

TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – AUGUST 2025

The following questions were submitted during the forum:

Question: How will the new Savings Plus Lump Sum Separation Pay Form work with employees earning 7,000 dollars?

Answer: On the new Savings Plus Lump Sum form, all employees can specify how they want to contribute their lump sum separation value to their retirement accounts. The new tax rules for high earners will only apply for “catch-up contributions” and for those who earn over \$145,000 in Social Security Wages in the prior tax year. The layout of the new form helps to call attention to this new rule and assist employees in selecting their elections. If more clarification is needed, please send follow-up questions to LeaveRollover@calhr.ca.gov.

Question: Once the California State Payroll System is deployed to all agencies, will the system replace Cal Employee Connect (CEC)?

Answer: Yes, the new system will replace CEC.

Question: Will the California State Payroll System (CSPS) process a name change via online as well? Will it require Human Resources (HR) staff to upload documents to verify the name change?

Answer: Ideally the system will accommodate these types of updates with a validation process. This level of detail has not been confirmed at this stage, but more is to come. The goal is to reduce manual work and improve efficiency. We are still in the process of determining how all of that will be processed, but we will take this comment back to our project team! As CSPS is being developed, Cal Employee Connect (CEC)/ConnectHR will continue to be the portal for employees and HR staff to use. When we are ready to implement, we will transition everyone from CEC/ConnectHR to CSPS.

Question: Will the lump sum year-end process be explained in a future forum meeting?

Answer: Yes! We will be back for September's forum to explain our new changes and will be offering training courses once our updated form is released. Please send an email to LeaveRollover@calhr.ca.gov for clarification on the process.

Question: When will the Benefits Calculator be updated and available?

Answer: Per CalHR, the goal is to have this updated by the start of Open Enrollment (OE) on September 15, 2025. The Benefits Calculator is always targeted to be updated by the start of every OE period. We are actively working on getting the 2026 rates ready and available for everyone.

Question: Will CalHR or SCO have a report available for agencies that list completed transactions related to dental, FlexElect, and vision? This would help staff reconcile the transactions.

Answer: We currently do not have a report that could capture this information. However, Personnel Specialists are encouraged to use their tickler as a reminder to check all employees on their roster that have expected changes. This would be after December cutoff to ensure all benefits were established correctly.

Question: When someone is hired mid-month and we enter in the Personal Leave Program (PLP) 2025 Earnings ID code, will California Leave Accounting System (CLAS) load in the adjusted PLP next month or will we need to key/adjust accordingly?

Answer: If the appointment and Earnings ID were entered timely, then the system will post a pro-rated amount. However, it must have happened before the program runs.

Question: Is there training available for Family Connect Portal (FCP)?

Answer: Our team is currently working on training for FCP. Once it has been finalized and posted, we will communicate this with each department. If you need any assistance with FCP in the meantime, please send an email to DRV@CalHR.ca.gov.

Question: Regarding Pre-Tax Parking, how do we request a refund for deductions due to late cancellation?

Answer: Requests for refunds should not be submitted until the employee confirms that their Pre-Tax Parking payroll deductions have ceased. Refund requests are reviewed by CalHR on a case-by-case basis. The employee's departmental personnel office must complete and submit a memo on the departmental letterhead, requesting a refund on the employee's behalf (requests cannot come directly from the employee or anyone outside the departmental personnel office).

To submit a refund request on behalf of an employee, please submit a detailed memo on the department letterhead with the following for consideration:

- Name of Employee
- The last four digits of the employee's Social Security number
- Total refund amount requested
- Detailed reason/justification for the refund
- Pay periods and amounts of double deductions, if applicable
- Pay periods for which the refund is specified and amount for each pay period
- If the refund is full or partial
- Attach a copy of the Pre-Tax Parking cancellation form that was submitted to the State Controller's Office (SCO)
- ALL supporting documentation showing the employee has been attempting to cancel this deduction

Please send an email with the memo and the supporting documents to Pre-TaxParking@calhr.ca.gov, and the request will be reviewed. If approved, we will submit a refund authorization to SCO to process the refund. If you have any questions or concerns, please send an email to Pre-TaxParking@calhr.ca.gov.

Question: Is the last day to submit lump sum forms to SCO for Permanent Intermittent (PI) employees on August 30, 2025?

Answer: Yes, please submit any STD. 701C/702 for PIs by August 31, 2025.

Question: Regarding the Department Enrollment Error Resolution Project, is the California Public Utilities Commission one of the agencies transitioning?

Answer: Yes, we will be providing the "Immersion Period" schedule for the first week of December. We will also be forthcoming with our communications, so you should be able to see your department on the schedule.

Question: One of the biggest issues we have is that sometimes payroll does not transfer to CalPERS. Will this be resolved, specifically, regarding older pay periods?

Answer: The Department Enrollment Error Resolution Project specifically aims to transition Enrollment Appointment errors to the departments.

Question: Can the reports in myCalPERS include the agency and unit number of the employees? For the Department of Transportation, our work is distributed to all the Personnel Specialists by agency and unit, and it becomes very difficult to know who needs to work with which employee without this information.

Answer: Depending on the type of report you are referring to, we would have to confirm where the information being requested is stored in myCalPERS, then identify which myCalPERS reports need to include that information to submit any needed system enhancements. Please send an email to Employer_Technical_Support@calpers.ca.gov to request changes to a CalPERS report.

Question: Is the Retirement Enrollment class free of charge in myCalPERS?

Answer: Yes.

Question: Who do we contact to take the Retirement Enrollment class?

Answer: The current myCalPERS Retirement Enrollment class is available in myCalPERS under the Education tab; however, it is only available for Public Agencies and Schools. Once State information is added to the class in January 2026, class registration will be open to State Agencies through myCalPERS under the Education tab.

Question: When does the payroll reporting process in myCalPERS for July start?

Answer: The State Controller's Office (SCO) has submitted their July payroll files. SCO submits payroll to CalPERS typically around the second week of each month for the prior month and is processed by SCO on the 25th of each month.

Question: Is there a list of Bargaining Unit contracts that will continue to get Other Post-Employment Benefits?

Answer: Please see [CalHR Human Resources Manual Policy 1422](#) for information.

Question: We have exempt staff who are not part of the salary reduction and would like to voluntarily reduce their salaries; what should we do to make that happen?

Answer: Please send an email to CalHR at PSB@calhr.ca.gov for assistance.

Question: Are Other Post-Employment Benefits for designated employees in E48/E59 effective July 31, 2025?

Answer: Yes, it is effective for the August pay period.

Question: Other Post-Employment Benefits (OPEB) suspension for Bargaining Unit (BU) 7 was effective July pay period. The Chief of Police is designated in M01 but associated with BU 7. Should their OPEB contributions stop in July, or will August be the correct effective date?

Answer: OPEB updates of all kinds, including suspensions, are based on the employee's OPEB Collective Bargaining Identification Designation (CBID). You can find the employee's OPEB CBID in the Personnel Information Management System.

Question: What address do I mail returned live checks to?

Answer: Please check Section I 318.60 - Mailing Addresses of the [Payroll Procedures Manual](#), it shows the address to mail warrants back to SCO.

Question: I have a few employees who are encountering difficulties changing their direct deposit information via their Cal Employee Connect (CEC) account. I recall that the agency can request direct deposit enrollments digitally using the 699 Excel File Generator. Could you please confirm if this process is still in place? If so, can you clarify whether a Personnel Specialist is authorized to process this form directly with SCO, or if it requires a manager's approval? Lastly, do you have a sample of the 699 Excel File Generator available?

Answer: Please send an email to the Direct Deposit team at PPSDDirectDeposit@sco.ca.gov to inquire if the account enrollment failed or if the employee needs to submit a question through their CEC account using the help and feedback tab. The 699 Excel File Generator option is available to agencies that have employees that do not have access to a network computer.

Question: Will there be an option for Human Resources Offices to set up accounts receivables (A/Rs) in ConnectHR instead of uploading the STD. 674?

Answer: The SCOConnect team is exploring the possibility of creating this feature in ConnectHR. Unfortunately, we do not have an estimated timeline for the completion of this feature.

Question: Will there be an update to the STD. 634 timesheet to include the Personal Leave Program 2025?

Answer: Yes, we are currently working on that, and it will be distributed soon.

Question: The Annual Recruitment and Retention (R&R) Pay Differential 240 states "If an employee terminates, transfers out of an eligible class, or is dismissed prior to completing the twelve (12) consecutive pay periods, there will be no pro rata payment for those months." Does this include when an eligible employee retires? I recently heard that an agency is paying a prorated amount to Personnel Specialists that retire. Is this open for interpretation by the agency?

Answer: It is not permitted to pay a prorated amount to an employee who is separated. The first bullet (of Pay Differential 240) states, "If the employee terminates or separates, they are not to receive a prorated amount." Bullet 5 states, "No employee shall be eligible if they have not completed 12 months."

Question: When an employee separates, is the lump sum issued at the base rate or the Hire Above Minimum rate?

Answer: The Government Code says that the employee's lump sum should be as if they were working and taking time off.

Question: Why is there a large backlog related to establishing accounts receivables (A/Rs) after submitting STD. 674 A/Rs to SCO?

Answer: SCO is implementing several strategies to tackle the backlog.

Question: What is the most current process to re-issue damaged paper warrants?

Answer: Please review Section I 320 of the [Payroll Procedures Manual](#) for clarification.

Question: To clarify, when an employee separates, we need to keep them on the Personal Leave Program (PLP) code correct? And key a 962 to pay the lump sum at the base rate? Also, do we need to take off the PLP code later or just leave as-is?

Answer: No, you must remove the PLP and key a 962. Refer to [Personnel Letter #25-009](#) for clarification.

Question: If a Full-Time/Permanent employee separates via S01 with lump sum cash out and reinstates to another agency within 15 workdays, then whose responsibility is it to enforce Government Code 19839(c)?

Answer: The Government Code says a lump sum payment shall not be made to a person who returns to a position in the same class and agency within 15 workdays. If the employee is not returning to the same department and same class, the money does not have to be returned, so neither agency needs to collect.

Question: If an employee is on State Disability Insurance, has Personal Leave Program (PLP), and they supplement, do we remove the PLP 2025?

Answer: There is no need to remove the PLP.

Question: Our office processed a Non-industrial Disability Insurance and a State Disability Insurance for July 2025 pay period. One was processed and one was dinged requesting the Personal Leave Program (PLP) 2025 be added in the Personnel Information Management System for processing. Please clarify the process for disability requests and PLP 2025.

Answer: If the pay period has regular time, then the PLP earning ID must be on the Personnel Action Request.

Question: Since Personal Holiday leave cannot be broken up, is it okay to use it before the Personal Leave Program (PLP) 2025?

Answer: No, Personal Holiday has no expiration date and cannot be used prior to PLP.

Question: Which unit do we upload an accounts receivable for Other-Post Employment Benefits? Is it to the Payroll or Retirement unit?

Answer: Upload it to the Payroll Unit.

Question: A position number on ConnectHR is not updated to what is shown on the Personnel Information Management System (PIMS), how do we get this fixed?

Answer: This scenario may have different reasons for the discrepancy. For assistance, please send an email to ConnectHRhelp@sco.ca.gov with your employee's information. In the meantime, the position number shown in PIMS should be the proper position number.

Question: Will the suspension of Other Post-Employment Benefits (OPEB) contributions for Bargaining Unit (BU) 9 linked to S09/E48 take effect on July 1, 2025, or July 31, 2025?

Answer: It depends on the employee's OPEB Collective Bargaining Identification Designation. For BU 9 employees, it would take effect July 1, 2025. For designated E48 employees, it would take effect July 31, 2025.

Question: Bargaining Units (BUs) 9, 10, and 12 states, "Employees working any holiday shall be paid in accordance with Government Code section 19853." Does this mean that they are impacted by the new Government Code updated on January 1, 2025, and their pay shall count toward any premium overtime compensation earned during the same work week?

Answer: If that is what the Memorandum of Understanding (MOU) Agreements say, then yes. However, if you have questions, please have your designated contact send an email to psb@calhr.ca.gov for clarification because holiday compensation is complicated.

Question: Should departments have their employees revise their July timesheets to reflect the Personal Leave Program usage first?

Answer: Where applicable, you are required to do so.

Question: If an employee is designated as E97/E99 and not indicated on the "tied to" chart on Pay Differential 386, how can we confirm which Personal Leave Program 2025 rate they should pay into?

Answer: Please send an email to PSB@calhr.ca.gov for assistance.

Question: Do we have to offer a salary advance for the remaining funds after the deferral to ensure timely payment of wages?

Answer: If the payment to the employee is mandated and it is unknown when the warrant will be issued, then yes, a salary advance should be provided to the employee. For more information, please see the [Salary Advance Reporting Guide](#) available on the State Controller's Office website.

Question: Five Personal Leave Program (PLP) hours posted for Bargaining Unit 3 employees but according to the contract, it should only be 4.38 hours based on 220 calendar school days; how can we fix this?

Answer: We are working on this correction. For next month's run, it will be correct. If an employee needs to use the time now, then you can void the incorrect amount and rekey the correct amount.

Question: Regarding the California Leave Accounting System (CLAS), we have an employee who started in 2010, and their Personal Holiday (PH) was never established. Are we able to add it now along with the additional PH accruals that were missed from previous years?

Answer: If the employee is due time, you must give it to them. Since you cannot key that far back, you need to post a beginning balance for the total number of years they are due time that are not on CLAS and then key each year that is available on CLAS as they should have shown up. Please ensure to document the employee's file.

Question: What if an employee requests the new agency to bring one of their leave balances with them as a condition of employment, and the new agency agrees to take it on, is this ok?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Will leave reduction plans be required this year?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Can the receiving department put a cap on the Vacation/Annual Leave that is transferred to them, forcing the releasing department to cash out a chunk of it?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Can an employee have both Personal Leave Program (PLP) 2025 and Voluntary Personal Leave Program (VPLP) in their Personnel Action Request (PAR)?

Answer: The California Leave Accounting System does not deal with PARs.

Question: Is there a regulation or any guidance on what specific documents should go in the Official Personnel Files (OPFs)?

Answer: Please refer to the [State Administrative Manual \(SAM\) Section 1600](#) for clarification.

Question: Can the new Personal Leave Program (PLP) 2025 be applied to the separation calendar run out as regular compensated leave types? Or does the PLP 2025 leave need to be added at the end of the calendar run out to not earn any accruals?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Are we required to keep the Withholding and Direct Deposit confirmation emails from Cal Employee Connect in the Official Personnel File (OPF)?

Answer: Please refer to the [State Administrative Manual \(SAM\) Section 1600](#) for clarification.

Question: Is it acceptable to submit a disability continuation for a benefit accounts receivable (A/R) on a STD. 674 A/R form instead of the STD. 674 form? The Payroll Procedures Manual (PPM) Section H 825 - 827 only mentions completing a STD. 674 form. We need clarification if that form is correct, as opposed to the STD. 674 A/R form.

Answer: Yes, you may use the STD. 674 A/R form to set up A/Rs for continuation of benefits for eligible disability. You may also use the STD. 674 form in the event the continuation of benefits would result in a payment.

Question: Where is it in writing stating the provision that sick leave cannot be used for Paid Family Leave (PFL) for baby bonding?

Answer: It does not expressly say it cannot be used. However, the Memorandum of Understanding (MOU) Agreements, Government Codes, and California Code of Regulations speak to what are approved sick leave reasons. Paid Family Leave for baby bonding is not listed as a sick leave reason.

Question: If an employee has Voluntary Personal Leave Program (VPLP) due to a furlough, are we supposed to end it, or can they keep it on top of the PLP 2025?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Are the leave reduction forms required this year with the Personal Leave Program (PLP) 2025?

Answer: This is a policy question; therefore, please consult with CalHR to best address your inquiry.

Question: Can the confirmations from Cal Employee Connect include the employee's new address?

Answer: To maintain the security of our users Personally Identifiable Information (PII), SCOConnect team is unable to include the employee's change of address in the confirmation email.

Question: Where can we find a chart for the prorated Personal Leave Program (PLP) 2025 for separation purposes?

Answer: Please refer to the [CalHR Human Resources Policy 2113](#) with the accrual charts for corresponding bargaining units.