Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

March 14, 2024

Question

Presenter: Ryan Baughman

Contact: [Statewide Customer Contact Center](#) (916) 372-7200

HR offices are still facing challenges enrolling employees into their retiree dental plan using the myCalPERS system. Could you kindly provide us with the status of this issue?

Answer: Please know that this was fixed on January 20, 2024. If employers are still having issues with this functionality, they should reach out to the [CalPERS Employer Contact Center](#) for assistance at 888-225-7377. If it is discovered that the system is not working properly by the CalPERS Employer Contact Center, it will be escalated from there to get resolved.

Question

Presenter: Kim Herlache

Contact: PSB@calhr.ca.gov

Does your department complete a salary determination and provide the appointment salary to the new hire if they are transferring from another department, prior to their start date?

Answer: Departments should complete a salary determination and provide it to the employee in all cases. There could be an instance where the employee is not aware that they do not retain certain salaries and may not accept the job once they are made aware. For instance, non-deep ranges, Career Executive Assignments (CEA), and Exempt appointments generally do not retain rights to their salary.

Question

Presenter: Tommy Fong

Contact: [Statewide Customer Contact Center](#) (916) 372-7200

For new to state service employees with Oath code A, is this a do not key? Currently it is not specified in Section 2.71 of the Personnel Action Manual (PAM) or in the Decentralized procedures.

Answer: HR offices must submit a do not key package for all appointment transactions for Oath code A.

2025 Employee Compensation Request Policy
HR Manual Section 1715

Presenter: Sue Main

Contact: EmployeeComp@calhr.ca.gov

California Department of Human Resources

2024

2025 Employee Compensation Request Policy

- 2025 Employee Compensation policy was released on March 4, 2024 (HR Manual Section 1715)

  o Bargaining Units included are: 2, 6, 9, 13, 16, 18, and 19

  o Reasons to submit an Employee (EE) Compensation request include:
    ➢ Recruitment and Retention
    ➢ Pay Equity
    ➢ Hard to fill locations or shift assignments
    ➢ Incentive-based pay (recognition)
    ➢ Compaction Issues

  o Changes to policy:
    ➢ Employee Compensation Unit is the single point of contact:
      EmployeeComp@calhr.ca.gov
    ➢ New Training has been posted to the NR Net to assist departments with the process
    ➢ Departments are encouraged to meet with CalHR to discuss concepts
    ➢ Requests are due June 1st

  o Departments will receive confirmation of receipt

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2025 Employee Compensation Request Policy

- Non-Compensation requests:

  o Contract language cleanup or Memorandum of Understanding (MOU) changes that do not result in change in compensation should continue to follow the Harvest Memo process

  o Classification requests that do not result in changes in EE compensation should continue to be routed to your Personnel Management Division (PMD) analysts
    ➢ Examples include Alternate Range Criteria (ARC) changes (criteria changes only), class spec changes, or class consolidations

- When in doubt, reach out to the Employee Compensation Unit for clarification: EmployeeComp@calhr.ca.gov

SCO KEY INITIATIVES

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Phase II – features:

- **Multifactor Authentication (MFA):**
  - Now available to all Cal Employee Connect (CEC) users
  - As of 03/11/2024: 70,710 employees have enabled MFA

- **Direct Deposit:**
  - 95% of departments statewide have been deployed
  - As of 03/11/2024: CEC has received 29,788 direct deposit transactions

- **Address Change:**
  - 95% of departments statewide have been deployed
  - As of 03/11/2024: CEC has received 7,443 address change requests

- **Withholdings Change:**
  - 95% of departments statewide have been deployed
  - As of 03/11/2024: CEC has received 9,770 withholdings change requests

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect Phase II – features:

- **eTimesheet Feature:**
  - As of 03/11/2024: 22 agencies have been using this feature
  - Note:
    - ➤ This feature is available to agencies who do not have a Time and Attendance system or wish to decommission their current system.
    - ➤ Limited work schedules and leave benefits. Please email us for additional information.

- **2023 W-2 Paperless Feature:**
  - As of 03/11/2024: 89,225 employees have opted-in (24% adoption rate)
    - ➤ The W-2 Paperless enrollment period runs yearly from February 1st to November 30th and allows employees the opportunity to receive their W-2 Statement electronically via CEC.

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

Accounts Receivable (A/R) 035 Deduction Collection Feature:

- 100% departments/agencies have been enabled

    o As of 03/04/2024:

        ➢ **Total of 71,337** A/R 035 deductions have been processed via this feature

        ➢ **Total of $16,180,147** has been collected

- SCO is unable to cancel or modify submitted and worked A/R 035s. HR offices will need to send a STD. 674 to either reverse or refund the deduction after monthly payroll.
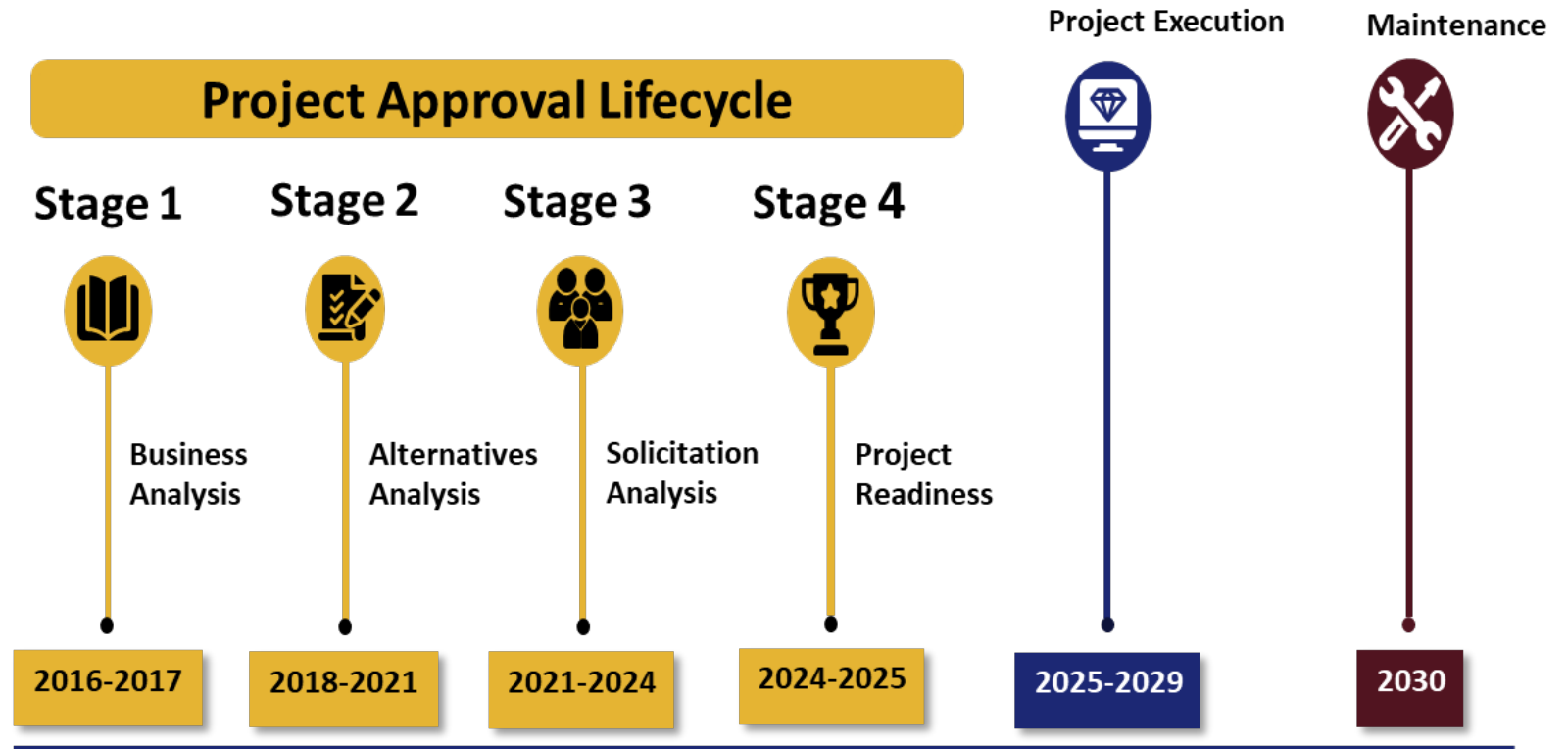
CSPS Status – March 2024

Presenter: Dominick Mullane

Contact: CSPSHelp@sco.ca.gov

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

Project Approval Lifecycle

Stage 1	Stage 2	Stage 3	Stage 4	Project Execution	Maintenance
Business Analysis	Alternatives Analysis	Solicitation Analysis	Project Readiness		
2016-2017	2018-2021	2021-2024	2024-2025	2025-2029	2030

Status Updates

- Procurement Team held additional rounds of confidential discussions and incorporated feedback from California Department of Technology on Addendum 5 documentation.

- Organizational Change Management will begin conducting Stakeholder Connect training sessions with their Department Agency Readiness Teams. Stakeholder Connect is the project's stakeholder communications management platform.

- Organizational Change Management anticipates work on a dedicated California State Payroll System website and is reviewing draft logos to modernize the project's Bear logo.

Transaction Supervisors Survey Results

- 117 responses

- 92.2% Agreed or Strongly Agreed they understand why CSPS is needed.

- 94.0% Agreed or Strongly Agreed they support CSPS.

- 66.7% of respondents said they would like more information on the future state and more general project information.

- 33.3% of responses were spread amongst differences from the prior project, Modernizing Pay Day also known as biweekly pay, procurement, project cost, vendor selection, and What's In It For Me.

BREAK

5 MINUTES

STATEWIDE BENEFITS ADMINISTRATION

Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

2023 Annual Form 1095-C, Employer-Provided Health Insurance Offer and Coverage (1095-C) Reporting

- All 2023 1095-Cs were mailed as of February 28, 2024
  - 1095-Cs were mailed to the address on file as of December 29, 2023
  - All undeliverable 1095-Cs will be sent to the agency to be forwarded to the employee
  - The 2023 1095-C issued report will be posted to ViewDirect and Mobius View by the end of the month
- Employees must contact their HR office to request a duplicate 1095-C
  - HR staff must confirm the employee qualified for a 1095-C on the 2023 1095-C Issued report prior to requesting a duplicate 1095-C from Affordable Care Act (ACA) Support
- Once confirmed, contact acasupport@sco.ca.gov and provide the following employee information:
  - First and Last Name
  - Last four of Social Security Number (SSN)
  - Employee address

Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

Compliance Reports and Information Reporting Penalties (IRPs)

- As of the 2021 reporting year, the Internal Revenue Service (IRS) is no longer providing relief to employers for incorrect reporting

- It is important to update all compliance report errors on a monthly and quarterly basis

- The longer the errors are on the report will have the highest impact on departments

  o If errors are corrected now, it will be penalized at the reduced rate (50% penalty for phase approach for the 2021 reporting year)

- Penalties will continue to compound if errors continue to sit

  o The table below is based on the 2020 corrected data for the top department, and the Phase Approach compounds

2020 Corrected Penalty Data – Phase Approach

Department	# of Penalties Assessed	Total Penalty at 50% for 2021	Total Penalty at 75% for 2022	Total Penalty at 100% for 2023 and Moving Forward
Department A	161	$43,470	$65,205	$86,940

Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

Information Reporting Penalty Information Coming Soon!

- Personnel Letter - Summer 2024

- IRP Email Inbox

- SCO Webpage dedicated to IRPs, including:

  o FAQs

  o Tools and Resources

  o Training Information

  o IRP Amounts

  o IRP Processes and Procedures

Affordable Care Act Program

Presenter: Shirley Chau

Contact: ACASupport@sco.ca.gov

Affordable Care Act System (ACAS) Virtual Training Updates

- Upcoming training
  - May 22 to 23, 2024
  - Register:
    - ➢ Visit Affordable Care Act (ACA) Training
    - ➢ Email PPSDACATraining@sco.ca.gov

For Assistance:

- ☐ ACA Helpdesk consultants are available to assist you with questions, contact:
  - ACASupport@sco.ca.gov
  - (916) 322-3770

CalHR Benefits Division

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by CalHR offered to state employees, retirees and dependents. Our goal is to ensure access to competitive, quality and affordable benefits. Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and maintaining a top-performing workforce.

Benefit Project Updates

CalHR Benefits Division

March 14, 2024

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Quarterly ACA Compliance Review

- The February ACA Quarterly Compliance Review is currently underway.

- 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 **March 15, 2024**.

- Departments are encouraged to utilize the ACAS User Guide (link will be available soon) and Scenario-Based Job Aid for Updating the ACAS on SCO's website for information on how to correct these errors.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: ACA.Policy@calhr.ca.gov

Reminders

- There was a significant uptick in the number of errors on the ACA compliance report of employees with a health benefits deduction without a corresponding ACA status code that indicates the employee elected to enroll in health coverage.

- The "Health Event Transaction" COGNOS Report in myCalPERS can be helpful to identify needed updates in the Affordable Care Act System (ACAS) for employees that have elected to enroll in health benefits and the effective date of coverage.

Affordable Care Act (ACA)

Presenter: Lisa Hatten
Contact: ACA.Policy@calhr.ca.gov

<u>ACA Training</u>

- CalHR and SCO facilitate ACA trainings throughout the year for departmental personnel offices. The next ACA training is scheduled for Wednesday, May 22, from 9:00 a.m. to 10:30 a.m. (Part 1) and Thursday, May 23, from 9:00 a.m. to 11:30 a.m. (Part 2)

- Departments should send their requests for training to SCO at: ppsdacatraining@sco.ca.gov.

- Additional training dates for 2024 will be posted on SCO's "Affordable Care Act Training" webpage.

Benefit Program Updates

CalHR Benefits Division

March 14, 2024

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor
Contact:DRV@calhr.ca.gov

What is DRV

The Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and Premier Vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.

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 and Premier Vision benefits. The bargaining unit contracts specify that family member eligibility for dental and Premier Vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor
Contact:DRV@calhr.ca.gov

DRV Updates

- CalHR automated the DRV process for dental and Premier Vision effective January 2023.
- The current health Dependent Eligibility Verification (DEV) process through CalPERS and the MyCalPERS system will remain unchanged.
- Departmental personnel offices are required to update dental and Premier Vision dependent re-verifications through the Family Connect Portal (FCP).
- All state agencies must establish an administrative account, who is at the supervisor or above class, in the FCP to manage each agency's authorized user accounts to update DRV transactions.
- Department compliance with DRV regulation will be monitored and addressed by Health Benefit Officers and FCP Department Administrators.

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Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor
Contact:DRV@calhr.ca.gov

DRV Updates continued

- CalHR 781 Dependent Eligibility Checklist and CalHR 025 Affidavit of Parent-Child-Relationship (dental/vision) have been updated to comply with CalPERS documentation revisions provided in the December 1, 2023, Circular Letter #600-046-23, Eligibility Criteria for Dependents in a Parent-Child Relationship.

- March, June, September, December 2023 and January 2024 birth month cycles: departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.

- April 2024 birth month cycle: All notifications were mailed except the 30-day cancellation notice, which was mailed March 1, 2024, to the incorrect employees due to a system error. CalHR is working to remedy this issue.
  - Employees who are part of the April birth month cycle must submit their DRV documents no later than the end of March for processing. All employees who received the cancellation notice in error should ignore the notice as the notice does not apply to them.

- The CAHP and CCPOA enrollment data in FCP is still pending.

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Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor
Contact:DRV@calhr.ca.gov

Total notices mailed to date:

Birth Month Cycle	1st Notice 90 days before end of birth month	Total Mailings of 1st Notice	2nd Notice 60 days before end of birth month	Total Mailings of 2nd Notice	3rd Notice 30 days before end of birth month	Total Mailings of 3rd Notice	Total Mailings
March	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
June	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
September	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
December	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
January	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
April	Jan-2024	8,195	Feb-2024	7,862	Mar-2024	N/A	16,057

*90 notice for March birth month cycle only included DRV notices for Health benefits.

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Dependent Re-Verification (DRV)

Presenter: Delia Baulwin, Benefits Program Supervisor
Contact:DRV@calhr.ca.gov

Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources from BAM, FCP Manual, and Human Resources Manual.

- 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 Premier Vision benefits only.

- Departmental personnel offices can send DRV and FCP related questions via email to DRV@calhr.ca.gov.

- Current response time is five (5) business days.

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Benefit Programs Appeals Reminders

Presenter: Kristin Wilsey
Dental Program: dental@calhr.ca.gov
Third Party Pre-Tax Parking Reimbursement Account: Pre-TaxParking@calhr.ca.gov
Vision: vision@calhr.ca.gov

- **A Complete Appeals Package Includes:**
  - Justification memo explaining appeal.
  - Complete and error-free forms.
    - CalHR 774 Premier Vision Plan Enrollment Premier Vision Plan Enrollment.
    - CalHR 695 Retiree Vision Plan Enrollment Retiree Vision Plan Enrollment.
    - STD. 692 Dental Plan Enrollment Authorization Dental Plan Enrollment.
  - Written confirmation that the employee acknowledges an accounts receivable will be established for retroactive enrollment (If applicable).
    - A refund request or no change in deduction A/R confirmation would not be applicable.
- Once an appeal is approved by CALHR and processed by SCO, we will not cancel or reverse the appeal.

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Benefit Programs Appeals Reminders

Presenter: Kristin Wilsey
Dental Program: dental@calhr.ca.gov
Third Party Pre-Tax Parking Reimbursement Account: Pre-TaxParking@calhr.ca.gov
Vision: vision@calhr.ca.gov

Best Practices for Departments to prevent:

- Appeal submissions returns due to <u>Not Submitting Paperwork Timely</u>.
  - o   Set up a tickler to remind team to submit benefits paperwork timely.
  - o   Have a team onboarding paperwork day.
  - o Create an onboarding forms checklist for your team.

- Appeal submissions returns due to <u>Incomplete Appeal Packages</u>.
  - o Create an appeals package coversheet checklist.
  - o   Have a supervisor review and sign off on appeal packages before submission.

Voluntary Benefits Reminders

Presenter: Kristin Wilsey
Group Legal: Grouplegal@calhr.ca.gov
Life Insurance: LifeInsurance@calhr.ca.gov
Long Term Disability: LTD@calhr.ca.gov

Voluntary Benefits Program Updates

- Open Enrollment – Voluntary Plan Benefit Changes.

  o Life, Legal, LTD, and Vision are the programs where employees could make their own changes directly with the vendors.

    ➢ Employees should review their December 2023 pay warrant to confirm if open enrollment changes for Life, Legal, LTD, and/or Vision took effect.

    ➢ Each program provided confirmation receipts during open enrollment. Employees should provide this to departmental personnel if an appeal is required because open enrollment changes did not take effect.

    ➢ A demonstration for how to review miscellaneous deductions to confirm open enrollment changes was given at the Transaction Specialist Educational Forum on February 1, 2024, to provide training to Personnel and Transactions Specialists.

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Benefit Programs Program Updates

Presenter: Kristin Wilsey
Vision vision@calhr.ca.gov

Vision Program

- Improving VSP Membership Profiles for Basic Vision.

  o VSP now receives a demographics file for Basic Vision employees.

  o All State of CA employees now have access to Eyeconic, VSP's online store.

- New Vision Handbook Coming.

Training Recommendations

- Benefits Administration Manual Training – online CalLearns

- Employee Benefits Orientation Training – online CalHR Webpage

Benefit Premiums

- Premiums cannot be waived for months when services are not used.

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CalHR Benefits' Resources

Websites:

Benefits Website:

https://calhr.benefitsprograms.info/

BAM Training Questions:

BenefitsInquiries@calhr.ca.gov

HealthierU Connections:

https://www.calhrwellness.com/en/welcome-california-state-employees/

Human Resources:

https://calhr.benefitsprograms.info/state-hr-professionals/

State Employees:

https://calhr.benefitsprograms.info/state-employee/

HR Manual:

http://hrmanual.calhr.ca.gov/Home/ManualItem

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CalHR Benefits' Resources Cont.

Contacts:

- ACA Program ACA.Policy@calhr.ca.gov

- BAM Training BAMTraining@calhr.ca.gov

- COBRA COBRA@calhr.ca.gov

- Dental Program dental@calhr.ca.gov

- Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov

- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov

- FlexElect/CoBen Program FlexElect@calhr.ca.gov

- Group Legal Grouplegal@calhr.ca.gov

- Life Insurance LifeInsurance@calhr.ca.gov

- Long Term Disability LTD@calhr.ca.gov

- Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov

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CalHR Benefits' Resources Cont.

Contacts:

- Vision vision@calhr.ca.gov

- Open Enrollment OpenEnrollment@calhr.ca.gov

- Virtual Benefits Fair BenefitsInquiries@calhr.ca.gov

Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Reconciling Employee Health Deductions with SCO

- CalPERS Cognos Report - *State Active health Enrollment and SCO Health Deduction Discrepancy Report*

- Any actions taken in myCalPERS are sent automatically to SCO:

  o Retroactive adjustments are either done automatically by Mainframe or;

  o Civil Service Benefits Team processes transactions that require additional verification.

  o Late Dependent Eligibility Verification

    ➢ Rescinding of a previous health transaction

- If myCalPERS is accurate, however Cognos / Mainframe is showing health plan discrepancy

  o Payroll Letter #18-017 - Form STD. 674 A/R Processing For Missing Health Deductions

  o Payroll Procedures Manual (PPM) Section H 722

    ➢ Submit STD. 674 A/R via ConnectHR for associated pay periods

    ➢ ConnectHR dropdown: Benefits – STD. 674 A/R Benefits Accounts Receivable

STATEWIDE PROGRAM UPDATES

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

Nonresident Alien Compliance

- Revised Personnel Letters for Nonresident Aliens:
  - Personnel Letter #24-001: Verification of Employees Identified a Nonresident Alien
  - Personnel Letter #24-003: Changes to Federal Tax Withholding Rates for Nonresident Aliens
  - Listing of Nonresidents Subject to IRS Notice 2005-76: Nonresident Alien Form
  - For Any inquiries, please contact PPSD Tax Support Team email at PPSDSTSP@sco.ca.gov

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Data Sheet Form PPSD21 and Salary Advance Reminders

- **Deceased Data Sheet - Form PPSD21:**
  - Payroll Letter #23-019: Deceased Employee and Designee/Beneficiary Reporting
    - Fill and Print Form PPSD21
    - Statewide Tax Support Program
- **Salary Advances:**
  - Reporting Salary Advances for the 2022/2023 calendar year
    - STD. 422 Salary Advances Paid/Offset Report
- **References:**
  - Payroll Procedures Manual (PPM) - Section N
    - Section N 103
    - Section N 109

Statewide Training Program

Presenter: Siobhan Hallinan

Contact: PPSDTraining@sco.ca.gov

Engagement is the Name of the Training Game!

http://cacontrollers.adobeconnect.com/p85g3u768r84/

Engagement is the Name of the Training Game!

Presented by: Personnel and Payroll Services Training

Transaction Specialists' Educational Forum (TSEF)

Presenter: Nastassja Johnson

Contact: TSEF@sco.ca.gov

- TSEF is a bi-monthly forum for personnel, payroll and benefits specialists. The purpose of the forum is for personnel, payroll and benefits specialists to ask questions, receive clarification on processes or procedures and gain assistance from the Control Agencies' Subject Matter Experts.

- **April Topics**:
  - SCOConnect: Cal Employee Connect (CEC)/ConnectHR Feature Demonstration
  - Open Enrollment walk-through on California Leave Accounting System (CLAS)
  - Fundamentals of Payroll
  - Statewide Training Program Update

  Topics are subject to change.

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.

PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data

- 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 our 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.

- HR offices calling the Statewide Customer Contact Center (916-372-7200) must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.

- Share this information with your Human Resources Team!

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 & 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 (SCCC) (916) 372-7200

FORUM QUESTIONS:

The following questions were submitted during the forum:

Question: After July 1, will departments still be allowed to continue to offer Hire Above Minimum (HAM) for specific classifications that have already been included in Section 5?

Answer: Yes, classes in Section 5 may still receive HAMs, if the criteria are met (location and department). Email at employeecomp@calhr.ca.gov for further clarification.

Question: Can you emphasize the importance for agencies to provide accurate A01 and salary information requests for employees (EE) transferring to another agency? We recently received inaccurate salary information for an EE transferring to our agency, which resulted in the EE losing out on a Merit Salary Adjustment (MSA) and the salary we provided the EE in the job offer was not correct.

Answer: To ensure employees are provided the correct salary rate upon movement to another agency/position, the losing departments must ensure accurate A01 and salary information is provided to the receiving agency. Likewise, once the information is received at the receiving agency, HR should be double checking or auditing that information in case a correction needs to be made to the employee's history. An employee should not miss out on an MSA because incorrect information was exchanged between departments. Departments must ensure MSAs are based on an accurate salary rate and processed in accordance with the MSA rules. Additionally, the A01 information is necessary to determine transfer eligibility where appropriate. With the Hire Above Minimum (HAM) changes, it is imperative that the departments provide information on the base pay salary, HAM plus rate, and whether the employee's HAM rate can be used for the salary determination. The HAM plus rate may only be used in the salary determination if the employee has had the Section 5 HAM for two (2) or more years, otherwise it is not retained.

Question: Can we get a list of all open Accounts Receivables (A/Rs) that are tied to the respective agency/department?

Answer: Your agency may access this information via Mobius View.

Question: If there is an employee that has multiple positions and we cannot access the A/R 035 feature in ConnectHR, then do we submit Form STD. 674 A/R for payroll deductions?

Answer: Yes, if you are unable to utilize the A/R 035 feature in ConnectHR, then you must upload a paper form.

Question: Will separated employees always have access to their Cal Employee Connect (CEC) account?

Answer: Yes, separated employees can always register with CEC if they have payment issued by the State Controller's Office (SCO) between January 2017 and current date.

Question: If the Accounts Receivable (A/R) is greyed out in ConnectHR, then does that mean it is paid or no longer collectable?

Answer: If the A/R is greyed out, it means that it is either already collected through payroll deduction, or it is in the process of being collected through payroll deduction. However, if an A/R is not greyed out, it does not mean that it has not been paid off. First, check that the A/R has not been paid off through agency collect or leave offset.

Question: When California State Payroll System (CSPS) is executed, will we begin being paid bi-weekly?

Answer: Yes, when the CSPS goes live at a department, the payment schedule will change to a bi-weekly basis for all employees. For more information, see the [CSPS FAQs](#).

Question: Will Cal Employee Connect (CEC) Team send out communications to employees regarding the Withholdings Change feature and process in CEC?

Answer: Personnel listed within the California Personnel Office Directory (CPOD) were sent an email regarding the deployment of the Withholdings Change feature. They were also provided a user guide and directed to forward communications to their employees.

Question: When reviewing SCO history, what does the G in GENG and the R in GENR stand for? I looked through the SCO manuals and found all other four (4) letters except the G and R.

Answer: When looking in the Civil Service Pay Scales (CSP), the G stands for the GEN information and the R stands for the SAL information.

Question: When will Bargaining Unit 06 (BU 6) employees be displayed in the Family Connect Portal (FCP) system for dental?

Answer: The Dependent Re-Verification Unit is currently in conversations with California Correctional Peace Officers Association (CCPOA) administrators regarding an agreement that will provide BU 6 employees' dental benefit data to CalHR to incorporate into the FCP. These conversations have not reached an agreement, and we will not be able to incorporate BU 6 into FCP until an agreement is reached. Currently, this remains a pending item. We will provide an update when the status changes at the next Transaction Supervisors' Forum.

Question: We have heard that the Family Connect Portal (FCP) system will be moving towards automatically dropping dependents if not re-verified timely, much like the CalPERS system. Is there an update on this?

Answer: No, this is not an enhancement scheduled for the Family Connect Portal, nor will CalHR be pursuing this action.

Question: Our departmental human resources (HR) office cannot find a few employees in the Family Connect Portal (FCP) system. Is there a process to go through or an email to contact to have employees added that are not showing in the system?

Answer: Typically, when an employee (EE) is not listed in Family Connect Portal (FCP), they can be found in the second dashboard. If an EE is in the second dashboard it means they have an exception on their account which will need to be corrected. If you are not able to locate the EE in the second dashboard, then please send an email to DRV@calhr.ca.gov with the EE's name and UEID for further assistance.

Question: If there are employees listed in the Family Connect Portal (FCP) system that have been verified but the verification was not done timely in FCP, then can we go in retroactively and update this?

Answer: Yes, FCP Admins and Users can go back and edit Dependent Re-Verification (DRV) alerts that have been previously entered. The DRV unit encourages all personnel departments to check that the FCP Admins/Users have completed the DRV transactions correctly and if there are any that need to be revised, please process them appropriately.

Question: For employees on the Family Connect Portal (FCP) exceptions report, how do we correct the information for the employee? There is only a remove button.

Answer: Exceptions are due to a carrier not having the same information that SCO is reporting (e.g., spelling of a first or last name, or date of birth); please call the carrier to update the information. Once you have updated the information, you may select the "Remove from Exception" button and the account will go back to the first dashboard. If the correction has not been updated with the carriers, the account will return to the second dashboard the following month.

Question: We are having issues with Permanent Intermittent (PI) enrollment into Delta Dental. Per the CalHR benefits manual, Limited Term (LT) state service with no break in service is counted toward the 24-month plan restriction. It is our understanding that meeting the restriction has always been based on hire date to 24 months from the date hire. However, we are getting PI dental forms back stating that they are declined due to not meeting the 24-month probationary period. Our PIs have 24 months with LT state service, one (1) year PI, and have met the control period hours. The error message we receive reads, "ERROR: Employee is not eligible for Delta Dental plan due to not meeting the 24-month probation period." Can we please get some clarification on this?

Answer: There are exceptions to the 24-month restriction period that allows employees to use their service time in a LT or Temporary Authorization Appointment (TAU) position to count towards the 24 months, provided they are not a student assistant, a temporary or seasonal employee (with exception of seasonal Firefighters and Lifeguards). This exception does not extend to Limited Intermittent employees, as that is considered a temporary classification. If these employees are in the correct classification and still being denied, you can submit the enrollment document as an appeal to CalHR and we will investigate the issue.

Question: For Pay Differential 470, can we get Rate 2 (8CT2) keying instructions into Payroll Input Process (PIP)?

Answer: Agencies should key 8CT2 by entering Earning ID and Hours worked into PIP for payment, leave rate and gross blank.

Question: Regarding the Payroll Input Process (PIP) system, my staff cannot key Out of Class using the Earning ID "8GN" in PIP. Are we waiting for the Foundation Table to be updated?

Answer: Earnings ID "8GN" is available for keying via PIP for employees with Collective Bargaining Identifier (CBID) R06, R07, and R09.

Question: Dental agencies are not allowing reinstatement of benefits through a phone call. Who do we call or email for reinstatement while employees are waiting for Accounts Receivables (A/Rs) to be set up?

Answer: Please send a detailed email to dental@calhr.ca.gov for assistance.

Question: I have an employee with a late payment dated the last week of December 2023; he has not yet received a Corrected Form W-2, when will those be issued?

Answer: If the pay issued in 2023, it is included in the 2023 Form W-2 and no Corrected Form W-2 will issue. If the pay issued in 2024, it will be reported on the 2024 Form W-2. Please refer to the Corrected W-2 FAQ on the SCO website.

Question: Do we need to key an Employee Action Request (EAR) for a deceased employee?

Answer: The employee must be keyed as a PERM exempt.

Question: Regarding Dependent Re-Verification, if we are deleting an employee's dependents due to not re-verifying, do we have to list all dependents on the STD. 692?

Answer: Yes, you must list all dependents on the STD. 692.

Question: When an employee is out on disability and receives a telework stipend in error, which is the appropriate drop-down to upload the STD. 674 A/R to? CS Payroll - STD. 674 A/R or Disability - STD. 674 A/R?

Answer: Please select Disability - STD. 674 A/R from the drop-down to upload the STD. 674 A/R.

Question: For Rank-and-File employees that are appointed to a managerial/supervisory position that have balances of Compensation Time Off (CTO) and Excess hours that were earned prior to the managerial/supervisory appointment, should these balances be cashed out since Work Week Group (WWG) E employees can no longer earn CTO or excess hours? Or is it appropriate to leave those balances on the employee's record?

Answer: If the employee is staying with the same department, then they are encouraged to take the time, otherwise if they are transferring elsewhere those balances should be paid out from the losing agency prior to transfer. Departments should be cashing out the employee's CTO/Excess balance prior to the employee's appointment to a WWG E class. When the leave is cashed out prior to the WWG E appointment, CalHR approval should not be required. The CTO rules apply and should be used within a year and in most cases can be cashed out if not used within the appropriate time frame.

Question: To be clear, we understand we cash out the employee's Compensation Time Off (CTO) and Excess hours if transferring out to another department, but are we supposed to cash out the employee's leave as well? If they promote to a supervisory status, staying at the same department, then are we to cash out their leave?

Answer: No. CalHR rule 599.707 is the applicable rule to follow to compensate CTO hours upon transfer to another department. CalHR has allowed excess hours to be cashed out as well.

Question: We have been receiving emails in reply to messages we have left for SCO Payroll, they are sometimes vague and prompt additional questions. I understand you are all working to process all the additional Personnel Action Requests (PARs) that have come in and have less time for phone calls, but is there a possibility that return calls will resume soon?

Answer: Thank you for reaching out to us about the call center and email responses. We understand that you have concerns about our process, and we want to assure you that we are working to improve our services.

Currently, we are responding to all phone calls in writing to identify and track training needs for our customers. While talking on the phone can be beneficial, we have found that when our staff get on live calls, they often receive more questions than they can handle, which makes it difficult to provide a confident answer.

We appreciate your understanding while we develop templates and training materials to assist human resources (HR) offices.

If we are having ongoing conversations and are not getting to a resolution, please feel free to have your supervisor send an escalation email. We want to make sure that we are meeting your needs as best as we can.

Question: If a Rank-and-File employee is receiving Flex cash $128 health only and they promote to supervisory, does the Flex cash automatically change to Consolidated Benefits (CoBen) cash of $130 health only? Is there no action needed from the human resources personnel or employee?

Answer: If a Rank and File employee is already enrolled in FlexElect Cash Option and promotes to supervisory or vice versa, the system should automatically correct it to the appropriate amount based on the employee's new Collective Bargaining Identifier (CBID). If you do not see the change occur, please contact the [Statewide Customer Contact Center](#).

Question: Is there any update regarding CalPERS creating an email box for Direct Pay rescission requests?

Answer: The highly recommended method that many employers are doing, is to utilize their email functionality to send their request by fax. Most email systems, including Outlook, will send a fax if you put the fax number in the "To" box, and any attachments will come over also.

When employers utilize the functionality of sending the fax via email, it creates a workflow that will go directly to the Enrollment Administration to be processed by one of our analysts. The fax number to the CalPER's fax is (800) 959-6545. If employers have any difficulties with this, they should work with their internal IT team.

Question: We have employees on training and development (T&D) assignments who receive uniform allowance in their regular position but would not be eligible in the position they are performing the T&D in. We have been trying to look for a clear rule/language regarding the uniform allowance and what to do under these circumstances but have not found it. Could, we get clarification on this?

Answer: Please refer the employees back to their department's labor relations officer. There are many variables such as, Bargaining Unit, classification, Memorandum of Understanding (MOU) language, etc., that might make the general answer different.

Question: When documents are dinged back, is it possible to include the name of the person who submitted the document, on the email ding notice?

Answer: Unfortunately, SCO is unable to update PR250 trackers to reflect this request. This will be discussed in a future rollout.

Question: Can we key Recruitment and Retentions (R&Rs) now? Or wait for something to be sent out?

Answer: You may key.

Question: For Overtime (OT) adjustments for the previous 12 months, would we use the updated Personnel Specialists (PS) Recruitment and Retention (R&R) revised amounts?

Answer: The overtime should be paid when the R&R is paid. The overtime lookback period would be paying the R&R overtime rate for each of the previous 12 months based on the amount received from the R&R.

Question: Can you provide a status update for establishing Accounts Receivables (A/Rs) for payment type 0? The current processing date is 5/3/2023.

Answer: The weekly processing dates are correctly reflected.

Question: How do I request an Accounts Receivable (A/R) pending to be expedited for an employee (EE) retiring?

Answer: Call the [Statewide Customer Contact Center](#) (SCCC) at (916) 372-7200 with EE name, social security number, and retirement date, as well as the CalHR connect A/R upload date, and they should forward it to a supervisor for review.

Question: I discovered an Accounts Receivable (A/R) package that was sent in 2020 and again in 2021, with only payment type (PT) 1 being established, not PT 0; since they were sent together, why wouldn't they all be established together? Also, how do I go about getting the PT 0 established?

Answer: The user must contact [Statewide Customer Contact Center](#) (SCCC) for assistance. More information is required to address the issue.