



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

February 13, 2025

New Power BI HR Net Vacancy Dashboard



Presenter: DiJon Walker/Annette McFarland

Contact: KeyData@calhr.ca.gov



SCO KEY INITIATIVES



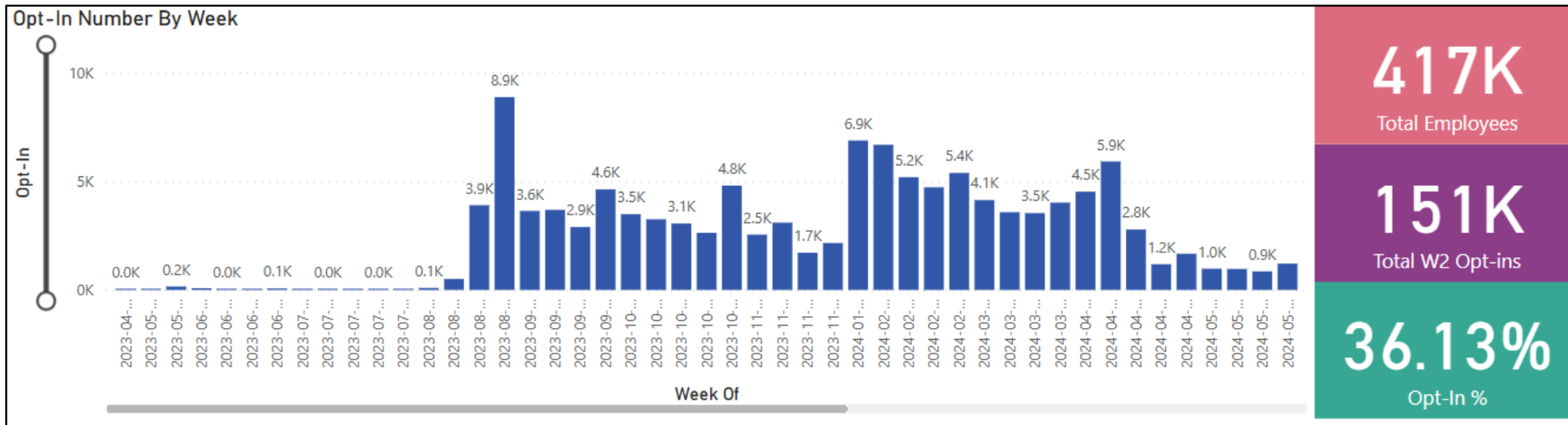
SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Tiffany Fong-Mao

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect (CEC) – W-2 Paperless highlights:

As of February 11, 2025



Goal for 2025: 50%

- New enrollment since February 1-10: 5,805
- Enrollment now open until November 30
 - Encourage your employees to opt-in to W-2 Paperless



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Tiffany Fong-Mao

Contact: ConnectHRHelp@sco.ca.gov

- **CEC Reminder:**
 - Ensure email is up-to-date
 - Forgot Username and Password requests will go to the email on file

Cal Employee CONNECT

Home Earnings W-2 Leave Time Employee Services Help & Feedback JOHN D DOE

Welcome JOHN D DOE Last Visit: 02-06-2025 08:28:24 AM

Earnings Summary

Next payday is 02/28/2025

YTD Earnings

\$0 Gross Pay	\$0 Deductions	\$0 Net Pay
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* Year To Date (YTD) totals may not match the YTD totals on your earnings statement or W-2.

Your most recent earnings statements

Issue Date	Pay Period	Gross Pay	Net Pay
10/11/2023	09/23	\$ 50.00	\$ 31.87
10/01/2023	09/23	\$ 6,071.00	\$ 3,755.70
09/12/2023	08/23	\$ 50.00	\$ 31.87

* The data provided is current as of the day it was posted. In some circumstances, your payroll may issue and not be released to you. Please contact your Human Resources Office if you have questions.

Leave Balances

	8/23 Begin Bal	Credit	Used	Misc.	9/23 Begin
ANNUAL	480.75	17.00	46.00	0.00	451.75
PH (UNITS)	2.00	0.00	0.00	0.00	2.00
EX HRS	4.00	2.00	0.00	0.00	6.00
TRNG/DEV	9.00	0.00	0.00	0.00	9.00

Leave balance information

What's New?

2024 W-2 Now Available in Cal Employee Connect New

If you have enrolled in W-2 Paperless, you can NOW access and download your official 2024 W-2 Statement on Cal Employee Connect.

Employees who have not enrolled in W-2 Paperless will have their 2024 W-2 printed and mailed via the State Controller's Office no later than January 31, 2025. The next opportunity to enroll in W-2 Paperless via CEC, will be February 1, 2025 and will allow users the ability to download PDF copies of all W-2s listed within CEC.

Multifactor Authentication (MFA) Security

Secure your account with a Multifactor Authentication (MFA) app. We support most of the popular MFA apps such as Google Authenticator, Microsoft Authenticator, Duo, and many others. Visit your [User Profile](#) and click the option to Turn On MFA and follow the instructions. If you have any questions or feedback on this feature, please [contact us](#).

Employee Services New

The Employee Services tab allows employees to self-serve with the submission of electronic forms via Cal Employee Connect (CEC). The ability to submit Direct Deposit, Address Change, and Withholdings forms using CEC is now available to most state agencies/campuses.

Head over to [Employee Services](#) and check it out. If you have any questions or feedback on this feature, please [contact us](#).

Payroll Messages and Warrant Inserts

SCO has begun adding warrant insert flyers online. Visit [here](#) to check them out.



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- **CEC Reminder:**

- Ensure email is up-to-date
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 - Changes can be made under their User Profile screen

Cal Employee CONNECT

Home Earnings W-2 Leave Time Employee Services Help & Feedback JOHN D DOE ▾

User Profile

Portal Information

User Name	CEC2020 Change
Email Address	MDuarte003@sco.ca.gov Change
Multifactor Authentication	<input type="checkbox"/> Turn On MFA
W-2 Paperless (more info)	<input checked="" type="checkbox"/> Opt-out of W-2 Paperless
Last Logged In	02-03-2025 12:05:40 AM
Password Last Changed	04-11-2024 01:20:57 PM
Date Joined	11-13-2020 08:50:40 AM
User Profile Last Modified	Invalid date

Employee Information

Employee Name	JOHN D DOE
Address	300 CAPITOL MALL SACRAMENTO CA
Zip Code	95814
Employee ID	9999-9999-9
Position Number	051-340-1000-001

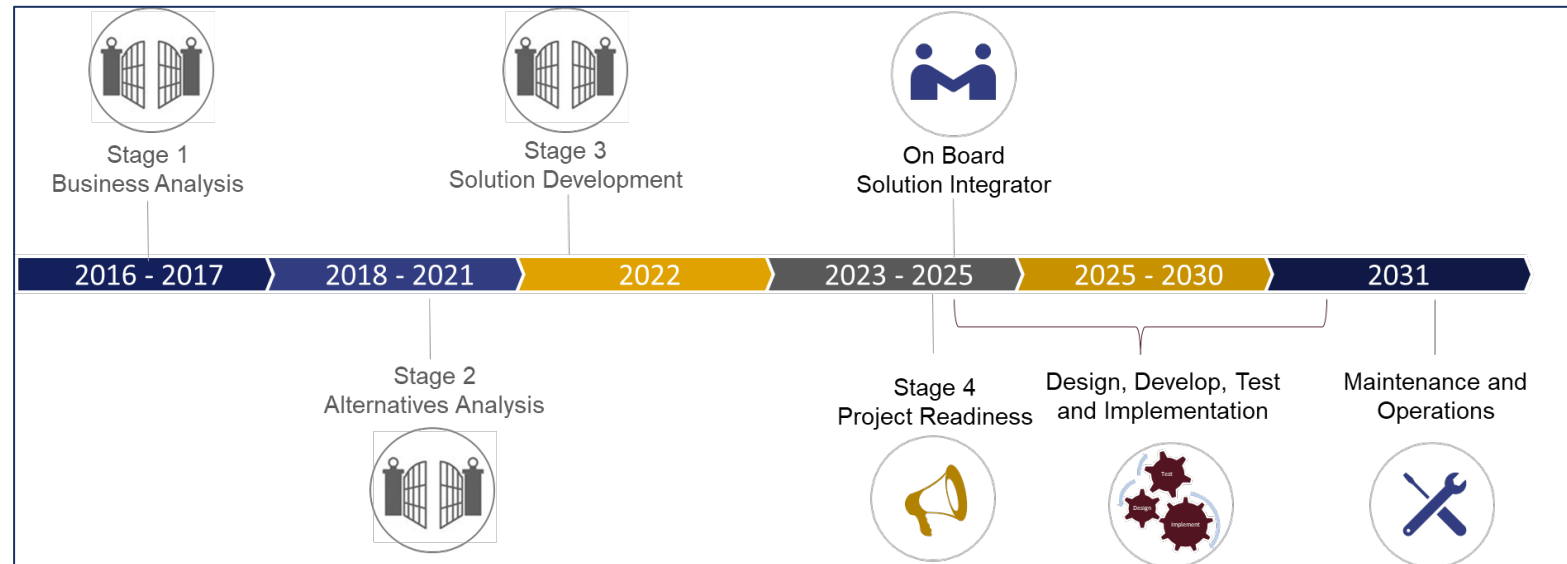
CSPS Status – February 2025

Presenter: Dominick Mullane

Contact: CSPSHelp@sco.ca.gov

Project Information:

- **Objective:** To modernize and integrate the State's Human Resource and Payroll systems
- **Goals:** Manager and Employee Self-service, Reduction in manual/paper submissions, Improved reporting capabilities, Efficiencies in processes/workflow



Status/Progress Updates

- **Technical Team** to update interface gap identification process code to meet the documented database standards and naming conventions.
- **Organizational Change Management** engaged with departments to gather data relating to Human Capital Management projects that are planned or in progress.
- **Functional Team** continues to work on the first Task Expectations Document (TED) and onboarding Functional Implementation Services (FIS) contract managers.
- **Project Management Team** received PAL Stage 4 approval and entered a 45-day review period.



STATEWIDE BENEFITS ADMINISTRATION



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

2024 Annual 1095-C Process Complete

- All 2024 1095-Cs were mailed to qualifying employees as of January 31, 2025
 - All 1095-Cs were mailed to the employee address in the Employment History database as of December 31, 2024
 - All undeliverable 1095-Cs returned to SCO will be forwarded to the agency for distribution to the employee
- The PDA1782 – 2024 1095-C Issued Report is now available on [Mobius View](#)
- For any Duplicate 1095-C Requests
 - Employees must request a duplicate 1095-C through their personnel specialist
 - Personnel specialist will need to verify the employee qualified and was issued a 1095-C for the reporting year requested prior to submitting the request to ACASupport@sco.ca.gov

If you need assistance, please reach out to Affordable Care Act at ACASupport@sco.ca.gov.



Transaction Supervisors' Forum:

February 13, 2025

CalHR Benefits Division Updates

*Benefits That Support
a Life Well Lived.*

About the Benefits Division

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by the California Department of Human Resources (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.





ACA Updates

Presenter: Lisa Hatten

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Quarterly ACA Compliance Review

- The February ACA Quarterly Compliance Review is currently underway.
- Departments who were notified of their outstanding ACAS errors are to correct and certify the errors were corrected by returning the Quarterly ACA Compliance Notification to ACA.Policy@calhr.ca.gov by March 14, 2025.
- Departments are encouraged to utilize the [ACAS User Guide](#) and [Scenario-Based Job Aid for Updating the ACAS](#) on SCO's website for information on how to correct these errors.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Reminders

- Open Enrollment Transactions:
 - Employee elected to cancel their health coverage during the 2024 Open Enrollment: Key a 5B status code in ACAS, effective 12/31/2024 (to indicate the employee voluntarily cancelled their health coverage but remains eligible for health benefits)
- Employee elected to enroll in health coverage during the 2024 Open Enrollment: Key a 3A status code in ACAS, effective 1/1/2025 (to indicate the first of the month in which the employee's health coverage is effective)
 - The “Health Event Transaction” COGNOS Report in myCalPERS can be helpful to identify ACAS updates for employees that have elected to enroll in health benefits and the effective date of coverage.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Reminders

- Permanent Intermittent (PI) Employees:
 - Employees who were credited with at least 480 paid hours in the July to December 2024 Control Period:
 - If employee is newly eligible for health benefits, the employee's ACAS record should be updated to reflect corresponding codes:
 - **2D, effective 1/1/2025** (to indicate the employee is newly eligible for health benefits)
 - **1A, effective 2/1/2025** (to document an offer of coverage – this date reflects the earliest day the employee is eligible to enroll in health benefits)
 - **3A, effective the date the employee's health coverage is effective** (to indicate the first of the month in which the employee's health coverage is effective) OR
 - **4A, effective 2/1/2025** (to indicate the employee affirmatively declined health coverage by returning the HBD-12) or 4B, effective the 61st day following the permitting event date if no HBD-12 is received declining coverage - administrative decline of health coverage)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Reminders

- Permanent Intermittent Employees:
- Employees who were enrolled in health benefits and lost their health benefits eligibility because they were not credited with at least 480 paid hours in the July to December 2024 Control Period (or 960 in two control periods):
- The employee's ACAS record should be updated to reflect:
 - **5A, effective 1/31/2025** (to indicate that the employee's health benefits were administratively cancelled due to loss of eligibility)
 - **2B, effective 2/1/2025** (to indicate that the employee must be credited with a minimum of 480 paid hours in a Control Period to be eligible for health benefits)
 - **COBRA Offer (1B, 1C, 1D, or 1E), effective 2/1/2025** (to indicate that the employee (and any dependents) were eligible for and offered COBRA coverage)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Reminders

- Permanent Intermittent Employees
- Employees who were **not** enrolled in health benefits and lost their health benefits eligibility because they were not credited with at least 480 paid hours in the July to December 2024 Control Period (or 960 in two control periods):
- The employee's ACAS record should be updated to reflect:
 - **2B, effective 2/1/2025** (to indicate that the employee is no longer eligible for health benefits until they are credited with a minimum of 480 paid hours in a Control Period to become eligible again)

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Reports to Monitor Benefits Eligibility for PI Employees

- There are reports in SCO's Management Information Retrieval System (MIRS) to help you identify Permanent Intermittent employees who may be newly eligible for or lost their health benefits eligibility.
 - **INT 001A Report** - Identifies Permanent Intermittent employees who are eligible for health benefits based on meeting 480 paid hours in a specified Control Period.
 - **INT 002A Report** - Identifies Permanent Intermittent employees and whether they are currently enrolled in health or dental benefits but have become ineligible for benefits based on not meeting 480 paid hours in a specified Control Period (or 960 paid hours in two consecutive Control Periods to continue their coverage).

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

ACA Training

- CalHR and SCO will facilitate the next ACA training on:
 - Monday, February 24, from 9:00am – 10:30am (Part I Module) and
 - Tuesday, February 25, from 9:00am – 11:30am (Part II Module).
- Departments should send their requests for training to SCO at: ppsdacatraining@sco.ca.gov.
- Additional training dates for 2025 are listed on SCO's "Affordable Care Act Training" webpage.



Benefit Program Reminders

Presenter: Susan Garrett

Benefit Program Reminders

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

- CalHR does not have access to update or correct addresses or name changes.
- Prior to submitting benefit enrollment forms, verify the employee's information within the SCO database.
- If the employee's information is incorrect within the SCO database, please follow your agency's policies/rules on correcting the employee's information.
- If the information is correct within the SCO database but incorrect with the carrier, then the agency's authorized personnel specialist should contact the carrier to correct the information.
- For program-specific questions, please email the specific program inbox, not multiple inboxes, to ensure the inquiry reaches the correct program staff.
- Prior to sending an inquiry, please review CalHR's website: [Benefits Administration Manual](#), [HR Manual](#), [Employee Benefits webpage](#).
- Please remind employees to contact their departmental personnel office for benefits-related inquiries.
- When submitting an inquiry or appeal please include the employee's name in the subject line.
- Do not submit an inquiry or appeal for multiple employees.

Benefit Program Reminders Continued

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

A complete appeal package includes:

- Justification memo explaining why the enrollment was not processed in a timely manner.
- Complete and error-free forms.
- Written confirmation that the employee acknowledges an accounts receivable will be established for retroactive enrollment (if applicable).

Important notes:

- Please verify that the employee is eligible to enroll in the program they have elected.
- Once an appeal is approved by CalHR and processed by SCO, we will not cancel or reverse the appeal.

Benefit Program Reminders Continued

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

Training recommendations:

- Benefits Administration Manual Training - online [CalLearns](#)
- Employee Benefits Orientation Training - online [CalHR webpage](#)

Benefit Premiums:

- Premiums cannot be waived for months when services are not used. It is the responsibility of the employee to notify their department of any changes to their dependent eligibility.

Benefit Program Reminders Continued

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

- If an employee made changes to their benefits during Open Enrollment, they should review their December 2024 pay warrant to confirm Open Enrollment changes took effect. Employees must contact their departmental personnel office immediately if the changes were not processed.
- Each program provided confirmation receipts during Open Enrollment. If changes made during Open Enrollment did not take effect, employees should provide the confirmation receipt to their departmental personnel office for the appeal.

Benefits Resources

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

- To help support employees affected by the Southern California Wildfires, we have compiled a [benefits resources webpage](#) with important information on benefits and services available as a guide for wildfires and other natural disasters.
- Please bookmark the [benefits resources webpage](#) and encourage your employees to check it regularly for benefits updates. We will continue to update the webpage on an ongoing basis as new information becomes available from our benefit vendors and carriers.
- Thank you for your care and support during this challenging time. If your departmental personnel office has additional questions regarding benefits administration or need assistance processing employee appeals, please contact the [Benefits Inquiries](#) inbox.



Vision and Dental Updates

Presenter: Parwana Mohabbat

Vision Program Updates

Presenter: Parwana Mohabbat

Contact: Vision@calhr.ca.gov

Program Updates

- Improving VSP membership profiles for Basic Vision:
 - VSP now receives a demographics file for employees enrolled in Basic Vision.
 - All State of CA employees now have access to Eyeconic, VSP's online store.
- New [Vision Handbook](#) posted for Open Enrollment.
- Departments should send VSP Premier enrollment or change forms directly to VSP for processing. Please do not send them to SCO, as this will delay enrollment or changes for the employee.
- Only permitting event transactions submitted beyond the 60-day eligibility window should be sent to CalHR as an appeal.
- Benefit Premiums cannot be waived for months when services are not used.

Dental Program Updates

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

Program Updates

- Please allow 30 calendar days for an appeal to be reviewed.
 - Confirm that the employee is aware of applicable accounts receivables.
 - Once an appeal is approved, it cannot be retracted.
- STD. 692 form versions older than 2020 will be rejected and returned to the agency.
- STD. 692 forms must be complete and error free.
- When submitting an inquiry or appeal please include the employee's name in the subject line.
- Do not submit an inquiry or appeal for multiple employees.
- Make sure to consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.



CoBen Cash Updates

Presenter: Monica Hernandez

CoBen Cash Updates

Presenter: Monica Hernandez

Contact: CoBen@calhr.ca.gov

Program Updates

- The 2016 ruling on the Petition to Vacate TRICARE Arbitration – CalHR v. CASE allowed rank and file employees in Bargaining Unit 2 (BU 2) who are covered under TRICARE to begin receiving the CoBen Cash Option.
- The BAM, FlexElect Handbook, and CoBen Handbook were updated to include this information, and the information will be updated in the CalHR HR Manual Section 1406 soon.
- This change took effect June 1, 2024, and departmental personnel offices do not need to offer appeals to BU 2 employees.
- Retroactive enrollments for TRICARE effective June 1, 2024 or later will require an approved CalHR appeal. Retroactive enrollments for the CoBen Cash Option that were previously rejected for using TRICARE prior to June 1, 2024 will not be considered.



Third Party Pre-Tax Parking Reimbursement Program Updates

Presenter: Monica Hernandez

Third Party Pre-Tax Parking Reimbursement Program Updates

Presenter: Monica Hernandez

Contact: Pre-TaxParking@calhr.ca.gov

Program Updates

- The maximum monthly deduction an employee can deduct for the cost of parking for the 2025 calendar year has been increased to \$325/month, which is a \$10 increase from the 2024 maximum monthly deduction of \$315.
- The maximum monthly deduction is set by the Internal Revenue Service (IRS).
- An HR Announcement was released on January 7, confirming the increased amount.



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of an employee's spouse, domestic partner, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and Premier Vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.
- Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental and Premier Vision benefits. The bargaining unit contracts specify that family member eligibility for dental and vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Highlights

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

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Updates

- [CalHR 781 Dependent Eligibility Checklist](#) and [CalHR 025 Affidavit of Parent-Child-Relationship](#) (dental/vision) have been updated to comply with CalPERS documentation revisions provided in the December 1, 2023, [Circular Letter #600-046-23](#), Eligibility Criteria for Dependents in a Parent-Child Relationship.
- CalHR has officially launched FCP Enhancements for disabled dependent and Parent-Child Relationship certifications.
 - Dependents enrolled in dental and/or Premier Vision only and require certification as a disabled dependent or PCR, will be certified by CalHR's DRV unit.
- The CAHP enrollment data in FCP is pending and CCPOA enrollment data is visible.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- March, June, September, December 2023 and January, April, July, October 2024 birth month cycles have concluded. Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- February 2025 birth month cycle: All notifications have been mailed, and all alerts must be processed by the end of March 2025 in FCP for all employees who submitted their documents by February 28.
- The next birth month cycle is May 2025, and the 90-day mailing was generated on or about February 3, 2025, with a mailing date of February 7, 2025, by the Department of General Services.
- Please note all employees in the current birth cycle will continue to receive DEV and DRV notices until their dependent verifications have been processed.
 - DRV mailings generate from FCP approximately on the 15th of the month prior to all scheduled mailings. All mailings are sent 90, 60, and 30 days prior to an employee's birth month.
- Please Note: DEV transactions must be processed in myCalPERS by the 1st of the birth month to avoid the automatic deletion from health coverage.

Dependent Re-Verification (DRV)

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Contact: DRV@calhr.ca.gov

Total Notices Mailed to Date

Birth Month Cycle	1 st Notice - 90 days before end of birth month	Total Mailings of 1 st Notice	2 nd Notice - 60 days before end of birth month	Total Mailings of 2 nd Notice	3 rd Notice - 30 days before end of birth month	Total Mailings of 3 rd Notice	Total Mailings
March	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
June	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
September	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
December	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
January	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
April	Jan-2024	8,196	Feb-2024	7,862	Mar-2024	6,254	22,312
July	Apr-2024	8,783	May-2024	8,230	Jun-2024	7,942	24,955
October	Jul-2024	9,018	Aug-2024	8,511	Sep-2024	6,501	24,030
February	Nov-2024	7,548	Dec-2024	6,965	Jan-2025	5,748	20,261
May	Feb-2025	8,671	Mar-2025	NA	Apr-2025	NA	8,671

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is for a dependent of type 'Disabled Child'. Key fields include:

- Dependent Type ***: Disabled Child (highlighted with a red box)
- Dependent Type Locked**: Checked (highlighted with a red box and a red arrow)
- Status**: Pending
- Status Date**: 5/10/2023
- Record Source**: Carrier File
- Birth Date ***: 04/04/1989 (highlighted with a red box)
- Re-verification Effective Date**: 05/01/2020
- Re-verification End Date**: 04/30/2025
- Dental Plan ***: Yes
- Dental Plan Effective Date**: 01/01/2022
- Dental Permitting Event**: -- Record Source --
- Vision Plan ***: Yes
- Vision Plan Effective Date**: 01/01/2024
- Vision Permitting Event**: -- Record Source --

At the bottom of the form, there is a 'Delete Dependent' button, a 'Comments' section with the text 'Added by Carrier File 2022-07-21', and 'Save' and 'Cancel' buttons.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Baulwin

1 Year Notification: April 2019

Is Notified

Notified Date

Notified By

90 Day Notification: January 2020

Is Notified

Notified Date

Notified By

60 Day Notification: February 2020

Is Notified

Notified Date

Notified By

30 Day Notification: March 2020

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Document Received Date *

04/30/2020

Dependent Certified By

CalPERS

Re-certification Effective Date *

05/01/2020

Re-certification End Date *

04/30/2025

Date Coverage History

Certification Document List *

- Authorization to Disclose Protected Health Information (CalHR XXX) *
- Dependent Eligibility Verification Checklist (CalHR Form 781) *
- Disabled Dependent Member Questionnaire and Medical Report (CalHR XXX) *

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is organized into several sections:

- Header:** Includes the Family Connect logo, navigation icons for Main Page, Reports, Admin, and FAQ, and a user profile for Delia Baulwin.
- Form Fields:**
 - Dependent Type *:** A dropdown menu with 'Parent Child Relationship' selected. This field is highlighted with a red box.
 - Status:** A dropdown menu with 'Pending' selected.
 - Status Date:** A date field containing '5/10/2023'.
 - Record Source:** A dropdown menu with 'Carrier File' selected.
 - First Name *:** A text input field with a masked name.
 - Middle Name:** A text input field with a masked name.
 - Last Name *:** A text input field with a masked name.
 - Birth Date *:** A date field containing '09/10/2012'.
 - Re-verification Effective Date:** A date field containing '10/01/2023'.
 - Re-verification End Date:** A date field containing '09/30/2024'.
 - Dental Plan *:** A dropdown menu with 'Yes' selected.
 - Dental Plan Effective Date:** A date field containing '01/01/2023'.
 - Dental Permitting Event:** A dropdown menu with '-- Record Source --' selected.
 - Vision Plan *:** A dropdown menu with 'Yes' selected.
 - Vision Plan Effective Date:** A date field containing '01/01/2020'.
 - Vision Permitting Event:** A dropdown menu with '-- Record Source --' selected.
- Buttons:** A 'Delete Dependent' button is located below the form fields.
- Comments:** A text area containing the comment 'Added by Carrier File 2022-07-21'.
- Footer:** 'Save' and 'Cancel' buttons are located at the bottom of the form.

A red arrow points from the 'Dependent Type Locked' status indicator to the 'Dependent Type' dropdown menu.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Bautwin

90 Day Notification: June 2023

Is Notified

Notified Date

Notified By

60 Day Notification: July 2023

Is Notified

Notified Date

Notified By

30 Day Notification: August 2023

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Re-certification Effective Date *

10/01/2023

Document Received Date *

09/30/2023

Dependent Certified By

CalPERS

Re-certification End Date *

09/30/2024

Date Coverage History

Certification Document List *

- Affidavit of Parent-Child Relationship (CalHR 025) *
- Dependent Eligibility Verification Checklist (CalHR Form 781) *
- Copy of first page of employee's federal or state income tax return such as IRS Form 1040 from the previous tax year listing child as a tax dependent (i)
- One Primary and two Secondary Supporting PCR Documents (see Supporting PCR Documentation on the CalHR 781) (i)

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources including [BAM](#), [FCP Manual](#), and the [Human Resources Manual](#).
- Contact the DRV Unit at CalHR with questions and processes related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or 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.



Public Service Recognition Week

Presenter: Shannon MacGregor

Public Service Recognition Week (PSRW)

SAVE THE DATES

This year's PSRW will be observed from Sunday, May 4, 2025, through Saturday, May 10, 2025.

Two virtual learning sessions will be held for department coordinators, supervisors, managers and other appropriate personnel:

- Thursday, March 6 at 2:00 p.m.
- Monday, March 10 at 11:00 a.m.

Registration link will be shared soon!

Threading the topic of employee engagement by nourishing the five elements of wellbeing.



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 PROGRAM UPDATES



Business Systems Enhancements Section

Presenter: Reana Hlawaty

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

Semi-Monthly Retirement Exclusion Payroll Program Changes

- The Monthly Retirement Exclusion Amount will be split between the first and second half payments for Employees with a Semi-Monthly Pay Frequency.
 - The system modification is scheduled to be implemented within the next few months.
 - Payroll Letter will be released prior to implementation.
 - This change is being made to comply with CalPERS reporting requirements.
 - For an employee, with a monthly exclusion amount of \$513.00, \$256.50 will be applied to each half payment for the month.



Business Systems Enhancements Section

Presenter: Reana Hlawaty

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

Semi-Monthly Retirement Exclusion Payroll Program Changes

- Example: Employee with a Retirement Exclusion Amount of \$513.00 and 8.5% Retirement Rate before the Modification.
 - Pay Period 01-01-2025
 - Gross Amount Subject to Retirement $\$3,000 - \$513 = \$2,487 \times 8.5\%$
 $= \$211.40$ Retirement Withheld.
 - Pay Period 02-01-2025
 - Gross Amount Subject to Retirement $\$3,000 + \text{Previous Payment } \$3000 =$
 $\$6,000 - \$513 = \$5,487 \times 8.5\% = \$466.40 - \$211.40 =$
 $\$255.00$ Retirement Withheld.
 - Total Withheld for the Month of January is \$466.40.



Business Systems Enhancements Section

Presenter: Reana Hlawaty

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

Semi-Monthly Retirement Exclusion Payroll Program Changes

- Example: Employee with a Retirement Exclusion Amount of \$513.00 and 8.5% Retirement Rate after the Modification.
 - Pay Period 01-01-2025
 - Gross Amount Subject to Retirement $\$3,000 - \$256.50 = \$2743.50$
 $\times 8.5\% = \$233.20$ Retirement Withheld.
 - Pay Period 02-01-2025
 - Gross Amount Subject to Retirement $\$3,000 - \$256.50 = \$2743.50 \times 8.5\% = \233.20 Retirement Withheld.
 - Total Withheld for the Month of January is \$466.40.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

Nonresident Alien (NRA) Compliance

- [Personnel Letter #25-002](#)
 - Biannual Personnel Letter of Employees Identified as Nonresident
- [Internal Revenue Service \(IRS\) Notice 2005-76](#)
 - Provides information on the taxation, it also includes a sample letter to the NRA employees and a link to the Frequently Asked Questions
- Annual certification for departments that do not hire NRA employees
 - Certification is valid for the current year, but your department will need to recertify every January
- Documents submitted to SCO should be uploaded directly to [ConnectHR](#)

REMINDER: Departments must submit the [Nonresident Alien Form](#) even if they do not have any NRA employees subject to IRS Notice 2005-76. Changes to a department's list of NRA employees should be reported to SCO monthly.

If you have any questions, please contact PPSD Tax Support Team at PPSDSTSP@sco.ca.gov. 61



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

- [PPSD-21, Deceased Employee Data](#) - Fill and print form
- [Payroll Letter #24-012: Deceased Employee and Designee/Beneficiary Reporting](#)
 - Contains reporting details and references
- Late reporting of the PPSD21 will result in a Corrected Form W-2 for the deceased employee and a late 1099-MISC to the designee/beneficiary
 - Submit forms as soon as possible, as Corrected Form W-2s are generated monthly

Salary Advance Initial/Offset Reporting

- [Payroll Letter #24-013: Salary Advance Initial/Offset Reporting – Year End](#)
- [STD. 422, Salary Advances Paid/Offset Report](#) - Fill and print form

NOTE: The PPSD-21, Deceased Employee Data and the STD. 422, Salary Advance Paid/Offset Report forms should be submitted to SCO on a flow basis throughout the tax year.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Exempt Employees Reminders:

- Employees who are filing exempt will need to file a new [STD. 686](#) (Employee Action Request) form by February 14, 2025.
 - They will be switched to single for standard withholdings which is equivalent to single and zero for both Federal and State.
 - Listings and notices were sent to human resources offices at the beginning of January regarding those employees who were exempt as of December 2024.

For Additional Information:

- [Employee Action Request \(EAR\) STD. 686 Form and Federal Withholdings Toolkit](#)
- [Request a Duplicate Form W-2, Wage and Tax Statement](#)
- [Form W-2 Wage and Tax Statement FAQs](#)



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Form W-2 Reminders:

- Form W-2s have been distributed by mail as of January 31, 2025.
- [Cal Employee Connect \(CEC\)](#)
 - Form W-2s and Corrected W-2s will be available on [CEC](#).
 - If employees did not opt in for W-2 Paperless, they will have view only access on CEC.

Duplicate Form W-2:

- The duplicate Form W-2 fee will be waived for W-2s not received through March 10, 2025.
 - [Payroll Letter #24-020](#)
- Employees who have opted in for W-2 Paperless via the CEC portal will not be eligible for a fee waiver.
- Prior year Form W-2s are in CEC and go back to 2016. Paper copies will go back to 2022.

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](#)



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 Resources



Websites:

- [Human Resources](#) (HR)
- [State Employees](#)

SCO Key Initiatives:

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

Contacts:

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