



## Transaction Supervisors Forum

November 2020

### 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:** To re-verify a spouse, the CalHR 781 states that the marriage certification AND the tax return or a COMBINATION of other documents must be submitted. However, the CalPERS letter sent to employees only requires the marriage certification and ONE document, not a combination of documents. When going through the DRV process, which form are we to adhere to? Employees are pushing back and the forms are not consistent.
  - **Answer (Wendy Yang):** What we want to focus on is the California code of regulations 599855 and also the CalHR 781 form. It does say there that to verify a dependent spouse or partner, we are required to having a combination of other documentation. I'll have to find out how I can go to CalPERS and have that corrected on their notices.
- **Question:** When will the 2021-2022 STD 640 calendars be published?
  - **Answer (Stephanie Ross - DGS):** The calendar is on the website as of now.
- **Question:** We have a PERM PI who we just hired in May 2020, new to State, He has Military order for training. Do we pay him for the Military time and how is it calculated? I can't find anything on how to pay a Perm PI on Military Pay. I assume it is prorated.
  - **Answer (Renee McClain):** I don't have the information in front of me, but I was informed by my staff that they did contact the specific department to solve this issue. Once I get the actual full information in writing I will inform everyone.
- **Question:** Due to the recent COVID pandemic, our department has converted to teleworking. Is there any way to receive the 672's for our roster ARU's electronically, they are currently sent to EDD in paper format? If you can direct me to the person to contact this would be much appreciated.

- **Answer (Arlene Bailey):** Our unit processes and requests for reprints of the 672's. Right now we do not have an electronic format for 672's. Due to the pandemic we are looking at how we can improve processes so we are researching how we can.
- **Question:** The Pre-Tax LSP Calculator on SCO only shows the tax years up to 2020, will this be updated to show 2021?
  - **Answer (Renee McClain):** Yes. You should be able to see the updated information (The lump sum pre-tax calculator).
- **Question:** Why is the computation for FMLA pay with cents for example, the employee used 80 hours the EFMLA pay is \$2000, but the benefit total shows as \$2000.09. My employee ended up with \$10,000.77, how are we supposed to reduce the time if employees are entitled EFMLA pay is up to \$200/day. When does the PLP 2020 resume automatic accrual for employees that are on EPSL/EFMLA. The health stipend eligibility during disability. Not sure about employees normally on flexcash.
  - **Answer (Renee McClain/CLAS):** We are not actually paying employees at their 2/3<sup>rd</sup> salary. What we're actually doing is reducing the amount of time which will equate the 2/3<sup>rd</sup>s of the employee salary. So in order to do that we'll have to take the time and because it's actually rounded it could exceed a \$200/day benefit. We don't want to negatively impact the employee so of course we will have to pay the employee a little bit more.

## Benefits:

### ❖ Affordable Care Act (ACA) Updates- Wendy Yang (CalHR)

- ACA Reminders
  - We sent out the CalHR quarterly ACA compliance review notification to effective departments to correct and certify their ACA errors. The November ACA quarterly compliance review is currently underway-should be certified December 11<sup>th</sup>.
  - Provided is my contact email which is [Wendy.Yang@calhr.ca.gov](mailto:Wendy.Yang@calhr.ca.gov).
- In December we will be receiving our compliance reports-which will be available in the SCO database by December 1<sup>st</sup>. All errors need to be corrected by December 30<sup>th</sup> 2020 to ensure we have accurate reporting to the IRS.
- If your department has a new ACA contact, please contact us to update your departmental ACA contact. Our email is [ACA.policy@calhr.ca.gov](mailto:ACA.policy@calhr.ca.gov).

❖ **Dental, FlexElect and CoBen Program Updates and Reminders- Chiara Galloway (CalHR)**

- No backlog for dental.
- The current turnaround time is 30 business days.
- For FlexElect & CoBen there is a minor backlog currently. Our goal is to mirror the 30 day turnaround time as we have for dental.
- There are a few pending appeals I have been working on that I will get to, we are working on being able to respond to the questions being sent out to us.
- When you're sending in appeals, please include all necessary information (Signatures, dates, etc.) to avoid delays.
- Please make sure you're using the most current versions of the forms.
- Please remind your employees and your retirees that for benefit related questions regarding form processing, that they are to go to the department's personnel office versus CalHR because we don't maintain any of the employee's records to avoid confusion about status.
- Due to the national emergency, part of the guidelines said that employees can continue to submit their 2019 expenses that were incurred during the eligibility period until further notice.
- To contact us directly, our email is [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)
- **Question:** What is the announcement date for the FlexElect?
  - **Answer:** It was an HR announcement and released on November 9<sup>th</sup>. You can find this on the CalHR website here: <https://www.calhr.ca.gov/state-hr-professionals/Pages/main.aspx> in the announcements section.
  - To contact FlexElect program, the email is [Flexelect@calhr.ca.gov](mailto:Flexelect@calhr.ca.gov)

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

- We need all of the standard 700 basic vision enrollment forms sent to SCO only for PI employees.
- The CalHR 695 retiree vision enrollment forms please send those to VSP directly within 60 days of the employee's retirement at [stateofca@vsp.com](mailto:stateofca@vsp.com).
- Please do not send those to SCO or CalPERS.
- To contact vision, our email is [vision@Calhr.ca.gov](mailto:vision@Calhr.ca.gov).

❖ **Open Enrollment - Bryce Miller (SCO)**

- The benefits team has processed just about 72% of dental forms received & 62% of the Flex forms received.
- If you're sending documents back to the agency and we send the back for corrections, please respond to us in a timely fashion as we would like to resolve your issue as quickly as possible.

## Poll

❖ **How are you maintaining payroll documents? (68% voted)**

- Saving the documents electronically: 27%
- Printing hard copies: 73%

## Tax Season

❖ **W-2/Miscellaneous Deductions Reminders – Monique Perez (SCO)**

- Reminder: Document submitting
- SCO will be issuing a payroll letter in December regarding the W-2s.
- SCO will be mailing all W-2s to the employee's current address, please validate.
- For more information contact: [ppsdtaxsupsect@sco.ca.gov](mailto:ppsdtaxsupsect@sco.ca.gov).
- When documents are being submitted in, please do not submit duplicates.

❖ **Employee Action Request (EAR) and Tax Withholdings – Tracy Gutierrez (SCO)**

- Employee Action Request (EAR): Due to the 2017 tax changes. We are making updates to the way W-4 withholdings are processed. Those changes will become effective December 1<sup>st</sup> 2020. We will be putting out a personnel letter and a payroll letter with details.
- There's a new form for the EAR that will be available December 1<sup>st</sup> 2020.
- We will be putting out FAQs for both employment history (EH) and payroll to understand the changes that we are making.
- All new hires that are keyed into the system on December 1<sup>st</sup> and after will be subject to the new withholdings. Any current employees that are making changes to their withholdings on or after December 1<sup>st</sup> will need to use the new EAR and withholding amounts.
- Anybody who makes no changes can stay on the withholdings that they are currently on.

### ❖ Cal Employee Connect (CEC) Address Verification Demo - Liz James (SCO)

- Address Verification Demo: If address is incorrect on CEC, go back to your HR offices and have them key the correct address so it can be updated. It should take a day for CEC to update itself.

## Program Updates

### ❖ Direct Deposit and Reminders – Karin Johnson-Anderson (SCO)

- Statewide Direct Deposit Enrollment Initiative:
- As of October our overall participation is 82.28%. These numbers are up slightly since September. We are working on survey results and determining next steps on the project.
- Department Specific data is available, please contact Jill Souza at [jsouza@sco.ca.gov](mailto:jsouza@sco.ca.gov).
- We have updated the Direct Deposit enrollment form STD699 to include a printed name box and an email address box of the HR Specialist completing the authorization. It should be posted on DGS soon.
- Coming Soon! New process to submit Direct Deposit Enrollment data. In the coming months SCO will formally introduce a new option to submit Direct Deposit Enrollment data. A very high level overview of the new process:
- SCO will provide an Excel spreadsheet and toolkit for each agency.
- HR Offices/Personnel Specialist will key enrollment data into the spreadsheet.
- Transmit the spreadsheet through secure File Transfer Protocol to SCO for processing.
- Update California Personnel Office Directory (CPOD).
- Please visit Department of General Services (DGS) website for updated Standard (STD) forms that allow for a digital signature.
- STD674 and STD674 A/R have been updated adding an email address box for the specialist. This allows SCO to contact the specialist in a timely manner vs. mailing Ding Notices/PR250's.

### ❖ Lump Sum Deferral and Payroll Updates – Renee McClain (SCO)

- Lump Sum Separation Pay Reminders:
  - Please refer to [Payroll Letter 20-012 for Lump Sum Separation Pay and Contributions](#)
    - Labor Code 201 and 202 state an employee must have a separation date of November or December in order to defer into two tax years.
    - The [Lump Sum Toolkit](#) has been updated and the lump sum pre-tax calculator has also been updated to include the 2021 tax year.

- Please respond back to the specialist that is on the PSD40 notice. Do not submit a duplicate Payroll Action Request (PAR).
- Please only submit one copy of the PAR. It is taking a bit longer for the Audits team to receive PARs from the various mailboxes and incoming mail, so if you don't receive an email confirmation within five days please contact the [Statewide Customer Contact Center at \(916\) 372-7200](tel:9163727200).
- If faxing, please fax to the preferred number of (916) 322-8137. This will ensure it is date stamped when it is received.
- Please make sure your contact information is up to date on [CPOD](#) and it is legible on the PAR.
- There can only be one 962 code entered on the PAR. Please refer to the PAM section 2.149 on the SCO website for instructions.
- PARs being submitted with Savings Plus deferrals for only the 2021 tax year are being cancelled and returned. We will not hold the PAR until we are able to start processing for the 2021 tax year. Departments can key the 2020 PAR to issue any lump sum due the employee if they are not deferring into Savings Plus for the current tax year and then submit the PAR for 2021 to SCO by 12/28/20 for November separations or by 01/08/21 for December separations.
- 105 Transactions:
  - Please verify the employee's Social Security Number (SSN) before creating an appointment. We have been receiving a lot of 105 transactions that could be avoided by double checking if the SSN is entered correctly.

#### ❖ Q&A:

- **Question:** Are employees allowed to make changes to their lump sum deferral elections for 2021 after they have separated and received their 2020?
  - **Answer:** No, employee has to assign that election form prior to separation date.
- **Question:** When will the Industrial Disability Leave (IDL) supplementation calculator be updated for 2021?
  - **Answer:** We are currently working on that, with testing. In the next couple of weeks this can be verified and addressed. Very shortly.

#### ❖ SCO Resources – Nastassja Johnson (SCO)

- **Websites:**
  - Human Resources: [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)

- **Contact:**

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

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