

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

The following questions were submitted during the forum:

**Question:** Regarding no tax on tips or overtime, this will be an item that can be claimed when filing our income taxes. When people work time-and-a-half, only half of the portion can be claimed. Will there be a separate box on Form W-2s that will have this information, or will employees need to figure this out when filing their taxes?

**Answer:** The State Controller's Office is currently working on a way to provide this information to employees for 2025. For 2026, this information will be included on Form W-2.

**Question:** What compensation can an exempt employee (E99) expect for the Personal Leave Program (PLP) 2025, given that they do not receive PLP (LY) leave compensation and are also subject to a three percent pay reduction?

**Answer:** Please send an email to [EPR@calhr.ca.gov](mailto:EPR@calhr.ca.gov) for exempt employee questions.

**Question:** How will the California State Payroll System (CSPS) work with our current human resources payroll system?

**Answer:** Each department will decide whether they want to interface their current systems with CSPS. It will be the department's responsibility to build the interface.

**Question:** Will employees receive the new Lump Sum Form from [Savings Plus](#)? When contacting Savings Plus, should the employee know what their lump sum is worth?

**Answer:** Correct; the new form will be posted on Savings Plus. Yes, Human Resources Offices should help employees determine the value of their leave before they reach out to complete their Lump Sum Form.

**Question:** When do we need to start using the new Savings Plus Lump Sum Form? If we have already received a few of the older versions, do we need to have the employees re-submit a new one?

**Answer:** Please use the new form once it has been posted to the Savings Plus website, we will still collect the old version until then. The new form will be posted next week, and we will send out a notice to all human resources offices once posted.

**Question:** Is this new Lump Sum Form effective for 2025/2026 deferrals?

**Answer:** The new form will be effective for both 2025 and 2026 contributions, once posted to the Savings Plus website next week. Notice will go out to all human resources offices once the new form is posted.

**Question:** Who do we contact to request a Saving Plus training session?

**Answer:** Please send an email to [LeaveRollover@calhr.ca.gov](mailto:LeaveRollover@calhr.ca.gov) to request training. We will also have a recorded tutorial available once the form is live and will send out these resources by email to all human resources offices.

**Question:** When are you expecting to release the new Lump Sum Form? Will the State Controller's Office (SCO) accept previous revision forms that are already submitted to human resources (HR) offices?

**Answer:** Currently, SCO will accept the old form. The new form will be posted next week and soon we will request everyone to use the new form. A notice will go out to all HR offices once the new form is posted.

**Question:** Regarding the Savings Plus Form, you mentioned two Personnel Action Requests (PARs); is the first PAR for the current year and the second for the following year?

**Answer:** Yes, the first PAR is for the current tax year, and the second PAR is for next tax year (for those separating in November or December and contributing to two years).

**Question:** I reviewed Personnel Letter #25-009 and it does not explicitly state that when someone returns from disability leave, we are to immediately put them back on the Personal Leave Program (PLP) 2025. Are we supposed to do this?

**Answer:** Yes, the employee should have the PLP earnings ID locked-in on their Personnel Action Request when on pay status if they meet the criteria as shown in the pay differential and Memorandum of Understanding.

**Question:** Can you tell me when the 2026 Consolidated Omnibus Budget Reconciliation Act (COBRA) rates will be updated?

**Answer:** The 2026 COBRA rates are published on the [CalHR](#) website.

**Question:** Are the 2026 Consolidated Benefits (CoBen) Allowances and Employers Health Benefits Contributions by Bargaining Unit available on the CalHR website?

**Answer:** Yes, it is available on the [CalHR](#) website.

**Question:** Will there no longer be Family Connect Portal?

**Answer:** Departmental Personnel Offices will continue to use the Family Connect Portal to process Dependent Re-Verification (DRV) transactions for Dental and/or Premier Vision dependent eligibility.

**Question:** Is the Request Tracking System just for Human Resources Offices?

**Answer:** Yes, it should be used to submit appeals to CalHR only. Please do not submit open enrollment submissions.

**Question:** Is the re-verification cycle expiration date for the November birth month cycle also extended by CalPERS for health so that all benefits are aligned?

**Answer:** The extended expiration date for the November 2025 birth month cycle applies to Dependent Re-Verification for Dental and/or Premier Vision eligibility only.

**Question:** Are the dental/cash option packages okay to do in a batch upload, or would you prefer single uploads for that scenario?

**Answer:** Yes, you may do this.

**Question:** Is the FlexElect Reimbursement Account still available? I cannot find the FlexElect handbook anymore that showed the annual limit. The information shown on the CalHR website links to the 2022 FlexElect handbook.

**Answer:** Please visit this link for the [2026 FlexElect Handbook](#).

**Question:** Is there a CalHR Open Enrollment Toolkit with all the 2026 PDF links for premiums, codes, etc.?

**Answer:** Yes, please see the [HR Professionals Toolkit](#) webpage available on the CalHR website.

**Question:** Are supervisors or managers the only ones that can send an escalation email to the State Controller's Office, Personnel and Payroll Services Division?

**Answer:** Yes.

**Question:** Can we collect an accounts receivable (A/R) for a deceased employee (EE) if the EE was notified? Additionally, can we collect the A/R if it was established after the EE is deceased? How are other departments handling similar cases? Or can the agency write off the outstanding A/Rs?

**Answer:** Please review the [State Administrative Manual](#) for clarification.

**Question:** We sent our leave transmittal to the State Controller's Office on Monday and have yet to receive any response. Who can I contact for assistance?

**Answer:** Please send an email to [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov) for assistance.

**Question:** Regarding the ConnectHR Garnishment Feature, is this option only available to supervisors?

**Answer:** ConnectHR has several levels of access. If a ConnectHR account needs an updated level of access, please reach out to your security monitor.

**Question:** Are we going to verify the dependent re-verification for employees whose re-verification end date is showing as November 30, 2025 (for dental and vision)?

**Answer:** Yes. Please note, CalHR Benefits Division has authorized verification of child dependents in the November 2025 birth month cycle to reconcile with CalPERS data for alignment with the Dependent Eligibility Verification (DEV) process. Do not un-verify child dependents that have been verified by CalHR. Please send an email to [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov) for more detailed guidance.

**Question:** Regarding the Enrollment Error Resolution Project, does this mean the errors that are in the current report will be corrected by CalPERS and the State Controller's Office (SCO)?

**Answer:** SCO will continue to correct as many errors as they can until the roll out at your agency occurs, at which time the agency will receive all pending and new errors.

**Question:** How do employees cancel their union deductions? Service Employees International Union (SEIU) have been giving employees push back on dropping out of their union. Can the State Controller's Office (SCO) cancel the deduction?

**Answer:** If SCO were to cancel the deduction, the union would just re-establish the deduction on the next file. This is why it is best for employees to go through their union directly to cancel.

**Question:** Regarding disability document types, what does regular, special, and complex mean?

**Answer:** Please see [Workload Definitions for Statewide Civil Service Disability Program](#) for clarification.

**Question:** Do we have an update on how to process Non-Industrial Disability Insurance/State Disability Insurance (NDI/SDI) for employees who have the Personal Leave Program (PLP) 2025 and are out the whole month?

**Answer:** PLP does not apply to disability pay or supplementation pay; however, it does apply to regular pay, so the PLP earnings ID must be on the Personnel Action Request if the employee works at all during the month.

**Question:** Can the Personal Leave Program (PLP) 2025 be donated to Catastrophic Leave?

**Answer:** No, the language states it has no cash value; therefore, it cannot be transferred to other employees.

**Question:** Personnel Letter #25-009 states, "the Personal Leave Program (PLP) Earnings ID should remain on employment history records of employees placed on disability leave, but not taken off payroll (i.e., SPC transaction or 100-percent ENDI)." We have concerns that this conflicts with the language in the CalHR manual which states, "employees on State Disability Insurance (SDI), Non-Industrial Disability Insurance (NDI), Enhanced Non-Industrial Disability Insurance (ENDI), Industrial Disability Leave (IDL), Enhanced Industrial Disability Leave (EIDL), or Workers' Compensation for the entire monthly pay period shall be excluded from PLP 2025 for that month." Can you please clarify if PLP 2025 should remain in history if an employee is on 100-percent ENDI or if there will be a corrected personnel letter?

**Answer:** If an employee is on disability the entire month, that statement is correct, the PLP earning ID does not need to be on the Personnel Action Request (PAR) because disability pay is not submitted to the reduction. If the employee works at all during the month, the PLP reduction applies to the regular pay and the PLP earning ID must be on the PAR.

**Question:** I have requested information regarding taxation for fringe benefit state housing. I received one call back and was told I would get a call the next day with information. I have not received any information. The amounts deducted for the June 2025 pay period were double the amount they usually are, and I need to provide information to the employees. Who can I contact for information?

**Answer:** Have you verified on TAXI if the amount matches? If so, please contact your departmental accounting office. Otherwise, please contact [PPSDW2Miscded@sco.ca.gov](mailto:PPSDW2Miscded@sco.ca.gov) for assistance.

**Question:** To confirm, overtime and holiday pay are issued at the Personal Leave Program (PLP) 2025 reduced rate, correct?

**Answer:** No, in most cases PLP is reducing an employee's regular earnings by three percent and they are earning five (5) hours of PLP. Additional earnings are not subject to PLP reductions, nor will the employee earn additional PLP hours.

**Question:** Can you confirm whether Voluntary Personal Leave Pay (VPLP) is not cashed out when transferring to another department? The new department has the option to remove or decline VPLP when transferring.

**Answer:** VPLP hours are not cashed out when transferring departments. If the employees Memorandum of Understanding provides for VPLP, then the receiving department cannot remove or decline VPLP enrollment. However, for excluded employees, departments determine their participation. If the department does not participate for excluded employees, the VPLP will need to be canceled at the new department.

**Question:** When processing out of class (OOC), do we use the Personal Leave Program (PLP) rates (reduce by three percent)?

**Answer:** In cases where the PLP amount is paid as if the employee was appointed to the classification, it will also be reduced by the appropriate PLP amount. Please see [CalHR Policy 2113](#) under the Additional Information section for more information related to instructions on when to reduce or not reduce the OOC payment.

**Question:** Is there a contact email for the State Controller's Office (SCO) Disbursements Division? We have been having issues with our warrants not being delivered timely and sometimes getting lost. We are trying to find out where the problem originates from and would like SCO's assistance with this.

**Answer:** The general email for disbursements is [disbgdgeneral@sco.ca.gov](mailto:disbgdgeneral@sco.ca.gov). This email address is for inquiries related to warrant status inquiries, STD. 435 status inquiries, and any other disbursement related inquiries. We also have the [disbstd435@sco.ca.gov](mailto:disbstd435@sco.ca.gov) email, which is only for submitting STD. 435s, not for questions or inquiries. If there is an urgent question or an expedited request, then please send an email to General Disbursements Post Issuance and Claims Processing Supervisor Shanel Watts, [swatts@sco.ca.gov](mailto:swatts@sco.ca.gov), and copy General Disbursements Warrant Release Supervisor Zachary Bean, [zbean@sco.ca.gov](mailto:zbean@sco.ca.gov), and General Disbursements Manager Cameron O' Shaughnessy, [coshughnessy@sco.ca.gov](mailto:coshughnessy@sco.ca.gov) on the email.

**Question:** I would like a little more clarification about the one-month delay for November Dependent Re-Verification (DRV). I saw in the chat that this only applies to Family Connect Portal (FCP), but CalPERS DRV will remain on the current schedule. If employees (EEs) submit re-verification documents according to CalPERS' timeline, can we still process their dental re-verification in FCP at that time? Or do we have to wait an additional month? Additionally, will the letters that CalHR sends out still be sent to people who have already re-verified their dependents? We have lots of EEs who submit forms at the beginning of the cycle. If they receive another letter from CalHR a month later, after their dependents have already been verified, it will cause confusion. I want to make sure our team is prepared to communicate this to our EEs properly.

**Answer:** You can still process DRV transactions in FCP as soon as you receive EEs' documents. You do not need to wait. Employees with dependents still needing to be verified in FCP at the time notices are generated will still receive a notice. Notices are generated around the 15th of each month. If you have further questions, please send an email to the DRV Unit at [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov).

**Question:** On the SPC, the Personal Leave Program (PLP) will accrue the hours; therefore, do we need to void the PLP accruals if the employee is off the entire month?

**Answer:** Yes.

**Question:** For those on SPC 100, do we key a void in the California Leave Accounting System for the Personal Leave Program (PLP) accruals?

**Answer:** If the employee is not due the PLP that has been posted, please void and make the correction as necessary. Please see [Leave Accounting Letter #25-008](#) for reference.

**Question:** I have an employee who was keyed into the system as new in the Personnel Information Management System (PIMS) but had prior service. Can I get someone to contact me on the process to get the employee's PIMS history corrected?

**Answer:** Please contact the Audits Unit through the [Statewide Customer Contact Center](#) at (916) 372-7200.

**Question:** Can we ask the California Leave Accounting System (CLAS) staff if there are questions on pro-rating of Personal Leave Program (PLP) 2025 if the employee was not paid in full for the month?

**Answer:** Proration is based on the intermittent chart that you can find in the PLP CalHR Policy and each Memorandum of Understanding.

**Question:** Can Catastrophic (CAT) Leave be used to supplement Non-Industrial Disability Insurance (NDI)?

**Answer:** Yes, if the NDI reason is also a catastrophic leave reason.

**Question:** Is there a limit for Excluded employees for Voluntary Personal Leave Pay?

**Answer:** Currently it is under the department's discretion. However, future state will be coming out between 30 to 60 days.

**Question:** If the transfer agency does not participate in the Voluntary Personal Leave Pay, would it need to be cashed out?

**Answer:** No, the employee keeps their leave.

**Question:** Regarding ConnectHR during Open Enrollment, can you give a quick rundown on the process of how to use the batch option for FlexElect?

**Answer:** Please see the following steps below for the process:

1. Combine the FlexElect forms into one PDF. Include a cover page of all the employees that are listed on those forms.
2. Log into ConnectHR.
3. Click on "Upload Files."
4. Select the appropriate Open Enrollment dropdown.
5. Select the checkbox for "Multiple/Batch Employees." This will lock the employee look-up feature.
6. Select the PDF you created in step 1 to be uploaded.
7. Click "Upload."
8. Save the confirmation email, along with a record of which employees were in that batch you just uploaded.

**Question:** For employees subject to Personal Leave Program (PLP) 2025, can it be used for less than 15-minute increments? For example, 0.13 hours of PLP 2025, because it must be used prior to all other leave types other than sick leave and usage only leave benefits; correct?

**Answer:** Yes, if the incremental leave usage combined with other leaves meets the incremental amount an employee may use. For example, if leave must be used in 15-minute increments you can combine the remaining PLP hours with another leave type to make it 15 minutes.

**Question:** When an employee is out on 100-percent Non-Industrial Disability Insurance (NDI), are we to leave the 350? Are we putting the Personal Leave Program (PLP) pay salary or the base pay salary? If we are supplementing leave for 100-percent, then would the employee be entitled to the prorated amount of (PLP)?

**Answer:** If the employee is on disability the entire month, then disability pay is not subject to the PLP reduction.

**Question:** Should Personal Leave Program (PLP) be used before Professional Training and Development (PDD) leave? You lose PDD if it is not used within the fiscal year.

**Answer:** PDD may be used prior to 2025 PLP.

**Question:** If an employee is in an out of class (OOC) to Work Week Group (WWG) E but their actual class is WWG 2, would they be eligible for overtime in their OOC assignment? Would they have to take hours off in whole day increments only?

**Answer:** No, the employee is not eligible for overtime. They are completing the duties of and being paid as a WWG E employee; therefore, they are receiving full compensation for all hours worked. Hence, they will be treated as a WWG E employee, using leave in whole days. A broadcast email was sent on September 22 to all Personnel Officers with this same information. If that information was not disseminated, then please reach out to your department's Personnel Officer to obtain a copy of the email.

**Question:** Can anyone confirm the group number (9946) for Delta Dental PPO (018)? It is in a different format from the group numbers. We have been getting push back from dental offices that it is incorrect.

**Answer:** Please refer to the information below for the full list of plan names and their group number.

1. Delta Dental PPO – 018 – Group Number 9946
2. Delta Dental PPO plus Premier Basic – 007 – Group Number 9949
3. Delta Dental PPO plus Premier Enhanced – 008 – 9948

If you are still having issues with this, then please send an email to [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov) for assistance.

**Question:** Regarding overtime, since Fair Labor Standards Act (FLSA) are duties based, and out of class-based duties can be as low as 50-percent, are FLSA supported employees still not eligible when performing 50-percent of regular duties?

**Answer:** If they are paid to do the Work Week Group (WWG) E duties, then they are compensated as WWG E, and it applies.

**Question:** In ConnectHR, what area do we upload STD. 674s for employees that had too much Other Post-Employment Benefits deducted?

**Answer:** Please upload to Payroll Adjustments.

**Question:** Will CalHR ever revert to their proprietary Family Medical Leave Act and California Family Rights Act (FMLA/CFRA) forms versus using forms from the Department of Labor (DOL) and California Civil Rights Department? For context, prior to 2021 CalHR had their own FMLA/CFRA forms (CalHR 752, CalHR 753, CalHR 754, CalHR 755, CalHR 756, CalHR 757) and still reference them on their Family Leave site, but not on the CalHR Forms site or the CalHR FMLA/CFRA Policy site.

**Answer:** No, DOL and the Civil Rights Department make frequent changes, and as the authority, we recommend using their forms. Thank you for bringing this to our attention, we will look at our CalHR website to ensure we remove mentions of the old forms.