



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

June 18, 2025



Survey Questions





Question

Presenter: Ryan Baughman

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

Is an extension possible for the one-time Special Open Enrollment (OE) period for FlexElect dependent care? Can you confirm that staff can also enroll during the regular OE period?

Answer: For as long as the ConnectHR dropdown is available, agencies can submit an OE STD. 701R form. SCO cannot guarantee that these will be processed by the cut-off date and may result in accounts receivables. Dependent Care and Medical Reimbursement Accounts terminate after the November pay period. All eligible employees can enroll during Open Enrollment for the next plan year.



Question

Presenter: Megan Vinson

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

I have worked at a couple of different agencies. Some adopt the practice of having Personnel Specialists documenting the 672 with leave (SL01 – 8, VA01 – 16, etc.) and some do not. Is this a mandated practice? If an agency does not do this, will there be an audit finding from the State Personnel Board (SPB)/State Controller's Office(SCO)?

Answer: Documenting the leave usage on the 672 is an option but is not mandatory. SCO and SPB would not penalize the department for choosing to manually key leave directly into California Leave Accounting System (CLAS).



Question

Presenter: Natalia Saferson

Contact: benefitsinquiries@calhr.ca.gov

Regarding the [CalHR 695 Retiree Vision Plan Enrollment](#) form, the email address listed for VSP is no longer valid. Can this be corrected?

Answer: VSP has confirmed no changes have been made and the contact information is correct.

CalHR Benefits Division suggests for departments to verify that the email address or fax number used is correct.

- If the contact information is accurate and the message is still timely, then resend it to stateofca@vsp.com.
- If the message is no longer timely, then please forward the information to CalHR at vision@calhr.ca.gov.



SCO KEY INITIATIVES

CSPS Status – June 2025

Presenter: Dominick Mullane, ACE

Contact: CSPSHelp@sco.ca.gov

Project Information:



2025 Current Activities: System Integrator (CGI) onboarding; Project Kick Off; Project Planning; Project Schedule Development

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:

- **Organizational Change Management Team** is preparing to conduct a series of project team training sessions including an Introduction to Advantage and Implementation Methods.
- **Project Management Office** continues to review State deliverables with workstreams and incorporate CGI's implementation schedule into the Master Project Schedule.
- **Functional Team** will hold working sessions with CGI partners to develop DLV 2.1 Software Development Lifecycle (SDLC) Methodology Plan.



STATEWIDE BENEFITS ADMINISTRATION

SECURE 2.0 Updates

Presented by Katie Kerr
LeaveRollover@calhr.ca.gov



SECURE 2.0: Section 603

“High Earner Rothification” Provision

Starting January 1, 2026, most **catch-up contributions** for employees aged 50 and older, who earn more than \$145,000 in FICA wages* in the prior year, **must** be made as Roth contributions.

*subject to Social Security withholding

Lump Sum Separation Pay Impacts

Our legal and compliance partners have provided updated guidance:

Only Age-based (50+, or Special 60-63) catch-up contributions are affected by this provision.

Traditional Catch-Up may be contributed on a pre-tax basis, regardless of prior year income.

Lump Sum Separation Pay Impacts (continued)

This new provision goes into effect January 1, 2026, but will impact employees who separate in November and December of **this year** (2025) and choose to defer into a second tax year (2026).

Section 603 Example

- Bob Smith is retiring on December 1, 2025
- He is electing to defer into the CURRENT tax year **and** SECOND tax year

Current Tax Year Deferral

2025 FICA Wages	\$130,000
Current Tax Year Lump Sum Contribution	\$20,000
Total	\$150,000

Second Tax Year Deferral

2025 "Earnings"	\$150,000
Age-Based Catch-Up Contribution: MUST BE Roth	\$7,500

*When deferring into a SECOND tax year, the employee must add their CURRENT year FICA wages **and** their CURRENT tax year Lump Sum Contributions (so in this example, "Prior Year Earnings" = \$130,000 + \$20,000 and therefore over the "High Earner" threshold of \$145,000).*



What is Next?

- Savings Plus and SCO have completed the update to the Lump Sum Separation Pay form – anticipated release date is August 4, 2025!
- Savings Plus and SCO are collaborating to update websites, toolkits, resources, and educational opportunities

We are here to help!

- HR/Payroll/Personnel may contact us at LeaveRollover@calhr.ca.gov or (916) 909-3717
- Please direct employees with questions to the Savings Plus Solutions Center at (855) 616-4776





Transaction Supervisors'

Forum: June 18, 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.





Open Enrollment

Presenter: Amber Neves

Open Enrollment (OE)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment (OE) Updates

- The 2025 OE period will take place September 15 – October 10, 2025.
- Eligible state employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, FlexElect, COBRA, long-term disability and legal insurance.
- All changes made during the 2025 OE period will be effective January 1, 2026.
- The CalHR OE Team is collaborating with stakeholders and state departments to plan, prepare and host both In-Person and Virtual OE events for the 2025 season.
- Upcoming OE events can be viewed on the Benefits Fair webpage located on the CalHR Benefits website. OE events will continue to be added to the webpage as information is confirmed.
- Open Enrollment Save the Date will release by the end of June 2025.

Open Enrollment (OE)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

Reminder:

- Please subscribe to the Personnel Officers CalHR Subscription list on the [CalHR website](#) to receive future updates.

CalHR Subscriptions

To receive updates by email, please fill out this form.

Send me updates on

- ☐ CEA Action Proposals
- ☐ Diversity, Equity, and Inclusion (DEI) Toolkit
- ☐ Pay Letters (State HR professionals only)
- ☒ Personnel Officers (State HR professionals only)
- ☐ Policy Memos
- ☐ State Recruiters (State HR professionals only)
- ☐ State Trainers (State HR professionals only)

My contact info

Email Address:

First Name:

Last Name:

Title:

Agency:

Phone:



Affordable Care Act (ACA) Updates

Presenter: Lisa Hatten

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Quarterly ACA Compliance Review

- Reminders to departments that did not certify the correction of their outstanding errors in the ACAS as part of CalHR's May Quarterly Compliance Review were sent last week.
- Once the errors on the quarterly compliance reports are corrected, please certify that the errors were corrected by returning the Quarterly ACA Compliance Notification to ACA.Policy@calhr.ca.gov.
- Refer to 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

ACA Training

- CalHR and SCO will facilitate the next ACA training on:
 - Monday, June 23, from 9:00am – 10:30am (Part I Module) and
 - Tuesday, June 24, from 9:00am – 11:30am (Part II Module)
- Departments can send their training requests to SCO at: ppsdacatraining@sco.ca.gov.
- Additional training dates for 2025 are available on SCO's "[Affordable Care Act Training](#)" webpage.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Observations from the ACA Compliance Reports and Reminders

- Compliance report of employees with a health deduction in pay history and no “acceptance of health coverage” captured in the ACAS continues to have the greatest number of errors, followed by employees who are newly eligible with no offer of health coverage.
 - The “Health Event Transaction” COGNOS report in myCalPERS can help identify the effective date of ACAS updates for employees that elected to enroll in health benefits.
 - While the 2D ACA status code is auto-populated by the SCO for certain positions that are eligible for health benefits, departments are still responsible for updating the employee’s ACAS record to indicate that the employee was offered health benefits. The effective date of the “offer” of coverage (e.g., 1A ACA status code) should reflect the first of the month following the qualifying event.
 - COBRA Offers of Coverage
 - Anytime an employee's health benefits are administratively cancelled due to loss of eligibility, please update the employee's record in the ACAS to reflect the cancellation of health benefits (e.g., 5A ACA status code) and offer of COBRA coverage (e.g., 1B, 1C, 1D, 1E, etc. ACA status code), if applicable.



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.

Benefit Program Reminders

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

- Please remind employees to first contact their departmental personnel office for benefits-related inquiries.
- Prior to sending an inquiry or appeal, please review CalHR's BAM and website to confirm eligibility and ensure proper completion of enrollment forms. [Benefits Administration Manual](#), [HR Manual](#), [Employee Benefits webpage](#) and check the SCO Pay History screen to verify the benefit deduction.
- Email the specific program inbox for program-specific questions, not multiple inboxes, to ensure the inquiry reaches the correct program staff and for tracking purposes.
- Please use the following subject line when sending an email to assist us in directing your inquiry:
Department - EE Name, Program / Example: CalHR - S. Smith, Dental
- As a further reminder, please do not:
 - Email and leave a voicemail for the same issue as it creates duplicate work
 - Include the program inbox on email conversations within your department's HR Office and/or the EE

Benefit Program Reminders

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 enrollment forms using the current form version.
- Written confirmation the employee acknowledges an accounts receivable (AR) will be established for retroactive enrollment (as applicable).

- **Important reminders:**

- Do not submit an inquiry or appeal for multiple employees in one email.
- Please verify 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.
- After CalHR responds to the agency that the appeal is approved, please do not upload the enrollment form into ConnectHR as CalHR stamps the form we received, uploads and completes this portion as part of the appeal process.

Benefit Program Reminders

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

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.

Training recommendations:

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



Vision Insurance

Presenter: Parwana Mohabbat

Vision Program Updates & Reminders

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 by employees or dependents.



Dental Insurance

Presenter: Parwana Mohabbat

Dental Program Updates & Reminders

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

- 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 forms must be complete and error free, and the most current version must be used.
- Do not submit an inquiry or appeal for multiple employees.
- Inquiries and appeals must be submitted to the dental email box. Do not send emails to individual email boxes.

Dental Program Updates & Reminders

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

- Make sure to consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - If an employee permanently separates from state service before completing 24 months of state service and subsequently returns, their time before separation does not count towards meeting the 24-month restriction.
 - Mandatory deletions cannot be on a current month basis, they must take effect the month following the event.
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.
 - Please refer to available resources online such as BAM, HR Manual, Open Enrollment Resources for more information.



FlexElect and CoBen Cash

Presenter: LaTrice Calloway

FlexElect Program Updates & Reminders

Presenter: LaTrice Calloway

Contact: FlexElect@calhr.ca.gov

Program Updates

- Outside of Open Enrollment, the enrollment will be effective the first day of the month following the month the enrollment form is received by the departmental personnel office. For example, if an enrollment form is received February 20, then the enrollment will be effective March 1.
- To avoid processing delays with appeals, do not redact the Social Security Number (SSN) from the STD. 701R FlexElect Reimbursement form. Instead include the last four digits of the SSN on the Std. 701R and send a separate email to FlexElect@calhr.ca.gov with the first five digits of the SSN or call and leave a voicemail with the full SSN at (916) 909-2863.



Long Term Disability Insurance

Presenter: Monica Hernandez

Long Term Disability (LTD) Insurance Updates & Reminders

Presenter: Monica Hernandez

Contact: LTD@calhr.ca.gov

- LTD is an employee paid voluntary plan for excluded employees.
- Deduction codes: 075-111 or 075-119
- Standard has created a website for departmental personnel offices, where employees can locate enrollment forms or obtain more information at <https://sites.standard.com/mybenefits/californiahr>.
- Effective January 2025, the LTD plan now includes Accident & Critical Illness Insurance.
 - Employees must have health insurance.
 - Employees have a Health Maintenance benefit of \$50 per calendar year, per plan.
 - Critical insurance has a \$5,000 coverage for Child(ren) as well as \$50 Health Maintenance benefit.

Long Term Disability (LTD) Insurance Updates & Reminders

Presenter: Monica Hernandez

Contact: LTD@calhr.ca.gov

- Employees can enroll in LTD online except for the following:
 - Direct Pay Employees (California Exposition & State Fair and California Fairs Services Authority) must return the form to their departmental personnel office.
 - Active Military employees must complete the enrollment form and email to socltforms@standard.com
 - All Other employees who wish to complete an enrollment form must email the form to socltforms@standard.com
- When completing the LTD enrollment form, the employee must also complete the Accident & Critical Illness Insurance form.
- LTD does not continue into retirement.
- Employee who transfers to a rank & file position can continue LTD for 24 months as a direct payment to Standard Insurance.
- If an employee wishes to continue their Accident & Critical Illness Insurance after loss of eligibility, the employee can continue coverage as a direct payment to Standard Insurance, within 60-days.



Basic Group Term Life & Supplemental Life Insurance

Presenter: Monica Hernandez

Basic Group Term Life & Supplemental Life Insurance Updates & Reminders

Presenter: Monica Hernandez

Contact: LifeInsurance@calhr.ca.gov

The Basic Group Term Life Insurance benefit is for Excluded employees only.

- Deduction codes: 200-003, 200-004 or 200-005
- Basic Group Term Life Insurance is an automatic employer paid benefit. If the PAR is processed by the 10th of the month, the enrollment will become effective on the first of the following month. Therefore, it is very important to key the PAR timely.
- Upon an employee's involuntary change from an excluded designation to a represented designation, the employing department must pay 12 months of Basic Group Life Insurance premiums. Please reference the BAM for instructions on paying these premiums.
- If the employee wish to continue coverage while out on a Leave of absence/disability or loss of coverage, must contact MetLife within 30-days.
- Departmental personnel offices are responsible for reporting a covered employee's death to MetLife at (800) 252-8524.

Supplemental Life Insurance Updates & Reminders

Presenter: Monica Hernandez

Contact: LifeInsurance@calhr.ca.gov

Supplemental Life Insurance is an employee paid voluntary benefit for Excluded employees who are enrolled in the Basic Group Term Life Insurance benefit plan.

- Employees enrolled in the employer-paid Basic Group Term Life Insurance may apply for Supplemental Life Insurance coverage at any time.
- Employees interested in purchasing Supplemental Life Insurance should contact MetLife at (800) 252-8524 for an informational brochure and to request an “Application for Group Supplemental Life and AD&D benefits” form. The completed and signed application must be returned to MetLife for processing.
- If MetLife approves the employee’s request for Supplemental Coverage, the premium information will be forwarded to SCO to initiate the payroll deduction.
- Deduction code: 075-107



Group Legal Services Insurance

Presenter: Monica Hernandez

Group Legal Services Insurance Updates & Reminders

Presenter: Monica Hernandez

Contact: GroupLegal@calhr.ca.gov

- Group Legal Services Insurance is an employee paid voluntary benefit.
- Deduction code: 075-081
- ARAG has created a website for departmental personnel offices, where the personnel specialist can locate enrollment forms or obtain more information at www.araglegal.com/socresources.
- Please review the BAM for enrollment options and instructions.
- Employees should be given a retiree enrollment kit upon retiring. Departmental personnel offices can contact ARAG Insurance to request enrollment kits by calling (800) 888-4184, Extension 605, or by emailing a request to clientsupport@ARAGlegal.com.
- Direct retiring employees to the [CalHR Retiree Group Legal Services Insurance Plan](#) webpage for more information about the Retiree Group Legal Services Insurance Plan, including information on how to enroll.
- Contact grouplegal@calhr.ca.gov for inquiries or appeals.



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- 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

- January, April, July, October 2024, February 2025 birth month cycles have concluded. Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- May 2025 birth month cycle: All notifications have been mailed, and all alerts should be processed by the end of June 2025 in FCP for all employees who submit their documents by May 31.
- The current birth month cycle is August 2025, and the 60-day mailing was generated on or about May 15, and mailed June 2, 2025, by the Department of General Services.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- 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.
- DEV for health benefits must be processed in myCalPERS by the first day of the birth month to avoid the automatic deletion from health coverage.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
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
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	8,321	Apr-2025	6,461	23,453
August	May-2025	10,493	Jun-2025	9,654	Jul-2025	TBD	20,147

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

FAMILY CONNECT

CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Logout Delia Baulwin

Review Dependent

Dependent Type *

Disabled Child

Status

Status History

First Name *

Birth Date *

04/04/1989

Dental Plan *

Yes

Vision Plan *

Yes

Dependent Type Locked

Status Date

5/10/2023

Middle Name

Re-verification Effective Date

05/01/2020

Dental Plan Effective Date

01/01/2022

Vision Plan Effective Date

01/01/2024

Record Source

Carrier File

Last Name *

Re-verification End Date

04/30/2025

Dental Permitting Event

-- Record Source --

Vision Permitting Event

-- Record Source --

Delete Dependent

Comments

Added by Carrier File 2022-07-21

Save

Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

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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 *

Dependent Certified By

Re-certification Effective Date *

Re-certification End Date *

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

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Logout Delia Baulwin

Review Dependent

Dependent Type *

Parent Child Relationship

Status

Status History

Pending

First Name *

Birth Date *

09/10/2012

Dental Plan *

Yes

Vision Plan *

Yes

Delete Dependent

Comments

Added by Carrier File 2022-07-21

Dependent Type Locked

Status Date

5/10/2023

Middle Name

Re-verification Effective Date

10/01/2023

Dental Plan Effective Date

01/01/2023

Vision Plan Effective Date

01/01/2020

Record Source

Carrier File

Last Name *

Re-verification End Date

09/30/2024

Dental Permitting Event

-- Record Source --

Vision Permitting Event

-- Record Source --

Save

Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

Logout Delia Baulwin

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

Document Received Date *

Re-certification Effective Date *

Re-certification End Date *

Dependent Certified By

[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 on 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.

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

Health Deduction Discrepancies – Kaiser Permanente

Background:

- Intermittently, the health providers will send listings of state employees with unpaid or missing health premiums.
- Received a listing from Kaiser (350 – 056) that Civil Service Benefits Team is auditing
- Date range of premiums is February 2022 to December 2024

What that means for Human Resource Offices:

- No action necessary at this point
- May see Accounts Receivables or payments set up for these health benefits
- Consistently working with CalPERS Cognos reports reduces the number of employees that are affected. Help us help you!



STATEWIDE PROGRAM UPDATES



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Reminders Regarding Processing of Mass Updates

- Retirement Contribution updates
 - SCO uses Pay Letters to determine impacted populations based on criteria such as Bargaining Unit, Retirement Category, and Class.
 - Assuming the update is to the employee contribution and/or exclusion amount, SCO reports on which Account Code(s) impacted employees are in.
 - If there are no records in the impacted Account Code(s) that do not require the update, SCO updates the contribution and/or exclusion amount.
 - If there are other Collective Bargaining Identification Designation (CBID) or Class Codes in the impacted Account Code(s), SCO will identify appropriate Account Codes to move impacted records to.
 - SCO creates a request for our Information Technology (IT) resources to select the required records and update the Account Codes.
 - SCO releases a Personnel Letter informing departments of the population to be updated, the old and new Account Codes (if applicable), and any further instructions.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Reminders Regarding Processing of Mass Updates

- What you need to know about Retirement Contributions and Account Codes
 - Account Codes are determined with the following attributes:
 - Classic or PEPRA status
 - Whether the employee is subject to Social Security
 - Exclusion Amount
 - Employee Rate (contribution percentage)
 - The appropriate Bargaining Unit Contract/Memorandum of Understanding specifies the Exclusion Amount and Employee Rate (contribution percentage)
 - There can be different values for these based on the employee's Retirement Category (Miscellaneous, Safety, Industrial, etc.) and whether they are subject to Social Security



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Reminders Regarding Processing of Mass Updates

- What you need to know about Retirement Contributions and Account Codes (continued)
 - The appropriate Account Code will result in a correct retirement contribution deduction
 - There are several Account Codes with the same attributes
 - Any code that meets the appropriate attributes for the employee may be used
 - The day following an update, confirm that impacted employees on your roster have been moved to an Account Code with the correct contribution percentage.
 - Reference the Personnel Letter, which will be released on the day the mass update is processed and will have information on old and new Account Codes.
 - When certifying pay, confirm that impacted employees on your roster have the correct contribution percentage.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Reminders Regarding Processing of Mass Updates

- General Salary Increase updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - SCO determines whether the population is large enough to necessitate a mass update
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Reminders Regarding Processing of Mass Updates

- Special Salary Adjustment updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - SCO determines whether the update can be automated based on criteria such as qualifying pay periods
 - If yes, SCO determines whether the population is large enough to necessitate a mass update.
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



Business System Support and Maintenance Section

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- Frequently Asked Questions
 - Why does SCO not share the mass update calendar with departments?
 - There are many factors that determine whether a mass update will move forward, and decisions can be made at the last minute.
 - The calendar is subject to change.
 - Why does SCO prioritize one Bargaining Unit over another?
 - No Bargaining Unit is prioritized; scheduling is based on the factors in the previous slides.
- Other Processes that SCO performs:
 - Records that fall out from the mass update process are worked by our Operations Team.



Business System Support and Maintenance Section

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- CalHR Pay Letters
 - There are many contract implementation items that are not subject to mass update
 - For example, new Earnings IDs for special pays.
 - When SCO is not performing a mass update, a Personnel Letter will not be released.
- CalHR will release a Pay Letter with instructions
 - SCO contributes system update instructions to these Pay Letters
 - Be sure to monitor Pay Letters



Business System Support and Maintenance Section

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- What departments need to do when we run mass updates
 - Reference appropriate contracts on the [CalHR website](#) to understand what changes are coming
 - Ensure Employment History (EH) is up to date for impacted employees
 - However, do not key updates to impacted records on the day of the update.
 - Review letters carefully
 - You may need to manually key some records
 - You are responsible for processing out of sequence transactions
 - Some payroll adjustments will require you to submit a STD. 674 to SCO, if what you key does not generate payroll as expected.
 - Also, review the CalHR Pay Letter that will be referenced in our Personnel Letter.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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- What departments need to do when we run mass updates (continued)
 - On the day following the update, confirm that impacted employees on your roster have the correct updated salary.
 - Manually key any records that were incorrectly not included in the mass update
 - As always, certify pay for your roster on payday and confirm that all eligible records were appropriately included in the mass update.



Business System Support and Maintenance Section

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

- What departments need to know about retroactive mass updates
 - The process is similar with some key differences:
 - Due to the complexity of retroactivity, more records may fall out from the mass update and require manual keying.
 - Retroactive pay will not issue until the first pay cycle following the update
 - Retroactive pay may not issue due to payroll errors
 - It is especially important to certify payroll for impacted records
 - Departments may have to submit STD. 674 forms for pay to issue



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

GEN/SAL Video

- Where do you find it?
 - [General Salary Increase \(GEN\) and Other Salary Change \(SAL\) Transactions](#)
- What's in it?
 - Explanation of the EH transactions process for Collective Bargaining General Salary Increases (GSI) or GEN and Other Salary Changes (SAL)
- Who should watch the video?
 - Newer Personnel Specialists
 - Seasoned Personnel Specialists looking to refresh their understanding of processing GEN/SAL transactions in EH



Business Systems Enhancements Section

Presenter: Arlene Chambers

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

ITEM 351 ESTABLISHED EARNINGS – NEW VIEWDIRECT REPORT AND AUDIT MESSAGES

- [Personnel Letter #25-006](#)
 - Report name PDSQ0122
 - Departments must review the transactions listed on PDSQ0122 every month and correct all records.
 - New Audit Messages
 - 0351-01 VERIFY EID #1 AND RE-ENTER OR DELETE EID, AS APPROPRIATE
 - 0351-02 VERIFY EID #2 AND RE-ENTER OR DELETE EID, AS APPROPRIATE
 - 0351-03 VERIFY EID #3 AND RE-ENTER OR DELETE EID, AS APPROPRIATE
 - 0351-04 DUPLICATE ESTABLISHED EARNINGS ID



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

- The Social Security and/or Medicare wage withholdings are reported on the deceased employees Form W-2 for the year the employee passes.
- Payment of wages issued after the date of death, but in the same calendar year are not subject to Federal and State income tax withholding for the deceased.
- SCO has created a guide to assist with any questions on the reporting process.
 - [Deceased Employee Reporting Guide](#)
- **Please under no circumstances should the recipients be advised that payments are not taxable.**
- Questions should be directed to a tax consultant or the Internal Revenue Service (IRS).

Reminder: SCO cannot give tax advice.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

References:

- [PPSD-21 Form Deceased Employee Data](#)
 - Fill and print Form PSD-21
- [Payroll Letter #24-012](#)
- [Payroll Procedures Manual \(PPM\)](#): Section I 900, Deceased Employee's Wages
 - For additional department requirements
- [Deceased Employee Reporting Guide](#)
 - Guide on the reporting process



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Salary Advances Initial/Offset Reporting - STD. 422

- Please work with your accounting office to ensure that your department has reported all outstanding salary advances provided to employees for the 2025 tax year.
- Wages must be reported in the year the employee constructively received the funds. If a salary advance was issued in 2024 and the SCO warrant issued in 2025, then a salary advance package must be sent to SCO to move the wages from 2024 to 2025 as that is when the employee received the funds.
- [Payroll Letter #24-013](#)
- [STD. 422 Salary Advances Paid/Offset Report](#)
- [Salary Advance Reporting Guide](#)

References

- [PPM](#): Section N 103 – Salary Advances
- [PPM](#): Section N 109 - Instructions for completing the STD. 422, Salary Advances Paid/Offset Report



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](#) – PPST'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