

## TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – DECEMBER 2025

The following questions were submitted during the forum:

**Question:** Is there an email for Personnel Services Branch military questions?

**Answer:** Yes, their email address is [psb@calhr.ca.gov](mailto:psb@calhr.ca.gov).

**Question:** Are we supposed to submit memos with our appeals? I didn't used to have to do that but am now being told otherwise.

**Answer:** Yes, please submit memos with your appeals.

**Question:** Will there be a job-aid for the information presented here today regarding this topic?

**Answer:** The deployment announcement with user guide was sent to all ConnectHR users on Friday, December 12, 2025. To receive a guide, please send an email to [PPSDPositionControl@sco.ca.gov](mailto:PPSDPositionControl@sco.ca.gov).

**Question:** If it is an age-based catch-up and not a traditional catch-up, we do not need a catch-up letter; is that a correct statement?

**Answer:** Yes, please submit memos with your appeals.

**Question:** To clarify, Traditional Catch-Up is if they wish to go back previous years?

**Answer:** Traditional Catch-Up allows participants to increase their contribution limit by looking back in historical years when that employee was eligible to contribute but did not contribute up to the maximum. They must apply and be approved. Savings Plus will issue an approval letter based on the employees submitted application. There is a video on [Savings Plus](#) to help employees with this process.

**Question:** Is this feature available for status of payroll warrants?

**Answer:** No.

**Question:** If I submit my employee's second PAR (S70 correct) package on December 29, is the 877 code needed in order to have lump sum cash payment issued in 2026? If submitted after January 1, 2026, is the 877 code not needed for lump sum cash payment to issue in 2026?

**Answer:** If the employee has elected a second tax year deferral, the pay will issue in the future tax year.

**Question:** Please go over out-of-state tax withholdings. For example, if an employee (EE) starts to live in Arizona the first of 2026 and does not want California (CA) taxes out of their monthly or other pay, is the procedure to send the EE the 2019 Form 540NR so that they send it to Franchise Tax Board (FTB)?

**Answer:** Currently we have three processes for employees who reside outside of CA:

1. Establish a header so that the employee is not CA taxed
2. On the EAR, key CA with S95 for no withholding
3. Or, have CA withholding deducted

For Options two and three, the employee will need to file the [CA \(540NR\), California Adjustments – Nonresidents or Part-Year Residents](#), income tax return with the FTB. The Franchise Tax Board will determine if any withholding is required or issue a refund.

**Question:** Is it A02 or A20?

**Answer:** It is A20 for permanent, and A02 for non-permanent.

**Question:** Can you share a little background regarding the Department Enrollment Error Resolution Project implementation schedule?

**Answer:** Per the Broadcast Email released December 11, 2025, the implementation date is Jan 2, 2026. The immersion schedule aims to manage the traffic of inquiries coming into SCO. On a different note, we encourage everyone to take advantage of the education opportunities provided by CalPERS.

**Question:** Where can a sample letter of the Consolidated Omnibus Budget Reconciliation Act (COBRA) denial be found? Or if someone is not eligible for COBRA, do we not send a notice?

**Answer:** Denial letters come from the carriers. Your department should not need to send anything out.

**Question:** Who do we reach out to regarding Salary Determination?

**Answer:** Please contact our [Statewide Customer Contact Center](#) for assistance.