



October 2023

Transaction Supervisors' Forum Notes

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SURVEY QUESTIONS:

The following questions are submitted prior to the forum via [Survey Monkey](#).

Question: Could the SCO Position Control Unit provide an overview of what their processes are when it comes to receiving STD. 607 documents from departments? What is the cutoff date to reflect STD. 607 changes? How should inquiries be handled if departments see STD. 607 documents that have not been processed to date?

Answer: Monthly Position Control Rosters are created the first week of each month and are available on [ViewDirect](#). STD. 607's that contain additions, changes or deletions can be submitted through the end of the third week of each month to appear on the monthly report. Inquires can be sent to PPSDPositionControl@sco.ca.gov. The subject line should reflect "Inquiry" and include the ConnectHR file upload confirmation attached to the email.

Question: When will employees see their pay increase due to the approved contract?

Answer: Timing of the increases hitting paychecks depends on many factors. CalHR will continue sending technical packages (Pay Letter drafts) to SCO on a flow basis to implement negotiated salary changes. At this point, it is too early to say when increases may begin appearing in paychecks. CalHR and SCO have already begun close collaboration with the goal of ensuring that state employees receive their increases as timely as possible.

Question: When requesting Personnel Action Request (PAR) Form 680 we are being told by other agencies that they "don't use turnaround PARs." Has SCO relaxed this requirement? Our management requires that we use them. Not sure to how to navigate an agencies refusal to provide them especially when it is readily available for download from Mobius View.

Answer: Agencies should always use a turnaround PAR when available. They are available on [Mobius View](#).

CalHR – Savings Plus – Sarah Reeder & Nicole Haven (Contact: nicole.haven@calhr.ca.gov)

[Savings Plus](#) program is a voluntary retirement investment program, which is available for most state employees. Our Lump Sum Contribution form allows individuals separating from state service the option to contribute their Lump Sum Separation Pay into their Savings Plus retirement accounts. 457b or 401k accounts.

– Lump Sum Separation Pay Contribution Election Form

- Section 1 – Participant Information: Fill it out completely
 - The contact information provided should be non-work related.
 - Often times questions come up after the employee has separated from state service, so a personal phone number and email address is highly encouraged.
- Section 2 – Participant Information (Table)
 - The check boxes at the top can be left blank if neither apply for your employee – this might be their first contribution to Savings Plus, which is fine. If they are already contributing to Savings Plus, please select the applicable boxes. These boxes alert the State Controller’s Office when processing the form that there is already a Savings Plus account.
 - Plan Year: Include ALL plan years the employee will be using for their lump sum. This could include the current and next tax year if they are separating in November or December. Both years should be included here.
 - The employee must indicate a dollar amount within the table. Do not let your employee write the word MAX on the form. We really need the employee to indicate the specific dollar amount here.
 - Whatever dollar amount is written on the form – this is what SCO will process. Changes cannot be made for employees who underestimate or want to change their elections after the close of the 5-day labor code period.
 - If the employee is unsure about how much they will receive in lump sum contributions, they can estimate up to the known limits – the limits are provided on the front side of the form.
 - Limit Changes: Sometimes limit increases are announced toward the end of the year – CalHR/SCO cannot take into account limit changes that occur after a form is received or after the closure of the 5-day labor code period. Participants cannot retroactively change their elections.

– Things to Remember – Forms need to be signed and dated

- 5-Day Prior Rule
 - The 5-day prior to separation rule is in federal and state labor codes – not a policy and we do not have flexibility.
 - We are unable to accept revisions to the form after this timeframe has lapsed.
 - We are unable to accept forms outside of this window for immediate separations, terminations, or retroactive disability retirements.
 - S05 transfers are not true separations from state employment and they’re not eligible for the lump sum process. To be eligible for Lump Sum Separation Pay, the employee must be completely leaving state service.

- If an employee asks when will the money be deposited into the Savings Plus Account?
 - Lump Sums are deposited in the same cadence as payroll
 - Savings Plus receives 2 payroll files from SCO per month – mid and month end.
 - Once a lump sum request is processed, the PAR and pay is processed by SCO, Savings Plus will receive the Lump sum pay on the next available file from SCO.
 - Once we receive the file, the amount is deposited to the Savings Plus account.
 - For example, if a lump sum request is processed by SCO on November 6, it will be on the next file sent to Savings Plus, middle of November. Once we receive that file in the middle of November, the money will be deposited into the Savings Plus account, middle of November.

- Transfer Future Leave Accruals Under Leave Buy-Back
 - 2023 Pilot Program – A new leave transfer option under the annual Leave Buy-Back program New pilot program for the 23-24 fiscal year. Savings Plus previously offered a similar pilot program in 2017 (which some of you might remember), but that program was suspended due to administrative challenges, which have been addressed. We are offering this option again.
 - Under the CalHR Annual Leave Buy-Back Program
 - Offers the option to transfer future leave accruals to Savings Plus retirement accounts.
 - Available for Departments that choose to participate in the Annual Leave Buy-Back program.
 - Eligible Employees
 - Excluded Employees
 - Department must be participating in Leave Buy-Back
 - Balance in Excess of 640 hours as of 12/1/2023
 - Eligible Leave
 - Vacation and Annual Leave only
 - Per IRS rules, only future leave. Must be requested in advance.
 - Based on department
 - To Apply
 - Complete Transfer Future Leave Accruals to Savings Plus form
 - Submit to Department HR Office
 - Due by 12/31/2023
 - Once submitted, form is irrevocable
 - How can you help your employees prepare for retirement?
 - Access key documents on Savings Plus for all employee needs
 - Order Savings Plus documents for your employees
 - Schedule visits with Savings Plus representatives to help educate your employees
 - Submit those who are eligible to enroll to us and let us do the hard work for you
 - [A Guide To Savings Plus for State Leaders](#)
 - Any questions, email nicole.haven@calhr.ca.gov.

SCO KEY INITIATIVES:

SCOConnect: Cal Employee Connect (CEC) Project/ConnectHR – Moe Adam (ConnectHRhelp@sco.ca.gov)

- Cal Employee Connect (CEC)
 - CEC Phase II – Employee Service features
 - Multifactor Authentication (MFA) ([MFA User Guide](#)):
 - Now available to all Cal Employee Connect (CEC) users
 - As of 10/16/2023: 46,716 employees have enabled MFA
 - Direct Deposit:
 - 95% of departments statewide have been deployed
 - As of 10/16/2023: CEC has received 14,695 direct deposit transactions
 - Effective 11/1/2023: SCO will no longer accept STD. 699 on ConnectHR
 - Employee self-service feature on CEC will be primary option for new and change direct deposit requests
 - Electronic File Transfer Protocol (EFTP) will remain an option only for those agencies currently set up
 - Address Change:
 - 95% of departments statewide have been deployed
 - As of 10/16/2023: CEC has received 3,062 address change requests
 - eTimesheet Feature:
 - As of 10/16/2023:
 - 20 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.
 - It has limited work schedules and leave benefits. Please email us for additional information.
 - 2023 W-2 Paperless Feature:
 - As of 10/10/2023:
 - This feature has been deployed statewide
 - 35,682 employees have opted-in (10% adoption rate)
 - Employees have until November 30th to opt-in

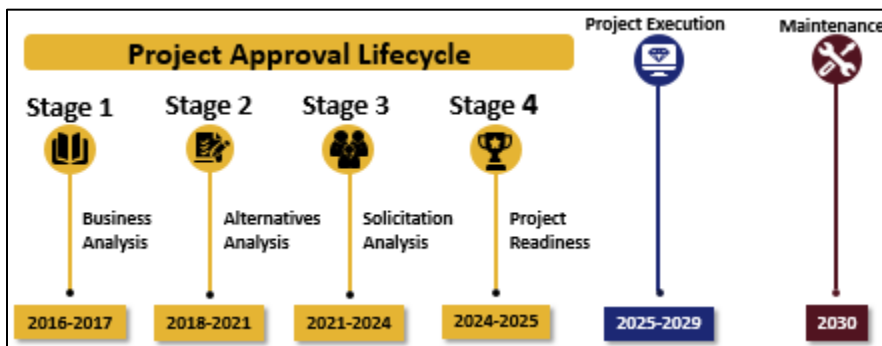
– ConnectHR

- Accounts Receivable (A/R) 035 Deduction Collection Feature:
 - This feature has been made available to all agencies
 - As of 10/10/2023:
 - Total of 52,431 A/R 035 deductions have been processed via this feature
 - Total of \$11,790,992 has been collected
 - As of 9/26/2023
 - The ConnectHR team sent notice of the feature availability to all remaining agencies via email to Security Monitors and Universal Email
 - 95% of departments/agencies have been enabled
- The ConnectHR team will continue to reach out to the agencies who are not using the 035 Feature via their Human Resources Chiefs.

SCO – California State Payroll System (CSPS) Project – Jeana O’Ferrall (Contact: CPSHelp@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 Administration, Benefits Administration, Position Control, Time & Attendance, Travel & Business Expense Management, and Payroll.
- Why CSPS: Current System is 50 years old and not integrated; current system does not reflect or incorporate IT, HR, PR innovations over past 50 years.
- Who will this impact: State HR, Payroll staff and all state employees.



– Status Updates/Progress:

- Recent Progress
 - Management met with departments to provide update on procurement
 - Met with Executive Steering Committee (ESC) to finalize new procurement strategy/approach
- Current Activities
 - Working on “Modernizing Pay Day”
 - Finalizing proposed solicitation schedule based on new procurement approach
 - Updating solicitation documents

- Schedule
 - As a result of the procurement suspension – CSPS is in the process of finalizing a revised project schedule with the ESC. The next ESC meeting will take place on October 12, 2023.

BENEFITS ADMINISTRATION:

SCO – Affordable Care Act – Jordan Kergan (Contact: acasupport@sco.ca.gov)

- SCO has completed the 2020 1095-C corrections process. An email communication was released on Monday, October 16, 2023.
 - Any employee or worker with a change to their health benefits or hours in 2020 will receive a corrected or new Form 1095-C, or a letter voiding their previously issued Form 1095-C.
 - The SCO address is pre-printed as the return address on all 1095-Cs.
 - All undeliverable 1095-Cs returned to SCO will be forwarded to the agency.
 - Human Resources (HR) staff are responsible for forwarding any returned 1095-Cs to the employee.
 - HR staff should ensure employees have their most current mailing address on file by submitting a corrected Employee Action Request Form (STD. 686).
- Auto-population Program Reminder – 2A, 2B, and 2D
 - The program cannot auto populate if:
 - Updates are not keyed into Employment History
 - The appointment transaction was keyed prior to implementation (09/22/2023)
 - Agencies are responsible for reviewing all keyed appointment transactions in the ACAS to confirm the appropriate 2 Code has been auto-populated
 - More information is located in [Personnel Letter #23-021](#)
 - For questions, contact the Help Desk email at acasupport@sco.ca.gov.

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.

- Affordable Care Act – Lisa Hatten (Contact: ACA.Policy@calhr.ca.gov)
 - Year End Reminders and Updates
 - All errors in the Affordable Care Act System (ACAS) must be corrected by December 29, 2023.
 - The state may be subject to information reporting penalties for failure to file a correct information return with the IRS and failure to furnish a correct 1095-C statement to employees.
 - For the 2023 reporting year, the state may be assessed a \$310 penalty for each failure to file a correct information return with the IRS. Additionally, the state may be assessed a \$310 penalty for each failure to furnish a correct 1095-C statement to an employee.

- ACA Monthly Compliance Reports
 - Departments are expected to review their ACA compliance reports in ViewDirect at the beginning of each month and correct all errors on the reports within 30 days.
 - Departments should prioritize ACAS keying for employees who are appointed to a position with a time base of $\frac{3}{4}$ or more or are eligible for health benefits.
 - The ACA Compliance Reports pick up most, but not all errors in the ACAS. Departments are expected to utilize other reports available in the State Controller’s Office Management Information Retrieval System (MIRS) and the COGNOS reports available in myCalPERS to monitor their ACA compliance.
- CalHR November ACA Quarterly Compliance Review
 - During the first week of November, CalHR will notify departments with outstanding ACAS errors. Departments are expected to correct and certify the correction of the outstanding errors within 30 days of receipt of notification from CalHR.
- Additional Reports Available to Monitor ACA Compliance
 - State Controller’s Office – MIRS Reports
 - COM-035 Report: Identifies employees who are on a temporary separation or unpaid status who may be eligible to continue their health benefits via Direct Pay.
Example: A 5C ACA status code needs to be entered in the ACAS for employees who were enrolled in health coverage and may be on a temporary separation or unpaid leave, who are still eligible for health benefits but may not receive the employer health contribution for the month. The effective date of the 5C should reflect the last calendar day of the month that the employee’s health benefits were effective through a payroll deduction.
 - CalPERS – COGNOS Reports
 - Employer Health Event Transactions Report: Identifies employees who may have enrolled in or cancelled their health coverage by using the myCalPERS self-service portal.
- Open Enrollment Updates in ACAS
 - During Open Enrollment, if employees elect to enroll in health benefits or cancel their health coverage, an update in the ACAS is required.
 - For employees who elect to enroll in health coverage during Open Enrollment, departments should key a 3A in the ACAS with an effective date of January 1, 2024. The 3A code indicates that the employee newly enrolled in health benefits.
 - For employees who elect to cancel their health coverage during Open Enrollment, departments should key a 5B in the ACAS with an effective date of December 31, 2023. The 5B code indicates that the employee elected to cancel their health coverage but remains eligible for health benefits.

Note: Departments may not Key Open Enrollment transactions in the ACAS more than 45 days in advance of the earliest effective date of the ACAS status code.
- ACA Training – CalHR and SCO will facilitate ACA training in November.
 - To register, send requests to SCO at ppsdacatraining@sco.ca.gov:
 - November 15 from 9:00 to 10:00 a.m. (Part I Module)
 - November 16 from 9:00 to 11:30 a.m. (Part II Module)
 - Additional training dates for 2024 will be announced soon and posted on SCO’s [Affordable Care Act Training](#) webpage.

- Dental Program Updates – Kristin Wilsey (Contact: Dental@calhr.ca.gov)
 - Program is current and within 30 days
 - Total Inquiries Received to Date:
 - 4,911
 - Top Inquiries
 - 2,180 Benefit Questions
 - 1,378 Appeals
 - Appeals Average Processing Time (complete appeals packages)
 - 8 days
 - 53 Appeals received in September
- Pre-Tax Parking Program – (Contact: Pre-taxparking@calhr.ca.gov)
 - Program is current and within 30 days
 - Total Inquiries Received to Date:
 - 895
 - Top Inquiries
 - 371 Benefit Questions
 - 342 Claims Schedules
 - Appeals Average Processing Time (complete appeals packages)
 - 6 days
- Vision Program Updates – (Contact: Vision@calhr.ca.gov)
 - Program is current and within 30 days
 - Total Inquiries Received to Date:
 - 1,515
 - Top Inquiries
 - 928 Benefit Questions
 - 475 Appeals
 - Appeals Average Processing Time (complete appeals packages)
 - 8 days
 - 29 Appeals received in September
- Vision Dental Authorization Portal Updates – (Contact: Visiondental.authorization@calhr.ca.gov)
 - Program is current and within 30 days
 - Total Inquiries Received to Date:
 - 386 Employee Update Requests
 - 45 Requests received in September

- Flex Elect Program Updates – (Contact: FlexElect@calhr.ca.gov)
 - Program is current and within 30 days
 - Total Inquiries Received to Date:
 - 1,020
 - Top Inquiries
 - 251 Benefit Questions
 - 715 Appeals
 - Appeals Average Processing Time (complete appeals packages)
 - 9 days
- General Program Updates or Reminders
 - A Complete Appeals Package includes:
 - Justification Memo explaining appeal
 - Complete and error-free forms
 - Written confirmation that the employee acknowledges accounts receivable 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.
 - Training Recommendations
 - Benefits Administration Manual Training – online CalLearns
 - Employee Benefits Orientation Training – online CalHR Webpage
 - Benefits Premiums
 - Premiums cannot be waived for months when services are not used.
- Customer Service & Support Project Updates
 - Improved VSP Membership Profiles for Basic Vision
 - Profiles will include all demographic information
 - Coming 2024
 - BAM Updates
 - Updates to reflect plan and premium changes for 2024
 - Coming 2024
 - Vendor Contract Renewals
 - Possible benefit changes coming soon.
 - Appeals Project
 - Online appeal submission
 - Working on project in 2024

- Dependent Re-Verification (DRV) Updates
 - CalHR automated the DRV process for Dental and Premier Vision effective January 2023.
 - 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.
 - September 2023 cycle: Departmental personnel offices should have processed all DRV documents submitted on or before the end of August.
 - December and January birth month cycle have overlapping notices for employees that were mailed October 2nd.
 - December birth month cycle 60-day notice
 - January birth month cycle 90-day initial notice
- Contact
 - Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources provided.
 - Contact the DRV Unit at CalHR with questions and processes related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or vision benefits only.
 - 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.
- Open Enrollment (OE) – Bobby Saetern (Contact: OpenEnrollment@calhr.ca.gov)
 - Updates
 - The 2023 Benefits Open Enrollment was September 18 – October 13, 2023 and has officially ended.
 - Open Enrollment occurs annually for State of California employees to make changes to their Health, Dental, Vision, & Voluntary Benefits such as Consolidated Benefits, FlexElect, Legal, Long-Term Disability, & Supplemental Life Insurance.
 - Changes made during Open Enrollment will be effective January 1, 2024.
 - For information regarding the submission and deadlines of Open Enrollment forms, please view the [2023 Instructions for Completing Open Enrollment Forms](#).
 - Virtual Benefits Fair
 - The CalHR Benefits Team hosted a two-day Virtual Benefits Open Enrollment Fair for state-employees on September 13 and 14, 2023, with our new cloud-based platform partner, Cvent.
 - During the Virtual Benefits Fair, employees were able to view on-demand webinars and join live Q&A sessions hosted by CalHR Benefit Program Vendors and CalPERS Health Plan Carriers.
 - A total number of 5,187 state employees registered for the event. As a result, the CalHR Benefits Team established the [Virtual Benefits Fair webpage](#) on the Benefits Website, where state employees can continue to view on-demand webinars as well as contact information for the Benefit Program Vendors and Health Carriers.

- In-Person Benefits Fairs
 - The CalHR Benefits Team has successfully assisted in organizing two in-person Open Enrollment Benefits Fairs in the Northern Region in Sacramento, CA on September 6, 2023, and in the Southern Region in Norwalk, CA on September 21, 2023.
 - The collaboration was successful as each fair had more than 100 attendees.
 - During these fairs, state employees were able to meet with program vendors and CalPERS health plan carriers to gather information and ask questions.
- Brown Bag Sessions
 - To support departments, the CalHR Benefits Division hosted the two virtual Brown Bag Sessions on September 12, 2023 and October 10, 2023, where more than 100 State HR professionals attended both sessions. The sessions provided HR professionals with the 2023 Open Enrollment season information from CalHR and the State Controller's Office (SCO).
 - If you missed both virtual Brown Bag Sessions, the presentation slides can be found in the [HR Professionals Open Enrollment Resources](#) webpage.
- Contact
 - Department Personnel Offices can send Open Enrollment related questions via email to OpenEnrollment@calhr.ca.gov.
 - Current response time is five (5) business days.
- Resources
 - [CalHR Benefits website](#)
- Statewide Engagement Program (Contact: StatewideEngagement@calhr.ca.gov)
 - Program Mission: Provide a holistic approach in connecting state departments with the capacity and community to support the overall wellbeing of state employees.
 - Employees can learn more about the Statewide Engagement Program by visiting our [CalHR Benefits website](#).
 - State HR Professionals, connect with us via our [Statewide Connect Form](#).
 - State HR Professionals, subscribe to our mailing list through our [Subscription Box](#).
 - Bringing together the voluntary benefit programs:
 - Employee Wellness Program: CalHRWellness@calhr.ca.gov
 - Employee Assistance Program (EAP): EAP@calhr.ca.gov
 - Merit Award Program: Merit@calhr.ca.gov
 - Employee Engagement Program: Engagement@calhr.ca.gov
 - Five Elements of Wellbeing (Gallup):
 - Career: You like what you do every day.
 - Social: You have meaningful friendships in your life.
 - Financial: You manage your money well
 - Physical: You have energy to get things done.
 - Community: You like where you live.

- CalHR Benefits’ Resources
 - NDI Policy CalHR Manual, Bargaining Units 7 and 12: PSB@calhr.ca.gov
 - Websites
 - CalHR Benefits Website: <https://calhr.benefitsprograms.info/>
 - BAM Training Questions BenefitsInquiries@calhr.ca.gov
 - Healthier U Connections: <https://www.calhrwellness.com/en/welcome-california-state-employees/>
 - Human Resources: calhr.ca.gov/state-hr-professionals
 - State Employees: calhr.ca.gov/employees
 - HR Manual: hrmanual.calhr.ca.gov/Home/ManualItem
 - Contacts
 - ACA Program ACA.Policy@calhr.ca.gov
 - Dependent Re-verification (DRV) Program DependentRe-verificationProgram@calhr.ca.gov
 - Dental Program dental@calhr.ca.gov
 - FlexElect/CoBen Program FlexElect@calhr.ca.gov
 - COBRA COBRA@calhr.ca.gov
 - Vision vision@calhr.ca.gov
 - Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov
 - Long Term Disability LTD@calhr.ca.gov
 - Life Insurance LifInsurance@calhr.ca.gov
 - Group Legal Grouplegal@calhr.ca.gov
 - Third Party Pre-Tax Parking Pre-TaxParking@calhr.ca.gov

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

- Open Enrollment Reminders
 - Complete all required sections on the form, including on cancels.
 - All dependents must be included on the enrollment forms, even if no action is occurring for them.
 - Refrain from sending in duplicate forms.
 - Write “Correction” at the top of any form submitted that is correcting a previous upload.
 - A cover sheet listing all employees (EE) is encouraged for batch uploads.
 - Use your resources.
- Open Enrollment Form Counts – October 17, 2023
 - Dental STD. 692
 - Received: 4,886
 - Completed: 3,357
 - FlexElect Cash Option STD. 701C
 - Received: 920
 - Completed: 491
 - Consolidated Benefits Cash Option STD. 702
 - Received: 328
 - Completed: 2
 - FlexElect Reimbursement STD. 701R
 - Received: 3,323
 - Completed: 2,728

PROGRAM UPDATES:

Business Systems Enhancements (BSE) – Arlene Bailey (Contact: [SCCC](#) (916) 372-7200)

- Employment History Data Cleansing
 - Personnel and Payroll Services Division (PPSD) will be manually correcting employment history records. Specifically for item 0952 - Case Number and Date of Action.
 - Request for information will be sent to the Agencies' universal email listed in the [California Personnel Office Directory \(CPOD\)](#).
 - Please respond to the request with the correct data within a maximum of 3 - 5 days.
 - Data cleansing activities will be ongoing through the deployment of the new [California State Payroll System \(CSPS\)](#).
 - Agencies may receive other requests for information or requests to fix the data manually. Please also respond to these requests within a maximum of 3 - 5 days.
 - If a turnaround Personnel Action Request (PAR) is received and there are questions regarding the transactions processed by PPSD, please contact the [Statewide Customer Contact Center](#).
 - Item 0405 – Time Base - Issues
 - Time Base was blank; or Time Base Fraction had an equal # in numerator/denominator. All appeared to have happened when an employee went from a fraction to FT, e.g., 003/008 to 008/008 instead of 003/008 to FT.
 - Item 0405 – Time Base - Reminder
 - Time Base should always have a value for an employee's record. It should not be blank. If you enter '*' to change an employee's time base, make sure that you enter the new time base value.
 - The only appropriate alpha characters are FT, INT or IND.
 - If numeric/fractional, the numerator (first 3 digits) must be less than the denominator (last 3 digits).
 - Item 0615 – Immediate Pay - Issue
 - Immediate Pay = Y instead of X
 - Item 0615 – Immediate Pay - Reminder
 - If an entry is made, the only appropriate entry is 'X'.
 - No other entry will be processed as Immediate Pay in the Payroll system
 - Item 0710 – Intermittent Dates & Hours - Issue
 - The day field contains a number that is larger than the number of days in the calendar month.
 - Example: 05/31/23 is the last day of May and was entered as 05/32/23.
 - Item 0710 – Intermittent Dates & Hours - Reminder
 - Whether entering a Begin Date or an End Date, make sure the Day field contains a number of days that are appropriate for the calendar month.
 - Check the calendar, for example: the Decentralized Payroll Calendar or the PAYROLL / AGENCY CUTOFF / CYCLE / TRANSFER DATE calendars in [Section D 200](#) of the Payroll Procedures Manual (PPM).

- Item 0952 – Case Number & Date of Action - Issue
 - Incorrect/Incomplete Case Numbers due to punctuation that was key entered.
- Item 0952 – Case Number & Date of Action - Reminder
 - The Case Number assigned by State Personnel Board (SPB), normally contains a hyphen: 2 digits for the year, hyphen, 4 digits for the Case Number. Example: 23-1234
 - However, the Employment History system only allows room for 6 characters in the Case Number portion of item 952. To accommodate the full SPB Case Number, no punctuation can be entered in the Case Number portion of this item. Example: 231234
 - Note: This field also contains a date. The Case Number and Date are separated by a hyphen. Example: 231234-01/01/23
- Item 0962 – Separation Pay at an Alternate Rate - Issue
 - The codes portion of the entry is greater than 4
 - 962: Salary Total – **Codes** – Days – Hours – Tenths of Hours
- Item 0952 – 0962 – Separation Pay at an Alternate Rate - Reminder
 - The only appropriate 962 codes are 1 – 4
 - The Personnel Action Manual (PAM) lists 6 numbered reasons for completing Item 962. It appears that some are using the number of the reason, instead of the appropriate code 1 – 4 as identified in [Section 2.149](#) of the PAM.
- Employee Action Request (EAR) – Address - Issues
 - Misspelled city names.
 - Incorrect abbreviations of city names
 - Incorrect zip codes
 - Incorrect state abbreviations
- EAR – Address - Reminder
 - Follow instructions in [PAM Section 6.9 – 6.9.3](#) for address completion instructions. Do not use any punctuation.
 - Make sure the city name is only 21 characters including any spaces, and leave 2 spaces between the city name and the state abbreviation.
 - State abbreviation is only 2 characters. Appropriate abbreviations can be found in [PAM Section 6.9.2 – 6.9.3](#).
 - If the city name exceeds 21 characters including spaces, you can access [USPS.com](https://www.usps.com), and use their “cities by zip code” lookup function to see if an appropriate city abbreviation is displayed.
 - Please refer to the Education: [Mobius View](#) report, EMPLOYEE WITHOUT APPROPRIATE ADDRESS, which requires a variety of address corrections.

Statewide Training Program – Michael Berlanda (Contact: PPSDTraining@sco.ca.gov)

- Program Overview: PPSD Statewide Training Section supports critical Personnel and Payroll functions by providing statewide training to decentralized human resources staff throughout the state. Our essential function is to provide transactional business rules training to personnel and payroll offices so they can accurately understand the business processes needed to data enter and process transactions in the personnel, payroll, Affordable Care Act, and leave accounting system(s).
 - Services we provide include:
 - Virtual instructor-led training
 - [eLearning Modules](#)
 - Direct access to trainers
 - Training consultation
 - Training resources
 - Training toolkits
 - To register for our training classes, please visit: <https://ppsdstatewidetraining.gosignmeup.com/Public/Course/Browse>
 - To view our on-demand eLearning classes, please visit: https://sco.ca.gov/ppsd_elearning_new.html.
 - Program Updates
 - The Lump Sum Separation Process eLearning Series is always available on demand on our website at: https://www.sco.ca.gov/ppsd_lump_sum_separation_process.html.
 - Within the eight (8) short eLearning modules, you are introduced to the training purpose, overall training objectives, prerequisites, and resources available.
 - Newly added classes to our Virtual Classroom
 - [Introduction to Salary Determination – Module 1](#)
 - Coming Soon
 - Virtual Payroll Input Process Training
 - Virtual Fundamentals of Payroll Training
 - Employment History Overview eLearning - October 2023 release date

Statewide Civil Service Retirement Program – Chris Alig (Contact: [Member Election Team@calpers.ca.gov](mailto:Member_Election_Team@calpers.ca.gov))

– Upcoming Reciprocity Changes

- Current process:
 - New employees fill out the Reciprocity Self-Certification Form (PERS-EAMD-801) and Departments send it to SCO
 - SCO reviews form and enters information into [myCalPERS](#)
- New process:
 - The Reciprocity Self-Certification Form (PERS-EAMD-801) will no longer be sent to SCO
 - Departments will retain completed reciprocity forms
- Departments must enter information into [myCalPERS](#)
- What you need to know:
 - These changes will be implemented effective January 1, 2024
 - More information and educational materials are on the way
 - This will not change the determination of retirement from CalPERS for employees
- What to look for:
 - SCO Personnel Letter
 - SCO FAQ – Coming soon to SCO’s website
 - CalPERS Training – Transaction Specialists’ Educational Forum Dec 7th
 - CalPERS [State Reference Guide](#)
 - CalPERS Online Classes
 - For questions, please contact: [Member Election Team@calpers.ca.gov](mailto:Member_Election_Team@calpers.ca.gov).

Statewide Tax Support Program – Monique Perez (Contact: PPDSTSP@sco.ca.gov)

– Verification of Employees Identified as Nonresident Aliens

- Tax Support conducts bi-annual verification; therefore, if you filed a form for the first half of the year (January through June), you must also submit a form for the second half (July thru December).
- [Personnel Letter 23-016](#) – Verification of Employees Identified as Nonresident Aliens
- The Nonresident Alien reports (PDW7170) are available on [ViewDirect](#) until December 31, 2023.
 - Please note any addition or deletion requests submitted to SCO after July 1, 2023, will not be included in the report.
- ALL agencies are required to submit the verification forms bi-annually, even if your agency does not have any Nonresident Aliens. Forms should be submitted on a flow basis to indicate any Additions or Deletions to the report.
- Forms are due by September 15, 2023.
- SCO will contact the department chiefs if forms are not received by September 15, 2023.

- Reporting Compliance 2023
 - January - June
 - Civil Service: 29%
 - July - December
 - Civil Service: 45%
- Reporting Compliance 2022
 - January - June
 - Civil Service: 32%
 - July - December
 - Civil Service: 32%
- Calendar Year End – (Contact: PPSDW2MiscDed@sco.ca.gov)
 - Payroll Letters Release
 - Document Cut-off dates for the 2023 calendar year-end processing
 - Salary Advance Initial/Offset Reporting for year-end
 - Deceased Employee Designee/Beneficiary reporting (PPSD21)

SCO – Statewide Civil Service Audits – Renee McClain (Contact: [SCCC](tel:9163727200) (916) 372-7200)

- Lump Sum Separation Reminders
 - Review [Payroll Letter 23-015](#) and the [Lump Sum Separation Toolkit](#)
 - Contact Civil Service Audits for assistance with Personnel Action Request (PAR) documentation
 - Contact Civil Service Payroll for lump sum payments and Savings Plus contribution amounts
 - Do not submit duplicate PARs (see [Lump Sum Separation Pay FAQ](#) on how to check PAR status)

Reminder: Our Promise Campaign 2023

- The campaign lasts from October 1 to December 31, 2023.
- Any California state employee can pledge a new donation, change their monthly payroll deduction, or make a one-time gift to support a nonprofit of their choice through [Our Promise](#).
- You can donate to any 501(c)(3) nonprofit organization. You can search among these [Certified Nonprofits](#) on [Our Promise](#) website.
- To donate online visit [Cal Employee Connect](#).
 1. Once you are logged in, click on your name at the top right-hand corner and select “User Profile” from the dropdown.
 2. Scroll down and at the bottom of your screen you will see the Our Promise Campaign banner and a link to donate below.
 3. When you click on the link, it will then prompt you to copy your Employee ID (UEID) before proceeding to the link to the Our Promise page to register for an account and start your donation.

PPSD General Reminders

- When you reconcile payroll, check that these *details* are correct:
 - Withholdings and deductions
 - Employer taxes
 - Hours worked, including overtime, vacation time, sick days, etc.
 - Wages and salaries
 - Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.
- Utilize ConnectHR to submit documents or upload data
- Include 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 EMAIL SUBSCRIPTION SERVICE:

- To ensure you're receiving essential PPSD notifications, please subscribe to our email subscriptions listed below. Also, we invite you to share this information with anyone who would be interested in PPSD notifications.
 - [California Leave Accounting System \(CLAS\) Letters](#)
 - [State Controller's Office Letters \(Personnel / Payroll Operations\)](#)

CUSTOMER RELATIONS SURVEY:

How would you like to receive information from us during this time? Please send suggestions to our HR Suggestions Inbox at PPSDHRSuggestions@sco.ca.gov.

SCO RESOURCES:

- Websites:
 - Human Resources (HR): https://sco.ca.gov/ppsd_state_hr.html
 - State Employees: https://sco.ca.gov/ppsd_se_payroll.html

SCO KEY INITIATIVES:

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

CONTACTS:

- Affordable Care Act (ACA) Email acasupport@sco.ca.gov
- [Cal Employee Connect \(CEC\) - Help and Feedback](#)
- [ConnectHR - Help and Feedback](#)
- California Leave Accounting System (CLAS) Email CLAS@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Decentralized Security Administration (DSA) & ViewDirect Access (916) 619-7234 or DSA@sco.ca.gov
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email ppsdmir@sco.ca.gov
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200

FORUM QUESTIONS:

The following questions were submitted during the forum:

Question: Will departments be officially notified if they are a part of the Pilot Program?

Answer: There will be two policies that Savings Plus will announce. The first will be the normal policy announcing if the program is available; that will be released in March or April of 2024. The second policy will announce what needs to be done on the assumption the program is offered. All departments are eligible, the criteria is the employees who are excluded and at or over max of their leave in December.

Question: Regarding Savings Plus, is Medicare and Social Security only being deducted? Not Federal or State taxes?

Answer: For a pre-tax transfer, the cash value is subject to the following mandatory deductions: Social Security; Medicare; State Disability Insurance; and Garnishments (if applicable). Federal and State Tax Withholdings will only be applied to the Social Security, Medicare, State Disability Insurance, and Garnishment withholding amounts not being deferred to Savings Plus account.

Question: Are there specific departments selected in the "limited population" for the Transfer of leave accruals to a Savings Plus account? If so, how will we know if our department is eligible?

Answer: It is open to any department participating in Leave Buy-Back; see [Section 2104](#) of the Human Resources Manual on CalHR's website for clarification. The Savings Plus option is posted in the manual under [Section 1807](#).

Question: Per Pay Letter 23-26, Employees who were at Range C for some classifications like 3135 were eligible for 3.55% increase effective 07/01/23. But SCO keyed 335C (including 3.55%) for some employees who changed to Range C on 07/16/23 or 08/02/23. Is this an error? If yes, will SCO be keying corrected 335 transactions to avoid further overpayment?

Answer: For a Roth after-tax transfer, the cash value is subject to the following mandatory deductions: Federal Tax Withholding; State Tax Withholding; Social Security; Medicare, State Disability Insurance; and Garnishments (if applicable).

Question: Regarding addresses on an Employee Action Request (EAR) form, what can we do about addresses that are too long?

Answer: Please add the correct address abbreviations shown on [USPS.com](https://www.usps.com) website.

Question: If someone submits a Direct Deposit change through Cal Employee Connect, then when should they expect it to become effective?

Answer: It will take approximately 30 days for new a Direct Deposit and up to 45 days for a Direct Deposit Change to come into effect. It is advised that the employee does not close bank accounts until they see the change come through.

Question: What is the turnaround time for when Cal Employee Connect responds to issues related to MFA?

Answer: The SCOCConnect Team tries to respond to all inquiries as soon as possible. Our usual turnaround is two to three business days, as long as the user submitted the question via the [Help and Feedback form](#). Otherwise, it may take longer since we will have to verify the identity of the employee.

Question: What is the Government Code/rules/regulations (if any) requiring employees to submit timesheets timely or by a particular date/time?

Answer: Please review the [Bargaining/Contracts](#) webpage on CalHR for clarification.

Question: What are the dates for the next Affordable Care Act System (ACAS) Training?

Answer: The next trainings are held on November 15 and 16. Please review the [Affordable Care Act \(ACA\) Training](#) webpage on SCO's website for future dates.

Question: Do we know the limit for 2024 pre tax parking yet?

Answer: Not yet, if there is a change to the limit, a Human Resource announcement will be sent out. You can also email pre-taxparking@calhr.ca.gov in late November, as sometimes we have that information prior to the announcement.

Question: I submitted an appeal for an employee for FlexElect because they wanted to sign up for Open Enrollment just in case the appeal was denied. Will that interrupt the appeal process?

Answer: Please send an email to flexelect@calhr.ca.gov to request to close the appeal.

Question: If someone did a change to their medical online during Open Enrollment and then later decide they want to leave everything as is, is there a way to cancel their submission?

Answer: The employee (EE) should try to cancel online via their myCalPERS. If they're unable to do so, then their departmental Human Resources need to attempt to cancel for the EE via myCalPERS. If neither works, contact CalPERS.

Question: If an employee (EE) wants to cancel their insurance after Open Enrollment (OE), can they cancel now or wait until the next OE? The EE wants to use their spouse's insurance not State EE insurance.

Answer: An employee can make changes to their insurance if they have a permitting event or during annual Open Enrollment. There are some benefits that cannot be cancelled based on their bargaining unit, hence the Personnel Specialist should review it with their EEs. If the employee missed this Open Enrollment, then they would need to either have a permitting event in the next year or will need to wait until the next Open Enrollment in 2024 to make changes.

Question: How do we do a batch upload? Is a batch upload having 10 Open Enrollment forms for STD. 701 R, and then a list of employees included?

Answer: Batch upload is a feature on the ConnectHR portal to upload multiple forms of the same type. During Open Enrollment (OE) it is turned on for OE Benefits forms. If you are going to use this feature, please make sure all the forms are the same type (i.e. OE 701R News, OE STD. 692 Changes, etc.). It is the Human Resources (HR) department's responsibility to keep track of what forms are uploaded, so it is encouraged to put a simple cover sheet at the top of the batch of the forms with the employees' names. This helps the HR department keep track of what is uploaded as well as ensures Civil Service Benefits that all forms are processed accordingly.

Question: An employee (EE) was enrolled in a Cash Option. They are now enrolling in health/dental but they did not submit the STD. 701 C/702. Can we do an administrative cancellation for the Cash Option or do we have to send it back to the EE to complete the form?

Answer: It is preferred that the employee sends in a 701 C/702 Cancel so they are aware of what will be happening. However, yes, you are able to perform an administrative deletion on the 701 C/702 in this scenario.

Question: I have a 26 year old delete pending, an Open Enrollment document changing plans with the dependent not listed, and the party code is still at 3. How do I avoid a ding for this?

Answer: As long as the 26 year old delete was submitted before the Open Enrollment change, the Civil Service Benefits team will work on them in order.

Question: If an employee is coming from a Supervisory Class to a Resource and Referral Agency (R&R), then would the employee need to complete a new STD. 692 to switch the rate or would the system do it automatically?

Answer: If the employee is enrolled in Delta Dental PPO plus Premier Enhanced, or MetLife Enhanced, or CCPOA Primary for Supervisors, then they do need to change their plans.

Question: Is the 2023 FlexElect Handbook available somewhere?

Answer: It is available now on alliantbenefits.cld.bz website.

Question: When will Salary Determination Advanced training be offered?

Answer: Currently, only Introduction to Salary Determination Training level I has been approved for delivery. Level II, Advanced Salary Determination, and Reinstatements are progressing through the approval process.

Question: Can we get a link to the new CalPERS Reciprocal Self-Certification Form?

Answer: [CalPERS Reciprocal Self-Certification Form](#)

Question: We do not need approval for Industrial Disability Leave (IDL), Non-Industrial Disability Insurance (NDI), and State Disability Insurance (SDI), correct?

Answer: Correct. Out of Class grievance settlements and pay differentials do not need CalHR approval.

Question: When will raises be processed for Bargaining Unit 1 and 4?

Answer: We are currently working on all Pay letters. No timelines yet, but we are well into the process and moving along. The goal is to get retro pay issued in this tax year. We do not have an expected date.

Question: What is the turnaround timeframe for CalHR approvals?

Answer: We are currently still processing approvals submitted to CalHR for October. Policy updates from bargaining units and legislature take priority and need to be caught up. Please be patient with us.

Question: When will the SCO Lump Sum Pre-Tax Calculator be updated for 2024?

Answer: We are currently working on them.

Question: The address change kept coming back in the Affordable Care Act (ACA) report, even with the abbreviations. How do we correct this?

Answer: Please email employee information to ACASupport@sco.ca.gov.

Question: Are Retired Annuitants (RA) entitled to overtime compensation? For Work Week Group (WWG) 2? And holiday credit?

Answer: Yes, they are entitled to overtime compensation. They are not entitled to additional compensation such as pay differentials. Non salaried employees are entitled to additional hours worked in a work week over 40 hours. RA's do not get holiday credit or Informal Time Off (ITO).

Question: Regarding the delegated authority that involves pay due to employee going beyond one year, is SCO still requiring an approval to issue the pay?

Answer: This is pending. SCO is waiting for CalHRs policy.

Question: Do we contact SCO to issue back pay for range changes? I keyed one for a staff, and only one year issued. What do I need to do for the rest to issue, going back to 2021?

Answer: You must submit a payment adjustment package to the Civil Service Payroll Adjustment ConnectHR dropdown.

Question: Regarding the Personnel Specialists retention increase, is this available to seniors as well as Supervisor Is and Supervisor IIs? What is the effective date? If the effective date is 07/2023, then will we do adjustments for any retentions issued 07/23 and after?

Answer: The Pay letter, when issued, will provide all the details about who it applies to and retroactive adjustments where applicable.

Question: If we did not receive the delegation agreement, then who should we reach out to?

Answer: Check with your Department of Corrections and Rehabilitation Headquarters.

Question: Do we know if the Special Investigators mentioned for an increase is for non-peace officers as well as peace officers?

Answer: The Pay letter will provide information on who is receiving what.

Question: Do you know when SCO will update the Leave Offset Calculator for S06 employee's that now work 184.16 hours monthly?

Answer: We are currently working on this update.

Question: Is there a specific end date for the Annual Leave Special Open Enrollment for Bargaining Unit 7 and 12 for the Non-Industrial Disability Insurance (NDI) starting 2024?

Answer: During October and November 2023, employees in Bargaining Unit 7 and 12 may elect to enroll into the Annual Leave Program. Employees may switch to Annual Leave even if it has been less than 24 months since electing to enroll into vacation and sick leave. Please review [Section 1411](#) of the CalHR Human Resources Manual.

Question: I have a Pay Differential 459 (Covid-19 Tester Monitors) for my State Special Schools that dates back to July 1, 2021 for several employees. We were able to process 12 months retroactively but do I need approval to process further retroactive months dating back to July 2021, or can I request this in the SCO system?

Answer: You may submit the payment request to the Premium Pay adjustment dropdown.

Question: To clarify, Transfer Future Leave Accruals under Leave Buy-Back is eligible to employees with more than 640 hours of leave?

Answer: Yes.

Question: CalPERS has a new 801 form, different from the one listed, which one is the correct form? CalPERS currently uses CalPERS-1187 Self Certification Form. Which one is valid?

Answer: The form number has changed but it is the same form. It is more user friendly. The most recent update was revised in May and a couple more revisions are to come, with circular letter. Use [Reciprocal Self-Certification Form CalPERS-1187](#) dated 5/23.

Question: Are we supposed to upload the CalPERS Reciprocal Self-Certification form on ConnectHR. Should I go back and upload them? Also, what is the dropdown to upload?

Answer: There is no dropdown to upload the document on ConnectHR. Please review [Personnel Letter #17-001](#) for form submission instructions.