



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

January 18, 2024

Survey Questions





Question

Presenter: Megan Vinson

Contact: CLAS@sco.ca.gov

Will a Leave Accounting Letter or other Personnel/Pay Letter be released regarding the Reproductive Loss Leave? Is there a leave code that has been created for tracking this new leave type?

Answer: As described in [Human Resources Policy 2129](#), employees are entitled up to a maximum of five (5) days of Reproductive Loss Leave for a reproductive loss event which is unpaid. Employees may use vacation/annual leave, personal leave, accrued and available sick leave, or compensatory time off that is otherwise available to the employee. SCO will not provide a transaction specific to this type of usage; however, employees should note the reason for the leave on their timesheets, and departments should track usage related to Reproductive Loss Leave outside of the Leave Accounting System. There will not be a Leave Letter released.



Question

Presenter: Kim Herlache

Contact: PSB@sco.ca.gov

As of January 3, 2024, the Memorandum of Understanding (MOU) Agreements have not been uploaded to CalHR for those Bargaining Units effective July 1, 2023. They still show tentative. When will they be uploaded?

Answer: The date is unknown. The Bargaining Unit contracts take time and are done in partnership with the union.



Question

Presenter: Kim Herlache

Contact: PSB@sco.ca.gov

Is the new Pay Differential 489 a monthly payment or three one-time payments when the criteria has been met?

Answer: The department should be redirected to CalHR for a response.



Question

Presenter: Monique Perez

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

Question: What are the Federal and State tax withholding rates for the July 1, 2023, General Salary Increase (GSI) retro pay that issued December 19, 2023? They seem to be higher than normal.

Answer: As a reminder, the employee will have aggregate taxes if multiple payment types are issued in the same pay period. Please review [Section H](#) of the Payroll Procedures Manual (PPM).

Question: For the employees that did not receive all their General Salary Increase (GSI) pay or Special Salary Adjustment (SAL) pay for July to December 2023 and will be issued in January or after, will the employee receive an amended Form W-2 for 2023 or will the adjusted pay be part of 2024 Form W-2. If there is an amended Form W-2 for 2023, then when will this issue?

Answer: The employee will not receive an amended Form W-2. The Form W-2 reflects the year the payment was issued. Please review [Section I](#) of the Payroll Procedures Manual (PPM).



Question

Presenter: Christina Campbell

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

Regarding the Personnel Action Request (PAR) packages with the Special Salary Adjustment (SAL) effective July 1, 2023, being uploaded to Cal Employee Connect (CEC) and to be keyed by SCO involving two agencies; will they be expedited, or will we have to check the [CS Weekly Processing Dates](#) for issuance of back pay?

Answer: We are working on packages based on the date they were received.



Question

Presenter: Karin Johnson-Anderson

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

Does the Disability Unit's new "green cycle only" processing rule mean that agencies will be expected to process more salary advances for disabled employees? SCO disability adjusted pay being submitted outside of the "green cycles" should not be expected to issue for months if it is not provided to SCO before the end of the pay period in question?

Answer: Agencies are encouraged to submit documents for current month pay during the green cycle days listed on the [Decentralized Calendar](#). If submitted outside of green cycle days for the current month, then the document is batched a "Regular," as listed on the [CS Weekly Processing Dates](#), and is worked as priority.



Question

Presenter: Natalia Saferson

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

Are we still issuing the Telework Stipend?

Answer: As of today, departments are still able to issue Telework Stipends to their employees. There have been no changes.

Partner Resources

Presenters: Cari Buenaventura and Tracy Gutierrez
Contact: [Statewide Customer Contact Center](#) (916) 372-7200

State Controller's Office:

- [SCO Letters](#)
- [Email Subscription Service Sign-up](#)
- [Broadcast Email Archive](#)
- [Personnel Action Manual \(PAM\)](#)
- [Payroll Procedures Manual \(PPM\)](#)
- [Civil Service Weekly Processing Dates](#)
- [Statewide Customer Contact Center \(SCCC\)](#)
- Websites:
 - Human Resources (HR) https://sco.ca.gov/ppsd_state_hr.html
 - State Employees https://sco.ca.gov/ppsd_se_payroll.html



Partner Resources

Presenters: Amy McCarthy

Contact: BenefitsInquiries@calhr.ca.gov

CalHR:

- [Human Resources Professionals](#)
- CalHR Website: <https://www.calhr.ca.gov/>
- Benefits Website: <https://calhr.benefitsprograms.info/>





Partner Resources

Presenters: Renee Ostrander

Contact: **Phone: 888 CalPERS** (or **888-225-7377**)

CalPERS:

- [Circular Letters](#)
- [my|CalPERS](#)
- [State Reference Guide \(PDF\) \(ca.gov\)](#)
- [CalPERS Email Subscriptions](#)
- Website: <https://www.calpers.ca.gov/>



SCO KEY INITIATIVES



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Phase II – features:

- **eTimesheet Feature:**
 - As of 01/16/2024: 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 01/16/2024: 55,783 employees have opted-in (16% adoption rate)
 - Opt-in deadline expired; employees will have to wait until 02/01/2024 to opt-in

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

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 01/16/2024: 60,736 employees have enabled MFA
- **Direct Deposit:**
 - 95% of departments statewide have been deployed
 - As of 01/16/2024: CEC has received 23,119 direct deposit transactions
- **Address Change:**
 - 95% of departments statewide have been deployed
 - As of 01/16/2024: CEC has received 5,632 address change requests
- **Withholdings Change:**
 - Wave A and B departments have been enabled
 - As of 01/16/2024: CEC has received 2,589 withholdings change requests



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

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

- This feature has been made available to all agencies
 - As of 01/02/2024:
 - **Total of 63,087** A/R 035 deductions have been processed via this feature
 - **Total of \$14,196,329** has been collected
 - As of 01/16/2024:
 - 99% departments/agencies have been enabled
- 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.





STATEWIDE BENEFITS ADMINISTRATION



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

2023 Annual 1095-C Reporting

- ACA is currently in validation for the 2023 1095-Cs
- All 1095-Cs will be printed and mailed to employees by March 1, 2024
 - A Personnel Letter will be released announcing the completion of the 1095-C process and posting of the 1095-C Issued Report on [ViewDirect](#) and [Mobius View](#)
 - All 1095-Cs will be sent to the address on file for employees as of December 29, 2023
 - All returned 1095-Cs will be returned to the agency to be forwarded to the employee
 - For duplicate 1095-C requests, please ensure the employee is listed on the 2023 1095-C Issued report (once posted) prior to submitting the request to ACA Support.
- Please contact acasupport@sco.ca.gov with any questions

Thank you!

CalHR Transaction Supervisors' Forum Update

CalHR Benefits Division

January 18, 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
January 18, 2024

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Affordable Care Act System (ACAS) Reminders

- ❖ Open Enrollment Updates in the ACAS
 - Employee elected to cancel their health coverage during the 2023 Open Enrollment: Key a **5B** status code in ACAS, **effective 12/31/2023** (to indicate the employee voluntarily cancelled their health coverage but remains eligible for health benefits)
 - Employee elected to enroll in health coverage during the 2023 Open Enrollment: Key a **3A** status code in ACAS, **effective 1/1/2024** (to indicate the first of the month in which the employee's health coverage is effective)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Permanent Intermittent Employees

Employees who were credited with at least 480 paid hours in the July to December 2023 Control Period:

If employee is newly eligible for health benefits, the employee's ACAS record should be updated to reflect corresponding codes:

- **2D, effective 1/1/2024** (to indicate the employee is newly eligible for health benefits)
- **1A, effective 2/1/2024** (to document an offer of coverage – this date reflects the earliest day the employee is eligible to enroll in health benefits)
- **3A, effective the date the employee's health coverage is effective** (to indicate the first of the month in which the employee's health coverage is effective) OR
- **4A, effective 2/1/2024** (to indicate the employee affirmatively declined health coverage by returning the HBD-12) or **4B, effective the 61st day following the permitting event date** if no HBD-12 is received declining coverage - administrative decline of health coverage)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Permanent Intermittent Employees

Employees who were enrolled in health benefits and lost their health benefits eligibility because they were not credited with at least 480 paid hours in the July to December 2023 Control Period (or 960 in two control periods):

The employee's ACAS record should be updated to reflect:

- **5A, effective 1/31/2024** (to indicate that the employee's health benefits were administratively cancelled due to loss of eligibility)
- **2B, effective 2/1/2024** (to indicate that the employee must be credited with a minimum of 480 paid hours in a Control Period to be eligible for health benefits)
- **COBRA Offer (1B, 1C, 1D, or 1E), effective 2/1/2024** (to indicate that the employee (and any dependents) were eligible for and offered COBRA coverage)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Permanent Intermittent Employees

Employees who were not enrolled in health benefits and lost their health benefits eligibility because they were not credited with at least 480 paid hours in the July to December 2023 Control Period (or 960 in two control periods):

The employee's ACAS record should be updated to reflect:

- **2B, effective 2/1/2024** (to indicate that the employee is no longer eligible for health benefits until they are credited with a minimum of 480 paid hours in a Control Period to become eligible again)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Additional Reports to Identify ACAS Updates

There are reports in SCO's Management Information Retrieval System (MIRS) to help you identify Permanent Intermittent employees who may be newly eligible for or lost their health benefits eligibility.

- INT 001A Report - Identifies Permanent Intermittent employees who are eligible for health benefits based on meeting 480 paid hours in a specified Control Period.
- INT 002A Report - Identifies Permanent Intermittent employees and whether they are currently enrolled in health or dental benefits but have become ineligible for benefits based on not meeting 480 paid hours in a specified Control Period (or 960 paid hours in two consecutive Control Periods to continue their coverage).

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Additional Reports to Identify ACAS Updates

There are reports in myCalPERS to help identify ACAS updates for employees that have elected to enroll in health benefits or cancel their health coverage during the 2023 Open Enrollment Period.

- COGNOS Report - Departments should utilize the CalPERS Employer Health Event Transaction COGNOS report to identify transactions processed through the self-service portal that require an update in the ACAS (e.g., employee enrolls in coverage, employee cancels coverage).

Benefits Open Enrollment (OE)

Presenter: Amy McCarthy

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment Updates

- ❖ The 2023 Benefits Open Enrollment period was September 18 – October 13, 2023, and has officially ended.
- ❖ Open Enrollment occurs annually for State of California employees to make changes to their Health, Dental, Vision, & Voluntary Benefits such as Consolidated Benefits, FlexElect, Legal, Long-Term Disability, & Supplemental Life Insurance.
- ❖ Changes made during Open Enrollment became effective January 1, 2024.
- ❖ For information regarding the submission and deadlines of Open Enrollment forms, please view the [2023 Instructions for Completing Open Enrollment Forms](#).

Benefits Open Enrollment (OE)

Presenter: Amy McCarthy

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: Amy McCarthy

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
January 18, 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, and September 2023 birth month cycles: Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- ❖ December 2023 birth month cycle: Departmental personnel offices must process all DRV documents submitted on or before the end of January in FCP.
- ❖ January 2024 birth month cycle: 30-day cancellation notice was mailed December 1, 2023.
- ❖ April 2024 birth month cycle: 90-day reminder notice was mailed January 2, 2024.
- ❖ 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	N/A	Mar-2024	N/A	8,195

*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.

Dental Program

Presenter: Monica Chavez

Contact: Dental@calhr.ca.gov

Dental Program Updates

- ❖ Program is current and within 30 days
- ❖ Total Inquiries Received To Date:
 - ❖ 5,015 in 2023
 - ❖ 131 in December
- ❖ Appeals
 - ❖ 1,725 Appeals Received in 2023
 - ❖ 236 January, highest month of appeals
- ❖ Appeals Average Processing Time (Complete Appeals Packages)
 - ❖ 15 Days
 - ❖ 101 Appeals Received in December

Pre-Tax Parking Program

Presenter: Monica Chavez

Contact: Pre-taxparking@calhr.ca.gov

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

- ❖ Program is current and within 30 days
- ❖ Total Inquiries Received To Date:
 - ❖ 729 in 2023
 - ❖ 35 in December
- ❖ Top Inquires
 - ❖ 496 Benefit Questions in 2023
- ❖ Appeals Average Processing Time (Complete Appeals Packages)
 - ❖ 30 Days

Vision Program

Presenter: Monica Chavez

Contact: Vision@calhr.ca.gov

Vision Program Updates

- ❖ Program is current and within 30 days
- ❖ Total Inquiries Received To Date:
 - ❖ 1,354 in 2023
 - ❖ 149 in December
- ❖ Top Inquires
 - ❖ 1,155 Benefit Questions
 - ❖ 149 Benefits Questions in December
- ❖ Appeals Average Processing Time (Complete Appeals Packages)
 - ❖ 30 Days

Flex Elect Program

Presenter: Monica Chavez

Contact: FlexElect@calhr.ca.gov

Flex Elect Program Updates

- ❖ Program is current and within 45 days
- ❖ Total Inquiries Received To Date:
 - ❖ 1,549
- ❖ Top Inquires
 - ❖ 682 Benefit Questions
 - ❖ 867 Appeals
- ❖ Appeals Average Processing Time (Complete Appeals Packages)
 - ❖ 14 Days

Benefit Programs Reminders for Departmental Personnel Offices

Presenter: Monica Chavez

General Program Updates and Reminders

- ❖ A complete appeals package includes:
 - Justification memo explaining appeal.
 - Complete and error-free forms.
 - Written confirmation that the employee acknowledges accounts receivable 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.
- ❖ 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 Reminders for Departmental Personnel Offices

Presenter: Monica Chavez

General Program Updates and Reminders Continued

- ❖ 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 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.

Benefit Programs Project Updates

Presenter: Monica Chavez

Customer Service & Support Section Project Updates

- ❖ Improving VSP Membership Profiles for Basic Vision
 - ❖ Profiles will include additional demographic information.
 - ❖ SCO, CalHR and VSP are currently testing demographic files process.
 - ❖ Anticipated completion by Spring 2024.
- ❖ Website Updates
 - ❖ CalHR Benefits Team is updating CalHR Benefits webpages to reflect plan and premium changes for 2024.
- ❖ Appeals Project
 - ❖ CalHR is working on developing an online appeal submission process for departmental personnel to submit appeals.
 - ❖ CalHR is developing the project in 2024 with implementation rollout projected for 2025.

Statewide Engagement Program

Program Mission:

Provide a holistic approach in connecting state departments with the capacity and community to support the overall wellbeing of state employees.

Return to Office Support:

- Welcome back communication highlighting engagement resources
- Building Tours
- Lunch N' Learns on Return to Office Resources
- Engagement activities such as: Mindful Walks, Pause and Appreciate
- Lunch session with our Director
- Social hour with music/jam sessions

Threading the topic of employee engagement by nourishing the five elements of wellbeing:



Statewide Engagement Program

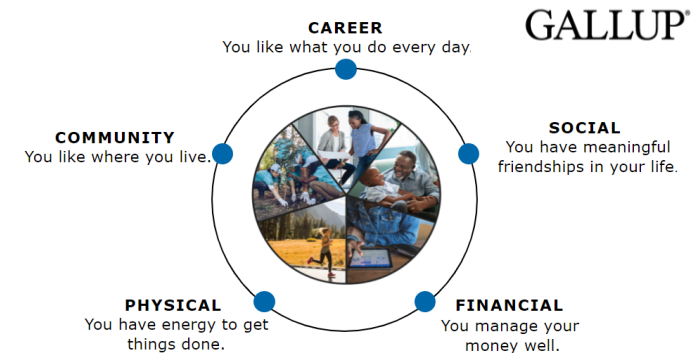
Program Mission:

Provide a holistic approach in connecting state departments with the capacity and community to support the overall wellbeing of state employees.

Program Resources:

- Employee Assistance Program (EAP):
 - Childcare, Financial Support, Career Counseling, Mental Health Resources
- Wellness Program:
 - Holistic wellbeing resources around physical fitness, mindful/health eating, and statewide challenges
- Merit Award Program:
 - Resources to support the recognition of your staff
- Employee Engagement Program:
 - Resources to support your staff holistically through Gallup resources

Threading the topic of employee engagement by nourishing the five elements of wellbeing:



Statewide Engagement Program

Connect with us:

- StatewideEngagement@calhr.ca.gov – Statewide Engagement Program
- EAP@calhr.ca.gov – Employee Assistance Program (EAP)
- Engagement@calhr.ca.gov – Employee Engagement Program
- CalHRWellness@calhr.ca.gov – Wellness Program
- Merit@calhr.ca.gov – Merit Award Program

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://www.calhr.ca.gov/state-hr-professionals>

State Employees:

<https://www.calhr.ca.gov/employees>

HR Manual:

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

CalHR Benefits' Resources Cont.

Contacts:

- ACA Program ACA.Policy@calhr.ca.gov
- Dependent Re-verification Program
DependentReverificationProgram@calhr.ca.gov
- Dental Program dental@calhr.ca.gov
- FlexElect/CoBen Program FlexElect@calhr.ca.gov
- COBRA COBRA@calhr.ca.gov
- Vision vision@calhr.ca.gov
- Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov
- Long Term Disability LTD@calhr.ca.gov
- Life Insurance Lifeinsurance@calhr.ca.gov
- Group Legal Grouplegal@calhr.ca.gov
- Third Party Pre-Tax Parking Pre-TaxParking@calhr.ca.gov
- Statewide Engagement Program StatewideEngagement@calhr.ca.gov



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Updates and Reminders

- Dependent Eligibility Verification / Dependent Re-Verification (DEV/DRV) Season
 - Verification for January birth month in progress.
 - **DEV** - Please make sure to complete any transactions within myCalPERS by February 1st.
 - **DRV** - Reminder that all procedures for deleting or re-adding dependents are still in effect. Please refer to the [Benefits Administration Manual](#) for instructions. Upload any necessary forms by February 1st for timely processing.
- Open Enrollment and Weekly Processing Dates
 - Civil Service Benefits team compiling lessons learned from Open Enrollment season. Always seeking efficiencies and ways to improve.
 - Check [Weekly Processing Dates](#) prior to calling the [Statewide Customer Contact Center](#). Catching up on backlog now that Open Enrollment is complete.



STATEWIDE PROGRAM UPDATES



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

- 1st Trimester is here; contact your training coordinator and register now!
- Upcoming opportunities for 2024...
 - Employment History Overview eLearning Module (January 2024)
 - Introduction to Salary Determinations: Level II
 - Fundamentals of Personnel: Appointments eLearning Module
 - Fundamentals of Payroll Virtual Training
 - Military Leave eLearning Module - UPDATE



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- CalHR and SCO had a record-setting amount of contract implementation to perform
 - General Salary Increase (GSI) for most of the 14 units ratified for 2023
 - More than 600 Special Salary Adjustments (SSA)
 - Changes to more than 90 Pay Differentials
 - Total of 207,193 records updated via mass update
- SCO and CalHR worked in close collaboration
 - CalHR provided technical documentation (Pay Letter drafts)
 - SCO is analyzing Pay Letter drafts to implement numerous mass updates



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed a Salary Adjustment for Bargaining Unit 12 on November 2
 - [Personnel Letter #23-024](#)
- SCO processed a General Salary Increase for Bargaining Unit 6 on November 27
 - [Personnel Letter #23-026](#)
- SCO processed a General Salary Increase for Exempt employees on December 7
 - [Personnel Letter #23-029](#)

Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed a General Salary Increase for Bargaining Units 5, 7, 16, and 19 on December 12th
 - [Personnel Letter #23-030](#)
- SCO processed a General Salary Increase for SEIU on December 14
 - [Personnel Letter #23-031](#)
- SCO processed a Salary Adjustment for Bargaining Unit 7 employees on December 19
 - [Personnel Letter #23-032](#)
- SCO processed a Salary Adjustment for SEIU on December 21
 - [Personnel Letter #23-033](#)



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed all records that could be included in a mass update by the end of 2023
 - Departments must process any remaining records that were not included in mass updates
 - Please reference the appropriate [Personnel Letter](#) for Management Information Retrieval System (MIRS) reporting instructions
 - While processing those records, if you encounter an error message requiring an override code, only then contact SCO.
 - SCO will continue to process updates that require override codes in the order received



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed updates in the most strategic manner
 - Some bargaining units were grouped together for efficiency
 - Larger and more complex updates, such as Service Employees International Union (SEIU), were processed later in December
 - SCO allowed as much time as possible for these to be as accurate as possible



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- Be aware of other impacts of retroactivity and multiple mass updates
 - Review supplemental pay that has issued
 - Some situations may require you to submit a STD. 674 for pay to issue
 - Some Special Salary Adjustment (SAL) updates occurred after Payroll Cutoff
 - December warrants may not have included full contract implementation
 - Please do not redeposit warrants unless all processing for the employee is complete
 - PPSD takes additional actions after mass updates that may impact some records
- Please use all available references to seek answers to your questions



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO is aware of rounding issues on some records that were processed via mass update
- This is a known issue with retroactive processing
 - This issue impacts some records for which there was a Merit Salary Adjustment (MSA) or Special In-Grade Salary Adjustment (SISA) after July 1, 2023
- SCO is keying corrections
 - This is labor intensive and will take some time
 - If you find a record that needs correction, please key the correction



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Form W-2 Reminders and Exempt Employees Information:

- Form W-2 Reminders
 - SCO will be distributing Form W-2s by mail no later than January 31, 2024
 - Form W-2s will be available on Cal Employee Connect (CEC)
 - Form W-2s will have a new look
- Duplicate Form W-2s
 - Requests for Duplicate Form W-2s will be addressed in February 2024
 - Fee waiver - February 1st through March 1st
 - Student Assistants
 - Inquiries regarding Duplicate Form W-2s, ppsdw2dupcor@sco.ca.gov
- Exempt Employees
 - New Employees Action Request (EAR) STD. 686
 - February 15th



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

2023 Retro General and Salary increases

Statewide Disability Green Cycle:

Green Cycle Documents

A Green Cycle Document is a STD. 674 and/or STD. 674D requesting time (days and/or hours) be issued in the current pay period during days indicated as “Green Cycle” on the [decentralized calendar](#).

If an employee has already received all possible time, 21 or 22 days, then it is not a Green Cycle Document.

Example of Green Cycle Documents include:

- Time is owed in the current pay period within designated Green Cycle days.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Examples of Non-Green Cycle Documents include:

- Industrial Disability Leave (IDL) 2/3 being transferred into IDL Full or Enhanced Industrial Disability Leave (EIDL) with no additional time being owed.
- IDL or Nonindustrial Disability Insurance (NDI) being transferred into Regular with no additional time being owed.
- Regular time being transferred into IDL or NDI after a full warrant has issued.
- Request for salary adjustment with no additional time being owed.
- Request of time for any month other than the current pay period.

If a warrant is returned, do not submit a document requesting time be issued until the redeposit appears in pay history. Until the redeposit appears, it is considered a transfer of funds which is a Special.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Statewide Disability Document workload definitions:

Document Type Definitions:

Green Cycle: Document requesting time be issued for the current pay period within designated Green Cycle days.

Regular: Document requesting time be issued within the previous 12 months which is not current pay during a designated Green Cycle.

Special: Document requesting a transfer of funds or salary adjustment within the previous 12 months.

Complex: Any document requesting time be issued, transfer of funds or salary adjustment for a pay period older than 13 months.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Statewide Disability Document workload definitions:

The document type is determined by date of submission and does not change once batched into inventory to be processed. Inventory is processed by document type and receipt date.

- For example, a document for the 12/2022 pay period requesting a transfer of funds uploaded on 10/16/2023 would be batched as and remain a Special while in inventory. It does not change to a Complex even after the pay period becomes older than 13 months. Do not upload inquiries for previously submitted documents as these will be deemed invalid and duplicate.

Once the online weekly processing date reflected is more than 10 days past the original upload for the document type, submit the original ConnectHR file upload confirmation as an escalation. [Escalation Email Instructions](#)

For PR250 corrections, mark “Amended” at the top of the document and include a copy of the PR250 notice email when uploading to ConnectHR.



Statewide Payroll Program

Presenter: Renee McClain and Christina Campbell

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

Lump Sum Separation Reminders

Election Form

- The Election Form must be signed by the employee at least five (5) days prior to the separation date
 - Labor Code [201](#) and [202](#)
- Catch-up approval letter must be included when uploading the Personnel Action Request (PAR) package
 - Catch-up amounts must be included in the amount(s) on the Election Form
 - Forms without this information will be processed based on the amount(s) completed on the Election Form
- Do not retain more than one Election Form

Duplicate Lump Sum Separation PARs

- Do not upload duplicate PARs
- Please read and follow the Civil Service (CS) Audits ding notice instructions
- Contact the [Statewide Customer Contact Center \(SCCC\)](#) at (916) 372-7200 if you need to make corrections to a lump sum PAR
 - Select #2 for Statewide Civil Service Programs, and then #2 for CS Audits
 - See the [Lump Sum Separation FAQ Q5](#) for items that can be corrected on a lump sum separation PAR



Statewide Payroll Program

Presenter: Renee McClain and Christina Campbell

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

1st and 2nd Tax Year PARs

- 1st Tax Year PAR must be completed with time to be issued for the 1st Tax Year request
 - 1st Tax Year PAR = Lump Sum pay and Savings Plus contributions issue in 2023
- 2nd Tax Year PAR must show the total time across both tax years
 - 2nd Tax Year PAR = Lump sum pay and Savings Plus contributions issue in 2024
 - The system will issue the remaining time available for the 2nd Tax Year
 - See samples of [1st and 2nd Tax Year PARs](#) in the Lump Sum Separation Toolkit



Statewide Payroll Program

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Friendly Reminders:

SCO has the following toolkits available for departments

[Guide to keying R01C toolkit](#)

[Payroll Input Process \(PIP\) Keying Guide for Payment Type 1 and 2 Adjustments Toolkit](#)

When leaving a voicemail for SCO please include the following information:

- Your Name
- Your Agency
- Employee First and Last name
- Social Security Number
- Employee Position Number
- Please provide information regarding the specific task you need help with

As a reminder the SCO Statewide Customer Contact Center team has two (2) business days to return all calls and voicemails.

Please make sure your agency's Universal email address is reflected correctly in [CPOD](#): SCO staff email PR250s, Civil Service (CS) Audits Ding Notices, and other communication to those mailboxes.



Statewide Payroll Program

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Exciting News!

The State Controller's Office has created a STIPULATION unit. Be on the lookout for future updates!

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 ppsdmir@sco.ca.gov
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200



FORUM QUESTIONS:

The following questions were submitted during the forum:

Question: Regarding reproductive loss leave, when keying leave into the Leave Accounting System (LAS), should the specialist be using 04 (in lieu of sick) as the transaction code?

Answer: You should key standard usage, and the employee should note the reason on their timesheet.

Question: Do employees have to apply for Family Medical Leave Act (FMLA) and California Family Rights Act (CFRA) for reproductive leave or is reproductive leave a leave on its own?

Answer: Reproductive leave is its own leave but FMLA/CFRA should always be offered when there is a known event. If approved, it would be in conjunction with the reproductive loss leave.

Question: What if an employee does not want to document their leave, due to reproduction loss, on their attendance? Also, what should we do if they claim Health Insurance Portability and Accountability Act (HIPAA)?

Answer: To be a protected leave, the employee must document the leave as such. An employee can always use their leave credits without protected leave but the time off is not protected.

Question: What is the turnaround on General Salary Increase (GSI) Personnel Action Request (PAR) packages?

Answer: We work on documents based on the received date.

Question: For Disability, is there going to be a new drop-down for General Salary Increase/Special Salary Adjustment (GEN/SSA) requests, or do we just upload to the applicable disability type?

Answer: There is no plan to add a new drop-down, please upload to the appropriate Disability type.

Question: Does the Civil Service processing dates indicate the actual date received or the date you assign to a specialist?

Answer: It is indicative of the date received.

Question: What if the Multi-Factor Authentication (MFA) does not work for the employee (EE)? When the EE inputs the code that the app provides, Cal Employee Connect (CEC) says it is not valid.

Answer: Please email the ConnectHR team at connecthrhelp@sco.ca.gov for assistance.

Question: How would the specialist be able to verify that the address change is correct in Cal Employee Connect (CEC)? We received a notification about an address change but it does not provide what the employee inputted.

Answer: The updated address information will be on the email confirmation. You may use this and print it out as confirmation.

Question: We are having issues with trying to change from an agency collecting an Accounts Receivable (A/R) to a payroll deduction in Cal Employee Connect (CEC), as it is not allowing us to make the change; who do we reach out to?

Answer: Please email the ConnectHR team at connecthrhelp@sco.ca.gov for assistance.

Question: Can we continue to send STD. 699 for our employees? At institutions, we cannot have our cell phones; therefore, we cannot use the Multi-Factor Authentication app to log in our internal network.

Answer: Yes, you can still upload STD. 699s for employees that do not have access to a network computer.

Question: When employees update their address in Cal Employee Connect (CEC) does it automatically interface with the Business Information System (BIS)?

Answer: Cal Employee Connect's address change feature will update the mainframe and CalPERS.

Question: Department of Corrections and Rehabilitation (CDCR) has noticed that we have some employees that state, Operator Not Authorized for Requested Action - See Supervisor, after the mass General Salary Increase (GSI). The employees are not on a separation status, and we have tried clearing the flags. They are appointed to our agency; however, we cannot take leave at all. We have staff reaching out to the California Leave Accounting System (CLAS) unit, and they have been able to repair on a case-by-case basis, but is this going to be addressed in a larger scale?

Answer: Yes, this is a known issue, the affected population is identified and corrections are being made as quickly as possible.

Question: If a transferred employee signed up for benefits during Open Enrollment (OE) in their previous agency, then can the agency that the employee transferred to, put the code in even if it was not set up in that agency? For example, the employee moved to SCO on 1/18/24, but signed up for benefits during OE at the old agency.

Answer: Please contact the appropriate CalHR Benefits Program inbox with the benefits this employee made changes to during OE. Changes should have been made in the December 2023 pay period prior to working for SCO in 1/18/2024.

Question: Where do we send an Open Enrollment (OE) appeal?

Answer: Please send the appeal to the specific benefits program inbox. For example, a dental appeal would be sent to dental@calhr.ca.gov or Vision would be sent to vision@calhr.ca.gov.

Question: We deleted a dependent because the employee failed to submit the required documents. When we send the employee the Consolidated Omnibus Budget Reconciliation Act (COBRA) Election form, will the COBRA event be for 18 months or 36 months?

Answer: Please review the [COBRA Benefits Administration Manual \(BAM\)](#) on CalHR's website. The permitting event situation determines the COBRA coverage.

Question: When the names are incorrectly shown for Dependent Re-Verification (DRV), how do you correct them?

Answer: Please email the DRV inbox, drv@calhr.ca.gov, to address any name updates or changes. To correct a dependent's account, please contact the carrier with the incorrect spelling and update the dependent's information verbally. The following month, the carrier with the incorrect information will send a file with the corrections and their Family Connect Portal (FCP) account will be updated. Carriers send their updated files between 1-10th of each month. Once you notice the correct spelling has been uploaded into FCP, please delete the dependent's account that has the incorrect spelling. The deletion steps start on page 27 of the FCP Manual. We recently made a change where all FCP users can now delete dependent accounts in FCP without a supervisor approval.

Question: For Dental, can someone explain why only the employee's name is sent over to the carrier when the STD. 692 is sent up for enrollment or changes? We also experience significant errors in dates of birth when the information is sent over to the carrier, which causes delays in benefit administration as the carrier responds to the dental offices that there is no coverage at all.

Answer: Please send an email to dental@calhr.ca.gov to address your inquiry. To ensure the name and Date of Birth (DOB) for the employees and dependents are correct, please make sure that the form is as legible as possible.

Question: Adjustments for those employees on disability still require a STD. 674D submission, correct?

Answer: Yes, this is true for Industrial Disability Leave (IDL), Non-Industrial Disability Insurance (NDI), and State Disability Insurance (SDI). For Temporary Disability (TD) a STD. 674 must be submitted.

Question: Will the STD. 674 for the adjustment pay that is due for General Salary Increase/Special Salary Adjustment (GSI/SSA) that won't issue, be processed with all STD. 674's in the order received or are those being pulled to get the back-pay caught up?

Answer: We work on documents based on the received date.

Question: SCO keyed General Salary Increases (GSIs) for board members that should not have received the GSI. Is SCO going to confirm and void these transactions?

Answer: Human Resources offices must make Employment History updates.

Question: The contract changed the Voluntary Personal Leave Pay (VPLP) rate, will adjustment pay be issued by SCO or do we need to submit a STD. 674?

Answer: You must submit an adjustment.

Question: If the Special Salary Adjustment/General Salary Increase (SSA/GSI) occurred during the same timeframe the employee had an Adverse Salary Decrease (PUN), then are we able to key or does this have to be submitted to SCO to process?

Answer: This must be submitted to SCO for processing.

Question: Are you going to add a special space on the processing date documents for Special Salary Adjustments (SSAs) and General Salary Increases (GSIs)?

Answer: No, not at this time.

Question: We have an employee that needs Personnel Action Request (PAR) corrections due to their Salary Adjustment/General Salary Increase but they also have an Adverse Salary Decrease (PUN) that makes it unable for us to key, do we add to connect in the regular Audits area or the area for stipulations?

Answer: Send to SCO for processing. Please review [December 2023 Transaction Supervisors' Forum Notes](#) for clarification.

Question: Can you confirm whether Retired Annuitants (RAs) receive a General Salary Increase (GSI) or Special Salary Adjustment (SSA)?

Answer: Please see the pay letter for any exclusions. If RAs are not specifically included, then they will receive the increases.

Question: At this time, if we have not keyed the Special Salary Adjustment (SSA) for employees that were supposed to receive it but did not receive it during the mass update, then we can no longer key it, instead we have to send to SCO? Is that correct?

Answer: You must send Personnel Action Request (PAR) packages to SCO for processing.

Question: Regarding employees who will be receiving corrected Form W-2s because they received 2023 lump sum Accounts Receivables (A/Rs), when can they expect to receive those?

Answer: The corrected Form W-2s will issue six (6) to eight (8) weeks after the lump sum has issued.

Question: How long will the lump sum retro pay take for General Salary Increase (GSI)?

Answer: You must update Employment History and send STD. 674s if the pay does not issue.

Question: Can you please go over establishing Accounts Receivable (A/R) for separating employees? We are being told the separation has to be in the Employment History (EH) before escalating. This is not always feasible. We have been penalized for holding funds for A/Rs that have yet to be established at the time of separation.

Answer: Prior to submitting an escalation email request, the employee's Employment History must reflect a permanent separation code.