



Transaction Supervisors Forum

March 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:** When an employee passes away their dependents are entitled to a 120-day survivor benefit. My agency works with our accounting office to obtain checks for the premiums and mail them to the applicable carriers. When the new Fi\$Cal system was implemented a few years ago, accounting offices were now required to log in each contact as a supplier (vendor). When it is an outside contact, they require a STD 204 be completed with the carrier's contact information, address, and signature. My manager completed this process a few years ago, but we are finding that carrier's information changes and we have to update the STD 204 each time. This information is difficult for HR offices to obtain, as most of the representatives have little to no training on survivor benefits and cannot give me a contact. Since the Fi\$Cal system is used by all agencies and supplier/vendor information is shared, is it possible for CalPERS and CalHR to maintain the STD 204's for health, dental, and vision carriers? This would eliminate the need for each HR office to find out if the information had changes, and ensures the payments are made timelier so that the family can utilize benefits without a lapse.
 - **Answer (CalHR – Chiara Galloway):** We are gathering all of the information needed from our carrier partners. What we'll do is create a section on our website that addresses this which will provide contact information. We'll also make sure that we notify the personnel specialist of its availability for future reference. We'll maintain any updates for personnel offices as well.
- **Question:** Will the 674's be got up soon, SCO is still on 09/22/2020? I have employees who want to know when there pay will be corrected. Employees also want to know how soon after the 674's from 2020 are entered they will receive a corrected W-2.
 - **Answer (SCO – Renee McClain):** We are currently working on 10-6 for 674s & 10-9 for 674 ARs. We have 8 employees who are working these workloads currently. I can't provide a specific timeframe on when exactly we'll be caught up. W-2s issue on the current tax year, this information will be included on your current W-2. If the 674 is for issuing pay that'll be based on issue date so that will be issued in 2021, included in wages for this year. If it's for an accounts receivable

for a prior year, they will receive a corrected W-2 which will generate the following month that the AR has established.

- **Question:** The concern is that if the manager receives the COBEN Cash and the chosen benefits premiums are a small amount, the employee receives the cash difference and also receives the health benefits stipend, will this potentially cause an overpayment?
 - **Answer (SCO – Rebecca Doctolero):** We haven't had this issue come up yet. The stipend is only for those who have benefits. It doesn't reference whether or not the amount is too low or too high, or even if the Consolidated Benefits (CoBen) covers the entire benefits. At this point we'll say there is no effect and there won't be an overpayment.
- **Question:** Do we include the reduced Voluntary Paid Leave Program (VPLP) rate when calculating rate of pay for ESPLA leave?
 - **Answer (SCO – Renee McClain):** The VPLP will not be included in the rate. The employee has to be paid at the regular rate of pay which is their base salary, not including VPLP.
- **Question:** Can SCO provide an update on making the Notice of Personnel Action (NOPA) accessible electronically?
 - **Answer (SCO – Nastassja Johnson):** We've put in a request with our technical team to prioritize this. We do not have a response back on when this will be implemented and what the details are.
- **Question:** Will Administrative Time-Off (ATO) be granted for employees to receive the Covid-19 vaccine?
 - **Answer (CalHR – Kim Herlache):** I recently sent an email blast to all personnel officers we have in our ListServ. If a department wants to grant a reasonable amount of ATO time for employees to receive their Covid-19 vaccine they can do that. They just need to document what the benefit to the state is on allowing them the time off. This should be applied equitably to everybody.

Program Updates

- ❖ **Fiscal Year End Letters, Student Garnishment Suspension, New Child Support Lump Sum Garnishment, \$260 Health Care Cash Payment, Max Compensation Project – Arlene Bailey (SCO)**

- Fiscal Year End Letters: We have released our first one back in February. This was regarding enrollment into our FTP files for schedule 8. We are no longer printing the schedule 8. Responses back for the FTP signups were due March 8th. A few more letters will also be coming out in April.
- Update Student Garnishment Suspension – These are extended out to September 30, 2021. The only exception is if a lender is a non-department of education owned lender, they do have an option to still reestablish that garnishment.
- New Child Support Lump Sum Garnishment – 339-00
- Max Compensation Project
- \$260 Health Care Cash Payment: a report will be available that will identify employees who have received either COBEN or Flex Cash and the \$260 health payment-being overpaid. This report will be ran every month on view direct.

❖ **Reminders and Updates to Certification Process – Michelle Norris (CalPERS)**

- Appeal status updates – Contact dental@calhr.ca.gov or flexelect@calhr.ca.gov
- Did you know?
 - The paper MEM-1344 was replaced with an online method for you to submit the Request for Employment Information.
 - Your agency will be notified based on your notification preferences in MyCalPERS to complete the employment certification if for an arrears.
 - If for a service credit purchase request this is now initiated by the employers electronically only through the MyCalPERS system.
 - The letter for this request is titled Request for Employment Information.
 - Will consist of two sections:
 - Employment Information
 - Payroll Detail/Earnings information
 - Your agency will have 30 days to complete the certification in MyCalPERS.
- What causes an arrears?
 - Under Gov. Code section 20283 of the Public Employees’ Retirement Law (PERL), employers have 90 days to establish membership in MyCalPERS.
 - Enrollments entered into MyCalPERS outside of the 90-day time frame are considered late.
 - Membership date input error
 - Missing payroll
 - Employer updated appointment
 - Service prior to membership request
- Reminders?
 - Arrears notifications: The two places to check are Member Self-Serve (MSS) or the reporting/request tab.

- Get your appointment entered on time.
 - Submit SPM requests early.
 - Waive and reconsider determinations.
- System Logic
 - A nightly batch process captures the retirement appointments entered that day in MyCalPERS with an effective date more than 90 days in the past.
 - When a retirement appointment is entered with a start date of more than 90 days in the past, your agency will receive a Notification of Reported Late Appointment. You may access this notice by selecting the Document History left-side link.
 - Enhanced Student Guide (MyCalPERS Employment Certification Functionality)
 - Updated January 16, 2021
 - <https://www.calpers.ca.gov/page/education-center/employer-education/employer-training-classes/mycalpers-student-guides>
- ❖ **Official Personnel Folder (OPF), Payroll Action Request (PAR), and 612 Submission - Employee Transfer – Kim Herlache (CalHR)**
 - ❖ **Lump Sum Update, Emergency Paid Sick Leave Act and 612 Submission – Renee McClain (SCO)**
 - Lump Sum Update: We are still processing some from the 2020 tax year. If you ask questions please refer to the processing steps of your department.
 - E-FMLA/EPFLA: We are no longer processing these as a priority workload. Those are going into the backlog and work by received date.
 - PPSD Temp Ops Mailbox: We've been getting a lot of questions and inquiries. This is for document submission only. Please submit the PDF to the specific area as well to avoid confusion & include area in subject line.
 - ❖ **W-4 Employee Action Request and Internal Revenue Services (IRS) Lock Letters – Monique Perez (SCO)**
 - Employee Action Request (EAR): My unit (W-2 miscellaneous deductions unit) is currently working on IRS Lock letters. Please be advised that when sending EAR inquiries in, we mainly deal with IRS Lock Letters. We will answer general EAR questions for you.
 - I am going to go over what we are unable to answer:
 - Address & name changes
 - Determining withholding amounts

- If you incorrectly enter in the EAR, do not key again. This can cause multiple deduction code errors. Which will take time for my unit to redo.

❖ **W-4Employee Action Request– Tracy Gutierrez (SCO)**

- The 2020 Employee Action Request (EAR) Std. 686 Form and Federal Withholdings Toolkit is available:
- Link to Toolkit: https://www.sco.ca.gov/ppsd_2020fedwithholdings.html
 - EAR Quick Start Guide
 - EAR Keying Guide
- Upcoming e-Learning is currently in development.
- Currently in development
- Target Date - June 2021

❖ **Business System Enhancement & Special Projects Unit– Pliny Reynolds (SCO)**

- Other Post-Employment Benefits (OPEB) Automation Project: It's a prefunded mandatory deduction of benefits to help offset rising benefit costs. To be eligible an employee must be eligible for health benefits. The rule of our OPEB automation project is to fully the OPEB withholding process.
- Our project is currently in user acceptance testing.
- We look to completing our first phase of testing in March.
- Our next effort will be to incorporate the maximum compensation limits onto OPEB.

❖ **Cal Employee Connect Human Resources Portal Update – Liz James (SCO)**

- Connect Human Resources Portal (ConnectHR): This is the portal that will be used by HR shops. If you have a CC account this will be similar.
- I will present a demo for everyone to inform you all more of how the tool works.

Benefits

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

- We have a reminder to personnel staff to contact VSP directly for vision inquiries other than appeals.
- It's much more efficient to email them, with employees name in the subject line.

- Assist perspective retirees in completing the CalHR 695 form, if they wish to continue vision benefits into retirement-they have 60 days to do so. Please send forms directly to VSP. CalPERS does not process these forms.
- Vision backlog is caught up to mid-February.
- Vision forms should be updated on our website soon: Makes the form more user friendly.

❖ **2021 BAM Training; Dental, FlexElect and CoBen Program Updates - Chiara Galloway (CalHR)**

- If a birth child has been verified in a previous cycle, then they will not have to re-verify in future cycles.
- We have BAM (Benefits Administration Manual) training scheduled for April 27th 2021.
- Registration is through CalLearns and you can register now.
- We are currently finalizing the 2-day schedule for it.
- Dental FlexElect & CoBen: Consolidated appropriations act of 2021 (Signed December 2020) as well as IRS notice act 2021-15.
- We had to wait for the IRS notice to take action. We have now been able to review what actions are available under both of these notices.
- We did make some changes in 2020 to help including the ability to cancel coverage midyear without a permitting event.
- In the consolidated appropriations act of 2021 the things that are included are:
 - Extending the grace period for the 2020 plan year
 - Extending the claims filing deadlines
 - Extending attendance that has aged out at age 13 to age 14
- The American Rescue Plan Act of 2021 was unexpected, and supports that for 2021 the maximum election for the dependent care reimbursement account can be increased from \$5,000 to \$10,500 for the 2021 claim year only. We are currently reviewing these impacts along with the consolidated appropriations act of 2021. This is optional not mandatory so it may not be implemented in priority.

Closings

❖ CalHR Benefits' Resources

○ Websites

- Human Resources: <https://www.calhr.vs.gov/state-hr-professionals>
- State Employees: <https://www.calhr.ca.gov/employees>

○ Contacts

- ACA Program ACA.Policy@calhr.ca.gov
- Dependent Re-verification Program DependentRe-verificationProgram@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
- CalHR Suggestions and Feedback benefits@calhr.ca.gov

❖ SCO Resources – Nastassja Johnson (SCO)

○ Websites:

- Human Resources: https://sco.ca.gov/ppsd_state_hr.html
- State Employees: https://sco.ca.gov/ppsd_se_payroll.html

○ Contact:

- [Statewide Customer Contact Center](tel:9163727200) (916) 372-7200
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Cal Employee Connect Email connecthelp@sco.ca.gov
- Cal Employee Connect Feedback Email connectfeedback@sco.ca.gov

○ SCO Key Initiatives:

- [Cal Employee Connect Project](#)
- [CalATERS Replacement Project](#)
- [California State Payroll System Project](#)

CUSTOMER RELATIONS SURVEY:

Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov

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