



## Transaction Supervisors Forum

July 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:** Do we have to participate in the new direct deposit process or can we wait until we can key directly into Cal Employee Connect (CEC)?
  - **Answer (Jill Souza – SCO):** Participation in the new direct deposit process is not required. SCO encourages departments to sign up for the new process to expedite enrollment in direct deposit for their employees. The new process eliminates the need to mail or email enrollment forms to SCO.
- **Question:** Has SCO considered a paycheck calculator for mid-month separations, which will account for the aggregation of taxes but no retirement and no miscellaneous deductions? Is an employee who is a Resident alien, represented by a B in item 545 on the Payroll Action Request (PAR), subject to additional taxes taken out of their pay warrant? The pay letter only specifies non-resident aliens.
  - **Answer (Monique Perez – SCO):** Please send the paycheck calculator suggestion to [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov) If the employee is a resident alien, he is taxed like an American citizen. Non-Resident Aliens are subject to additional withholding based on the Internal Revenue's rules for taxation. Please refer to the IRS guidelines link: Taxation of U.S. Resident Aliens <https://www.irs.gov/individuals/international-taxpayers/taxation-of-nonresident-aliens>
- **Question:** When will training be available for the CalPERS service credit requests we are now supposed to be processing? Who can we contact to resolve issues when processing?
  - **Answer (Kristina Bozzo-Baldenegro– CalPERS):** The training specific for ER Certification that pertains to the Service Credit requests and Arrears was already given and we do not have any future trainings scheduled. The online ER certification applies to a handful of request types which many State/CSU agencies have completed and had opportunity to participate in webinars over the past few months. There are resources available online such as the Student Guide and the contact center is available for further assistance as well.
- **Question:** We are looking for CalHR or SCO to please clarify how a Special Salary Adjustments (SISA) would apply to classifications with multiple ranges and all ranges shows SISA in the pay scale. Do employees work towards a SISA each time they move

between the ranges and are at the minimum, or are SISA's only given when first appointed to the position and the employee is placed at the minimum of whichever range they are placed in?

- **Answer (Kim Herlache – CalHR):** If the employee is at the minimum of the range they qualify for the SISA. The employee qualifies for a SISA once in each range, as long as each range receives a SISA and the employee moves to the minimum. There have been cases where the minimum of the classification is raised and then an employee who has already had a SISA in that range finds themselves at minimum again, they are not entitled to a second time.
- **Question:** Are Bargaining Unit (BU) 2 employees and associated excluded employees are entitled to the Health Cash benefit for the June pay period. If so, would this be the final Health Cash benefit payment for them?
  - **Answer (Kim Herlache – CalHR):** If the employee is at the minimum of the range they qualify for the SISA. The employee qualifies for a SISA once in each range, as long as each range receives a SISA and the employee moves to the minimum. There have been cases where the minimum of the classification is raised and then an employee who has already had a SISA in that range finds themselves at minimum again, they are not entitled to a second time.
- **Question:** Can Personal Development Days be used during disability waiting period? How do we key 215 for only one day of Supplemental Paid Sick leave (SPSL) usage?
  - **Answer (Kim Herlache – CalHR):** PDD days may be used to cover the waiting period for disability. In addition, PSB is in the process of working with the CLAS unit to allow the system to use PDD in lieu of excess hours.
- **Question:** For EPSL I used to key it the next day beginning of business (BOB). but now when I tried to do Supplemental Paid Sick Leave (SPSL) BOB it asks for time to be paid to be completed.
  - **Answer (Christina Campbell – SCO):** SPSL FAQ
    - Employment History Documentation:
      - What is the effective date of the 215 PAR transaction at the start of the SPSL benefit?
        - The effective date is the approved benefit start date.
      - What date should be entered in the Remarks section of the 215 PAR transaction for SPSL?
        - Enter the approved benefit start date. Enter it as “SPSL MM/DD/YY”.
      - What is the effective date of the 215 PAR transaction at the completion of the SPSL benefit?
        - The effective date is the completion date of the SPSL benefit. This may not extend past 09-30-21.
- **Question:** Can CalHR or SCO going to address the ongoing issue with Delta Dental not processing dependent enrollments? Delta Dental says they are not getting the enrollment forms to add dependents from SCO. This has been an ongoing issue since 2019 and does not seem to be getting any better. When employee's change their

address, Delta Dental is also not processing the address change for dependents and only for employees. Can this issue be resolved as well? Agencies are spending a lot of time correcting these issues with Delta Dental.

- **Answer (Chiara Galloway– CalHR):** CalHR is aware of the issues with Delta Dental and we are working on finding the root cause of the issues. We will update departmental personnel offices as we have more information.
- **Question:** What does a F behind an S90 mean; displays in employees Employment History screen as S90F?
  - **Answer (Tommy Fong – SCO):** F usually is a fix by SCO. For example, it is a keying error that's not done by the agency.
- **Question:** How many 715s in a row can be keyed in an employee's (EE) employment history? Is there a difference in how many 715s can be keyed when there is pay due to the EE or no pay due to the EE? Where can we find a rule in writing?
  - **Answer (Tommy Fong – SCO):** You cannot have NON in item 606 two times in a row per California Code of Regulations (CCR) 599.785.

## SCO KEY INITIATIVES: PROJECT UPDATES

### California State Payroll System (CSPS) – SCO – Bill Harrigan

- Project Vision: The California State Payroll System (CSPS) Project will modernize the human resource management and payroll system used by 285,000+ state government employees in order to provide accurate and timely personnel and payroll service with quality customer service.
- In Process:
  - Developing Solicitation Documents – SOW/RFP
  - Procurement activities for SFY 21/22 in progress
  - Data Cleansing Strategy Planning (DCSP) sessions
  - Continuing to initiate engagement with BPO
- Recent Progress:
  - BPO orientation sessions complete
  - Completed 5 DCSP sessions
  - Completed CalHR Benefits Administration walk-throughs
  - Completed initial draft of solicitation documents for the future solution
- What's Next
  - BPO orientation sessions complete
  - Completed 5 DCSP sessions
  - Completed CalHR Benefits Administration walk-throughs
  - Completed initial draft of solicitation documents for the future solution
- Our Ask

- Review solicitation documents and provide comments and/or approval
- Complete Departmental Demographic Survey
- Participate in “In Process” activities
- Provide SME support for questions
- Provide SME support for data cleansing sessions

#### **Connect Human Resources Portal (ConnectHR) – SCO – Liz James**

- Shadow feature
- Agency's outgoing public IP address verification
- File Upload feature

#### **BENEFITS ADMINISTRATION**

##### **Statewide Civil Service Benefits Program – SCO – Bryce Miller**

Contact: [BMiller@sco.ca.gov](mailto:BMiller@sco.ca.gov)

- Benefits Updates
- Benefits Reminders

##### **ACA – CalHR – Elaine Smith**

Contact: [ACA.policy@calhr.ca.gov](mailto:ACA.policy@calhr.ca.gov)

- SCO has several ACA compliance reports available on ViewDirect. Departments are expected to review these reports monthly and correct all errors within 30 days. Departments should prioritize ACAS keying for employees who are eligible for health benefits.
- Any time an employee’s health benefits status changes (e.g., employee is newly eligible for health benefits, enrolls in health benefits, is offered COBRA coverage, offered an opportunity to continue benefits via Direct Pay) an update in the ACAS is required.
- Departments are encouraged to utilize existing reports available on SCO’s Management Information Retrieval System, such as the INT 001A report, INT 002A report and COM-035 to identify updates needed in ACAS.

##### **Vision Program – CalHR – Lisa Hatten**

Contact: [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)

- Contact VSP directly for vision inquiries other than appeals. Email VSP at [stateofca@vsp.com](mailto:stateofca@vsp.com). Be sure to include employee’s full name in the subject line and use the group number when checking eligibility.
- Remind employees to contact their own departmental personnel staff directly with questions about their benefits.

- Assist prospective retirees in completing the CalHR 695 form if they wish to continue vision benefits into retirement, as they have 60 days to elect coverage. Send forms directly to VSP at [stateofca@vsp.com](mailto:stateofca@vsp.com).
- CalHR is working on a Retiree Flier to be uploaded on CalHR's and VSP's websites. Stay tuned!
- Complete new vision forms for employees returning from a Leave of Absence and send to VSP at [stateofca@vsp.com](mailto:stateofca@vsp.com).
- Please be sure to use the latest forms on CalHR's website. CalHR is in the process of updating the Privacy Notice on the back of all vision forms.
- VSP's mailstop has changed to **MS 229**. Forms and website are currently being updated.
- Send vision appeals to CalHR at [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov). This is the most efficient way to contact the vision program. Please be sure to include the employee's full name in the subject line of the email. Please also attach the CalHR 774 vision form to the email for an appeal.
- Vision backlog is caught up to July 8, 2021.

#### **COBRA – CalHR – Lisa Hatten**

Contact: [cobra@calhr.ca.gov](mailto:cobra@calhr.ca.gov)

- Updated information regarding the COBRA premium subsidy relief is available in our COBRA BAM section 400 at [Consolidated Omnibus Budget Reconciliation Act \(COBRA\) – CalHR](#). Further guidance on payments and the reimbursement process will be sent out very soon.

#### **Dental – CalHR – Chiara Galloway**

Contact: [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)

- Appeals status
  - Dental is current, no backlog
- Reminders
  - Please audit each STD. 692 before submitting them to SCO or CalHR as a part of an appeal.
  - Please communicate with your employees, about enrollment process, ARS, their rights and responsibilities.
  - Please do not submit STD. 692 older than 2017 version to CalHR or SCO.

#### **FlexElect and CoBen Programs – CalHR – Chiara Galloway**

Contact: [flexelect@calhr.ca.gov](mailto:flexelect@calhr.ca.gov)

- Appeals status
  - Backlog for FlexElect/CoBen appeals is approximately 90 days.
  - For escalated appeals, please indicate "Escalation" in the subject line.
- FlexElect/CoBen Cash Option for SEIU and related excluded
  - Will be instated July 1, 2022, special Open Enrollment will occur in the second quarter 2022.

- All employees will be required to complete a new STD. 701R or STD. 702.
- Reminders
  - Retroactive changes are not permissible under IRS guidelines. These are different than processing errors.
  - Please send reimbursement check issues to [FlexElectStopPaymentRequest@calhr.ca.gov](mailto:FlexElectStopPaymentRequest@calhr.ca.gov).

### **Open Enrollment – CalHR – Amber Neves**

Contact: [flexelect@calhr.ca.gov](mailto:flexelect@calhr.ca.gov)

- Open Enrollment dates: September 20 - October 15, 2021
- Open Enrollment Human Resources announcement email will be sent out early August to share highlights and changes during the 2021 Open Enrollment season.

### **Affordable Care Act (ACA) – CalHR – Elaine Smith**

Contact: [ACA.policy@calhr.ca.gov](mailto:ACA.policy@calhr.ca.gov)

- SCO has several ACA compliance reports available on ViewDirect. Departments are expected to review these reports monthly and correct all errors within 30 days. Departments should prioritize ACAS keying for employees who are eligible for health benefits.
- Any time an employee's health benefits status changes (e.g., employee is newly eligible for health benefits, enrolls in health benefits, is offered COBRA coverage, offered an opportunity to continue benefits via Direct Pay) an update in the ACAS is required.
- Departments are encouraged to utilize existing reports available on SCO's Management Information Retrieval System, such as the INT 001A report, INT 002A report and COM-035 to identify updates needed in ACAS.

### **Healthier U Connections – CalHR – Emily Mah-Nakanishi**

Contact: [CalHR.Wellness@calhr.ca.gov](mailto:CalHR.Wellness@calhr.ca.gov)

- SCO has several ACA compliance reports available on ViewDirect. Departments are expected to review these reports monthly and correct all errors within 30 days. Departments should prioritize ACAS keying for employees who are eligible for health benefits.
- Any time an employee's health benefits status changes (e.g., employee is newly eligible for health benefits, enrolls in health benefits, is offered COBRA coverage, offered an opportunity to continue benefits via Direct Pay) an update in the ACAS is required.
- Departments are encouraged to utilize existing reports available on SCO's Management Information Retrieval System, such as the INT 001A report, INT 002A report and COM-035 to identify updates needed in ACAS.

## PROGRAM UPDATES

### Employment Certification for State Agencies– CalPERS – Kristina Bozzo-Baldenegro

- Member Requests:
  - Select the Reporting global navigation tab.
  - Select the Member Requests local navigation link.
  - Locate the member to certify on the list. Click on the status link.
- Resources
  - CalPERS Customer Contact Center
  - **888 CalPERS** (or 888-225-7377)
  - [Circular Letter 200-042-20](#)
  - [Membership\\_Reporting@calpers.ca.gov](mailto:Membership_Reporting@calpers.ca.gov)
  - [myCalPERS Employment Certification Functionality Student Guide](#)
  - [myCalPERS System Access Administration](#)
  - [myCalPERS System Privileges for Business Partner Roles](#)
- Q&A:
  - Question: Who is supposed to receive the employee's requests? The employee's current institution or work location or the location in which the employee worked during the time in question?
    - CALPERS response: The agency that the employee is requesting to purchase time for or when a membership review has been requested.
  - Question: Regarding employees Service Credit Requests, Who is supposed to receive the employee's requests? The employee's current institution or the location in which the employee worked during the time they are wanting to purchase back? We have several request for employees who are not currently working here and not having access to their file makes it difficult to process the request.
    - CALPERS response: The agency that the employees are requesting to purchase time for or when a membership review has been requested. You will need to work with SCO to have them obtain and input the data on employees no longer with your agency.
  - Question: Also, we are having difficulty uploading the work history file in CalPERS
    - CALPERS response: If you are having errors please reach out to the Contact Center at 1-888 CalPERS to have them reach out to the appropriate area for assistance.
  - Question: Bozzo-Baldenegro, Kristina to upload the pay/employment history excel document from SCO for a Service Credit request for employment from 1994-1995, what would the naming convention be? It keeps giving me an error, and I haven't received a response from the CalPERS rep. I'm unable to manually add the info as it is asking for the pay period dates. I reached out to SCO to receive that information, but they don't have historical records going back that far.

- CALPERS response: The agency must manually add the service period detail into the certification screens. If you are having additional errors or cannot certify the request, please reach out to the Contact Center at 1-888 CalPERS and they will reach out to the appropriate area for assistance.
- Question: Campbell, Christina If I'm interpreting this Service Credit Request question correctly, it is regarding CalPERS' process of which employer receives the Service Credit Purchase request for processing.
  - CALPERS response: This question was answered above.
- Question: Yes, uploading EE HIST in CalPERS has been extremely difficult and can't seem to get any assistance.
  - CALPERS response: The agency must manually add the service period detail into the certification screens. If you are having additional errors or cannot certify the request, please reach out to the Contact Center at 1-888 CalPERS and they will reach out to the appropriate area for assistance.
- Question: When will CalPERS be providing additional information on the Health Enrollment Project? They provided some information in the June AdHoc Meeting but not in the Transactions Forum. What does this new process mean for Departments?
  - This is for Health, not membership.
- Question: Will we receive a notification that we have a member to certify, or are we to check this on our own?
  - CALPERS response: As of 7/12/2021, when an employee submits their service credit request through their myCalPERS account and employer certification is needed, the employer will get an email notification. The hierarchy is: 1<sup>st</sup> to payroll, 2<sup>nd</sup> to Human Resources, 3<sup>rd</sup> any primary, then 4<sup>th</sup> to any with an email.
- Question: I have an employee that was told there was issues with his verification however when I bring him up all I can see is what I did with the status as submitted. If there are errors will we be notified that something is wrong?
  - CALPERS response: When completing the employer certification, be sure to complete all questions in the certification and complete each field when enter the payroll detail. For example, if the employer does not provide the total hours worked (reportable hours), and the request is submitted to CalPERS, we will determine that the request is incomplete. We will notify the employee and the employee must submit a new request for the employer to complete and edit the missing information.
- Question: With regards to Employment Certifications, we are having problems in meeting the 30 days deadline process for those that we have to get information from another agency. Can this be extended because of this as we find that the request has expired?



- CalPERS response: We are not able to provide extensions. If the request expires prior to the employer completing the certification, the employee must submit a new request.
- Question: The CalPERS system is not allowing us to enter for prior employees. Has this been fixed?
  - CalPERS response: I'm not sure what issue the employer is talking about. I am not aware of any issues where an employer cannot complete a certification for a prior employee.

### **Statewide Tax Support Program– SCO – Monique Perez**

Contact: [MPerez@sco.ca.gov](mailto:MPerez@sco.ca.gov)

- Employee Action Request (EAR) Keying Update:
- Dependent Keying Error – Claim Dependents (E05)
  - Must be a whole dollar amount (i.e. \$2,000.00)
  - Should not be a single number (i.e. 1)
    - Withholding will not calculate correctly, as it will be base off \$1.00 rather than \$2,000.00 as it should be.
    - **DO NOT** put the amount for Claim Dependents in the Additional Withholding field as this amount will deduct every pay period
- EAR Quick Start Guide: [https://sco.ca.gov/Files-PPSD/EAR\\_Quick\\_Start\\_Guide\\_ADA\\_version.pdf](https://sco.ca.gov/Files-PPSD/EAR_Quick_Start_Guide_ADA_version.pdf)
- Please refer employees to the Internal Revenue Service Tax Withholding Estimator to ensure the EAR is completed correctly.
- <https://www.irs.gov/individuals/tax-withholding-estimator>

### **Program Management and Analysis Bureau – SCO – Arlene Bailey**

Contact: [ABailey@sco.ca.gov](mailto:ABailey@sco.ca.gov)

- July 2021 Salary and Employment History Changes
  - PPSD processed several Employment History mass updates:
    - On 07/06/2021, 211,888 350 transactions successfully posted per CalHR Pay Letter 20-18 and Exempt Pay Letters dated July 6, 2021.
    - On 07/12/2021, 203,256 GEN transactions successfully posted per CalHR Pay Letter 20-19.
    - On 07/14/2021, 1,572 GEN transactions successfully posted per Exempt Pay Letter dated July 14, 2021, and 17,272 SAL transactions successfully posted per CalHR Pay Letter 20-19.
    - On 07/20/2021, 19,555 505 transaction successfully posted bargaining unit 05 and 09 employees.
  - Please refer to the CalHR pay letters and SCO Personnel Letters [21-011](#), [21-012](#), [21-015](#) and Email Broadcast dated [07/15/2021](#) for Departmental specific instructions.
  - PPSD updated Retirement State share rates and the Enhanced Survivor 1959 deduction rate for the July 2021 pay period please refer to SCO Payroll Letters [21-006](#) and [21-007](#).

- PPSD will issue BU16 Continuing Medical Education Payments by July 28, 2021. The SCO Payroll letter is forthcoming.

### **Business System Enhancements – SCO – Rehana Kausar**

Contact: [RKausar@sco.ca.gov](mailto:RKausar@sco.ca.gov)

- Other Post- Employment Benefits (OPEB) 7/1/2021 Changes. OPEB employee share deduction and rate changes.
- OPEB/Max Compensation Integration Project Update
- Blank OPEB Collective Bargaining Identifier (CBID) on employment history (EH) records.

### **Program Analysis and System Coordination Section – SCO – Tracy Gutierrez**

Contact: [TGutierrez@sco.ca.gov](mailto:TGutierrez@sco.ca.gov)

- W-4 and Employee Action Request (EAR) Form eLearnings:
  - W-4 / EAR eLearning All Agencies, California State Universities (CSU) & Uniform State Payroll System (USPS) (run time: approximately 25-30 minutes):
    - Link: <http://cacontrollers.adobeconnect.com/p47gntxn130o/>
    - This eLearning provides information about the revised Std. 686 Employee Action Request (EAR) Form containing the new fields. Find helpful tools, resources and examples for completing and updating the EAR Form.
  - W-4 / EAR eLearning for HR Department Staff (run time: approximately 25-30 minutes)
    - Link: <http://cacontrollers.adobeconnect.com/p926o60v9cuo/>
    - This eLearning provides in-depth information about the revised Std. 686 Employee Action Request (EAR) Form and the required keying fields. You will examine EAR Form submission examples, how the information is keyed on the EAR screen, and identify common keying errors and how to resolve them.

### **Statewide Civil Service Payroll Program – SCO – Renee McClain and Christina Campbell**

Contact: [Mcclain@sco.ca.gov](mailto:Mcclain@sco.ca.gov) and [CCampbell@sco.ca.gov](mailto:CCampbell@sco.ca.gov)

- Employment History Reminders
- Payroll Program Reminders
- Paycheck Calculator: [https://www.sco.ca.gov/ppsd\\_se\\_paycheck\\_calc.html](https://www.sco.ca.gov/ppsd_se_paycheck_calc.html)

### **Communications Team– SCO – Nastassja Johnson**

- New State HR Webpage
  - [SCO | Human Resources \(ca.gov\)](https://www.sco.ca.gov/human-resources)

### **SCO General Reminders – SCO – Nastassja Johnson**

Contact: [Nxjohnson@sco.ca.gov](mailto:Nxjohnson@sco.ca.gov)

- Include specific program name in the subject line of emails to the PPSDTempOps@sco.ca.gov mailbox.
  - This inbox is not for questions or inquiries.
- Include your name and email on all documents submitted to the SCO.
- Submit one email for each specific program area.
- Utilize secure email to send documents rather than fax or mail.
- Include the complete social security number (SSN) when sending documents through secure email.
  - CEC – Do not send the full SSN to Connect HR
- Visit Department of General Services (DGS) website for updated Standard (STD) forms that allow for a digital signature.
  - STD674 and STD674 A/R have been updated to allow for an email address for the specialist. This allows SCO to contact the specialist in a timely regarding PR250's.
- Update California Personnel Office Directory (CPOD).

## RESOURCES

### CalHR Benefits

- **Websites:**
  - 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>
- **Contacts:**
  - ACA Program: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)
  - Dependent Re-verification Program: [DependentReverificationProgram@calhr.ca.gov](mailto:DependentReverificationProgram@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)
  - Dental/Vision Authorization Portal: [VisionDental.Authorization@calhr.ca.gov](mailto:VisionDental.Authorization@calhr.ca.gov)

### 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](tel:(916)372-7200) (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

- 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)

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