



Transaction Supervisors' Forum

Presented By: Nastassja Johnson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

March 19, 2026



Survey Questions





Question

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

When our office learns an employee's domestic partner becomes a spouse, we contact CalPERS to update the employee's account. To update the deduction, we are advised to submit an STD 674 to SCO to change the employee's status. It seems that CalPERS and SCO may not be communicating this information with one another. How do we address this change and is there a better way to communicate this type of change to both agencies?

Answer: When there is a change in the domestic partner reporting, the SCO Benefits and W-2 programs are notified through a monthly report. At that time, they will make the necessary changes and will refund any withholdings accordingly. The adjustments may take approximately two months to complete.



STATEWIDE BENEFITS ADMINISTRATION



Affordable Care Act Program

Presenter: Corey Cummings

Contact: ACASupport@sco.ca.gov

Upcoming ACA Training Dates

CAL HR - PART 1	SCO – PART 2
Wednesday, March 25th, 2026	Thursday, March 26th, 2026
Wednesday, April 22nd, 2026	Thursday, April 23rd, 2026
Wednesday, May 6th, 2026	Thursday, May 7th, 2026
Wednesday, June 24th, 2026	Thursday, June 25th, 2026

2021 Information Reporting Penalties

- PDSQ0173

2025 Annual 1095-C Reporting

- Personnel Letter #26-005
- Personnel Letter #26-006



MARCH 19, 2026

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.





Benefits Administration Manual (BAM) Updates and Benefits Ambassador Training

Presenter: Anna Burke, Project and Training Specialist

BAM Updates and Upcoming Benefits Ambassador Training

Presenter: Anna Burke, Project and Training Specialist

Email: BenefitsCommunications@calhr.ca.gov

CalHR Benefits Ambassador Training Series:

Benefits Administration Manual
(BAM) Basics and Navigation



- **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 have standardized content to make it a clearer, more user-friendly resource for HR professionals across the state.
- In coordination with this refresh, in 2026 CalHR launched the Benefits Ambassador Training Series. This quarterly virtual training offers practical, easy-to-understand sessions designed to boost your knowledge and confidence with employee benefits.

Benefits Ambassador Training

Presenter: Anna Burke, Project and Training Specialist

Email: BenefitsCommunications@calhr.ca.gov

- First training: **Benefits Administration Manual (BAM) Basics and Navigation**
- Date and Times:
 - March 24th from 10:30 a.m. - 12 p.m. - Session Full
 - April 2nd from 1:00-2:30 p.m.- Registration Open
- This training will help participants:
 - Learn how to navigate the updated BAM.
 - Understand the goals of the BAM standardization effort.
 - Become familiar with the structure of state benefits resources.
- To register for this training visit:

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

or scan the QR code





Public Service Recognition Week 2026 | May 3 – 9

Presenter: Michelle Blair-Medeiros

Recognize. Reconnect. Reignite.

Presenter: Michelle Blair-Medeiros

Email: Engagement@calhr.ca.gov

Recognizing the People Who Make a Difference

- Office Hours
 - Thursday, April 9 from 11:00 a.m. – 12:00 p.m.
- Learn more about PSRW: [California's PSRW Toolkit](#)
- For questions, contact the Employee Engagement Program at Engagement@calhr.ca.gov

CALHR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

PUBLIC SERVICE RECOGNITION WEEK

RECOGNIZE. RECONNECT. REIGNITE. **2026**

MEANINGFUL MONDAY • MAY 4
Start the week with purpose and pride. See how your daily work contributes to the greater good.

TEAMWORK TUESDAY • MAY 5
Celebrate collaboration and camaraderie. Strengthen workplace relationships and mutual appreciation.

WELLBEING WEDNESDAY • MAY 6
Appreciate the people behind the work. Be seen, valued and supported as a whole person.

THANK YOU THURSDAY • MAY 7
Show gratitude in every direction. Enjoy a culture of gratitude throughout the day.

FUTURE FRIDAY • MAY 8
Recognize potential and invest in growth. Feel supported in your professional journey and celebrate your strengths.

The graphic features a background image of three people in a meeting setting, with a large yellow number '5' in the top right corner.



Employee Assistance Program

Presenter: Shannon MacGregor

Employee Assistance Program

Presenter: Shannon MacGregor

Email: Eap@calhr.ca.gov

A New Chapter for the Statewide Employee Assistance Program: Enhancing Access, Innovation, and “Whole You” Support with Spring Health

- Transition to Spring Health | July 1, 2026
 - What’s Coming
 - Enhanced Access to Care
 - Holistic Wellbeing Support
 - Specialized Support for High-Impact Roles
 - Improved Digital Experience
 - Stronger Program Integration
 - What to Expect Next
 - For any questions, please email eap@calhr.ca.gov



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

Department Enrollment Error Resolution Project

Presenter: Natasha Washington

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

Reminders:

1. If your department is not listed in the [Project Immersion Schedule](#), please call the Statewide Customer Contact Center at (916) 372-7200 and follow the Retirement prompt to add your department to the schedule.

2. When approved by your manager to clear the enrollment errors, HR Staff are expected to take advantage of the following opportunities for education to clear the enrollment errors during their department's immersion period:

- [myCalPERS Retirement Enrollment](#)
- [Business Rules & myCalPERS Classes | CalPERS](#)
- [Retirement Enrollment Preprocessing Toolkit](#)



Department Enrollment Error Resolution Project



Presenter: Natasha Washington

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

Reminders Continued:

3. SCO will give priority to department's inquiries submitted during their scheduled immersion period. HR staff are encouraged to utilize all available resources prior to reaching out for assistance. Once the department's immersion period has ended, employers are expected to take over the clearing of enrollment errors in myCalPERS.

4. If you are unable to resolve the appointment issue due to contribution errors, please contact the Statewide Customer Contact Center, and follow the Retirement prompt. For all other inquiries, please contact CalPERS at (888) 225-7377.

Permanent Separations

Veronica Silva-Gil
CalPERS

Reporting Requirements

- Employers are required to report all CalPERS-covered employment and updates timely including, but not limited to:
 - Membership enrollment
 - Permanent separation from employment
 - Leave of absences

Negative Impacts of Not Reporting Timely

- Incorrect membership enrollment
- PEPRRA/classic
- Incorrect formula placement
- Reciprocity determinations
- Illegal retirements

System Enhancements - Zero Payroll reported

- ❑ Auto Separation of appointments where zero payroll has been reported for 12 months or more.
 - Notification will be sent warning of potential separation to the employer and member at 9 months of zero payroll reported
 - Notification of separation to employer and member at 12 month

System Enhancements - Retirees

- ❑ Upon retirement, a missing separation date on any appointment will generate notifications to both the employer and retiree
 - Month 2 – First notification advising of missing separation date and potential suspension of benefits
 - Month 4 – Final notification of missing separation date and advising benefits will be suspended until separation date is reported
- ❑ Employers must immediately report the separation date upon notification to avoid benefit suspension for the retiree

Not Separated

- ❑ If the member is not separated from employment with your agency, they may be illegally retired
- ❑ Notify CalPERS immediately if this is your situation and we will work with our benefits team to cancel the retirement



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

Changes to Federal Tax Withholding Rates For Nonresident Alien (NRA)

- [Personnel Letter #26-004](#)
 - Changes to Federal Tax Withholding Rates for Nonresident Alien
- [Personnel Letter #26-001](#)
 - Biannual Personnel Letter of Employees Identified as Nonresident Aliens
- [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*9 that do not hire NRA employees
 - Certification is valid for the current year, but your department will need to recertify every January
 - Departments should be reviewing the View Direct Report PDW7170 “Employees Identified as Nonresident”
- **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.

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 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](#)

