

September 2021

Transaction Supervisors' Forum Notes

QUESTIONS:

The questions below were submitted prior to the forum via <u>Survey Monkey</u>.

- **Question:** With all the changes in submitting items, no more faxes, mail, etc. will the Payroll Procedures Manuel (PPM) be updated so that staff will be able to reference how to submit special items, like Accounts Receivable for separating employees?
 - Answer: Please contact the Statewide Customer Contact Center at 916-372-7200. Our staff will pull the document and send it to the manager over that program. (Christina Campbell – SCO)
- Question: Franchise Tax Board (FTB) has employees who work out of state, reporting to offices in Texas, Illinois, and New York. Some of those employees reside in other states that are near their home office. For example: Employee resides in Indiana and works in Illinois, or employee resides in New Jersey and works in New York. We want to ensure we are reading the garnishment section of the Payroll Procedures Manual (PPM) correctly when it comes to out of state garnishments. Is it correct that we can only accept the garnishment from the state of the office, not the employee's state of residence? For example: If an employee resides in Indiana, can we receive an order from Indiana and process it, or must it be from Illinois (work location)? Would the fact that the employee teleworks impact the decision at all? Exceptions would be federal garnishments such as student loans or Internal Revenue Services (IRS) levies.
 - Answer: An agency in California is served with an out-of-state court order (339-007) to satisfy a debt owing to a judgment creditor in another state. According to CCP Section1710, the out-of-state judgment is not enforceable since it was not served through a California court. The judgment creditor may however apply for the entry of a sister state judgment by filing an application pursuant to CCP Section 1710 in a California court. Upon entry of the judgment, the judgment becomes a valid ordinary money judgment. (Christina Campbell SCO)
 - Defaulted Student Loans (339-008).
 - Effective January 1, 1998, out-of-state support orders do not have to be registered in California.

CalHR has not provided guidance on out of state telework. The answer is the same regardless if the person is teleworking or physically residing in another state, but that isn't something CalHR would answer. (Kim Herlache – CalHR)

• **Question:** Can Personal Leave Program (PLP) 2020 be used as leave offset to clear an Accounts Receivable (AR)?

- Answer: Yes for Service Employees International Union (SEIU) and all excluded employees. No for all other bargaining Units. The reason for SEIU is their new memorandum of understanding (MOU) language says PLP 2020 can be used the same as vacation/annual leave. This is only for PLP 2020 and not PLP 2010 or 2012. (Kim Herlache – CalHR)
- Question: When an employee is returning from military leave and is entitled to six months of state service and leave credits. Does the six months start as of the date of the S51, which includes the 30 calendar days of military pay, or does it begin as of the effective date of the military orders?
 - Answer: For vacation CCR 599.739 says completion of six monthly pay periods of continuous service. If the employee has been separated for six months or longer, the six month period will start again. If the employee returns prior to six months their QPP's count. For example, if the employee separates in December with 4 QPP's and returns to state service 4 months later, they only need two more QPP's to be eligible for the 42 hours. . Generally speaking the PH language states after six months of their initial probationary period. If the employee separated before completing six months of their probation they will be required to serve six months of their probationary period prior to be PH eligibility. For both please reference the MOU to ensure this language applies. (Kim Herlache CalHR)
- Question: We are working on our Non-Resident Alien (NRA) reports and have identified two employees that continue to display on the report. We have sent the report back the last two times (July 2020 and January 2021) asking that they be deleted. Can you please clarify how this reports is generated and if there's something else we should be doing to remove them?
 - Answer: Please refer to <u>Personnel Letter#21-014</u>: Verification of Employees <u>Identified As Nonresident Aliens.</u> (Alita Rivas – SCO)
- Question: Will an employee communication regarding Other Post-Employment Benefit (OPEB) contribution changes effective 9/1/2021 be released? We would like to notify our employees, but want to wait if there is more information to come.
 - Answer: On August 31, 2021 the State Controller's Office sent out a broadcast email with the subject "Automation of Other Post-Employment Benefits (OPEB) Contributions." You can find this email as well as an archive of all of our emails on the <u>SCO website</u>. On July 6, 2021 SCO released <u>Personnel Letter #21-011-</u> <u>Personal Leave Program and Minimum Wage Equity Adjustment Removal.</u> (Rehana Kausar – SCO)
- **Question:** When will CalHR release its updated information for Open Enrollment (e.g., 2022 Dental Handbook, reimbursement account info, etc.)?
 - Answer: CalHR released Open Enrollment information for the 2021 season in August and it is located online on the new CalHR Benefits Division Website. The website has a password protected page for all HR Professionals that includes Open Enrollment resource documents. Please note that the CalHR department website will not be updated for Open Enrollment and there is no longer a toolkit. Please view the new CalHR Benefits Division website

https://calhr.benefitsprograms.info/. for updated information. For any questions, please email me at <u>BenefitsInquiries@calhr.ca.gov</u>. (Amber Neves – CalHR)

- **Question:** Does a limited term/intermittent position count towards eligibility for health benefits if an employee later becomes permanent intermittent? Also, when are employees in a limited term position eligible for health benefits?
 - Answer: Limited-Term Intermittent employees are not eligible for health benefits regardless of the number of hours they work. If a Limited-Term Intermittent employee is later appointed to a Permanent Intermittent position, you only count the hours while in the Permanent Intermittent position towards the 480 hours in a 6-month Control Period to determine eligibility. (Elaine Smith CalHR)
- **Question:** Many of the dental and Accounts Receivable (AR) forms submitted to PPSDTempOps email box from January through March have not been processed. Is there a specific period of time that we need to wait before we resubmit other than waiting for the processing dates?
 - Answer: After checking the weekly processing dates on SCO's webpage, and you see that your document hasn't been processed please call the Statewide Customer Contact Center (916) 372-7200 and check to see if your documents have been received. If your documents have been received but not processed, the phone center representative will escalate for processing. If your documents have not been received, send the document through ConnectHR. (Bryce Miller SCO)

POLL:

- **Question:** Does your department utilize encryption on your emails?
- Results:
 - Yes 25
 - o No 7

PROGRMA UPDATES:

- CalPERS Membership Updates/Reminders Michelle Norris:
 - Reporting Sick Leave
 - Use the person search in myCalPERS
 - Click on the Employer under Appointment History on the member's summary page.
 - Click on the Division link on the site change history page.
 - Click on the radial button for the Permanent Separation transaction on the Appointment Event History list. Hit Correct Event box.
 - Enter the days of sick leave in the Unused Sick Leave box. Hit Save.
 - Employer Training:
 - https://www.calpers.ca.gov/page/education-center/employereducation/employer-training-classes
 - Under myCalPERS Retirement Enrollment
 - myCalPERS Retirement Enrollment Student Guide
 - Permanent Separation:
 - Circular letter 200-036-20
 - Zero payroll must be reported monthly if your employee is out on leave to avoid being permanently separated by CalPERS

- Scenarios of when to permanently separations are needed
 - Retires from your agency
 - Does not return from a leave of absence
 - Voluntarily resigns from employment
 - Retired annuitant reinstates from retirement
 - Has a health only appointment and cancels their health coverage
 - Becomes deceased
- Retirement Formula 1^{st} and 2^{nd} Tier:
 - <u>Election package</u> provided to employee upon hire
 - Correct tier must be selected for correct member benefits to apply
- Resources:
 - CalPERS Customer Contact Center 888 CalPERS (or 888-225-7377)
 - Membership_Reporting@calpers.ca.gov
 - myCalPERS Retirement Enrollment Student Guide
 - <u>myCalPERS System Access Administration</u>
 - myCalPERS System Privileges for Business Partner Roles
- CalHR Service & Seniority Statewide University Update Elda Ortiz
 - Employees submitting a CalHR-039 form for exempt time worked at a Private University:
 - The request can be submitted by the employee or by the HR Staff by emailing <u>ucpath@universityofcalifornia.edu</u>
 - In the email please include:
 - The CalHR-039 form with Section I Employee Information completed & signed by the employee. The employee's signature authorizes UC to release the employment history and payroll records to the Employee or HR Staff.
 - On the email subject line add: Cal HR Records Request. (To ensure the case is assigned to the appropriate team to complete.)
 - Include all dates of employment at the University and employee and or HR Staff phone number so that the UC Staff can obtain the SSN# for the employee
 - Include the return email address to send the completed form and month to month record of earnings
 - In the event the requested data is for a timeframe prior to what is available in the UC Path system, the form and report will be completed with the available information from UC Path. The UC Path associate will explain which timeframe will need to be requested prior to the launching of the new UC Path system.
- SCO Statewide Tax Support Program Monique Perez
 - Employee Action Request (EAR):

- Employee Action Request (EAR) Keying Update:
- Dependent Keying Error Claim Dependents (E05)
 - Must be a whole dollar amount (i.e. \$2,000.00)
 - Should not be a single number (i.e. 1)
 - Withholding will not calculate correctly, as it will be based off \$1.00 rather than \$2,000.00 as it should be.
 - DO NOT put the amount for Claim Dependents in the Additional Withholding field as this amount will deduct every pay period (SCO has been receiving inquiries from specialists and EE's
- EAR Quick Start Guide: <u>https://sco.ca.gov/Files-</u> <u>PPSD/EAR Quick Start Guide ADA version.pdf</u>
- Please refer employees to the Internal Revenue Service Tax Withholding Estimator to ensure the EAR is completed correctly. https://www.irs.gov/individuals/tax-withholding-estimator
- Any questions please feel free to email me or my team email ppsdw2miscded@sco.ca.gov
- SCO Business Services Enhancements Pliny Reynolds and Rehana Kausar
 - Other Post-Employment Benefits (OPEB) Payroll Automation Project:
 - The following have been updated on the SCO website:
 - Payroll Letter #21-011: Automation of Other Post-Employment Benefits (OPEB) Contributions
 - OPEB Payroll Automation FAQs
 - Modified Paycheck Calculators (CA, NY, IL) effective 9/2021 pay period
 - <u>Payroll Action Manual (PAM) Revision Payroll Action Request (PAR)</u> <u>Item 142 (OPEB CBID)</u>
 - Reminders:
 - Blank OPEB CBID in Employment History
 - Retirement max compensation review in Pay History
 - August pay period is the last month with the OPEB interim deduction
- SCO Statewide Disability Program Christina Campbell on behalf of Karin Johnson-Anderson
 - Differential Payments for Employees on a Disability Leave of Absences Processing Update. The State Controller's Office, has made an update to the process of submitting documents for employees that receive Differential Pay while on disability. This update will go in to effect on October 1, 2021. Documents submitted prior to October 1, 2021 do not need to be resubmitted, they will be worked in date order received. See update below:
 - Industrial Disability leave (IDL) and Enhanced Industrial Disability leave (EIDL): Certify and submit Differential Pay for employees on IDL or EIDL on the same <u>Std. Form 674 D - Industrial/Non-Industrial Disability Pay</u> <u>Request</u> as the IDL or EIDL pay certification. Upload documents through the ConnectHR Disability drop down.

- Non-Industrial Disability Insurance (NDI) or Enhanced Non-Industrial Disability Insurance (ENDI), : Certify and submit Differential Pay for employees on NDI or ENDI on the same <u>Std. Form 674 D - Industrial/Non-Industrial Disability Pay Request</u> as the NDI or ENDI pay certification. Upload documents through the ConnectHR Disability drop down.
- Temporary Disability (TD): Certify and submit Differential Pay for employees on TD on the same <u>Std. Form 674 - Payroll Adjustment Notice</u> as TD pay certification. Upload documents through the ConnectHR Disability drop down.
- SCO Statewide Payroll Program Renee McClain and Christina Campbell
 - Misrouted Documents:
 - We have been receiving misrouted documents in the Temp Ops email. In order to better assist you:
 - Civil Service Audits Should be receiving Payroll Action Requests (PAR) the departments are unable to key; this includes lump sum separations. These should not be going to the Retirement program. Phone calls pertaining to lump sum PAR documentation should also be going to Civil Service Audits.
 - Civil Service Payroll Should only be receiving STD. 674s and STD. 674ARs (Accounts Receivable) for regular pay, lump sum pay, and Military.
 - Premium Pay Should receive out of class, payment types 1,2,8,9, A, F G not GT, H, S, Y
 - Please do not send inquires to the Temp Ops email. You may contact the Statewide Customer Contact Center (SCCC) (916) 372-7200 for status on your document.
- CalHR Savings Plus Lump Sum Deferral Guidelines and Resources
 - Lump Sum Separation Definition
 - What is Lump Sum?
 - The opportunity to defer a portion or all of an employee's unused vacation and annual leave (minus Social Security and Medicare) upon separation from state service to the Savings Plus 401(k) and/or 457(b) Plans.
 - What are the benefits?
 - Tax break
 - Deferring into two tax years
 - Employer's Part
 - Provide an estimate of cashable accumulated leave time available
 - Reinforce the 5 workday timeframe for completing the form (Savings
 - Plus can assist participant with completing it)
 - HR Manual (1802/1803) provides guidelines for reference
 - Send completed form to State Controller's Office
 - •

- Retirement
- Contact CalPERS (no more than 120 days prior)
- Notify your Personnel Office (45-65 prior)
- Catch-up: Complete and submit paperwork to Nationwide (45 days prior)
- Lump Sum Fill out the Lump Sum Transfer form and submit to your Personnel Office (30 days prior)
- Labor Code: Lump Sum Separation Pay paperwork must be officially submitted five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to separation in accordance with California Labor Code Sections 201(b) and 202(b). No changes will be accepted after the five day threshold has passed.
- o Employee Resources
 - Lump Sum Separation Pay Contribution Election Form
 - Contact a Retirement Specialist
 - Lump Sum Separation & 457(b) Traditional Catch-Up Webinar
- Contact Information
 - Call us at (855) 616-4776
 - Visit savingsplusnow.com
 - Contact me: Julie Schultze
 - (916) 322-3771
 - Julie.Schultze@calhr.ca.gov

Benefits Administration

- CalHR Benefits Division
 - Open Enrollment
 - Reminder: Open Enrollment starts on September 20 and ends October 15, 2021.
 - Official Open Enrollment Announcement was emailed to state department Personnel Officers on August 18. CalHR sent out Open Enrollment information one month in advance so state departments could share information with state staff.
 - Personnel Officer changes or questions regarding the list should be reported to Kim Herlache at Kim.Herlache@calhr.ca.gov.
 - Please share the link to the CalHR Benefits Division website: calhr.benefitsprograms.info with your staff. The CalHR website will not contain updated information for the 2021 Open Enrollment Season. Please have employees view the CalHR Benefits Division website for updated information.
 - Open Enrollment Fair:
 - First-ever state employee virtual Open Enrollment Fair on the Healthier U Connections wellness portal through October 15.
 - To attend the virtual Open Enrollment Fair, state employees will need to create or log into their Healthier U Connections account at www.calhrwellness.com, Registration Code: Wellness2021.
 - Virtual Open Enrollment Fair resources include:

- Pre-recorded presentations from health, dental, vision, and voluntary program plan vendors.
- Access direct links to Open Enrollment webpages and resources for CalHR administered plans, plan websites and the CalPERS administered health plans.
- After October 15, state employees can continue to access Healthier U Connections yearround for well-being resources such as healthy recipes, cooking tutorials, wellness articles, a fitness library and more.
- Dental Program:
 - Dental appeals are current.
 - Reminders:
 - Enrollment or changes outside of Open Enrollment must be based on a valid permitting event. Enrollment requests or appeals submitted without a valid permitting event will be denied. Effective dates of coverage must be based on the permitting event and the date the form is received in the personnel office. Refer to the BAM for details.
 - Please submit complete appeal packages using the current version of the Std. 692 form. Outdated Std. 692 forms will be rejected and the employee will be required to complete the current form.
- Vision Program
 - Contact Vision Service Plan directly for vision inquiries other than appeals at stateofca@vsp.com. Include employee's full name in the subject line.
 - Remind employees to contact their own department personnel staff directly with benefits inquiries.
 - Assist prospective retirees in completing the CalHR 695 form to continue vision benefits into retirement, as they have 60 days to elect coverage.
 - Complete new vision forms for employees returning from a Leave of Absence and send to Vision Service Plan at stateofca@vsp.com.
 - Vision Service Plan's mailstop has changed to MS 229. Use the latest forms on the CalHR website.
 - Send vision appeals to CalHR at vision@calhr.ca.gov. Vision backlog is caught up to September 1, 2021.
- FlexElect and CoBen Programs
 - The backlog for FlexElect/CoBen appeals is approximately 90 days.
 - For escalated appeals, please indicate "Escalation" in the subject line.
- o COBRA
 - Updated information regarding the COBRA premium subsidy relief is available in BAM section 400 at Consolidated Omnibus Budget Reconciliation Act (COBRA) – CalHR.
- CalHR Benefits' Resources Websites
 - Human Resources: calhr.ca.gov/state-hr-professionals
 - State Employees: calhr.ca.gov/employees
 - HR Manual: hrmanual.calhr.ca.gov/Home/Manual Item
 - Contacts
 - ACA Program ACA.Policy@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 Program DependentReverificationProgram@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
- Vision <u>vision@calhr.ca.gov</u>
- SCO Statewide Civil Service Benefits Bryce Miller
 - Open Enrollment
 - ConnectHR
 - Benefits Reminders

SCO Key Initiatives

- SCO California State Payroll System Project Bernadine Schult
 - In Process
 - SCO Legal reviewing solicitation (SOW/RFP) documents
 - Ancillary procurement activities for SFY 21/22
 - Agency/Department demographic survey
 - Recruiting for multiple OCM positions
 - Enterprise Architecture Services procurement
 - Obtain SCO/CalHR approval for Stage 3 Part A
 - Recent Progress
 - Executive Steering Committee meeting complete
 - CR007 Travel and Expense Management approved
 - CR006 Benefits change approved
 - Transformational Opportunities "Change Pay Frequency" and "Leave Accounting Consolidation" approved
 - Phase 0 Bidder's Survey responses received
 - What's Next
 - Union Town Hall in September
 - Submit Stage 3 Part A to CDT
 - Process Advisory Committee (PAC) kickoff
 - Evaluation of Phase 0 Bidder's Survey
 - o Our Ask
 - Participate in "In Process" activities
 - Provide SME support for questions
 - Provide SME support for data cleansing sessions
- SCO ConnectHR Grant Boyken:
 - ConnectHR file upload feature will soon be the only means of submitting personnel/payroll documents to SCO
 - Goal: Deploy ConnectHR to as many departments as possible for the Open Enrollment period. 46 of 168 still not deployed.

- Prioritizing new deployments please be patient if you already have ConnectHR access and are requesting to add/delete users
- SCO General Reminders Nastassja Johnson
 - Include your name on all documents submitted to the SCO.
 - Utilize ConnectHR to send documents rather than fax, email or mail.
 - Include the employees complete social security number (SSN) when sending documents through ConnectHR.
 - 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 to allow for an email address for the specialist. This allows SCO to contact the specialist in a timely regarding PR250's (dings).
 - o Update California Personnel Office Directory (CPOD).
 - The <u>PPSD Register</u> PPSD's Monthly Newsletter
- SCO Resources Nastassja Johnson
 - Websites:
 - Human Resources: <u>https://sco.ca.gov/ppsd_state_hr.html</u>
 - State Employees: <u>https://sco.ca.gov/ppsd_se_payroll.html</u>
 - Contacts:
 - <u>Statewide Customer Contact Center</u> (916) 372-7200
 - HR Suggestions Email (All HR Staff) <u>PPSDHRSuggestions@sco.ca.gov</u>
 - CS Escalation Email (HR Supervisors and Managers) <u>PPSDOps@sco.ca.gov</u>
 - SCO Key Initiatives:
 - <u>Cal Employee Connect</u>
 - <u>California State Payroll System Project</u>

COVID-19:

- The Personnel and Payroll Services Division (PPSD) is monitoring the <u>COVID-</u><u>19</u> pandemic closely. At this time, PPSD is open for business as usual. PPSD will continue to stay on top of the latest COVID-19 information and update departments of any changes that may impact services to our customers. PPSD is updating the State Controller's Office (SCO) <u>State Human Resources</u> and <u>State Employees</u> webpages with service information as it becomes available. These webpages will be updated regularly, as necessary.
- SCO has developed <u>streamlined processes</u> to expedite financial transactions and to report.
 - PPSD will accept electronic signatures. Please follow your electronic signature protocol.
- Updates have been made to the <u>COVID-19 Emergency Family Medical Leave Act (E-FLMA) calculator</u>. Please be sure to use the most up to date version of the calculator.
- The State Controller's Office (SCO) has made a permanent decision to no longer impose restrictions identified in the Personnel and Payroll Services Division's (PPSD) <u>Decentralized Security Program Manual</u> and <u>Decentralized Security Guidelines</u> below:

- Access and use of SCO's systems shall only be initiated from workstations that are owned or leased by the state agency and that are physically located within a facility that is owned or leased by the state agency and;
- Access and use of SCO's Human Resource Management Systems shall only be initiated from workstations that are owned or leased by the state agency and that are physically located within a facility that is owned or leased by the state agency.
- Instead, agencies and campuses should review and adhere to the following policies and procedures for remote access to information systems.
 - <u>State Administrative Manual (SAM) 5305.5</u>
 - <u>State Administrative Manual (SAM) 5360.1</u>
 - <u>Statewide Information Management Manual (SIMM) 5360-A</u>
- Updates to PPSD's Decentralized Security Program Manual and Decentralized Security Guidelines to reflect this change in policy will be made as soon as practical.
- For more information, please access our <u>COVID-19 FAQs</u>.

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.
 - o California Leave Accounting System (CLAS) Letters
 - o State Controller's Office Letters (Personnel / Payroll Operations)

Contacts

- Transaction Supervisors' Forum <u>SCOTransactionSupervisors@sco.ca.gov</u>
- <u>SCO Personnel and Payroll Services Division (PPSD)</u>
- <u>California Department of Human Resources (CalHR)</u>
- California Public Employees' Retirement System (CalPERS)
- <u>California Personnel Office Directory (CPOD)</u>
- HR Suggestions Email (All HR Staff) <u>PPSDHRSuggestions@sco.ca.gov</u>
- ConnectHR Email: <u>connecthrhelp@sco.ca.gov</u>
- Cal Employee Connect Email <u>connecthelp@sco.ca.gov</u>
- Cal Employee Connect Feedback Email <u>connectfeedback@sco.ca.gov</u>

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