



Transaction Supervisors' Forum

Presented By: Nastassja Johnson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

December 17, 2025

Survey Questions





Question

Presenter: Erin Leight

Contact: PPSDTraining@sco.ca.gov

When will Advance Salary Determination and Fundamentals of Payroll return to the training offerings? Also, when will Military Leave training be added?

Answer:

Advance Salary Determination and Fundamentals of Payroll trainings are both in the works and will be returning soon.

The State Controller's Office has been instructed by CalHR to direct all training questions regarding Military Leave to Personnel Services Branch (PSB) at PSB@CalHR.CA.Gov. This is because every Military Leave situation is unique and there is no one training that would address each unique situation.



STATEWIDE BENEFITS ADMINISTRATION

CalHR Transaction Supervisors' Forum Update



CalHR Benefits Division

December 17, 2025



DECEMBER 17, 2025

CalHR Benefits Division Updates

*Benefits for a
Life Well Lived.*

About the Benefits Division

OUR MISSION

We administer benefits through stakeholder collaboration that empowers strategic partners to attract, retain and enhance the wellbeing of the State of California workforce.

OUR VISION

A thriving State of California workforce that is empowered by high-quality, comprehensive and competitive benefit options to lead healthy, secure and prosperous lives.





New Benefits Newsletter

Presenter: Anna Burke

New Benefits Newsletter

Presenter: Anna Burke - Project and Training Specialist

Email: BenefitsInquiries@calhr.ca.gov

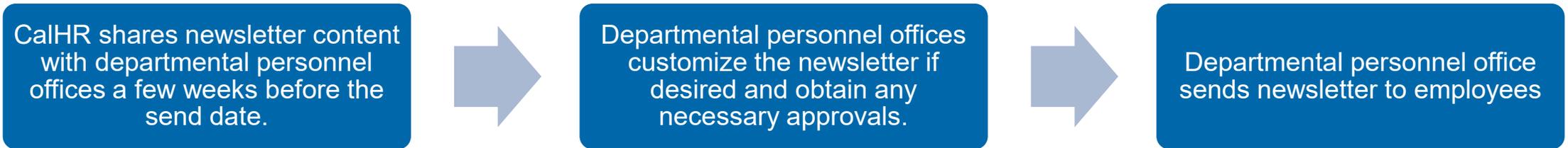
- **What's New:** Starting in 2026, CalHR will launch a new monthly benefits newsletter. The newsletter will highlight state benefits, provide helpful reminders and tips, and share other valuable benefits information for employees.
- **Purpose:** Support departmental personnel offices by empowering them to help employees understand and make the most of their benefits. It also establishes ongoing communication with employees to keep benefits top of mind throughout the year.
- **Additional Resources:** Each newsletter links to a webpage with detailed content and helpful resources for employees.

New Benefits Newsletter

Presenter: Anna Burke - Project and Training Specialist

Email: BenefitsInquiries@calhr.ca.gov

How It Will Happen:



*Make sure you coordinate within your departmental personnel office on roles and/or the approval process for sending out employee communications.

How to Receive Newsletter Content:

- Make sure you are on the Personnel Officer listserv
- Sign up here if you're not already receiving Personnel Officers updates: [CalHR Subscriptions - CalHR Website](#)



Benefits Administration Manual (BAM) Updates and Benefits Ambassador Training

Presenter: Anna Burke

BAM Updates and Benefits Ambassador Training

Presenter: Anna Burke – Project and Training Specialist

Email: BenefitsInquiries@calhr.ca.gov

- **What is BAM?** The Benefits Administration Manual also referred to as BAM is a statewide resource that guides HR professionals in administering employee benefits accurately and consistently.
- As part of our ongoing efforts to improve the BAM, we are working to standardize content and make it clearer, more user-friendly resources for HR professionals across the state
- **In coordination with this refresh, launching in 2026**, CalHR will begin rolling out the Benefits Ambassador Training to strengthen engagement with HR professionals and benefits administrators. This includes a series of *BAM-focused trainings*.
- First training (early 2026): **BAM Basics & Navigation**
 - How to navigate the updated BAM structure using real HR scenarios
 - Understand the goals of the BAM standardization effort
 - High-level overview of state benefits

To find updates on this training series visit:

<https://benefits.calhr.ca.gov/state-hr-professionals/benefits-ambassador-training/>



Affordable Care Act Program Updates

Presenter: Lisa Hatten

Affordable Care Act Program

Presenter: Lisa Hatten

Email: aca.policy@calhr.ca.gov

Detailed Safe Harbor Outreach

- CalHR reached out to departments with errors observed on the latest Detailed Safe Harbor Report from SCO for the state's full-time employees.
- Correction instructions were provided to departments, as well as a summary of all errors on the monthly compliance reports, with a reminder to correct all errors in the Affordable Care Act System (ACAS) prior to the end of the year.

Note: The monthly ACA compliance reports pick up most, but not all errors in the ACAS. Departments are expected to utilize other reports available in SCO's Management Retrieval System and COGNOS reports available in myCalPERS to monitor their ACA compliance.

Affordable Care Act Program

Presenter: Lisa Hatten

Email: aca.policy@calhr.ca.gov

December Monthly ACA Compliance Review

- The December Monthly ACA Compliance reports are available on SCO's ViewDirect and Mobius View. All errors on these reports need to be corrected prior to the end of the year to be reflected in the annual reporting to the Internal Revenue Service to reduce the state's exposure to penalties.

Affordable Care Act Program

Presenter: Lisa Hatten

Email: aca.policy@calhr.ca.gov

Information Reporting Penalties

- The state may be subject to information reporting penalties up to \$680 per corrected 1095-C for the 2025 reporting year if the health benefit status data on the 1095-C form issued to the employee and reported to the Internal Revenue Service is incorrect.
 - \$340 penalty for each failure to file a correct information return with the IRS
 - \$340 penalty for each failure to provide a correct information return to the employee

Reminder: Departments will be responsible for 100 percent of any information reporting penalties assessed for the 2025 reporting year.



Dental Program Updates

Presenter: Susan Garrett

Dental Program Updates

Presenter: Susan Garrett

Email: Dental@calhr.ca.gov

- If you received a 'ding notice' or correction request from SCO to correct a form you submitted for open enrollment, please send the correction back to SCO as soon as possible.
- All dental program questions and inquiries for CalHR must be sent to dental@calhr.ca.gov for a response. Any emails sent to Benefits Division program staff will be returned to sender.
- Current response times:
 - Appeals 30 business days
 - Inquiries 5 business days
- If an appeal needs urgent attention, please provide an explanation of the urgency and indicate in the subject line of your email.
- Dental appeals may still be submitted to dental@calhr.ca.gov until December 31, 2025.



Request Tracking System (RTS)

Presenter: Susan Garrett

Request Tracking System (RTS) Officially Launches January 1, 2026

Presenter: Susan Garrett

Email: Dental@calhr.ca.gov, FlexElect@calhr.ca.gov, Vision@calhr.ca.gov

- Dental, FlexElect and Vision appeals needing CalHR approval must be submitted to CalHR through RTS as 'Customer Service and Support Appeals Requests.'
- Departmental personnel offices may reach out to the appropriate inbox above to request resources, including a recorded system demo, FAQ's and a User Manual.
- The programs will continue to accept Dental, FlexElect and Vision appeals submitted via email to the program inboxes for a limited time (until December 31, 2025).
- **Beginning January 1, 2026, Dental, FlexElect, and Vision appeals must be submitted through RTS.**
 - Appeals submitted via the email inboxes will not be processed.
- [Link to RTS](#)



Vision Dental Health Authorization (VDHA) List Update

Presenter: Susan Garrett

Vision Dental Health Authorization (VDHA) List Updates

Presenter: Susan Garrett

Email: DRV@calhr.ca.gov

- The Vision Dental Authorization (VDA) Portal housed in SharePoint has been decommissioned and replaced with the Vision Dental Health Authorization (VDHA) in the Family Connect Portal (FCP).
- The VDHA List identifies departmental personnel and CalPERS health benefit officers who are authorized to speak directly to vision, dental and health benefit carriers to make changes to employees, retirees and their dependents state sponsored benefits.
- Effective November 19, 2025, through December 19, 2025, Department Admin roles in the FCP must review existing Department User roles and assign the VDHA List role as needed.
- Department Admin will be required to manage all VDHA List accounts by approving and removing access for the respective agency.
- Resources for this update will be available on the DRV Benefits Administration Manual (BAM).
- If you have questions or need assistance, please contact the email listed above on this slide.

Vision Dental Health Authorization (VDHA) List Updates

Presenter: Susan Garrett

Email: DRV@calhr.ca.gov

- Department Admin users are automatically included on the VDHA user list.
- **Important:** Please ensure you have assigned the VDHA role to the people on your team who need to be able to speak to the benefits carriers on employees' behalf by close of business on **December 19, 2025**.
- The first VDHA List will be provided to carriers on **December 22, 2025**.
- [Family Connect Portal](#)

Resources – CalHR Benefits Webpages

- [Benefits Website](#)
- [State HR Professionals](#)
- [State HR Professionals Benefits Toolkit](#)
- [State HR Professionals OE Resources](#)
- [HR Manual](#)
- [Open Enrollment](#)
- [CalPERS Open Enrollment for Active Members](#)
- [Virtual Library](#)
- [Benefits Calculator](#)
- [State Employees](#)
- [Health](#)
- [Dental](#)
- [Vision](#)
- [Insurance Benefits](#)
- [Consolidated Benefits \(CoBen\)](#)
- [FlexElect Reimbursement Account](#)
- [Life Insurance for Excluded Employees](#)
- [Group Legal Services](#)
- [Group Long-Term Disability Insurance \(LTD\) – Excluded Employees Only](#)
- [Work Resources](#)
- [Engagement Resources](#)

Resources – CalHR Benefits Contacts

- ACA Program ACA.Policy@calhr.ca.gov
- BAM Training BenefitsInquiries@calhr.ca.gov
- COBRA COBRA@calhr.ca.gov
- Dental Program dental@calhr.ca.gov
- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov
- FlexElect Program FlexElect@calhr.ca.gov
- CoBen Program CoBen@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
- Vision/Dental Authorization Portal VisionDental.Authorization@calhr.ca.gov
- Vision Program vision@calhr.ca.gov
- Open Enrollment OpenEnrollment@calhr.ca.gov
- General Questions BenefitsInquiries@calhr.ca.gov



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Open Enrollment (OE) Updates

- All documents processed
 - Received over 32,000 OE documents
- Verify all deductions are present and accurate after cutoff
 - Call the [Statewide Customer Contact Center](#) if anything is missing or incorrect
- PR250 or ding notices
 - Please return any outstanding ding notices that were sent for OE
 - Return in a timely manner



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Announcement!

- Effective January 1st, Ryan will no longer be the Civil Services Benefits Program Manager
- Accepted IT Specialist I within California State Payroll System – Functional Team
- Rebecca Garcia will be covering Benefits Program duties until filled

Thank
you
all



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Part One – Login:

Log into a [ConnectHR](#) account.

CONNECTHR

Help & Feedback Login

→ Login

User Name
[Forgot User Name?](#)

Password
[Forgot Password?](#)

Submit

Cancel

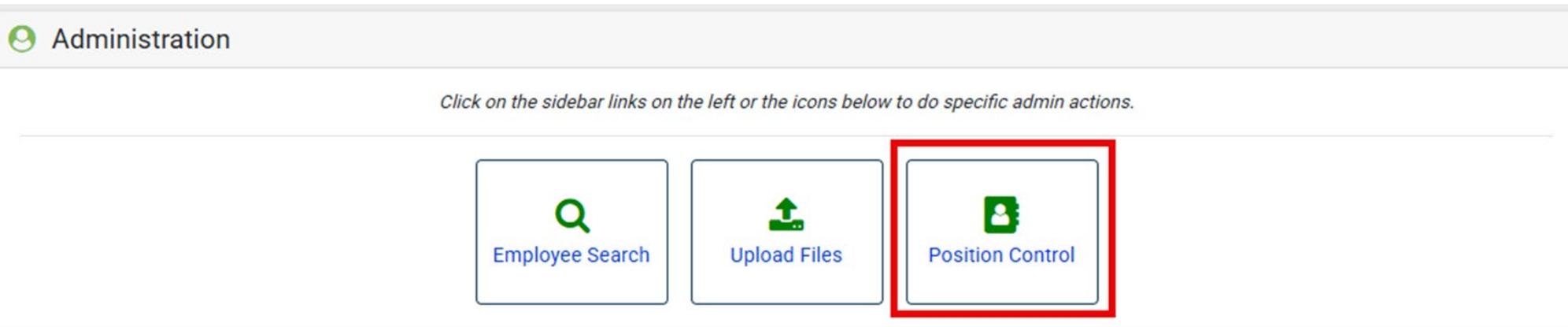
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SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Click the Position Control tile



Administration

Click on the sidebar links on the left or the icons below to do specific admin actions.

Employee Search Upload Files **Position Control**



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Select the position control operation type

 Position Control - (607)

Step 1: Select the type of position control operation

Select Operation

Select operation type

- Add
- Delete
- Change

If processing multiple forms with similar information, select the “do not clear form on submission” option.

Step 1: Select the type of position control operation

Select Operation

Select operation type

Do not clear form on submission



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Add new Position

- Fill in the required information and click submit

Step 2: Fill in the required information below

Fiscal Year
2026

Document Number ⓘ
12345678

Add Position

Effective Date ⓘ
12/02/2025

Expiration Date ⓘ
 Permanent MM/dd/yyyy

Agency Number ⓘ
Click to Select Department(s)

Unit Number ⓘ
123

Class Code ⓘ
1234 Find

Select Class Title
No class title selected. Please enter a valid class code and click Find.

Serial Number ⓘ
123

Timebase ⓘ
 Full Time

Submit Position Request

If more information on a section is needed, the "i" information icon.

Agency Number ⓘ
Click to Select Department(s)

Unit Number ⓘ
123



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Delete Position

- Fill in the required information and click submit

Step 2: Fill in the required information below

Fiscal Year
2026

Document Number ⓘ
12345678

Delete Position

Effective Date ⓘ
11/26/2025

Expiration Date ⓘ
 Permanent MM/dd/yyyy

Agency Number ⓘ
Click to Select Department(s)

Unit Number ⓘ
123

Class Code ⓘ
1234 Find

Select Class Title
No class title selected. Please enter a valid class code and click Find.

Serial Number ⓘ
123

Timebase ⓘ
 Full Time

Submit Position Request

If more information on a section is needed, the "i" information icon can.

Agency Number ⓘ

Click to Select Department(s)

Unit Number ⓘ
123



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Change Position

- Fill in the required information and click submit

Step 2: Fill in the required information below

Fiscal Year
2026

Document Number ⓘ
12345678

Add Position

Effective Date ⓘ
11/26/2025

Expiration Date ⓘ
 Permanent MM/dd/yyyy

Agency Number ⓘ
Click to Select Department(s)

Unit Number ⓘ
123

Class Code ⓘ
1234 Find

Select Class Title
No class title selected. Please enter a valid class code and click Find.

Serial Number ⓘ
123

Timebase ⓘ
 Full Time

Submit Position Request

Delete Position

Effective Date ⓘ
11/25/2025

Expiration Date ⓘ
 Permanent MM/dd/yyyy

Agency Number ⓘ
Click to Select Department(s)

Unit Number ⓘ
123

Class Code ⓘ
1234 Find

Select Class Title
No class title selected. Please enter a valid class code and click Find.

Serial Number ⓘ
123

Timebase ⓘ
 Full Time



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

Contact: ConnectHRHelp@sco.ca.gov

Confirm your request details and click submit

 Position Control 607 Confirmation ✕

Step 3. Please confirm your position control request details:

Position Control Request Details	
Transaction Type	
Fiscal Year	
Document Number	
Add Position - Effective Date	
Add Position - Expiration Date	
Add Position - Position Number	
Add Position - Position Type	
Add Position - Timebase	

The foregoing additions to, deletions from, or changes in the original payroll roster of the herein named state agency are true, correct, and in accordance with law. As modified to date by payroll roster changes filled with the State Controller, to and including the within, said original payroll roster, or whose status is modified by this payroll roster change were employed in approved established positions and have, if required by law, taken the oaths, including the oath set forth in Section 3103, Government Code.

CSPS Status – December 2025

Presenter: Dominick Mullane, ACE

Contact: CSPSHelp@sco.ca.gov

Project Information



2025 Current Activities: The Planning Phase of CSPS has officially been completed and the Project Team began work on Phase 1 activities and scope validation

Objective: To modernize and integrate the State’s Human Resource and Payroll systems

Benefits: Manager and employee self-service, reduction in manual/paper submissions, improved reporting capabilities, efficiencies in processes/workflow

Status/Progress

- **Organizational Change Management** continues helping departments complete their Awareness Campaign activities.
- **Functional Team** approved the Software Development Life Cycle (SDLC) Methodology Plan and conducted ELM training for Epics, Features and User Stories.
- **Project Management Office** continues to support ongoing recruitment efforts for new Fiscal Year (FY) 25/26 positions and key project roles.
- **Project Team** started collaboration sessions to support completion of Deliverable Expectation Documents (DEDs) due this month.



STATEWIDE PROGRAM UPDATES



Statewide Civil Service Audits Program

Presenter: Christina Campbell

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

Reminder:

If you have already uploaded your PAR package, but did not key the S70, **your agency must key an S70 by 12/18/2025**, to prevent regular pay (item 606) from issuing and X pay immediate (item 615). **Failure to do so may result in an overpayment.**

Do not submit corrected PAR packages, the SCO Audits team will verify Employment History (EH) and update the PAR package to reflect the PAR as an S70C.



Statewide Payroll Program

Presenter: Christina Campbell/LaTreese Menefee

Contact: Statewide Customer Contact Center (916) 372-7200

Savings Plus Election Form Reminder:

If an employee is eligible for an age based or traditional catchup deferral, they must complete Section 3 of the form for the 2025 tax year and section 5 for the second tax year (2026).

If section 3 or 5 are incomplete the SCO will process as-is.

The SCO does not have the authority to assume the employee's election.



Lump Sum Updates

Savings Plus
Sarah Reeder



Department Warrant Inquiry Page

Presented By:

Hector Garcia-Gonzalez, Stakeholder Engagement
ADD, Disbursements Bureau



Disbursements and General Disbursements (GD)

- ▶ 13.5 million warrants issued
- ▶ Less than 1% require Post Issuance actions
- ▶ GD Post Issuance Unit:
 - ▶ Lost or stolen warrants (Replacement Warrants)
 - ▶ Forged or altered warrants
 - ▶ Stop Payment and Redeposit Warrants
 - ▶ Warrant Status Inquiries
- ▶ All post issuance requests must go through GD



Benefits of the Department Warrant Inquiry Page

- ▶ Deliver excellence in customer service by modernizing access to general warrant status information.
- ▶ Remedy constituent needs through any time access to real-time information.
- ▶ Tentative launch date: December 2026



Contact Information



Presenter: Hector Garcia-Gonzalez

Email Address: HGarcia-Gonzalez@sco.ca.gov



Disbursements ListServ Subscription Page:

www.sco.ca.gov/scocontactus/listserv_disbursement_subscription



General Warrant Status Questions: DISBGDGeneral@sco.ca.gov

Submit a STD 435 or CD 113A/B form: DISBSTD435@sco.ca.gov



Disbursements Contact Number: (916) 445-7789

(For any questions regarding warrant status, STD 435, CD 113 A/B, and forgery)



Frequently Asked Questions: https://sco.ca.gov/warrant_inquiries

SCO Website: <https://sco.ca.gov>



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDed@sco.ca.gov

Employee Address Change and Annual Withholding

- Employees should ensure current mailing address on file
 - Update via Cal Employee Connect or STD. 686, Employee Action Request (EAR)
 - Opt-in for electronic Form W-2, Wage and Tax Statement has closed
 - February 1, 2026, Opt-in will be available
- Annual Withholding
 - Employees should review their withholdings every year if they have any of the following:
 - Lifestyle – Marriage, divorce, birth or adoption of a child, or home purchase
 - Wage income – Increase in income, spouse starts or stops working
- For additional information:
 - Personnel Action Manual (PAM): Section 6 - EAR Processing
 - QuickStart Guide and EAR Samples
 - Internal Revenue Service - Tax Withholding Estimator



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDed@sco.ca.gov

Increase in Paper Form W-2

- Agencies and campuses will incur a service fee of **\$1.45** for each paper Form W-2 mailed
 - New rate based on the increase in postage, processing expenses, and the extra materials needed.
 - The W-2 is now printed on two pages. This is in compliance, per the IRS.
 - Agencies will receive an invoice from SCO for these services by April 2026.
- February 1, 2026, the option to opt-in will be available in Cal Employee Connect for employees to select an electronic Form W-2.

REMINDER: Please encourage your employees to opt-in for an electronic Form W-2 to decrease departmental fees.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

One Big Beautiful Bill Act (OBBBA) - Overtime

On July 4, 2025, the President signed into law Public Law 119-21, known as the One Big Beautiful Bill Act (OBBBA). This Act introduces several new federal income tax deductions for tax years 2025 through 2028, which may affect employee's federal income taxes.

Key Deduction Available (Tax Years 2025-2028):

- **Qualified Overtime Compensation:** Employees may be able to deduct the portion of their overtime pay that exceeds the regular rate of pay (the "half" in time-and-a-half pay), up to an annual limit.
- **Reporting:** Amounts eligible for deduction for qualified overtime compensation and tips will be reported in Box 14 of Form W-2.

Important Note on 2025 Tax Withholdings:

- **No Change to Tax Withholding:** The law does not change the amount of federal income tax, Social Security, Medicare or State Disability Insurance (SDI) taxes required to withhold from your pay this year.
- **Action Required to Adjust Withholding:** If employees wish to account for this new deduction in the 2026 tax year to potentially reduce withholding, employees must submit a new STD. 686, Employee Action Request to their HR Office or make the change via Cal Employee Connect.
- **Consult a Professional:** Employees are encouraged to use the IRS Tax Withholding Estimator to help determine the correct withholding amount and to consult with a qualified tax professional for personalized advice.

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.

Resource: Payroll Procedures Manual (PPM) [Section M](#)



Business System Support and Maintenance Section

Presenter: Allan Fong

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

Generalist Classification Consolidation

Mass Update

- Will be processed in January 2026 for all permanent employees
- A20 transactions effective January 1, 2026

Nonpermanent Employees

- Departments are responsible for identify all nonpermanent employees.
- A02 transactions
- Effective January 1, 2026
 - TAU
 - Limited Term Appointment
 - Retired Annuitants
 - Emergency Appointments

PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Please **do not** email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- Update [California Personnel Office Directory \(CPOD\)](#)
- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- 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 Contacts

Web Resources:

- HR Personnel | [Webpage](#)
- State Employees | [Webpage](#)

Contacts:

- Affordable Care Act (ACA) | [Contact Email](#)
- Cal Employee Connect (CEC) | [Help and Feedback](#)
- ConnectHR | [Help and Feedback](#)
- California Leave Accounting System (CLAS) | [Contact Email](#)
- Civil Service Escalation Email (HR Supervisors and Managers) | [Contact Email](#)
- Decentralized Security Administration & ViewDirect Access | [Contact Email](#)
- PPSD HR suggestions (All HR Staff) | [Contact Email](#)
- Management Information Retrieval System (MIRS) | [Contact Email](#)

