



March 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 an employee promoted from rank in file to supervisory. He submitted a dental form to enroll into PPO Plus Premier Excluded within the 60 days of his eligible appointment. He previously did not have coverage. We submitted the form on 10/2022 with a permitting event code of "40." As of today, the document has not been processed. We called and the representative instructed us to change the permitting event code to "01" instead. What is the correct permitting event code for this type of change/scenario?

**Answer:** The code "40" is part of the Dental Changes category of the Dental Program Permitting Event Code Chart as stated on the top of page 7. The code "40" would be appropriate if the employee is changing Bargaining Unit AND has new dental plan options while currently having some other dental coverage with the state. For this scenario, there is no previous dental coverage at all to change. The permitting event code would therefore need to be "01" as it is technically a new dental enrollment.

**Question:** When will SCO catch up on dental forms as we have to call often to add dependents or changes over the phone? The weekly processing dates shows the following: New (2/02/2023), Cancel (2/16/2023), and Change (11/14/2022). However, these dates are not accurate as we have to call for changes back to October.

**Answer:** The SCO is currently using multiple strategies to catch up on Dental and other workloads. We are projecting to be within 30 days of current date on all dental workloads by mid-April. The processing dates are accurate based on current workloads. Please contact the Statewide Customer Contact Center at [Statewide Customer Contact Center](#) (916) 372-7200, if a form has not been worked and past the processing dates.

**Question:** With PARs and NOPAs now being available via Mobius, is there a way to separate them by unit like the 672s are each month?

**Answer:** This may be possible. We have inquired about our ability to do this as well as how long it would take. If possible, it would have to be prioritized with the rest of our projects.

**Question:** Is there a way to reach Disbursements? Messages have been left with no follow-up.

**Answer:** Disbursements apologizes for any inconvenience to our customers while we piloted the voicemail feature using VOIP (voice over internet protocol). This new process, coupled with staff shortages, caused extra work for our staff that resulted in some calls not being returned timely. We have decided to discontinue the voicemail feature, so that a live staff member may answer the phone calls during office hours, Monday through Friday, 8AM – 5PM. While we are still challenged with staff shortages, we hope this change will assist customers better.

**Question:** We downloaded the exceptions from the family connect portal as soon as they became available. We were working them on a flow basis but early this week, they disappeared. We have not completed our review. What happened?

**Answer:** CalHR resolved several data issues with the carriers in the past couple of months, but they needed to be cleared in FCP. We have performed a reset of all the exceptions in FCP, which has erased all of the data issues that were submitted by the carriers up until February 2023. Starting with the file that is uploaded on March 10th, only truly unresolved issues will be displayed as exceptions in FCP.

## SCO KEY INITIATIVES:

**SCOConnect: Cal Employee Connect (CEC) Project/ConnectHR** – M. Robinson ([ConnectHRhelp@sco.ca.gov](mailto:ConnectHRhelp@sco.ca.gov))

Cal Employee Connect (CEC)

- CEC Phase II – Employee Service features
  - Multifactor Authentication (MFA):
    - Now available to all Cal Employee Connect (CEC) users
    - As of 3/13/23: 9,207 employees have enabled MFA
  - Direct Deposit:
    - 90% of departments statewide have been deployed
    - As of 3/13/23: CEC has received 5,028 direct deposit transactions
  - Address Change:
    - Deployment has begun in wave approach
    - As of 3/13/23, this feature has been enabled in pilot mode to 10 agencies
    - CEC has received 10 address change requests

ConnectHR

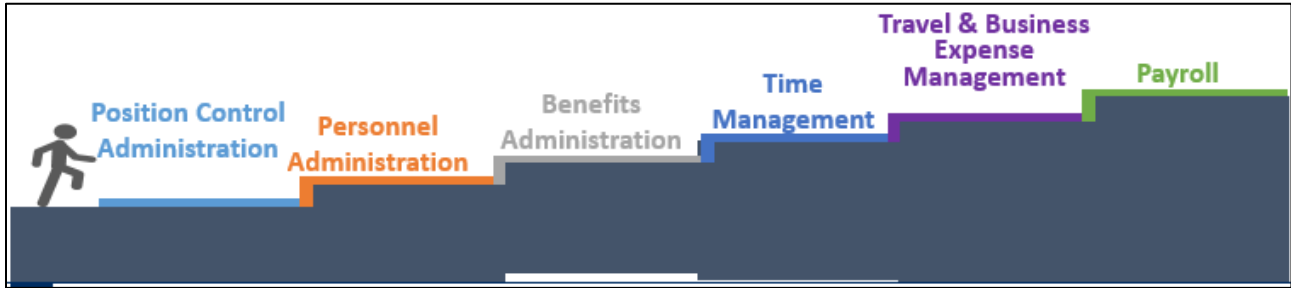
- A/R 035 Deduction Collection Feature:
  - As of 03/09/23, this feature has been made available to all agencies
  - As of 03/13/23:
    - The ConnectHR team sent notice of the feature availability to all remaining agencies via email to Security Monitors and Universal Email
    - 94 out of the 179 departments/agencies have been enabled. This number includes Wave 1, 2 and the Pilot groups
    - Total of 13,292 035 deductions have been processed via this feature
    - Total of \$2,962,970.93 Accounts Receivables has been collected

**SCO – [California State Payroll System \(CSPS\) Project](#)** – Stephen Hamilton-Archer (Contact: [CSPSHelp@sco.ca.gov](mailto:CSPSHelp@sco.ca.gov))

- Organizational Change Management (OCM) and Department Agency Readiness Teams (DARTs)
  - Focus on the people side of change
  - Support departments in building their DARTs
  - Four objectives of DARTs:
    1. Voice
    2. Partnership
    3. Collaboration
    4. Communication

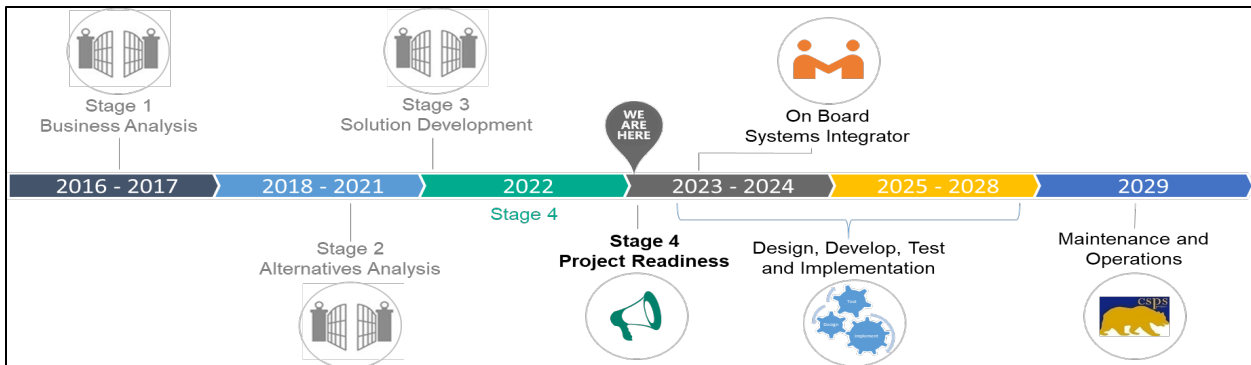
– Project Information:

- **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, Benefits, Position Control, Time & Attendance, Travel & Business Expense 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:

- We are currently evaluating bids from potential vendors for the CSPS Project
- In February, we met with the DART Liaisons to help them understand the role of the DART Coordinators and Subject Matter Experts (SMEs)
- Departments have until the end of May to identify SMEs and Coordinators to their assigned ACE
- The OCM Agency Change Experts will conduct initial outreach meetings with their departments throughout March



## BENEFITS ADMINISTRATION:

### Affordable Care Act Program – Jordan Kergan (Contact: [acasupport@sco.ca.gov](mailto:acasupport@sco.ca.gov))

- Reminder for departmental HR staff to perform cleanup efforts in the Affordable Care Act System (ACAS) in preparation for the 20201095-C Corrections process
  - Affordable Care Act (ACA) will be beginning this process in May of 2023
  - HR staff can locate their departments ACA compliance reports on View Direct and/or Mobius View
  - HR staff to correct errors listed for their department listed on each compliance report
  - For assistance please contact ACA Help Desk at: [ACASupport@sco.ca.gov](mailto:ACASupport@sco.ca.gov)
- Training (Contact: [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov))
  - CalHR – “ACA Policy” Part 1: Tuesday, April 4, 2023 (9:00 am - 10:00 am)
  - SCO – “ACAS” Part 2: Wednesday, April 5, 2023: (9:00 am - 11:30 am)
  - Limited to 25 attendees per session; Waitlist available
  - For assistance please contact ACA Training Team: [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov)

### CalHR – Benefits Division

- Affordable Care Act Program – Lisa Hatten ([ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov))
  - Quarterly Compliance Review
    - The February Affordable Care Act (ACA) Quarterly Compliance Review notices were sent to departments in early February who had errors in the ACAS that were older than 90 days.
    - Departments who were notified of their outstanding errors have until March 17, 2023, to certify that all outstanding errors were corrected by returning the “Quarterly ACA Compliance Notification” document to [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov).
    - Departments should refer to the State Controller’s Office (SCO) “ACAS User Guide” and “Scenario-Based Job Aid for Updating the ACAS,” available on the SCO’s website for information on how to correct the errors.
    - CalHR will now include the report name and number in the title of each error report to assist departments in locating the applicable compliance reports with errors.
  - Detailed Safe Harbor Outreach
    - CalHR’s Detailed Safe Harbor Outreach is underway. Departments with errors observed on the Detailed Safe Harbor Report for the state’s full-time employees who are eligible for health benefits but the ACAS record for the employee reflects otherwise. Correction instructions will be provided.
  - ACA Training
    - CalHR and SCO will facilitate the next ACA training in April. Departments should send their requests for training to SCO at: [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov).
      - Tuesday, April 4 from 9 to 10 a.m. (Part I Module)
      - Wednesday, April 5 from 9 to 11:30 a.m. (Part II Module)
      - Additional training dates for 2023 will be announced soon and posted on SCO’s “Affordable Care Act Training” webpage.
    - Virtual Benefits Fair [BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)

- Dependent Re-Verification (DRV) – Nafisa Khan ([DRV@calhr.ca.gov](mailto: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
  - 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
    - March 2023: 90-day Dental and Premier Vision *Initial* (CalHR) DRV notices will be mailed out for June 2023 birth month cycle
  - Department Personnel Offices have started processing dental and premier vision dependent re-verifications through the Family Connect Portal (FCP)
  - The current health DRV process through CalPERS will remain unchanged
  - With this launch, department compliance with DRV regulation will be monitored through Family Connect Portal (FCP)
  - The DRV Unit at CalHR will continue to monitor and adjust processes while remaining aligned with the DRV regulations and policies. Family Connect Portal (FCP) is an interim solution to CSPS.
  - The DRV Unit will provide HR offices with guidance and assistance with the Family Connect Portal and all tasks related to DRV
  - All DRV & FCP procedures, manuals, and FAQs have been posted in the DRV section of the Benefits Administration Manual (BAM) on CalHR Benefits Website.
    - [DRV – Benefits Administration Manual \(BAM\)](#)
    - [FCP Manual for State HR Professionals](#)
    - [DRV – Benefits Administration Manual \(BAM\)](#)
    - The password for the State HR Professionals page is 2021StateHRP
- Contact
  - Before contacting the DRV Unit with policy and procedure related questions, please review all DRV Resources provided
  - Department Personnel Offices can send DRV related questions via email to [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)
  - Current response time is five (5) business days

– Benefits Programs – Kristin Wilsey

- Dental
  - Program is current and within 30 days.
  - Reminder about 24-month PPO restriction
    - Employees need to complete the full 24 months before they are eligible to enroll in a PPO dental plan. For example, an employee hired in December 2020 is not eligible to enroll in a PPO plan until January 2023.
- Appeals Issues
  - We continue to receive incomplete/incorrect STD 692 forms. Please review and audit forms prior to submission to CalHR.
  - 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.
  - Enrollment is not on a current basis.
- Request for additional information
  - Respond to existing appeal email.
  - Do not send a new email. A new email will be paced in the cue for processing.
- A Complete Appeals Package includes:
  - Justification memo explaining appeal
  - Complete and error free STD 692
  - 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.
- Third Party Pre-Tax Parking Reimbursement Account
  - 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 cancellation form will delay processing.
  - Special announcements
    - The 2023 Monthly Deduction Amount - HR Announcement was released on December 9, 2022. For 2023, the monthly deduction limit for qualified parking is \$300. This amount is an increase of \$20 over the limit of \$280 in effect for the year 2022.

- 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.
  - Recommendation for form submission email subject
    - Premier Vision Enrollment\_Employee Name (Last Four)
    - Retiree Vision Enrollment\_Retiree Name (Last Four)
  - Appeals
    - Prior to sending an appeal, confirm employee information in SCO miscellaneous deductions.
    - Complete Appeals Package includes:
      - Justification Memo explaining appeal
      - Copy of completed forms submitted and any confirmation documents that were received at time of submission.
      - Written confirmation that the employee acknowledges accounts receivable for retroactive enrollment (if applicable).
  - VSP Contact Information
    - Phone Number: 800-400-4569
    - Email: [stateofca@vsp.com](mailto:stateofca@vsp.com)
    - Fax: 916-389-8304
    - Employee Website: <https://stateofcaemployee.vspforme.com/>
    - Retiree Website: <https://stateofcaretiree.vspforme.com/>
- Vision Dental Authorization Portal
  - Program is current and within 30 days.
  - The new template requires departments to provide their agency code and in the exact format provided within the template.
  - Requests to add, update, or delete employees must come from a supervisor or manager listed in SCO's California Personnel Office Directory.
- FlexElect
  - FlexElect is currently at 60 days for processing appeals.
  - 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](mailto:asi@asiflex.com).
- General Program Updates or Reminders
  - Training Recommendations
    - Benefits Administration Manual Training – Online CalLeans
    - Employee Benefits Orientation Training – Online CalHR Webpage
  - 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.
  - Benefits premiums cannot be waived for months where 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.
- CalHR Benefits’ Resources
- Websites
    - CalHR Benefits Website: <https://calhr.benefitsprograms.info/>
    - BAM Training [BAMTraining@calhr.ca.gov](mailto:BAMTraining@calhr.ca.gov)
    - Healthier U Connections: <https://www.calhrwellness.com/en/welcome-california-state-employees/>
    - Human Resources: [calhr.ca.gov/state-hr-professionals](http://calhr.ca.gov/state-hr-professionals)
    - State Employees: [calhr.ca.gov/employees](http://calhr.ca.gov/employees)
    - HR Manual: [hrmanual.calhr.ca.gov/Home/ManualItem](http://hrmanual.calhr.ca.gov/Home/ManualItem)
  - Contacts
    - ACA Program [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)
    - Dependent Re-verification (DRV) Program [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)
    - Dental Program [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)
    - FlexElect/CoBen Program [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)
    - COBRA [COBRA@calhr.ca.gov](mailto:COBRA@calhr.ca.gov)
    - Vision [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)
    - Dental/Vision Authorization Portal [VisionDental.Authorization@calhr.ca.gov](mailto:VisionDental.Authorization@calhr.ca.gov)
    - Long Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)
    - Life Insurance [LifelineInsurance@calhr.ca.gov](mailto:LifelineInsurance@calhr.ca.gov)
    - Group Legal [Grouplegal@calhr.ca.gov](mailto:Grouplegal@calhr.ca.gov)
    - Third Party Pre-Tax Parking Reimbursement Account [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)

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

– Updates

- Weekly Processing Dates – Civil Service Benefits
  - Dental News & Cancels back to within Service Level Agreement (30 days).
  - Going to be focusing on Dental Changes and STD. 674AR workloads. Higher volume but progress will be seen.
  - We have begun receiving Dependent Eligibility Verification/Dependent Re-Verification forms for March 2023. Please ensure your staff are timely in sending appropriate forms for deleting or re-adding dependents.

– Reminders

- If you have an employee that inquires about dropped benefits coverage, be sure to check pay history prior to calling the Statewide Customer Contact Center.
- Look for Payment type "P" payments or Accounts Receivables set up and check the deductions screen. Those may indicate the deduction or payment has already been issued.
- Please have Specialists check [Weekly Processing Dates](#) prior to calling Statewide Customer Contact Center.
- For emergent inquiries, please use the [Escalated Email Instructions](#) found on SCO website.

## PROGRAM UPDATES:

### Statewide Civil Service Audits Program – Renee McClain (Contact: SCCC @ (916) 372-7200)

- Reminders:
  - Select the appropriate program area when calling the [Statewide Customer Contact Center](#).
  - Be sure staff are using the references they have available to them before contacting SCO.
  - The [ConnectHR](#) document directory can be used to identify what program area to contact for assistance with document completion and payment history details.

### Statewide Customer Contact Center – Christina Campbell (Contact: SCCC @ (916) 372-7200)

- Reminders:
  - If you have document inquiries, before calling the Statewide Customer Contact Center (SCCC) be sure to check payment history prior to calling the SCCC.
  - When calling the SCCC please remind your staff to not use speakerphone as this makes it very difficult for our teams to hear.
  - Please have Specialists check [Weekly Processing Dates](#) prior to calling SCCC.
  - For emergent inquiries, please use the [Escalated Email Instructions \(supervisors/managers only\)](#) found on SCO website.

### Statewide Tax Support Program – Monique Perez

- Nonresident Alien Compliance – (Contact: [PPSDSTSP@sco.ca.gov](mailto:PPSDSTSP@sco.ca.gov))
  - Revised [Personnel Letter #23-002 – Verification of Employees Identified as Nonresident Alien](#).
  - Documents should be uploaded directly to [ConnectHR](#).
    - Any inquires please contact PPSD Tax Support Team email at [PPSDSTSP@sco.ca.gov](mailto:PPSDSTSP@sco.ca.gov).
  - All departments should verify the nonresidents and report any changes to add or delete employees, and indicate no changes or no nonresidents to report.
  - PPSD Tax Support team will be reaching out to departments/campuses who have not reported by March 15, 2023.
- Deceased Data Sheet Form PPSD21 – (Contact: [PPSDW2MiscDed@sco.ca.gov](mailto:PPSDW2MiscDed@sco.ca.gov))
  - [Payroll Letter #22-002: Deceased Employees and Designees/Beneficiaries](#)
  - Fill and print Form PPSD21
    - [https://sco.ca.gov/ppsd\\_state\\_hr\\_tax\\_support.html](https://sco.ca.gov/ppsd_state_hr_tax_support.html)
- Salary Advance:
  - Reporting salary advances for 2022/2023 calendar year
  - [Payroll letter #22-003: Salary Advance Reporting Compliance](#)
  - [STD. 422 Salary Advances Paid/Offset Report](#)
- References:
  - Payroll Procedures Manual
    - [Section N 103](#) - Salary Advances
    - [Section N 109](#) - Instructions for completing the STD. 422, Salary Advances Paid/Offset Report

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

### – Fee Letters from CalPERS

- PPSD is aware of departments receiving fee letters from CalPERS
- PPSD is developing a Frequently Asked Questions (FAQ) page to address fee letters that is in the review stage
- It will include:
  - Answers to questions we have received
  - Samples of fee letters you may receive
  - Tips and Tricks for avoiding fees
  - Contact information for assistance with resolution
  - Links to resources
- Under Government Code (Gov. Code) [section 20283](#), employers have 90 days to establish membership and report retirement contributions to CalPERS.
  - Enrollments later than 90 days result in liability for both member and employer contributions, as well as a \$500 administrative fee.
- Under Government Code (Gov. Code) [section 21220](#), an employer shall enroll a retired member within 30 days of the effective date of hire.
  - Enrollments later than 30 days result a fee of two hundred (\$200) dollars will be assessed per month until the retired annuitant is enrolled in [my|CalPERS](#).
- If your department needs SCO assistance with an invoice, please provide it as an attachment and send it to PPSD Civil Service Retirement Inbox at [ppsdcsretirement@sco.ca.gov](mailto:ppsdcsretirement@sco.ca.gov).
- [Circular Letter #200-009-20](#) has details regarding Gov. Code 20283
- [Circular Letter #200-049-21](#) has details regarding Gov. Code 21220
- It is a best practice to verify that new appointments have been added to [my|CalPERS](#) the day after they are keyed, as part of your appointment routine.
  - If a transaction did not result in a record being added to [my|CalPERS](#), please contact the [Statewide Customer Contact Center \(SCCC\)](#) at (916)372-7200.
  - This will assist in avoiding late assessment fees.
- It is critical to address fee letters as soon as you receive them.
  - Response beyond 30 days can result in additional fees and the inability to request a waiver.
  - If you have concerns about the accuracy of fees, contact SCO at the SCCC as soon as possible.

### **Statewide Training Program – Michael Berlanda ([PPSDTraining@sco.ca.gov](mailto:PPSDTraining@sco.ca.gov))**

- 2023 2nd Trimester Needs Assessment
  - Opened 03/10; closes 03/24
- Temporarily Discontinued/Cancelled Classes: PIP and Fundamentals of Payroll

## PPSD General Reminders

- 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](mailto:PPSDHRSuggestions@sco.ca.gov).

## SCO RESOURCES:

- Websites:
  - Human Resources (HR): [https://sco.ca.gov/ppsd\\_state\\_hr.html](https://sco.ca.gov/ppsd_state_hr.html)
  - State Employees: [https://sco.ca.gov/ppsd\\_se\\_payroll.html](https://sco.ca.gov/ppsd_se_payroll.html)

## SCO KEY INITIATIVES:

- [SCOConnect](#)
- [California State Payroll System Project](#)

## CONTACTS:

- Affordable Care Act (ACA) Email [acasupport@sco.ca.gov](mailto: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](mailto:CLAS@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Decentralized Security & ViewDirect Access - (916) 619-7234 or [DSA@sco.ca.gov](mailto:DSA@sco.ca.gov)
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- Management Information Retrieval System (MIRS) Email [ppsdmirs@sco.ca.gov](mailto:ppsdmirs@sco.ca.gov)
- [Statewide Customer Contact Center](#) (916) 372-7200

## FORUM QUESTIONS:

The following questions were submitted during the forum:

**Question:** Is there a way that departments can get a record of staff who have completed the Affordable Care Act (ACA) trainings?

**Answer:** All registered employees who attend the Affordable Care Act (ACA) training and are considered to have completed the course in full by submitting the required test, are emailed a Certificate of Completion. ACA Training keeps a record of rosters by the scheduled training date for both part I and part II. Departments may inquire about a specific employee by sending the following information to ACA Training email box at [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov).

**Question:** What if not all dependents were listed to verify?

**Answer:** Contact the vision and/or the dental carrier to confirm the dependent is enrolled and the date the enrollment was updated in their system. If the enrollment was updated in their system within 30 days or if based on your inquiry, the vendor/carrier adds or updates the dependent's enrollment in their system, then check the Family Connect Portal (FCP) the following month to review the dependent's information and to process their re-verification. Vendor/carrier enrollment data files are submitted to FCP between the 1<sup>st</sup> -10<sup>th</sup> of each month. If you do not see the dependent listed in FCP the following month or if the vendor/carrier informs you that dependent has been enrolled without any breaks in coverage within the last 2-3 months, send an email to the Dependent Re-Verification (DRV) Unit at [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov) and provide a summary of the issue you are having, the steps you have taken with the vendor/carrier and the information they provided to you. The DRV Unit will assist with resolving the issue.

Please note: 1) As long as the employee has submitted all DRV docs by the due date and the DRV Unit has been informed of this issue, the re-verification of the "missing" dependent will not be negatively impacted. The DRV Unit will provide the HR office sufficient time to re-verify the dependent without a lapse in coverage.

2) FCP does not automatically remove/delete employees and/or dependents from any benefits.

**Question:** Are employees still required to fill out the dental form to delete a 26 year old dependent?

**Answer:** Yes, employees must complete Dental Plan Enrollment Authorization form (STD. 692) to report any changes to their dependent eligibility, including deletion of 26 year old dependents.

**Question:** We were told you only need one bill now, is that is correct? If so, will the CalHR 781 be updated to say they only need one bill instead of a combination?

**Answer:** CalHR 781 will be updated in the near future. In the meantime, here is the updated information that is listed in all Dependent Re-Verification (DRV) notices that are mailed out: "Other reoccurring financial documentation, including but not limited to a household bill, account statement, or insurance policy listing the name of you and/or your spouse or domestic partner and your current mailing address, or a combination of other documents that substantiate the existence of a current marriage or domestic partnership. Household bills and account statements older than 60 calendar days are unacceptable."

**Question:** Is there any update on the BU 5 union plan, CAHP Blue Cross, being updated in Family Connect Portal (FCP)?

**Answer:** We are still in the process of discussing requirements. There are not any additional updates at this time.

**Question:** How does staff receive the Dependent Re-Verification (DRV) notices?

**Answer:** CalHR mails DRV notices to employees with dependents enrolled in dental and/or premier vision. The dental/premier vision notices are mailed through DGS/OPS. CalHR contracts with CalPERS to mail out notices to employees with dependents enrolled in health benefits. Most employees will receive two notices providing them the same instructions – submit all required DRV documents to their department's HR office.

**Question:** Will the CalHR781 be updated because it says "combination"?

**Answer:** Yes, the CalHR 781 form will be updated in the near future.

**Question:** Is the staff's agency and unit number for the Vision Dental Authorization Portal, the agency and unit that the staff/Personnel Specialists (PS) are appointed into? Or is it the agencies and units that the PS have on their rosters?

**Answer:** When managers or supervisors are requesting to add a user to the portal, CalHR is asking for the Agency Code not the unit. Therefore, when the Agency is requesting to add a user, the agency will assign the Personnel Specialist the agency code. It is the responsibility of the agency to appoint the Personnel Specialist to the appropriate agency code the Personnel Specialist would need to be assigned to. Should that Personnel Specialist transfer to a different roster (agency code) then the agency should request an update to change the Personnel Specialist's agency code.

**Question:** Would it be possible to create a calculator/674D setup for IDL/TD and SDI/PFL similar to the NDI calculator?

**Answer:** We will work with our Analyst to see if this is possible.

**Question:** Wet signatures, is Personnel Liaison 20-030, which was issued 11/30/20, still in effect? Our Accounting office is asking and wants us to confirm with SCO if it is.

**Answer:** The SCO PPSD is still accepting electronic signature.

**Question:** With the collapse of Silicon Valley Bank, will there be a notice to employees who have direct deposit to that bank? Or will those direct deposit accounts automatically be cancelled?

**Answer:** Business as usual. Direct Deposits will continue unless the bank notifies the employee.

**Question:** Are there any exceptions to having to cancel direct deposit when an employee retires? We have an exempt employee that believes it does not apply to her position but all the supporting documents I can find say to cancel.

**Answer:**

For Retirees – CalPERS administers the Direct Deposit regulations and enrollment. Please call the CalPERS Contact Center at (888) 225-7377 for assistance.

Active State Employees – It is a longstanding best practice for Direct Deposit to be canceled prior to an employee separation however it is at the Department's discretion whether or not to cancel. It is strongly recommended that direct deposit is canceled for separating employees as a preventative measure to avoid overpayments, while also providing HR offices the ability to clear outstanding salary advances, travel expense claims and accounts receivables with the issuance of a paper warrant.



**Question:** Once a PAR is keyed, when will the new one be available in Mobius?

**Answer:** It should be available the following day.

**Question:** Any forms submitted to SCO can have an electronic signature?

**Answer:** All forms submitted to the PPSD team may have electronic signatures.

**Question:** So the Turnaround PAR is immediately available after we key a new transaction?

**Answer:** As long as it is after a cycle date.

**Question:** When completing I-9s is it required to make copies of the documents (social, passport, DL) and attach with the I-9?

**Answer:** Please follow the [I-9 website](#).

**Question:** In regards to wet signatures, does this apply to employees as well. Can they submit forms to HR with a digital signature such as dental or direct deposit forms?

**Answer:** That depends on your agency's departmental policy.

**Question:** Regarding the bank collapse, we're aware of one employee who had a difficult time getting the funds from the 02/23 deduction. I don't have the details though. We're instructing employees to submit the cancellation request to SCO if they want to stop the deduction. Would that be correct? It's a 051 deduction.

**Answer:** Yes.

**Question:** Has there been any additional movement on the plan to change the salaries for Personnel Specialists (PS) and Senior Personnel Specialists to match those of the Staff Services Analyst (SSA) and Associate Governmental Program Analyst (AGPA)?

**Answer:** Salaries are subject to collective bargaining and cannot be discussed by the Personnel Management Division (PMD).

**Question:** We have an employee who wants to go to college and be reimbursed for taking classes. The classes he is taking are related for upward mobility; however, are not required to perform his current duties. Where can I find information regarding requirements?

**Answer:** Please review the [HR Manual 1005 Upward Mobility Program](#) and contact the Civil Rights Division for follow-up queue.

**Question:** We have been made aware that dental was getting cancelled for employees even though premiums were deducted. SCO Benefits advised that this should be corrected by the January master cut-off; however, we are still getting contacted by employees who's dental and/or vision is still showing inactive, even after the January master cut-off. Do we have an ETA of when this will be corrected? This impact is for all dental providers.

**Answer:** This is something we are currently working on with SCO and carriers to resolve. Once a resolution has been determined we will be providing an update.

**Question:** Since VSP basic uploads all birthdates as 01/01/1901, carriers are not able to confirm coverage.

We have advised our employees to ask VSP to look them up in their system by just their social security number and not include the birthday, or search for the birthday of 01/01/1901, but there are many times an employee's coverage cannot be confirmed and we are having to reach out to confirm coverage with VSP. How are other agencies handling this outside of calling VSP for each employee who reaches out? This impact is for permanent full-time employees only.

**Answer:** We hope this issue will be resolved when CSPA is rolled out.

**Question:** Are CalHR exempt employees eligible for Personal Development Days (PDD) leave? Our interpretation is they are not eligible as they are a CBID E-Designated Class. Is it written clearly somewhere that we can refer the employee to?

**Answer:** Questions regarding exempt (governor appointed employees) should be sent to [epr@calhr.ca.gov](mailto:epr@calhr.ca.gov) by the department asking the question. If a CalHR employee is asking this question, please send an email to [PSB@calhr.ca.gov](mailto:PSB@calhr.ca.gov). If this is a question from a department, per CalHR Policy, employees in Bargaining Units 1, 3, 4, 7, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, and 21, and Excluded and Exempt employees shall receive two PDDs each fiscal year.

**Question:** When enrolling a child to dental, one document says through age 6, the other says up to age 6. Which is correct?

**Answer:** We are working to update our employee dental webpage so it aligns with the information provided in the Benefits Administration Manual (BAM). Adding a newborn, adopted child, or child at each birthday through the age of 6 to a one, two, or three party enrollment is allowable as a permitting event.

**Question:** Why is it Direct Pay if they are under FMLA or SDI and benefits are maintained by the department setting up Accounts Receivables (A/Rs)?

**Answer:** We understand that this has caused confusion with departments. Please work with your personnel office on questions about A/Rs and direct pay while an employee is out under FMLA or SDI.

**Question:** Is the employee required to have 24 months of state service before they can enroll in Delta Dental or is it 24 months from their start date regardless of state service? If an employee is off on leave and not earning state service, does that time count towards the 24 months?

**Answer:** According to [Section 506 of Dental Benefits Administration Manual \(BAM\)](#), 24 months of employment without a permanent break during the 24-month qualifying period. Based on this, as long as the employee is not permanently separated.

**Question:** In April 2020 there was a special one-time cancellation for reimbursement accounts but none of those requests were processed. These request were sent to the PPSD email but never stopped. Accounts Receivables (A/Rs) were established but should not have been. We have sent an appeal to CalHR but is there any information if those requests will be worked?

**Answer:** In order to provide an accurate response we will need the employee's name and Social Security Number (SSN). Please email Flex Elect program at [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov) so we can research this further.

**Question:** For Dental, when a child is turning 26 without any disabilities, do they need to fill out the dental form to delete the child or is that automatically done?

**Answer:** Yes, a completed STD. 692 must be submitted by the employee for the dependent to be deleted. It is the responsibility of the employee to notify their department within 60 days of a change in their dependent eligibility. This also can be done administratively, they can refer to [Section 511 of Dental Benefits Administration Manual \(BAM\)](#) and they can also refer to [Section 1403 of HR Manual](#) for dental.

**Question:** Why aren't dental carriers receiving new enrollments or enrollment changes from SCO? Is there a resolution in the works so we don't have to call the carriers all the time?

**Answer:** We are currently working with SCO and carriers to resolve.