



July 2023

Transaction Supervisors' Forum Notes

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SCO KEY INITIATIVES:

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

- Cal Employee Connect (CEC)
 - CEC Phase II – Employee Service features
 - Multifactor Authentication (MFA) ([MFA User Guide](#)):
 - Now available to all Cal Employee Connect (CEC) users
 - As of 7/18/23: 37,616 employees have enabled MFA
 - Direct Deposit:
 - 95% of departments statewide have been deployed
 - As of 7/18/23: CEC has received 9,650 direct deposit transactions
 - Address Change:
 - 95% of departments statewide have been deployed
 - As of 7/18/23: CEC has received 1,399 address change requests
 - 2023 W-2 Opt-in Feature:
 - Coming soon
 - Demo
- ConnectHR
 - Accounts Receivable (A/R) 035 Deduction Collection Feature:
 - This feature has been made available to all agencies
 - As of 06/30/23:
 - Total of 35,492 A/R 035 deductions have been processed via this feature
 - Total of \$8,140,083 has been collected
 - As of 7/18/23:
 - The ConnectHR team sent notice of the feature availability to all remaining agencies via email to Security Monitors and Universal Email
 - 86% of departments/agencies have been enabled

- Starting mid-July, the ConnectHR team will be reaching out to the agencies **who are not** using the 035 Feature via their Human Resources Chiefs.

SCO – [California State Payroll System \(CSPS\) Project](#) – Jeana O’Ferrall (Contact: CSPSHelp@sco.ca.gov)

– Changes Means Opportunity

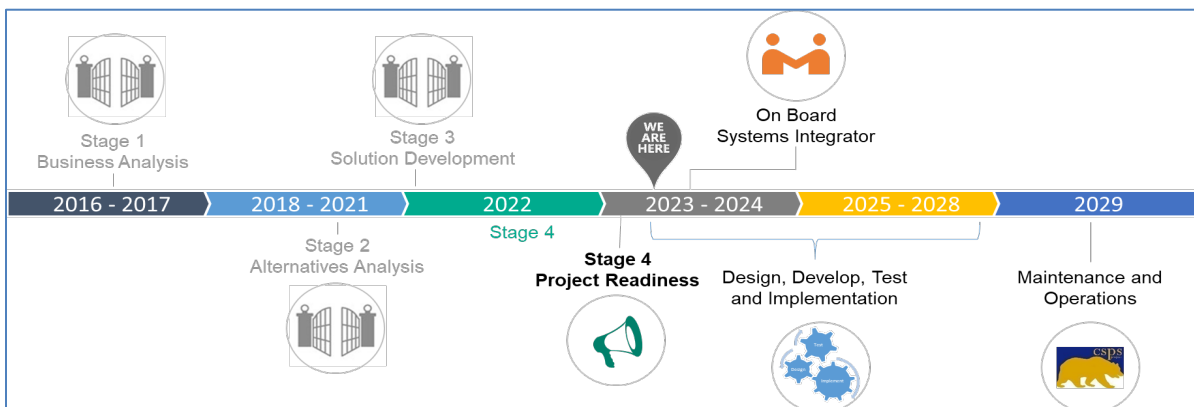
- First cell phone
- First computer
- In today’s fast-paced world, change is inevitable.
- It is one thing to know change is needed, it is quite another to make that change happen.

– Project Information:

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

– Status Updates:

- Negotiations with vendors are coming to a close.
- Technical team continue to monitor data for quarterly reporting.
- Departments have until August to identify Subject Matter Experts (SMEs) and Coordinators to their assigned Agency Change Expert (ACE).
- The Organizational Change Management (OCM) ACEs have been conducting outreach meetings with their departments over the last couple of months.



BENEFITS ADMINISTRATION:

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.

- Open Enrollment (OE) – Amber Neves (Contact: OpenEnrollment@calhr.ca.gov)
 - Updates
 - The 2023 Benefits Open Enrollment period is September 18 – October 13, 2023.
 - Open Enrollment is a set period of time annually for State of CA 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 will be effective January 1, 2024.
 - Virtual Benefits Fair
 - CalHR will be hosting a Virtual Benefits Fair over the course of 2 days this year. The Virtual Benefits Fair will take place September 13 - 14, 2023.
 - In-Person Benefits Fairs
 - New for 2023, CalHR is working on organizing in-person benefits fairs. The current proposal is to have one in each region of California: Northern, Central, and Southern California.
 - More information on benefit fairs will be shared in the next meeting.
 - Contact
 - Departmental personnel offices can send Open Enrollment related questions via email to OpenEnrollment@calhr.ca.gov.
 - Current response time is five (5) business days.
- Affordable Care Act (ACA) Updates and Reminders – Lisa Hatten (Contact: ACA.Policy@calhr.ca.gov)
 - Permanent Intermittent Employees:
 - Employees who were credited with at least 480 paid hours in the January to June 2023 Control Period
 - If employee is newly eligible for health benefits, the employee’s ACAS record should be updated to reflect:
 - 2D, effective 7/1/23
 - 1A, effective 8/1/23
 - 3A, effective the date the employee’s health coverage is effective OR
 - 4A, effective 8/1/23, if the employee declines 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)
 - 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 January to June 2023 Control Period (or 960 paid hours in two consecutive Control Periods)
 - The employee’s ACAS record should be updated to reflect:

- 5A, effective 7/31/23
 - 2B, effective 8/1/23
 - COBRA Offer (1B, 1C, 1D, or 1E), effective 8/1/23
 - 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 January to June 2023 Control Period (or 960 paid hours in two consecutive Control Periods)
 - The employee’s ACAS record should be updated to reflect:
 - 2B, effective 8/1/23
 - There are reports available 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)
- Additional Reports Available to Monitor ACA Compliance
 - State Controller’s Office – MIRS Reports
 - COM-035 Report: Identifies employees who are on a temporary separation or unpaid status who may be eligible to continue their health benefits via Direct Pay (5C Update)
 - California Public Employees’ Retirement System – COGNOS Reports
 - Employer Health Event Transactions Report: Identifies employees who enrolled in or cancelled their health coverage by using the myCalPERS self-service portal
- Dental Program – Kristin Wilsey (Contact: Dental@calhr.ca.gov)
 - Program is current and within 30 days
 - Appeals Issues
 - Dual coverage is not permissible.
 - Verify employee eligibility prior to submitting an appeal.
 - With retroactive enrollments, prior to submitting appeals to CalHR, departments must ensure that employees are aware of the responsibility to pay retroactive premiums and that accounts receivables will be established to recover these premiums, if applicable.
 - Administrative signatures are only acceptable on an STD. 692 for mandatory deletions.
 - CalHR requests for additional information that are not received by the reply by date, will result in the appeal being closed.
 - When CalHR provides directions and links to resources in response to an appeal, please follow the directions and utilize the links provided. Failure to do so will delay the appeal.

- Special Announcement:
 - Effective May 1, 2023, in order to improve the accuracy of the provider enrollment files, departments are expected to use the most current version of the STD. 692 Dental Enrollment Form. Effective May 1, 2023, CalHR and the SCO will reject any outdated STD. 692 Dental Enrollment forms. You can access the most current STD. 692 Dental Enrollment Form here: [Dental plan enrollment authorization \(ca.gov\)](#).
- Third Party Pre-Tax Parking (PTP) Reimbursement Account Updates
 - Program is current and within 30 days.
 - Reminders for personnel specialists:
 - Use the SCO database to check the status of an approved refund prior to emailing CalHR to inquire on the status.
 - Prior to enrolling an employee in PTP, the personnel specialist needs to ensure the employee is not already paying into a state-sponsored parking program.
 - When submitting the required memo for a refund request, please include ALL of the information requested within the memo requirements, including the cancellation form submitted to SCO.
 - Incomplete memos without the proper cancelation form will delay processing.
 - Going forward, Pre-Tax Parking refund requests will be restricted to a period of 36 months determined by the date the refund approval is received by SCO and the date that the refund request is processed by SCO.
 - COVID-related refund requests will no longer be accepted as a justification for deductions beginning with the January 2023 pay period.
 - After December 2023, COVID-related refund requests will not be accepted for the pay periods from January 2020 through December 2022. Requested refunds are subject to SCO's 36-month retroactivity limitations.
- Vision Program – Kristin Wilsey (Contact: Vision@calhr.ca.gov)
 - Program current and within 30 days.
 - Form submission – Send forms directly to VSP:
 - CalHR 774 (Premier Vision Enrollment)
 - COBRA
 - CalHR 695 (Retiree Enrollment)
 - Do not send multiple enrollments in one email; this can cause errors with data entry and delay employee enrollment.
 - Recommended subject line language for email submissions
 - Premier Vision Enrollment -Employee Name (Last Four)
 - Retiree Vision Enrollment -Retiree Name (Last Four)
 - Child Dependent Age Check
 - Dependents over age of 26 are being submitted to VSP without confirmation that they are a disabled dependent.

- Appeals
 - Prior to sending appeals, check SCO
 - With retroactive enrollments, prior to submitting appeals to CalHR, departments must ensure that employees are aware of the responsibility to pay retroactive premiums and that accounts receivable will be established to recover these premiums if applicable.
- VSP Contact Information
 - Phone Number: (800) 400-4569
 - Email: stateofca@vsp.com
 - Fax: 916-389-8304
 - Employee Website: <https://stateofcaemployee.vspforme.com/>
 - Retiree Website: <https://stateofcaretiree.vspforme.com/>
- Vision Dental Authorization Portal
 - Requests are current and within 30 days.
 - Reminder to make a change to the authorization portal, the request must come from a supervisor or manager listed on SCO's CPOD.
 - Information to provide when adding an authorized user:
 - Agency Code (this is often missed)
 - Agency Name (as listed on CPOD)
 - Personnel Specialist's first and last name
 - Personnel Specialist's telephone number using this format (123) 456-7890
 - Personnel Specialist's email address
 - Reason for request – Add, Delete or Update
 - Do not send requests to the Dental or Vision program general email boxes
 - Send requests to visiondental.authorization@calhr.ca.gov
- FlexElect Program
 - FlexElect is current and within 30 days.
 - Reminder to only submit one appeal per email.
 - Flex forms should be fully complete, including the employee and the personnel sections.
 - Please check SCO Pay Hist for updates approximately 14 business days after you receive the determination from the Flex Unit.
 - For questions regarding an employee's ASI account, the employee should contact ASI directly via phone at (800) 659-3035 or email at asi@asiflex.com.
- Long-Term Disability (LTD) and Group Legal Programs
 - Information to provide when submitting an inquiry for an employee:
 - Original Document
 - Employee's First and Last Name
 - Employee's Social Security Number
 - Employee's Position Number
 - Reason for Inquiry

- General Program Updates or 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.
 - Benefits Administration Manual Training – Online CalLeans
 - Employee Benefits Orientation Training – Online CalHR Webpage
 - Benefits premiums cannot be waived for months when services are not used.
 - We continue to receive calls and emails from employees stating their personnel office directed them to call CalHR. Do not refer your employees to CalHR. Employees must work with their personnel office regarding their benefits.
- Dependent Re-Verification (DRV) – Delia Baulwin (Contact: DRV@calhr.ca.gov)
 - What is DRV: The Dependent Re-verification (DRV) is the process of re-verifying the eligibility of your employees’ spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health and dental benefits.

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

- DRV Updates
 - CalHR automated the DRV process for Dental and Premier Vision effective January 2023.
 - The current health DRV process through CalPERS and the MyCalPERS system will remain unchanged.
 - CalHR mails out DRV notices to employees with dependents enrolled in Dental and/or Premier Vision who require re-verification at 90, 60 and 30 days before the employees’ birth month.
 - CalHR contracts with DGS to mail out DRV notices.
 - Mailing list is prepared 15 days in advance of the mailing date.
 - Departmental personnel offices are required to update Dental and Premier Vision dependent re-verifications through the Family Connect Portal (FCP).
 - Department compliance will be monitored with department HR offices with the designated Health Benefit Officers and FCP Department Admin roles.
 - March 2023 cycle: HR offices must take necessary steps to remove unverified dependents from dental and vision benefits.
 - June 2023 cycle: HR offices have 30 days after the end of a birth month cycle to process re-verifications for dependents whose documents were submitted by the due date, June 30th.
 - Sept 2023 cycle: 60-day Health (CalPERS), Dental and Premier Vision (CalHR) 2nd DRV notices was mailed out on 7/3/23.
 - The CAHP and CCPOA enrollment data in FCP is still pending.

- Contact
 - Before contacting the DRV Unit with policy and procedure related questions, please review all DRV Resources provided
 - 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 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
- CalHR Benefits' Resources
 - Websites
 - CalHR Benefits Website: <https://calhr.benefitsprograms.info/>
 - BAM Training Questions BenefitsInquiries@calhr.ca.gov
 - Healthier U Connections: <https://www.calhrwellness.com/en/welcome-california-state-employees/>
 - Human Resources: calhr.ca.gov/state-hr-professionals
 - State Employees: calhr.ca.gov/employees
 - HR Manual: hrmanual.calhr.ca.gov/Home/ManualItem
 - Contacts
 - ACA Program ACA.Policy@calhr.ca.gov
 - Dependent Re-verification (DRV) Program DRV@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 LifelineInsurance@calhr.ca.gov
 - Group Legal Grouplegal@calhr.ca.gov
 - Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov

SCO – Statewide Benefits Program – Ryan Baughman (Contact: ppsdcsbenefits@sco.ca.gov)

- Permanent – Intermittent (PI) Employee STD. 701c / STD.702 Cash Option
 - PI employees who submitted 701c/ 702 to HR office during 2022 Open Enrollment are eligible to receive lump sum payment, if they completed the following:
 - Must have completed a STD. 701C during the open enrollment period, or as newly eligible after open enrollment, but prior to January 1 AND
 - Must have been eligible to be enrolled in health and/or dental insurance for the entire January through June control period AND
 - Must be paid for at least 480 hours worked during the January through June control period AND
 - Have a PI appointment from January 1 through June 30 of the Plan Year for which they have enrolled (with no break in service).
 - Refer to [CalHR Benefits Administration Manual](#) for more information.
- 2023 Open Enrollment is coming
 - Currently working on creating an Open Enrollment Resources page for the SCO Website.
 - Expected to be available by mid-August
 - Content included for Dental, FlexElect/CoBen Cash Option, & FlexElect Reimbursements:
 - Checklists
 - Examples, Tips, & Common Form Errors
 - Frequently Asked Questions
 - Transactions Specialist Educational Forum is August 3rd
 - Open Enrollment
 - Please encourage your staff to attend!

PROGRAM UPDATES:

Statewide Tax Support Program – Monique Perez (Contact: PPSDSTSP@sco.ca.gov)

- Verification of Employees Identified as Nonresident Aliens
 - Verification of Employees Identified as Nonresident Aliens Personnel Letter issued 07/17/2023
 - [Personnel Letter 23-016](#)
 - Reports are on View Direct until December 31st of 2023
 - The report name in View Direct is PDW7170
 - The Tax Support Unit does a bi-annual verification. If you submitted a form for the first half (January through June) of the year, you will submit a form for the second half.
 - **ALL Agencies/Campuses** are required to submit the verification forms bi-annually to indicate any additions, deletions, OR if you do not have any Nonresident Aliens to report.
 - **Forms are due by September 15, 2023. This is a requirement for all agencies.**

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

- Mass Update Retirement Contribution Change
 - Effective Date July 1, 2023
 - Various Bargaining Units 1, 3, 4, 7, 11, 14, 15, 17, 20, 21
 - 505 Transaction ran on July 6, 2023
 - Total Employees Impacted 112,515
 - Total Number of Exceptions 1,371 that will need to be keyed by departments
 - Mass Update Exceptions
 - Employee off pay status, out-of-sequence, appointment expiration date prior to July 1, 2023
 - Departments must key a 505 and update the employment history
 - Employee Working While On Leave Prior to July 1, 2023
 - Departments must key a 505 updating the employment history effective July 1, 2023
 - Failure to updating the retirement code may reflect in the incorrect retirement rate being withheld
 - Employees On Disability (SDI, IDL and TD) Prior to July 1, 2023
 - Departments must key a 505 updating the employment history effective July 1, 2023
 - Failure to updating the retirement code may reflect in the incorrect retirement rate being withheld
- Mass Update General Salary Increase
 - Effective Date July 1, 2023
 - Various Bargaining Units 2, 8, 9 and 18
 - GEN Transaction ran on July 11, 2023
 - For Rank-And-File and Excluded Employees
 - Total Employees Impacted 28,619
 - Total Number of Exceptions 74 employees

- Effective Date July 12, 2023
 - Additional update run for BU 2 and 9 for class code 6016 and 3130
 - GEN Transaction was processed
 - Total Employees Impacted 636
- Mass Update Special Salary Adjustment
 - Effective Date July 1, 2023
 - Various Bargaining Units 5, 10 and 13
 - SAL Transaction ran on July 19, 2023
 - For Rank-And-File and Excluded Employees
 - BU 10 includes certain class codes
 - BU 13 includes only S13 employees
 - Total Employees Impacted 7,879
 - Total Number of Exceptions 63 employees
 - Reminder that impacted employees in Bargaining Units 2, 13, and 18 require departmental action

Statewide Payroll Program – Renee McClain (Contact: SCCC (916) 372-7200)

- 07/01/23 Mass Updates
 - Reminder
 - Departments should refrain from keying Employment History (EH) transactions the day prior to a mass update to minimize employee records from being excluded in the update which results in manual processing.
 - 505 Retirement Contribution Rate Change Mass Update – [SCO Personnel Letter #23-014](#)
 - Over 1300 records on the listing
 - CS Audits sent letters to departmental universal mailboxes to request action on appointments, separations, and plus salaries with expired dates.
 - 455 records must be corrected to prevent A/Rs for retirement contributions
 - Listing has been completed
 - GEN Mass Update
 - 76 records on the listing – [SCO Personnel Letter #23-015](#)
 - Listing has been completed
 - SAL Mass Update – See [SCO Personnel Letter #23-015](#)
 - 63 records on the listing
 - In progress
 - 105/Dual SSNs
 - Verify on the PSN screen in (EH) if the SSN already exists
 - Verify the SSN is correct prior to selecting “enter” for the transaction
 - If SSN is incorrect, exit out of transaction and rekey
 - If the incorrect SSN is created, wait for the turnaround PAR with the incorrect SSN to be viewable in Mobius the following day, and upload a 105 Transaction in ConnectHR.

- Do not rekey the transaction with the correct SSN in order to prevent incorrect EH and payroll records for the employee
 - 105 Transactions will be worked as a priority and EH will be updated in accordance with the SCO personnel workload calendar, which occurs weekly.
- Canceled PARs
 - Departments should review the [Lump Sum Separation FAQ](#) before requesting to cancel a PAR
 - Several items on the PAR can be corrected versus canceling and resubmitting
 - Saves the HR and SCO staff time
 - New PAR submitted will have a new received date
 - Please verify the documents submitted prior to being uploaded
- Statewide Customer Contact Center Calls (SCCC)
 - HR offices should direct calls to the appropriate program area
 - CS Audits receives calls daily for other program areas which diverts staff from the work
 - Contacting the appropriate program area will ensure you receive accurate information pertaining to workloads and processes

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.
- Utilize ConnectHR to submit documents or upload data – include SSN
- Include the employee's complete social security number (SSN) when sending documents through ConnectHR
- Check [Weekly Processing Dates](#) before sending inquiries
- Update [California Personnel Office Directory \(CPOD\)](#)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out recommended Human Resources [subscriptions](#)
- Review Communication from State Policy and Instructional Departments for Business Process impacts
- It is recommended that the Human Resources (HR) staff follow [Section M](#) of the Payroll Procedures Manual (PPM) for certifying payroll, which requires HR staff to validate that both mandatory and voluntary deductions have been withheld appropriately and to certify the employee's payroll is accurate.
- Share this information with your Human Resources Team!

SCO EMAIL SUBSCRIPTION SERVICE:

- To ensure you're receiving essential PPSD notifications, please subscribe to our email subscriptions listed below. Also, we invite you to share this information with anyone who would be interested in PPSD notifications.
 - [California Leave Accounting System \(CLAS\) Letters](#)
 - [State Controller's Office Letters \(Personnel / Payroll Operations\)](#)

CUSTOMER RELATIONS SURVEY:

How would you like to receive information from us during this time? Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov.

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 (DSA) & ViewDirect Access (916) 619-7234 or DSA@sco.ca.gov
- HR Suggestions Email (All HR Staff) ppsdhrsuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email ppsdmirs@sco.ca.gov
- [Statewide Customer Contact Center](#) (916) 372-7200

FORUM QUESTIONS:

The following questions were submitted during the forum:

Question: How is the Accounts Receivable (A/R) feature on ConnectHR going to work?

Answer: The 035 Feature allows departments to process 035 deductions to collect A/Rs. If your agency is not using this feature, we can send you the information to enable your users.

Question: Regarding the Accounts Receivable (A/R) operation feature, when is the cutoff for the deduction to be included in the current pay period?

Answer: The last day to set up deductions for the current pay period is the day before monthly payroll cutoff.

Question: Will the W-2 still be mailed out next year or will this be the only option?

Answer: If the employee opted into paperless W-2 by November 30, 2023, the employee will not receive a paper printed copy.

Question: If an employee opts in for paperless, this means they will not be mailed out, correct?

Answer: Yes, this is correct.

Question: If employees need a Corrected W-2, will that be paperless or will a physical copy be sent?

Answer: The paperless process does not affect Form W-2c. The employee will receive a paper and electronic copy.

Question: Will W-2 opt-in instructions be sent to all employees, or are departments required to inform employees of this option?

Answer: The Cal Employee Connect (CEC) team will send informational emails to the Human Resources staff once the feature is enabled. The Opt-in instructions will be provided to the employee at the moment of login via a pop-up message. The expectation is that each employee will read the pop-up message and agree with the terms and conditions displayed on the screen.

Question: Will Human Resources receive a list of employees who go paperless?

Answer: We are working on reporting requirements about this feature and we will share more information when the feature is released statewide.

Question: When will premiums for 2024 be available?

Answer: The CalPERS Board adopted the 2024 health premiums this week. They are available on CalPERS Website here: [2024 hmo ppo premiums attach 3 \(ca.gov\)](#).

Question: When an employee transfers to a department and the prior department has the incorrect code, how does the department handle that and who pays the fine? How does the department ensure when an employee transfers, before keying them into the system with the new department, that they are in the correct Affordable Care Act (ACA) code?

Answer: The new department is responsible to update their employees' Affordable Care Act System (ACAS) by working with the previous agency, since that agency no longer has the ability to key for that employee in the ACAS.

Question: If a Permanent Intermittent (PI) employee wants Flex Cash in lieu of benefits, do they still have to sign up during Open Enrollment (OE)?

Answer: Please refer to the [Benefits Administration Manual \(BAM\)](#) for Flex for information. If you still need assistance, please email your inquiries to flexelect@calhr.ca.gov; PASSWORD: 2021StateHRP

Question: Does the new department have to key the prior departments ACAS code?

Answer: The new department is responsible to update their employees Affordable Care Act System (ACAS) by working with the previous agency, since that agency no longer has the ability to key for that employee in the ACAS.

Question: If an employee goes on a leave of absence or on disability, do we have to update the Affordable Care Act System (ACAS) if short term?

Answer: The ACAS should be updated to reflect their health enrollment status. If something has changed while they are on leave, then an update is needed.

Question: Can we receive additional information on COGNOS reports?

Answer: For information on the CalPERS COGNOS reports, please view the [Student Guide](#).

Question: What are the pre-tax memorandum requirements for pretax parking refunds?

Answer: Please refer to the [Benefits Administration Manual \(BAM\)](#) – FlexElect Program

Question: What is the best number for agencies to use to contact VSP for enrollment issues?

Answer: (800) 400-4569

Question: How can we add an employee to the authorization list?

Answer: Please email your request to visiondental.authorization@cahr.ca.gov.

Question: Does CalHR send out letters to employees after the departments update their dependents on Family Connect?

Answer: It depends on when they were re-verified. At times, there are letters that were already sent out and on the way to the employee while they are being re-verified. If the dependents have already been re-verified, they can disregard the notice.

Question: Can you please provide the link to where the Personnel Specialist (PS) Benefit Training links are (Health, Dental, Vision, Flex, etc.)?

Answer:

- <https://hrmanual.calhr.ca.gov/Home/ManualItem>
- <https://calhr.benefitsprograms.info/state-hr-professionals/benefits-administration-manual/flexelect-program/>

Question: Will you provide a link for the Transactions Specialists' Educational Forum (TSEF)?

Answer: <https://www.calhr.ca.gov/state-hr-professionals/Pages/Transaction-Specialists-Educational-Forum.aspx>

Question: Can someone let us know when we can expect to receive the July 672s in Mobius?

Answer: They can be expected July 2, 2023.

Question: We began working our fallout report yesterday, and yesterday's supplemental mass update email was sent at almost 8:00 pm.

Answer: We try to get those notices out as quickly as possible. Several factors play into the timing of communication, the key piece is making our final go/no-go decision on a mass update run. In some cases we run into issues near the very end stages of the process, so until we know with some confidence that we will move forward with the run, we hold off on communication. Our intent is to be as clear and concise as possible with the goal of streamlining the communication. I apologize that it is not always what happens. I have some thoughts and will work with my team and our Communications team on some alternatives. Thank you for the feedback!

Question: Where should we send questions to regarding the 505?

Answer: Questions regarding the 505 can be sent to retirementrequests@calhr.ca.gov.

Question: Which employees can we key on and which employees should we hold off on keying?

Answer: Please key the exempts.

Question: Does this include those who choose to supplement while out on disability?

Answer: Please key a 505.

Question: What about Industrial Disability Leave (IDL)?

Answer: Please key a 505.

Question: There are Bargaining Units (BU)'s and employees who do not need any mass updates to their records, correct? And therefore, we can key any transactions we need to for these employees? We're avoiding keying transactions on Services Employees International Union (SEIU) as you're running an update on them on 7/20, correct?

Answer: You can key transactions for employees as long as it is not part of the mass update this evening (7/20). If you key something and the employee is part of the mass update, the record will fall out and the department must update the employment history.

Question: Did the updates for R13 post?

Answer: Bargaining Unit 13 is for S13 only.

Question: Do the 330 Personnel Action Requests (PARs), effective July 1, 2023, for Bargaining Unit (BU) 2 also have the new anniversary date changed to July 1, 2023? If yes, wouldn't all eligible BU 2 employees need a Merit Salary Adjustment (MSA), effective July 1, 2023, to follow the 330 PAR? The Personnel Letters did not specifically state what the anniversary date should be, they just mentioned the effective date.

Answer: If the employee has less than 12 Qualifying Pay Periods (QPPs), then the anniversary date should be bumped to as many more months as are needed to complete 12 QPPs. The employee should not get an MSA before the 330, as the date of the 330 will equal the due date of the MSA.

Question: Bargaining Unit (BU) 18 did not get the mass updated General Salary Increase (GEN), correct? Are they only eligible to receive a Special Salary Adjustment (SAL) or a 330?

Answer: Yes, correct. Employees in Bargaining Units (BU) 2, 13, and 18 are eligible for the Special Salary Adjustment if they have been at the maximum of an eligible classification for 12 qualifying pay periods. Employees are eligible for a new anniversary date via a 330 transaction if they have not met the qualifying pay period criterion. Departments are responsible for keying the SAL or 330 transaction, effective July 1, 2023, for all eligible employees in these BUs. The percentage of the salary increase varies based on the bargaining unit. Please refer to CalHR's Pay Letter #23-23 for specifics on the salary increase, including exceptions, rate differences, and ineligible class codes.

Question: Did you say the report is available on ViewDirect?

Answer: Yes, the details are located on [Personnel Letter #23-017](#).

Question: I have employees in Bargaining Unit (BU) 3. The 505 did not get updated. They are academic exempt. Do we have to process them manually?

Answer: Yes, exempts need to be processed manually.

Question: What is the difference between special and complex 674Ds for State Disability Insurance (SDI) or Nonindustrial Disability Insurance (NDI)? How long after the processing date should we wait before sending an inquiry?

Answer: Special is within 12 months for the date of submitting the 674D, and Complex is over 12 months.

Question: Is there a way to get a listing of all our employees UEID numbers for our agency?

Answer: Once our Phase II deliverables are completed, the team will work on an enhancement to allow departments to pull UEIDs from ConnectHR; however, currently, this feature is not available.

Question: Regarding garnishments, is there a plan to make this process electronic like the Notice of Personnel Action (NOPA), Personnel Action Request (PAR), etc.? If yes, is there an anticipated roll out date for this process?

Answer: Please view page 5 of the [August 2022 forum notes](#), which include detailed steps for common errors for Garnishments.

Question: Is the effective date of the 505 the date of return from the Leave of Absence (LOA), or is it still July 1, 2023?

Answer: Although Item 505 is not a required field when returning an employee to pay status, these employees' Item 505 – Account Code field must be updated by the appointing agency once their appointment is extended or the employee returns to active pay status following a leave of absence. If the account code is not entered, the retirement contribution will be withheld at the incorrect rate and will require future adjustments. Please refer to the appropriate section of the Personnel Action Manual (PAM). Additionally, the 505 is to be processed on the transaction to return the employee to work by using the 505 field, so it will have the same effective date as the employee's return to work.

Question: Regarding an Employee Action Request (EAR), the amount was keyed in the wrong section when keying the EAR. The amount should have been in the dependent amount, not in the additional deduction. It was an error made by the Personnel Specialist. Can the employee get a refund? What is the process or who should I contact to have this resolved?

Answer: Please send an email to ppsdw2miscded@sco.ca.gov. We need more information to properly address this.

Question: What is the duration a UEID is updated for a new –to-state employee after the Personnel Action Request (PAR) is keyed?

Answer: If the appointment for the new employee is keyed in the Employment History system today, Human Resources (HR) offices will be able to view the employee's UEID the following business day via the ConnectHR Shadow feature. Employees on the other hand will need to wait until pay is issued for them to register into Cal Employee Connect (CEC) and view their own UEIDs.

Question: What are the compliance rates for the bi annual request for non-resident alien?

Answer: Please send an email to the Tax Support unit at PPSDSTSP@sco.ca.gov.

Question: If the Affordable Care Act System (ACAS) codes are not correct at the time of transfer, and the gaining department has already keyed the transferring appointment, should the gaining department key the corrections to the ACAS codes?

Answer: Yes, the gaining agency will need to work with the previous agency and make the necessary changes to the employee's record in the Affordable Care Act System (ACAS).

Question: When an employee has completed Nonindustrial Disability Insurance (NDI) 100% and does not return to work but is wanting to be paid for 11 days, we put the employee out on an S50. Where do we send the 674? I was directed by SCO to send a 674 to Civil Service (CS) Payroll but had some issues the last time this happened. Can you provide direction?

Answer: Those should be included in our supplemental update tonight (7/20), assuming they are among the impacted. We had a technical issue that left them out of the first one.

Question: Can we get clarification on range change eligibility when an employee is out on a Leave of Absence? Does the absence count towards Range Change eligibility or will the Range Change be delayed (like MSA is), and how is it calculated? Add days to end, or count all hours to 1920?

Answer: Please contact CalHR PSB.

Question: What is the latest revision to the STD. 692 Dental form and can you send a link to the updated version of the STD. 692?

Answer: 2021 is the latest revision to the form. Please encourage your employees to utilize the [Benefits Calculator](#) to generate the [STD. 692](#), it only takes 5 minutes. They can complete the form and submit it to your office for you to complete section E of the form and send it to SCO.

Question: An employee was a manager as of the Nonindustrial Disability Insurance (NDI) approval date, and was returned to Rank and File via an A03 after that date. Do I key the S49, A03C and put them back on the S49 same day as the A03?

Answer: Please send an email to Dtse@sco.ca.gov for this scenario.

Question: Do you need a copy of CalHR's approval for all retro-pay?

Answer: Yes, the approval must be uploaded with the document. It will be dinged without it.

Question: Do we have an update on the CalHR approval process? I thought in the last forum there would be an update.

Answer: Yes, CalHR provided the instructions in the entitlement memo. The State Controller's Office (SCO) will release a broadcast email soon.

Question: First of all, thank you to the Employment History (EH) Inquiry Unit for the quick response to my request for the additional EH pages. My question is, are we only allowed to see up to 9 pages of the EH and the remaining pages, send the inquiry to the SCO?

Answer: Yes, you will need to [request the additional history](#) from SCO's Personnel and Payroll Services Division (PPSD).

Question: Are there any updates on Service Employees International Union (SEIU) 1000 employees' new contract negotiations?

Answer: Negotiations are still ongoing.

Question: If an Accounts Receivable (A/R) was set up for payroll deduction through ConnectHR but the employee paid via a personal check, how can we go about canceling the deduction? Should we call SCO?

Answer: The deduction cancelation process has not changed. Please reach out to ConnectHRHelp@sco.ca.gov with additional information for further assistance.

Question: I was not aware of the Personnel Management Liaisons (PML). Can you provide the link?

Answer: <https://www.calhr.ca.gov/PML%20Library/2007026.pdf#search=pml%202007%2D026>

Question: I have a dual Personnel Action Request (PAR) package that was sent up for a Bargaining Unit (BU 13) employee. Can I go in and update the Salary Increase (SAL) and 505 or do I need to contact SCO for processing?

Answer: You can key the 505 and Salary Adjustment (SAL) for the correct Social Security Number (SSN). You do not have to key the one for the incorrect SSN.

Question: I see the "content" of the request is referenced, but just confirming there is not a standardized "format" for the submission?

Answer: You can send an email with all of the information. Please follow the steps provided by CalHR. Once they finalize the policy, they will update.

Question: We have employees who suddenly have overtime adjustments over a year old. Do we need approval for that since it doesn't require keying anything into PIMS?

Answer: Yes.

Question: Do we have any information on getting any Salary Determination trainings for the specialists in the near future?

Answer: A new trainer has been working on getting things up and running. She will have a few eLearning modules posted and then the class itself will roll out. We will notify everyone as soon as they are ready.

Question: SCO's process for an employee that is retiring (S70) and would like to keep their dental is that the form has to be submitted to CalPERS before keying the S70 transaction. However, CalPERS does not accept the dental submission/enrollment until the employee is separated. Can the Personnel Specialist process the S70 before the dental form is submitted so that there is no loss of coverage to the employee?

Answer: Please refer to the [separation checklist](#) for personnel specialists in the lump sum toolkit. In the checklist we provide the steps for specialists to key the employees dental into the MyCalPERs system.

Question: With the revision to alternate range criteria (069) for Staff Services Analyst has there been any guidance or recommendation on conducting range changes for current staff in that classification? Have departments been conducting range changes independently of receiving guidance? What process did you use? If you are conducting range changes independently, did you request a new application or utilize the one from when they were hired and retroactively make the change back to when it was applicable (no further than April 2023)?

Answer: Please have the appropriate departmental representative contact CalHR.

Question: When is the last day SCO will accept STD. 699 Direct Deposit forms via Cal Employee Connect (CEC) for non-new to state employees?

Answer: The goal is to eliminate the submissions of STD. 699's through ConnectHR by October 1, 2023. Agencies and campuses should have employees use the Employee Self-Serve feature in CEC, or enroll in File Transfer Protocol (FTP) to send enrollment data in a file to SCO.

Question: During the CalPERS training on using the Self-Serve feature (for employees to enroll in health plans, change plans, add dependents, etc.), we were told CalPERS is working with CalHR to address the documentation retention policy for benefit forms, since employees would now be enrolling electronically and in some cases, as with employees changing plans during Open Enrollment, there are no forms to print. What determination has been made regarding this?

Answer: CalHR is continuing to work with CalPERS regarding Self-Serve features and document retention for benefits forms. When we have additional direction for retention, we will provide an announcement.

Question: Can SCO provide direction for how to key the CalHR Attorney Series Classification Consolidation, Personnel Letter #23-012?

Answer: Please reference [Personnel Letter #23-012](#) for the specific directions that are provided.

Question: We have been running in a situation with benefits related accounts receivables for multiple employees. We have employees new to state who enroll in health and dental benefits. The health benefits are processed, and an Accounts Receivable (A/R) is issued to for the premiums. The employee is notified of the A/R, payroll deductions are scheduled through ConnectHR and the A/R is satisfied. Then once the dental enrollment is processed, the original A/R for health premiums is reversed (even though it's already been paid) and a new A/R is established for both health and dental. This results in us being required to reverse the payment for the first A/R, and then set up collection for the second A/R. Is there a way that dental A/Rs can be established independent of the health A/R? Or is there a way for the system to see an A/R has already been satisfied and adjust the new A/R? This has caused a lot of confusion for our employees and Accounting office. It also creates a lot of extra work for both the Specialist and SCO who have to process the reversals.

Answer: The only time SCO would reverse an Accounts Receivable (A/R) without an agency request is if the A/R was established in error or has incorrect information. If the A/R was correct, then a separate A/R would be set up for dental benefits without cancelling the first. Please verify all information on the A/R is correct prior to collection via ConnectHR.

Question: What is the process for the Personnel Action Manual (PAM) to be updated with the retirement code changes as they are made? [Personnel Letter #22-013](#) came out in July 2022 regarding changes to BU 02 retirement account code changes; however, this information still has not been updated in the PAM. As I am sure you are aware, the Personnel Specialist (PS) position is an entry level position with a very high turnover rate, meaning that several of our current PSs were not here when this letter was released and would not automatically know about it. Since it isn't realistic to expect staff to search through prior Personnel Letters before determining the 505 code to use for each appointment, we are inquiring about when we should expect this information to be updated in the PAM. This happened with BU 09 a few years back, which caused penalties for the department even though staff used what was in the PAM at that time. It is critical that the information in the PAM is accurate as we direct our staff to always refer to the PAM before keying any transaction. This is becoming more and more difficult for us to do when so much of the information is outdated.

Answer: SCO has begun an effort to update and improve the [Personnel Action Manual \(PAM\) Section 505](#) that contains Retirement Account Codes. We understand that departments would benefit from a more robust reference for determining the appropriate Retirement Account Code for each employee. Our goal is to update the section so that all Account Codes are present and accurate, as well as improve the formatting of the section to better assist departments. We will be sharing updates in each forum as to the progress of this ambitious effort. Additionally, SCO is also updating the [Personnel Payroll Manual \(PPM\) Section B 015](#) to ensure that all Retirement Account Codes are present and accurate.

Question: We have several Permanent Intermittent (PI) employees who elect in the \$840 FLEX. We cannot get pay to issue. When we submit the documents, we never receive a DING, but also pay never issues. Is there a new process or new way to submit these forms?

Answer: These forms should not be submitted until after the control period ends (June 30), and the lump sum cannot be processed until July 1 at the earliest. SCO is processing STD. 701C/STD. 702 PI Cash Option forms from 2022 Open Enrollment now.