



## Transaction Supervisors' Forum

January 2021

### SURVEY QUESTIONS:

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

- **Question:** Is CalHR working with their Business Partners to provide a Statewide Transactions Operations/Procedures Manual for ALL Transactions Offices to use (not specific to a system, but consistent business processes)? This would be a replacement to the Personnel Transaction Manual.
  - **Answer (Melissa Russell):** No, CalHR is not currently working on a replacement for the Personnel Transactions Manual.
- **Question:** Employees who are working as Contact Tracers have been advised to document their time worked in an online portal. Will that information be shared with home departments or will we be required to have the employees create a second timekeeping record?
  - **Answer (Kim Herlache):** Because it's public health that is taking care of the contact tracers and having them use that portal, the person to reach out to at public health is the HR chief. I tried to find out but didn't have time to get to her before this meeting. Her email is below.
    - Deputy Director of Human Resources Division:  
[Kristanna.Rivera@cdph.ca.gov](mailto:Kristanna.Rivera@cdph.ca.gov)
- **Question:** Can CalHR go over how to calculate probation extensions?
  - **Answer (Kim Herlache):** That is not a personnel services branch function, but I did confirm with our personnel management division that they would be happy to do a walkthrough of that in our next supervisors' forum meeting.
- **Question:** Have there been any updates in regards to whether the Families First Corona Response Act (FFCRA) program is being extended beyond 12/31/20? If it is being extended, does this mean that the Emergency Paid Sick Leave Act (EPSLA) and Emergency Family Medical Leave Act (EFMLA) entitlement will be reset as of 01/01/21 where the employees would again have the full entitlement for both?

- **Answer (Kim Herlache):** The state has not extended it at this time. The federal register was updated with the latest rounds of stimulus that went out. It was not a mandatory extension. Employers outside of government agencies receive tax credits, but that doesn't apply to the state. This will cost the state money and so because our employees earn leave it was decided at this time it's not going to be extended. However considering the new administration there is a new package that is proposing extending this once again and making it mandatory so we'll have to see. If it is extended we will update our policy and make amendments where there are any changes needed including an expiration.
- **Question:** An intermittent employee new to state effective 1/1/20 is serving a waiting period for Personal Holiday and only works 140 hours before becoming fulltime (FT) effective 2/3/20. Will the 140 hours go towards their waiting period or do they still have to serve 6 months from the effective date when they became FT? If the 140 hours goes towards the waiting period what would the waiting period end date be?
  - **Answer (Kim Herlache):** Generally speaking it's the initial 6 months of the employee's probationary period.
- **Question:** Do any department have a policy on the increments used for docking employees? Do employees only dock in 15 minute increments or do they dock down to the minute?
  - **Answer (Kim Herlache):** I have my staff looking to see if any of the MOU's or if there is anything that spoke to how employees would dock. There is nothing that we can find that specifies the increments in which an employee can be docked. I'm still looking into this.
- **Question:** We have been told by SCO Direct Deposit that a reversal can be done up to 5 pay cycles after the check has issued. Our agency usually follows that process and does not request reversals if it has been over 5 days. Recently, we have had a few situations comes up where employees made changes to their lump sum election, separations were reported late, or a keying error was made. I personally reached out to DD to see if a reversal could be done for an employee over one month old, and was told yes. One of my staff called for a different employees and was told it could not be done. We would like confirmation that it can be done beyond 5 pay cycle days, and if this is something that requires an escalation? Since we've been told both yes and no, we're trying to ensure our internal process is up-to-date in case we have unique situations occur again where this needs to be done. In both of these situations, the funds were still in the accounts and the employees requested that we remove the money from their accounts instead of setting up AR's.
  - **Answer (Jill Souza):** We do allow for reversals to be processed up to five pay cycles from the date of issue. We understand that there are extenuating circumstances that may require us to go beyond the 5 pay cycle rule. In these

cases we would ask that you explain your case to the direct deposit specialist who will then get approval from the program supervisor once they've shared the details.

- **Question:** Our accounting is requesting a report with warrant numbers and addresses at least 5 days before pay day. The problem is when running a Management Information Retrieval System (MIRS) report, we can't run it until the Monday after cutoff. For example, in March when cutoff is on the 22nd and the Monday after is the 29th there isn't enough time to run the report and then get them the information. Is there a way to get a report after cutoff with this information? Also are other departments experience this problem and how did they resolve this issue?
  - **Answer (Sarah Huggins):** I can't answer the other department's processes, but can address the question itself and what the work around is for it. The basic way that MIRS works is that the data is uploaded every Friday night. What other departments have done to work around this is keying anything up to the Friday before-being generated the following Monday. This will maintain an accurate report for you.
- **Question:** Franchise Tax Board and California Department of Tax and Fee Administration have employees that work in Texas, which does not have state taxes. With the previous Employee Action Request (EAR), we would only key taxes on the federal line and leave blank the state section. The header was programmed to know that these employees do not pay state taxes. With the new EAR, do we key the state withholding as Exempt? If not, what is the correct way to key this? We cannot find an example that address this in the tool kit.
  - **Answer (Rehana Kausar):** The same you would do for all of the employees is what you would do with the EAR form. There's no changes that need to be made essentially. The system knows when to withhold taxes.
- **Question:** Can SCO provide a quick training on how to process new Employee Action Requests (EAR) forms?
  - **Answer (Tracy Gutierrez):** We are working on an E-Learning on how to key in an EAR. We don't have an estimation but it is something we are working on. We may have an estimation of when by the next forum meeting.
- **Question:** Our agency has sent several escalation emails regarding documents that have not been keyed however we have not heard back from an representative nor has the documents sent in been keyed. Can you please provide timeframe as to when a response will be given when escalations emails are sent?
  - **Answer (SCO):** When an escalation email is sent in it is our policy to reply within 48 hours. If you're not hearing back by then please send us a follow up email to [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov). We do encourage you to visit our website and

checkout the weekly processing dates we put on there. This will let you know where your document is at in the line of being processed.

- **Question:** With the teleworking schedule continuing for the time being, is SCO working on a way to send out Std. 672s and Notice of Personnel Action (NOPA) electronically?
  - **Answer:** PPSD is actively discussing how to deliver personnel and payroll documents electronically. We will follow up as we make changes. I encourage you to make sure you are registered to our email distribution list and reading our monthly newsletter ([The PPSD Register](#)).

## Benefits

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

- Reminders:
  - January 2021 re-verification due date
  - April 2021 re-verification due date
  - Notices have already been sent out to all employees that have dependents
  - Dental reminder and cancellation notices – There will be a follow up in May 2021
  - We wanted to ensure you're sending out the COBRA Election Notices
- Updates:
  - CalPERS reminder notices – As of January 1<sup>st</sup> 2021 the language within the reminder will reflect CalHR 781 dependent eligible verification checklist.
- Email: [Wendy.Yang@Calhr.ca.gov](mailto:Wendy.Yang@Calhr.ca.gov)

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

- Reminder to personnel staff to contact VSP directly for vision inquiries other than appeals. Email VSP directly at [stateofca@vsp.com](mailto:stateofca@vsp.com).
- After submitting an appeal to [vision@Calhr.ca.gov](mailto:vision@Calhr.ca.gov), if additional information is required and personnel offices do not respond within 30 days, the appeal will be closed.
- Vision backlog is caught up to December 1<sup>st</sup>, 2020.

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

- Appeal status updates – Contact [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov) or [flexelect@calhr.ca.gov](mailto:flexelect@calhr.ca.gov)
- Preferred method of contact for employees
- The general time for dental appeals is 30 days
- For FlexElect and CoBen the appeal times are 60 days
- Irregularity notices
- Benefits calculator reminder – <https://www.calhr.ca.gov/pages/benefits-calculator.aspx>

- Consolidated Appropriations Act of 2021 – We’ve been receiving questions regarding balances from 2020, and how employees can access the money. At the end of December, this Act was signed. We’ve done a preliminary evaluation on what these provisions are and currently awaiting further direction from Internal Revenue Services (IRS) before implementation.
- Contact Chiara at: [Chiara.Galloway@calhr.ca.gov](mailto:Chiara.Galloway@calhr.ca.gov).

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

- Open Enrollment Information
- Reminders

**Tax Season**

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

- Distribution and Billing of 2021 W2’s & Tax Statement – will be mailed to address on the form or could be sent to employee’s current department.
- For W2 Duplicate Inquiries please email [ppsdw2dupcor@sco.ca.gov](mailto:ppsdw2dupcor@sco.ca.gov)

❖ **2020 W-2 Cal Employee Connect (CEC) Update – Liz James (SCO)**

- For any questions/assistance email us at [connecthelp@sco.ca.gov](mailto:connecthelp@sco.ca.gov)

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

- 2020 Employee Action Request (EAR) Std. 686 Form and Federal Withholdings Toolkit – it includes an FAQ. We are adding to those.
- Link to Toolkit: [https://www.sco.ca.gov/ppsd\\_2020fedwithholdings.html](https://www.sco.ca.gov/ppsd_2020fedwithholdings.html)
- EAR Quick Start Guide is available.
- EAR Keying Guide is available.
- Upcoming E-learning
- Beginning development for E-Learning this week

**Program Updates**

❖ **Affordable Care Act Program Update – Sarah Huggins (SCO)**

- Open Enrollment Transaction Reminder:
  - Employee elects to cancel his/her health coverage during the 2020 Open Enrollment: Enter 5B, effective 12/31/2020
  - Employee elects to enroll in health coverage during the 2020 Open Enrollment: Enter 3A, effective 1/1/2021
  - 2020 1095-Cs - Complete and out for printing. Will be mailed no later than March 2. Once they’re all mailed, we’ll publish the 1095-Cs Issued report on ViewDirect.

- New Compliance Report
- Staffing Updates

❖ **Statewide Direct Deposit Program Updates – Jill Souza (SCO)**

- Statewide Direct Deposit Enrollment Initiative. As of December our overall participation is 82.97%.
- Department Specific data is available, please contact Jill Souza at [jsouza@sco.ca.gov](mailto:jsouza@sco.ca.gov).
- Direct Deposit Enrollment Form STD.699 has been updated to allow for the email address of the HR Specialist completing the form.
- The CEC team has received multiple inquiries from state employees regarding delivery of monthly direct deposit. Employees should contact their banking institution.
- SCO has created and presented a new process to submit Direct Deposit enrollment data four external Human Resources offices.
- Agencies will participate in a pilot (test) of the new process starting in February.
- Anticipated rollout to all State agencies in Q2.
- Include specific program name in the subject line of emails to the PPSDTempOps@sco.ca.gov mailbox.
- Utilize secure email to send documents rather than fax or mail.
- Include the complete social security number when sending documents through secure email.
- Visit Department of General Services (DGS) website for updated Standard (STD) forms that allow for a digital signature.
- STD674 and STD674 A/R have been updated to allow for an email address for the specialist. This allows SCO to contact the specialist in a timely regarding PR250's.
- Update California Personnel Office Directory (CPOD).

❖ **Statewide Civil Service Audits and Payroll Program Updates – Renee McClain (SCO)**

- Lump Sum Separation Updates – We have quite a volume we need to get through. We are receiving a lot of inquiries about when the PAR packages will be keyed. Due to this, if you received an email confirmation that we received your PAR, please be patient.
- We are receiving a lot of inquiries regarding the Emergency Paid Sick Leave Act (EPSLA) and Emergency Family Medical Leave Act (EFMLA), we are currently not processing them as a priority as deadline was the end of December 2020.

## Poll

**Question:** Do agencies track Compensating Time-Off (CTO) hours monthly to ensure they don't go over 240 hours? If so, what method do you use to track the hours? Do you pull a MIRS or use a spreadsheet of sorts? Do you track the hours at all?

- Yes – Email method you use to track hours to [SCOTransactionssupervisors@sco.ca.gov](mailto:SCOTransactionssupervisors@sco.ca.gov). (67.02%) 63 responses
- No (32.98%) 31 responses

Note: SCO provides the CTO Aging Report on a monthly basis in ViewDirect for agencies using the California Leave Accounting system, which identifies EE's that have 240 or more total CTO hours and leave in any amount that was earned 10 months or more prior. However, it is up to the agencies to enforce and comply with the actual 240 limit.

- **Question:** Who can I contact regarding special process retirement with deferrals for 2020?
  - **Answer (Renee McClain):** You can send it to the escalation email and we will address it.
- **Question:** If employees are over the 240 hours for CTO, is it recommended that they cash out?
  - **Answer (Kim Herlache):** I'd advise that you email PSB at [PSB@Calhr.ca.gov](mailto:PSB@Calhr.ca.gov) for this information.

## Closings

### ❖ CalHR Resources

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

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

- Websites:

- Human Resources: [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)

- **Contact:**

- [Statewide Customer Contact Center](#) (916) 372-7200
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Cal Employee Connect Email [connecthelp@sco.ca.gov](mailto:connecthelp@sco.ca.gov)
- Cal Employee Connect Feedback Email [connectfeedback@sco.ca.gov](mailto:connectfeedback@sco.ca.gov)

- **SCO Key Initiatives:**

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

### **CUSTOMER RELATIONS SURVEY:**

Please send suggestions to our HR Suggestions Inbox at [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)

*Disclaimer: This publication is intended for reference only. It does not supersede current applicable laws or regulations, and it is not intended for purposes of providing legal advice.*