Payment Program Modifications
 - Career Executive Assignment (CEA) positions - 7500 class code tied to Bargaining Unit (BU) 06 and BU 07 are not eligible to receive the pay differential and are excluded by a Social Security Number (SSN) exclusion list within the automated payment program.
 - The SSN exclusion list needs to be updated, and all current data will be deleted on February 26th, 2024.
 - For the February 2024 pay period payments, each Agency will need to send an email to Arlene Bailey, abailey@sco.ca.gov with the following information to exclude CEA employees not eligible for the pay differential by February 28th, 2024:
 - Employee name
 - Position number
 - Last 4 digits of the SSN
 - If this information is not received timely the next automated program processing date the CEA will receive a payment, and if it is in error the Agency must follow the return warrant process in [Section I 318.10 - 318.20](#) and [Section J 013](#) in the PPM.



System Activities Coordination and Support

Presenter: Chuck Lucas

Contact: ppsdsacs@sco.ca.gov

FISCAL YEAR-END LETTER #24-001: SCHEDULE 8 FILE TRANSFER PROTOCOL SIGN-UPS AND VIEWDIRECT REPORT

- Schedule 8 is coming up fast! FYE 24-001 is the first of 5 Fiscal Year End Letters that will be posted to the [SCO Letters](#) webpage to help agencies complete their SCH 8 process
 - Agencies can only receive the Regular SCH 8 files via the FTP portal, The supplementary file is not available via FTP. You can receive the test file in May and the production file in July (each file cost is \$72.00)
 - Please note, due to system limitations, agencies that have already signed up for the FTP file before will be able to receive this year, no new sign-ups. We hope to have this fixed by the next fiscal year.
- Agencies can also get the files through View Direct/Mobius. File PD59 for Regular file and File PD60 for Supplementary file (free of charge)



System Activities Coordination and Support

Presenter: Chuck Lucas

Contact: ppsdsacs@sco.ca.gov

FISCAL YEAR-END (FYE) LETTER #24-001: SCHEDULE 8 FILE TRANSFER PROTOCOL SIGN-UPS AND VIEWDIRECT REPORT

- FYE 24-001 form: [State Controller's Office Letters](#)
- Sign-up for the notifications for FYE Letters: https://sco.ca.gov/pspd_email.html
- Return filled out forms or direct questions to: ppsdsacs@sco.ca.gov
- Information on View Direct/Mobius: https://sco.ca.gov/pspd_viewdirect.html



Executive Office (EO) Inquiries

Presenter: Natalia Saferson

Contact: ppsdeoinquiry@sco.ca.gov

What are Executive Office Inquiries?

- Inquires that constituents send to SCO using the [Contact Us](#) webpage on the SCO website
 - [Email Inquiry Form](#)

January 2024: 133 Total

- Top Inquiries: January 2024
 - Paycheck: 39
 - General Information: 17
 - Form W-2: 15
 - 73% of our January inquiries from current employees were sent back to their HR office



Executive Office (EO) Inquiries

Presenter: Natalia Saferson

Contact: ppsdeoinquiry@sco.ca.gov

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 to a Personnel Specialist/Supervisor within their departmental HR office. We copy Transactions Managers and the HR Chief. BCC the department's universal email inbox (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

Presenter: Natalia Saferson

Contact: PPSDHRSuggestions@sco.ca.gov

- We received 12 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 HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov.

PPSD General Reminders



When you reconcile payroll, check that these *details* are correct:

- Withholdings and deductions
- Employer taxes
- Hours worked, including overtime, vacation time, sick days, etc.
- Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- 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 our 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.
- HR offices calling the [Statewide Customer Contact Center](#) (916-372-7200) must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.
- 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 \(CEC\) Help and Feedback](#)
- [ConnectHR Help and Feedback](#)
- California Leave Accounting System (CLAS) Email CLAS@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or DSA@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: In our last meeting, it was mentioned that the Form W-4 would be deployed in November 2023, but there is no icon displayed for the Form W-4 in Cal Employee Connect. Please advise.

Answer: As of 3/11/24, CEC's Withholding feature was displayed statewide. 95% of the agencies are able to utilize the feature as is. We are working with the remainder agencies to complete the deployment.

Question: Does the response/communication about a PR250 (ding notice) cover the times when we have to contact CalHR to rescind Direct Pay? When the request needs to be escalated to the Health Benefits Unit at CalPERS, we get an estimate of three (3) to five (5) business days before the Direct Pay is rescinded.

Answer: Civil Service Benefits is aware of this delay and are mindful when we receive PR250 responses for this situation. As long as myCalPERS is aligned with what is needed to process the Continuation of Benefits STD. 674 A/R, then we can process a PR250 response that comes in timely after the Direct Pay is rescinded.

Question: Regarding Cal Employee Connect (CEC), I wanted to download my Form W-2 but it wants me to opt-in to paperless. I do not want to opt-in to paperless, I just want to download it. Can we change this?

Answer: In support of a paperless initiative, opting into the W-2 paperless feature is a requirement in order to utilize the ability to download a paperless copy of your Form W-2. If you continue to receive your Form W-2 by mail, your Form W-2 will be view only on CEC.

Question: Can the e-Timesheet feature include an option to be able to manually add billing codes needed for budgetary purposes?

Answer: No, this option is not available at this time.

Question: If employees opted-in for paperless W-2 last year, do they need to opt-in again this year? Or is this just a one-time sign-up?

Answer: Once you have opted-in to the W-2 paperless feature, you do not need to re-enroll each year.

Question: Regarding Form STD. 422, when should employees expect their corrected Form W-2 once the Civil Service processing date has passed?

Answer: Corrected Form W-2s generate the following month the transaction processed.

Question: If an A/R (Accounts Receivable) 035 has been submitted for a future pay period and the employee goes out on Leave of Absence (LOA) prior to the scheduled pay period, do we resubmit the A/R 035 after the employee returns to pay status, or would we then need to submit a STD. 674 A/R because the A/R 035 was already submitted?

Answer: You may complete the A/R 035 once the employee has returned to pay status. If the A/Rs were established and set up prior to the employee going out on LOA, you do not need to submit a duplicate request. The only exception is if the employee is out on LOA longer than six (6) months. Before resubmitting, let the first warrant run and verify the deductions.

Question: Our agency is not getting notified when employees change their withholdings through Cal Employee Connect. Are we supposed to be getting a notice like we do for a change of address and direct deposits?

Answer: Please send an email to ConnectHRhelp@sco.ca.gov regarding your inquiry, we will further investigate your question.

Question: If an employee submitted an address change via Cal Employee Connect, would the address submitted reflect on the confirmation email SCO sends to the employee?

Answer: Unfortunately, no; however, once the address change has been processed, agencies will be able to view the new address in PIMS, as well as in ConnectHR.

Question: My staff have noticed that some employees are not in the CalHR Family Connect Portal for the Dependent Re-Verification relating to their dental and/or vision benefits. Will this be corrected in the future?

Answer: Our team would be happy to look into this issue, please send us an email at DRV@calhr.ca.gov with the employees that you noticed are missing.

Question: If Life Insurance is not showing on the deductions but the employee received a letter, who do we contact?

Answer: For Life Insurance deduction issues, please contact the [Statewide Customer Contact Center](#) at 916-372-7200; it can be routed to Civil Service Benefits. If this employee is an excluded employee, please contact lifeinsurance@calhr.ca.gov and provide the employee's name and social.

Question: What if Vision Service Plan (VSP) cannot open encrypted emails? Is there a delay in responding, as of today?

Answer: Please email Vision@calhr.ca.gov with your inquiry.

Question: Could you provide a contact regarding being able to key the retiree dental?

Answer: You must have your agency administrator contact CalPERS at 888-225-7377 and select employer retiree.

Question: Will in-person training be reinstated or is virtual the future?

Answer: In-person training will not be reinstated at this time.

Question: Any update on the release of the Military Leave eLearning modules that had been released then pulled back?

Answer: We are working with CalHR to ensure all information is accurate.

Question: Is requesting SCO Trainers to come to the institutions to provide in-person training an option?

Answer: At this time, SCO is not offering in-person training. We are actively developing and revising our training program content. Please continue to view our [webpage](#) on the SCO website for the most current training offerings available.

Question: Is there a possibility of a virtual/sample environment where we could practice keying into the system?

Answer: A live training environment is currently available for some of our courses, such as California Leave Accounting System and Affordable Care Act. We continue to actively develop and revise our training program content.

Question: Is there an update as to when Personnel Action Requests (PARs) between agencies will be keyed due to the General Salary Increase (GSI) effective 7/1/23? Also, is there an update on STD. 674s for pay adjustments for the GSI? I received an email from SCO that these were a priority.

Answer: The audits team just finished an internal listing, and will work on documents based on the received date for all PARs and adjustments.

Question: Regarding duplicate Form W-2s, can a Student/Retired Annuitant employee not requesting a waiver, and has not opted into Cal Employee Connect, send their form and money order directly to SCO? Or do they have to send it to their HR office?

Answer: Please send an email to ppsdw2dupcor@sco.ca.gov. The Student/Retired Annuitant can send their request directly to SCO with a money order for the fee.

Question: We received a late approval for Industrial Disability Leave (IDL) for a Bargaining Unit 18 employee and the employee is working while on IDL. The last Green Cycle was yesterday. Do we submit the STD. 674D through the 674D in ConnectHR? The pay is for 01/24 pay period, which was to be submitted this week during the Green Cycles.

Answer: Correct. Since it is no longer Green Cycle, you would not use the Green Cycle option for upload. Please use the applicable ConnectHR option, In this case, it would be Disability_674D_IDL.

Question: Can I be put into contact with someone to assist with an agency code change and the updated agency code not generating Personnel Action Requests, STD. 672, or reflecting monthly payroll?

Answer: For assistance, please send your request to ppsd@sacs@sco.ca.gov.

Question: If we sent a bunch of STD. 674 A/Rs that have not been worked on yet and the current processing dates are way after the date I sent them, then should I call and inquire for all of them?

Answer: Yes, please call the [Statewide Customer Contact Center](#) at (916) 372-7200 and leave a detailed message.

Question: In relation to the election form, please clarify the five (5) day rule.

Answer: The labor code states the election form must be signed five (5) days prior to the employee separation. The labor code is what we audit for. We understand that sometimes you cannot get us the package five (5) days prior due to the internal delays.

Question: Is there an email to contact garnishments or must we call and leave a message regarding returned garnishments?

Answer: You must call the [Statewide Customer Contact Center](#) at (916) 372-7200 for assistance.

Question: Is there a general retention time for Accounts Receivable (A/R) files (STD. 674 A/R, Notice, collection document, A/R 035 confirmation, etc.), or is this agency specific?

Answer: Please review the Secretary of State retention schedule.

Question: Please provide contact information relating to Life Insurance inquiries.

Answer: Agencies may contact lifeinsurance@calhr.ca.gov for inquiries related to state paid Life Insurance (for excluded employees).

Question: Can CalPERS create an email box specifically for requesting Direct Pay rescissions?

Answer: The highly recommended method that many employers are doing, is to utilize their email functionality to send their request by fax. Most email systems, including Outlook, will send a fax if you put the fax number in the "To" box, and any attachments will come over also.

When employers utilize the functionality of sending the fax via email, it creates a workflow that will go directly to the Enrollment Administration to be processed by one of our analysts. The fax number to the CalPER's fax is (800) 959-6545. If employers have any difficulties with this, they should work with their internal IT team.

Question: I have a few employees that were put in the incorrect retirement code from their first appointment. Once the corrections are made and Accounts Receivables (A/Rs) are set up, how long will the employee have to pay the A/R? Can they transfer funds from their 401K or 457 account to pay the A/R?

Answer: We do not advise on the collection process, please review the employees Memorandum of Understanding and the Government Code related to collection of overpayments for clarification. The instructions regarding method of collection is shown in [Section I 011](#) of the Payroll Procedures Manual. We do not have an answer available regarding 401K, but you can send an email to ppsdcsretirement@sco.ca.gov to further investigate your inquiry.

Question: What is a good contact to reach out to Disbursements?

Answer: For updated general disbursements (escalation) inquiries, contact the main phone number at (916) 445-7789. For general disbursements requests, send an email to DISBGDGeneral@sco.ca.gov. For inquiries related to STD. 435 email to DISBSTD435@sco.ca.gov.

Question: Do we know when CalPERS will have the retro salaries (from the General Salary Increase/Special Salary Adjustment effective 07/01/23) updated in the employee's myCalPERS accounts, in order to receive a more accurate retirement calculation for employee's getting ready to retire this year?

Answer: myCalPers has been updated to reflect the retro salary increases that included the General Salary and Special Salary Adjustments associated with the bargaining unit raises from July 2023. If you do not see your employees' contributions reported in myCalPERS, then please reach out to the Retirement Unit at ppsdcsretirement@sco.ca.gov.

Question: Do you remember the date the notices were sent out to agencies for employees claiming "exempt" at the end of the year?

Answer: The date of the exempt notices was in the beginning of January. If a Department needs a copy, then they can send an email to Tax Support at PPSDSTSP@sco.ca.gov.

Question: We need to adjust full regular pay for 2022 for Industrial Disability Leave (IDL) 2/3 pay and supplementation because it is a prior tax year, can SCO explain to us what would happen in payroll? Would a payment issue for 2024 for the supplementation and an Accounts Receivable (A/R) will be established for full pay to 2/3? In current tax year, it is a simple transfers of funds but we want to know the process for a prior tax year.

Answer: Please refer to [Section E 411](#) of the Payroll Procedures Manual (PPM) for detailed information. This PPM reference states in part, "Transfer funds from regular pay to IDL full pay. This corrects the taxable income for the year and will generate a W-2C if regular pay was issued in a prior tax year."

If regular pay with an issue date in a prior year is transferred into a nontaxable IDL payment type, either 6 or N, the transfer corrects taxable income for the issue year and will generate a corrected W-2. An A/R will be established for any overpayment when funds are transferred. Supplementation will be counted as taxable income according to the issue date of the payment. For example, if supplementation for a prior year is issued in 2024, it will be included as taxable income on the 2024 W-2.

Question: An employee deleted two (2) dependents from vision, therefore, changing from a party code of three (3) to one (1), but the employee is still paying a party code of three (3) for over a year; do we just send up escalation?

Answer: Please send an email to vision@calhr.ca.gov for assistance.