June 2023

Transaction Supervisors' Forum Notes

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SURVEY QUESTIONS:

The following questions are submitted prior to the forum via Survey Monkey.

Question: 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 too for the premiums. The employee is notified of the A/R, payroll deductions are scheduled through ConnectHR and the A/R is satisfied. Once the dental enrollment is processed, the original A/R for health premiums is reversed (even though it has 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 independently of the Health A/R?

Answer: In the case where the collected Accounts Receivable (A/R) was reversed and re-established, it was likely that the first health benefit related A/R was inaccurate (e.g. incorrect COBEN allowance, health plan, or party code). Otherwise, a separate A/R would be established solely for the dental deductions. SCO will not reverse an A/R unless it is incorrect, a duplicate, or requested by the agency following appropriate procedures. It is imperative that the Personnel Specialist verify all benefits information relating to the A/R (e.g. health plan, party code, COBEN rate, etc.) is correct before setting up a payroll deduction via ConnectHR. This would include matching the health plan and party code shown in the A/R deductions with myCalPERS.

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 do not receive DING Notices and pay is not being issued. Is there a new process or new way to submit these forms?

Answer: The process remains the same as before. If it is for the current control period then the funds will not issue until after the control period ends. For any prior control periods, please contact the PPSD Statewide Customer Contact Center at 913-372-7200.

Question: When CalHR or SCO releases a payroll/personnel letter, what is the process for the changes to be reflected in the Personnel Action Manual (PAM) and Payroll Procedure Manual (PPM)?

Answer: We understand the importance of our manuals being updated timely. Our teams are working on internal procedures to improve our efforts.

Comment to a Question: The Transaction Supervisors' Forum received an extensive and complex Family Medical Leave Act (FMLA)/California Family Rights Act (CFRA) question for Personnel Services Branch (PSB). There was no contact information provided by sender for follow-up, so we would like to remind departments to please have their designated contact email PSB at PSB@calhr.ca.gov with any specific situations or scenarios as it relates to FMLA/CFRA so that PSB can work on it with you as a team.

Reminder: When you do submit your question via the Transaction Supervisors' Forum survey please be sure to include your contact information; some questions warrant follow-up or further clarification from sender and we want to ensure that we are able to provide an answer for you.

SCO KEY INITIATIVES:

SCOConnect: Cal Employee Connect (CEC) Project/ConnectHR – Mason Duarte (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 6/13/23: 33,394 employees have enabled MFA
    - Direct Deposit:
        - 90% of departments statewide have been deployed
        - As of 6/13/23: CEC has received 8,223 direct deposit transactions
    - Address Change:
        - 90% of departments statewide have been deployed
        - As of 6/13/23: CEC has received 760 address change requests
- ConnectHR
    - Accounts Receivable (A/R) 035 Deduction Collection Feature:
        - This feature has been made available to all agencies
        - As of May:
            - Total of 29,096 A/R 035 deductions have been processed via this feature
            - Total of $6,556,167 has been collected
        - As of 6/13/23:
            - The ConnectHR team sent notice of the feature availability to all remaining agencies via email to Security Monitors and Universal Email
            - 84% 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)

- CSPS Speed of Change
    - 2026-2028 | Commitment Level: Ownership and Commitment
        - Roll Out to Departments
        - Maintain System
    - 2024-2025 | Commitment Level: Support and Knowledge
        - Prep for Go-Live
        - Train Users
        - Pilot with Departments
    - 2023-2024 | Commitment Level: Understanding
        - Onboard Vendor
        - Configure System
        - Educate on Future State

- 2022-2023 | Commitment Level: Awareness
  - Vendor Selection
  - DART Formation
  - Validate Processes
- 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:
  - Formal negotiations with potential system integrators for the CSPS Project has been completed.
  - Technical team completed modifications to the ACA Address Compliance process, and 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 weeks
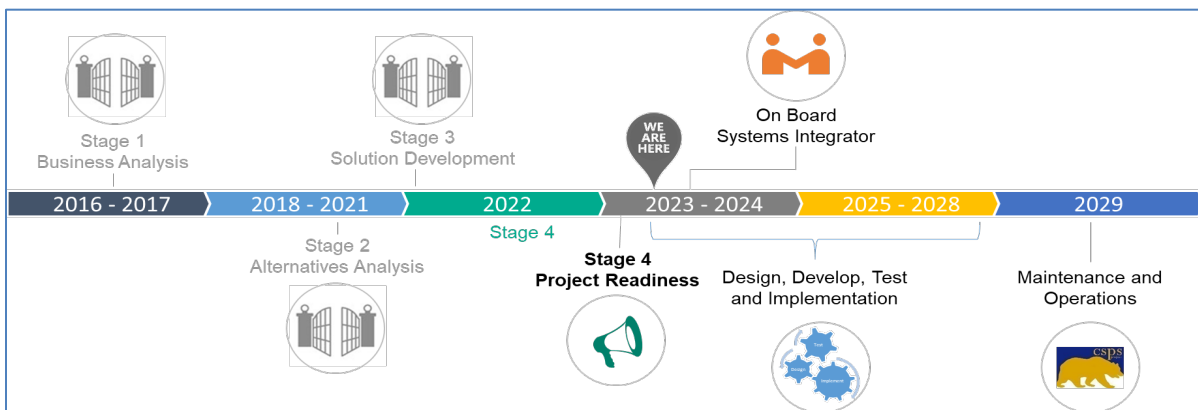
BENEFITS ADMINISTRATION:

Affordable Care Act System (ACA) – Jordan Kergan (ACASupport@sco.ca.gov)

– ACA Compliance Report Reminder

- Updates to the monthly compliance report PDA2050F "Employee Without Appropriate Address" effective 06/01/2023

- Modifications include changes to position status, which will increase the number of records on the report to include:
   - Active or On Leave employees
   - Separations effective 01/01/2023 or later

- Modifications will also be included on the quarterly report, available 08/01/2023

- For additional information please see Personnel Letter #23-013 released 06/01/2023

CalHR – Benefits Division

– Affordable Care Act (ACA) Updates and Reminders – Lisa Hatten (ACA.Policy@calhr.ca.gov)

- The CalHR May ACA Quarterly Compliance Review is currently underway. CalHR noticed approximately 70 departments in early-mid May who had errors in the ACAS older than 90 days.

- Departments who were notified of their outstanding ACAS errors are to correct and certify that the errors were corrected by returning the Quarterly ACA Compliance Notification to ACA.Policy@calhr.ca.gov by **June 16, 2023**.

- Departments are encouraged to utilize existing resource documents available on SCO's website on how to correct the errors in the ACAS (e.g., ACAS User Guide, Scenario-Based Job Aid for Updating the ACAS).

- CalHR is currently reaching out to departments with errors on the detailed safe harbor reports for full-time employees without an offer of health coverage captured in the ACAS. Correction instructions are provided.

- Upcoming training dates are available on SCO's "Affordable Care Act Training" webpage. To request ACA training, departments can send their requests to SCO at: ppsdacatraining@sco.ca.gov.

– Dependent Re-Verification (DRV) – Nafisa Khan (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 with DRV regulation will be monitored and addressed with Health Benefit Officers and FCP Department Admins.
  - March 2023 cycle: HR offices must take necessary steps to remove unverified dependents from dental and vision benefits.
  - June 2023 cycle: Employees have until 6/30/23 to submit their DRV documents for a timely re-verification.
  - Sept 2023 cycle: 90-day Health (CalPERS), Dental and Premier Vision (CalHR) **Initial** DRV notices was mailed out on 6/1/23.
  - 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.
  - Department Personnel Offices can send DRV related questions via email to DRV@calhr.ca.gov.
  - Current response time is five (5) business days
- Open Enrollment (OE) – Nafisa Khan (OpenEnrollment@calhr.ca.gov)
  - Updates
    - The Annual Open Enrollment project has officially kicked off and project tasks are currently in progress.
    - The Open Enrollment Dates for this year will be 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 dates are currently being reviewed and will be shared once finalized.
  - In-Person Benefits Fairs

- o 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 will be shared once finalized.
  - Contact
    - o Departmental personnel offices can send Open Enrollment related questions via email to OpenEnrollment@calhr.ca.gov.
    - o Current response time is five (5) business days.
- − Benefit Programs – Jennilee Betz
  - Dental
    - o Program is current and within 30 days.
    - o 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.
  - A Complete Appeals Package includes:
    - o Justification memo explaining appeal.
    - o Complete and error free STD. 692.
    - o Written confirmation that the employee acknowledges accounts receivables 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.
  - Special Announcement:
    - o 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
    - o Program is current and within 30 days.
    - o 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 cancellation form will delay processing.
    - COVID-related refund requests will no longer be accepted as a justification for deductions beginning January 2023.
    - COVID-related refund requests will no longer be accepted after December 2023 for pay periods that fall within the period from January 2020 through December 2022. Requested pay periods are subject to SCO's 36-month retroactivity limitations.

- Vision
    - 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 for VSP.
    - 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 on vision forms without indication of disabled dependent.
    - Appeals
        - Prior to sending an appeals
            - SCO check
            - AR confirmation if applicable
        - A Complete Appeals Package includes:
            - Justification Memo explaining appeal
            - Complete and error-free vision form.
            - Written confirmation that the employee acknowledges accounts receivables for retroactive enrollment (if applicable).
                - ❖ Once an appeal is approved by CalHR and processed by SCO, we will not cancel or reverse the appeal.
    - 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/
    - Please be patient, kind, and professional

- 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.

- o 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
- o Do not send requests to the Dental or Vision program general email boxes
- o Send requests to visiondental.authorization@calhr.ca.gov

- FlexElect
  - o FlexElect is current and within 30 days.
  - o Reminder to only submit one appeal per email.
  - o Please check SCO Pay Hist for updates approximately 14 business days after you receive the determination from the Flex Unit.
  - o 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
  - o 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
  - o Training Recommendations
    - ➢ Benefits Administration Manual Training – Online CalLearns
    - ➢ Employee Benefits Orientation Training – Online CalHR Webpage
  - o Reminders for Open Enrollment Changes
    - ➢ Check pay history to verify open enrollment changes were processed.
    - ➢ Employees should check their pay warrant for Vision, Legal, and LTD open enrollment changes.
  - o Benefits premiums cannot be waived for months where services are not used.
  - o 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.

- CalHR Benefits' Resources
  - Websites
    - o CalHR Benefits Website: https://calhr.benefitsprograms.info/
    - o BAM Training Questions BAMTraining@calhr.ca.gov
    - o 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 LifeInsurance@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)

– Reminders**:**
- Decentralized Calendar – HBD RETRO SCHEDULE
  - Indicates when system-generated Accounts Receivables are created.
  - Verify Accounts Receivable is accurate prior to using 035 feature on ConnectHR.
- STD. 692 Dental Enrollment Form – Must Use Most Current Version
  - In May 2023, the Civil Service Benefits Unit began sending back outdated versions of STD. 692 Dental forms for correction.
  - The current version date is 03/2021 and can be found here on the Department of General Services website. An autofill version is available for employees on CalHR's benefits calculator website.

PROGRAM UPDATES:

CalHR – Personnel Services Branch – Katie Narvaez (PSB@calhr.ca.gov)

– Supplemental Paid Sick Leave (SPSL)

- Around June 19, SCO will produce a report that identifies employees who have overused SPSL.
- The report will reflect SPSL usage calendar year 2021 and 2022.
- Departments are required to initiate corrections within 60 days of the report being issued.
- This report will rerun monthly so the data will be "refreshed" as records are cleaned up. This means you will have two reruns during those 60 days of the report first being issued.
- Employees who have used too much leave may substitute using a different leave credit or an Accounts Receivable (A/R) must be set up.
- If an A/R is set up, then employee must be immediately notified to ensure they are notified timely within the 3-year statute of limitations.
- A few months back, SCO contacted affected departments that had employees use the 2022 SPSL benefits after the benefit had ended and since then, there are still 76 employees that have not had their records fixed. This is a reminder that those records still need to be fixed.

Statewide Tax Support Program – Rachel Holmes (Contact: PPSDW2MiscDed@sco.ca.gov)

– Salary Advance

- Paycheck Calculator Calculations
- Break down is based on Pay Periods
- Payroll letter #22-003: Salary Advance Reporting Compliance

– References

- Payroll Procedures Manual
  - o Section N 103 - Salary Advances
  - o Section N 109 - Instructions for completing the STD. 422, Salary Advances Paid/Offset Report
    - ➢ STD. 422 Salary Advances Paid/Offset Report

Executive Office (EO) Inquiries – Shelley McCarthy (ppsdeoinquiry@sco.ca.gov)

- What are EO Inquiries?
    - Inquiries that constituents send to SCO using the [Contact Us](#) webpage on the SCO website
        - [Email Inquiry Form](#)

- Top inquiries: May 2023
    - Paycheck: 15
    - Direct Deposit: 11
    - General Information: 6
        - 45% of our May inquiries were sent back to the HR office

- Top inquiries: January-May 2023
    - Taxes & W-2: 110
    - Paycheck: 69
    - Direct Deposit: 32
        - 43% of our 2023 inquiries were sent back to the HR office

- How can you help?
    - Inform your employees by sharing [employee bulletins](#)
    - We ask that HR offices make employees aware of resources available to them such as [SCO State Employees Webpage,](#) [California Public Employees' Retirement System](#), [California Department of Human Resources](#), and [Cal Employee Connect.](#)

- Our responses
    - We provide the employee with contact information for a Personnel Specialist/Supervisor within their departmental HR office. We copy Transactions Managers and the HR Chief. BCC the department's universal email inbox (Personnel Transactions)
        - Encouraged to review/update the [California Personnel Office Directory](#) (CPOD)
    - Access the [Statewide Customer Contact Center](#) (SCCC) and [Escalation Email](#) should you need assistance from the SCO

Human Resources (HR) Suggestions – Natalia Saffold & Siobhan Hallinan (PPSDHRSuggestions@sco.ca.gov)

- We received 14 HR suggestions in the last three (3) months.

- In May, we were able to implement one (1) suggestion. We will continue to share if any other suggestions are implemented at the forum.
    - Creating Military Leave eLearning Modules

- Remember to submit your HR suggestions to the SCO's HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov.

PPSD General Reminders

- When you reconcile payroll, check that these *details* are correct:
    - Withholdings and deductions
    - Employer taxes
    - Hours worked, including overtime, vacation time, sick days, etc.
    - Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is

similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

- 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: Can an A/R that has been changed to payroll deduction through the 035 process be changed back to agency collection through a 674?

Answer: No, once collected the Accounts Receivable (A/R) is considered completed and closed. If a partial payment was made via payroll deduction, the remainder can be collected by agency collection then reported to SCO using the 995A - Agency Collection Accounts Receivable Form.

Question: I attempted to send a 674 Accounts Receivable (A/R) to establish an A/R but I was not able to. Is the 035 function only for collecting an already established A/R?

Answer: The 035 is only used to establish payroll deductions.

Question: For Dental, I have had a couple employees who have had their dependents dropped even though they are current on paying the premiums. Is there a way to avoid this?

Answer: We are actively collaborating with dental carriers to address this issue. If you encounter such cases, please follow these steps: 1. Verify that the employee is enrolled in the correct dental plan and is making deductions for the correct party code by checking SCO's pay history. 2. If the information is accurate on SCO's pay history, please contact the carrier directly to manually enroll the dependents in the employee's dental plan. If the issue persists for the same employee, please email us at dental@calhr.ca.gov, and we will gladly assist you. 3. If the information is not accurate on SCO's pay history and the event occurred within the past 60 days, please submit the STD. 692 form to SCO for processing. 4. If the event occurred more than 60 days ago, you must submit an appeal to CalHR for review and allow 30 days for CalHR to make a determination.

Question: For Flex-Elect, do employees have the option to make a one-time change each year without a permitting event? Or was that just an exception for 2020 and 2021?

Answer: In 2021, the State of California implemented a one-time prospective change, exempting the need for a qualifying event, as part of the COVID Relief Bill. However, at present, a permitting event code is required.

Question: Are you still working on the new Benefits Admin Manual (BAM)? I have run into a few links that don't work and are no longer available on the previous BAM site.

Answer: Please share the links that were not working on the BAM website and we will research to determine why the links are broken.

Question: If I submitted a Flex Elect Appeal and question, and didn't receive a response, should I resend? I sent one in early April.

Answer: Send a follow-up email to flexelect@calhr.ca.gov.

Question: How can I invite my co-supervisor who does not have the link?

Answer: We need more details to this question. I am not sure what link is being referred to here. Please have your program contact the appropriate CalHR program inbox.

Question: Who can we contact for military questions?

Answer: If you have any policy questions, submit them to PSB at CalHR: PSB@CalHR.ca.gov. If you have questions regarding how to complete a payment/adjustment or Accounts Receivable (A/R), call the Statewide Customer Contact Center at SCO (916) 372-7200.

Question: I originally sent my appeal during open enrollment; however, when I received the approval it was for January 2023 not for 07/01/2022. I have resubmitted several times. The employee reaches out to me several times a week trying to obtain information.

Answer: Additional information is needed to respond to this question. Please email the appropriate CalHR program inbox that you submitted the appeal to.

Question: Is it possible to get the monthly 672s as fillable PDFs?

Answer: All versions of the 672 are editable. If you are having trouble adding information to the Adobe document, make sure you are opening it with Adobe Reader, Adobe Pro, or Adobe DC, not through your web browser. Once opened in one of these programs, select Fill and Sign and you should then be able to add information to the document. You should work with your department IT if you have further issues.

Question: Are departments no longer receiving turnaround PARs along with NOPAs?

Answer: NOPAs and Turnaround Pars are both available on Mobius View.
https://www.sco.ca.gov/ppsd_feb_3_2023.html
https://www.sco.ca.gov/ppsd_apr_26_2023.html

Question: Is there any update to the keying procedures for Personnel Letter #23-012? I have called the Statewide Customer Contact Center and they are waiting for direction from CalHR.

Answer: SCO released a revised version of Personnel Letter #23-012 on June 16, 2023.

Question: Are half sheets going to continue to be mailed to departments since they are available on Mobius?

Answer: Accounts Receivable half sheets should not be going out in paper format. These documents have been available on ViewDirect and Mobius View for several years. There are paper accounting half sheets that are still going out to accounting offices. You can differentiate the two by looking for the employee's Social Security Number (SSN). The accounting half sheets do not have the SSN, the payroll half sheets do. PPSD is also reviewing its procedures and if it finds that the half sheets are still being sent out, will immediately cease printing them.

Question: If an A/R was set up after an employee transferred to a new department, can they use leave to cover this A/R? The employee is requesting this method.

Answer: Yes, leave can be used to satisfy the Accounts Receivable (A/R). The MOU language isn't nullified because someone changes departments. Please refer to the SAM accounts receivable collection and the employee's MOU.

Question: If the Supplemental Paid Sick Leave (SPSL) began at the end of December 2021 and continued through the beginning of January 2023, would the SPSL still apply?

Answer: If this is supposed to be December 2022, then the answer is yes, if the employee started using SPSL in December 2022 and there was no break in the usage, then the usage can continue into January 2023.

Question: Do we key the appointment and then submit a request for approval for the back pay prior to 1 year? Or do we not key and request prior approval to key?

Answer: You may update Employment History, but all retro pay requests exceeding 12 months must be approved by CalHR.

Question: PDFs are not fillable when I download as fillable PDFs from Mobius.

Answer: All versions of the 672 are editable. If you are having trouble adding information to the Adobe document, make sure you are opening it with Adobe Reader, Adobe Pro, or Adobe DC, not through your web browser. Once opened in one of these programs, select Fill and Sign and you should then be able to add information to the document. You should work with your department IT if you have further issues.

Question: Keying two 335s with the same effective date leads to confusion.

Answer: Key the A20 then a 335, if needed.

Question: Do you not key the A20 and then the 335? Is that what is not working?

Answer: Key the A20 then a 335, if needed.

Question: Per the meeting yesterday with CalHR, A20 into range A and then 335 to range B.

Answer: Key the A20 then a 335, if needed.

Question: Do we not key the SAL or are we waiting for further guidance?

Answer: SCO released Personnel Letter #23-015 regarding both the General Salary Increase and Salary Adjustment that some bargaining units are receiving effective 7/1/2023. That letter is here: https://www.sco.ca.gov/Files-PPSD-Letters/Pers/2023_e23-015.pdf. For the Attorney Consolidation, the updated letter is here: https://www.sco.ca.gov/Files-PPSD-Letters/Pers/2023_e23-012.pdf.

Question: Is the Industrial Disability Leave (IDL) section of workers comp going to be able to catch up with past transactions? So far they have only reached up to 10/2022.

Answer: SCO is working diligently on our backlogged workloads.

Question: They also said that the SAL would be included in the A20, not a separate SAL.

Answer: Updated information for the Attorney Consolidation is here: https://www.sco.ca.gov/Files-PPSD-Letters/Pers/2023_e23-012.pdf.

Question: Who do we contact at CalHR for BU 2 questions?

Answer: Consolidation@calhr.ca.gov

Question: Is there any way we can get access to Delta Dental's Eligibility Management Account (EMA)? It sounds like this is a similar program to myCalPERS and would allow Personnel Offices to quickly fix enrollment issues (especially since dependents are frequently dropped/not properly added during Open Enrollment). This would be so helpful. I have asked Delta who would be able to do this, and they told me to ask my system administrator. I am assuming this would be CalHR?

Answer: Unfortunately, the option to address such issues directly through state personnel offices is not yet available. Therefore, we recommend that you continue to contact Delta Dental to resolve any problems related to employees or dependents. If the issue persists with the same employee, you can also contact the dental unit at CalHR by emailing us at dental@calhr.ca.gov, and we will be more than happy to assist you.

Question: Are the instructions from SCO regarding the Attorneys going to be updated? We are keying, and need to know if we can proceed.

Answer: Updated information for the Attorney Consolidation is here: https://www.sco.ca.gov/Files-PPSD-Letters/Pers/2023_e23-012.pdf.

Question: Is there a report coming out in the future to get a list of A/Rs in the ConnectHR? I am having surprise A/Rs from employees transferring in.

Answer: The losing HR office must indicate on the 612 if the employee has outstanding A/Rs and the method of collection.

Question: We have old California Leave Accounting System (CLAS) for Holiday Credit from 2018 that CLAS transaction will not let us subtract the balance and move the balance forward. What options do I have? There are approximately 35 employees.

Answer: Once the department has put the hours into their department's name, you only need to contact the California Leave Accounting Unit to delete the old benefits.

Question: Who can we reach out if we are not able to download the 672s that are fillable?

Answer: All versions of the 672 are editable. If you are having trouble adding information to the Adobe document, make sure you are opening it with Adobe Reader, Adobe Pro, or Adobe DC, not through your web browser. Once opened in one of these programs, select Fill and Sign and you should then be able to add information to the document. You should work with your department IT if you have further issues.

Question: I have an employee that transferred and had a Holiday Credit, and it will not let the new agency use it. What do we do with this one?

Answer: You need to transfer the holiday credit to the new agency. If you are still having issues or the leave was accrued prior to 2018, contact the CLAS Unit at (916) 327-0756.

Question: If there are certain reports that aren't available to us on Mobius, who can we reach out to?

Answer: Access to reports on Mobius View and View Direct can be directed to PPSD's Decentralized Security Administration. The email address is DSA@sco.ca.gov.

Question: I have an employee that transferred and had a Holiday Credit and it won't let the new agency use it. What do we do with this one? If it wasn't transferred to the new department, Cal Employee Connect (CEC) can't see it. CEC only reflects their current department leave. So if Holiday Credit (HC) isn't transferred, they don't see it. We can see on the CLAS side.

Answer: You will need to transfer the Holiday Credit to new agency. If it wasn't transferred to the new department, Cal Employee Connect (CEC) can't see it. CEC only reflects their current department leave. If you are still having issues or the leave was accrued prior to 2018, contact the California Leave Accounting System (CLAS) Unit at (916) 327-0756.

Question: Can Personal Holiday (PH) in-lieu of the new holidays be used more than once if they have more PH in the system?

Answer: No, per the policy, this is only to be done one time per fiscal year.

Question: Regarding Dependent Re-Verification (DRV), do we submit an administrative document to drop from dental and vision if the employee does not submit the documentation?

Answer: Yes, you will submit a STD. 692 with administrative cancellation just for dental to SCO. For Premier Vision Cancellation, you will need to fill out a CalHR 774, electing "Cancel" and submit to VSP.

Question: If there is no premium change, but a dependent should come off, does SCO still want the document? Or just call the carrier to take off?

Answer: Yes, please still send the STD. 692 with the dependent being noted for deletion. SCO sends the processed form to the carriers who will then remove the dependents. Premier Vision is solely done through VSP, so please do not send the CalHR 774 to SCO.

Question: Do flags need to be cleared so they can generate/print?

Answer: Yes.

Question: Has anyone been able to get access to Non-Industrial Disability Insurance (NDI) or State Disability Insurance (SDI) online? Are we only able to get these electronically? How do agencies get access to EDD online?

Answer: Please reach out to the Employment Development Department (EDD) directly.