



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

September 18, 2025



Survey Questions





Question

Presenter: Kim Herlache

Contact: PSB@calhr.ca.gov

Regarding Pay Differential 240 Annual Recruitment and Retention (R&R) Pay Differential, when an employee in an eligible classification retires from state service, are they eligible for a prorated payment for the months they have served at the time of retirement? Our agency recently became aware that other agencies are paying out a prorated payment upon retirement for an eligible employee. Is this at the agency's discretion?

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 five states: No employee shall be eligible if they have not completed 12 months.



SCO KEY INITIATIVES



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect:

- W-2 Paperless Opt-in
 - As of this week: 42% adoption rate
 - Please remind your employees that the enrollment period for W-2 paperless will run until November 30.

Why go paperless?



Easy Access

Access your W-2 Statement any time from any internet-connected device



Early Access

Access your W-2 Statement earlier before the printed version



Eco-Friendly

Cut down on unnecessary paper



PDF Download

Download your W-2 Statement anytime



Cost Savings

Help save the State of California money



Secure

No paper document lost due to theft, fire, etc.



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

- Garnishment feature
 - ConnectHR's electronic Garnishment feature is an alternative to the paper Standard form (STD.) 639 and currently allows Human Resources (HR) staff the ability to submit standard (339) "Add" Garnishments via a ConnectHR account.
 - Starting in October, the Garnishment feature will expand to include the ability to "Cancel" existing standard (339) active Garnishments. This functionality will be incorporated within the current Garnishment feature framework and will appear as a dropdown option within the Garnishment feature. An email communication will also be provided to the affected ConnectHR users when the deployment of this feature has been completed.

HR Operations ▾

035 Agency Collect Deduction

339 Garnishment

Garnishment - (339)

Step 1: Select the type of garnishment deduction to be established.

Select Operation

Select operation type ▴

Add

Cancel

CSPS Status – September 2025

Presenter: Dominick Mullane, ACE

Contact: CSPSHelp@sco.ca.gov

Project Information



2025 Current Activities: Solution 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** completed the Validating Naming Conventions assignment to confirm the list of departments/agencies identified in the implementation planning of the CSPS solution.
- **Functional Team** will continue Scope Validation Sessions and development for DLV 2.1 Software Development Lifecycle (SDLC) Methodology Plan.
- **Project Management Office** obtained final approval and signatures from leadership for 12 Project Management Plans.
- **Technical Team** will prepare for HERMES Release 2.0, which encompasses data for over 250 benefits interfaces and a new section for CSPS information, including interface technical and business owner groups.

CSPA Project Webpage Overview

California State Payroll System (CSPA) Project



The CSPA Project will deliver accurate and timely personnel and payroll services for the state of California.

Mission & Vision

What We Do

Lead the project that will modernize the human resource management, travel advance and expense management, and payroll systems used by approximately 300,000 state government employees.

Why We Do It

To provide accurate and timely personnel and payroll services for the state of California with quality customer service.



About the Project



Project Timeline



Meet the Team



CSPA Project FAQ



Modernizing Payday



About the Journey

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sco.ca.gov/csps.html | CSPSHelp@sco.ca.gov | ©2025

CSPA Project Webpage Overview

Why We Do It

To provide accurate and timely personnel and payroll services for the state of California with quality customer service.



About the Project



Project Timeline



Meet the Team



CSPA Project FAQ



Modernizing Payday



About the Journey

CSPA Project Webpage Overview

Project Timeline



A Message from Controller Cohen



Additional Resources

- [Contact Us](#)
- [California Department of Human Resource \(CalHR\)](#)
- [California Department of Technology \(CDT\)](#)
- [Cal Employee Connect Project \(CEC\)](#)



STATEWIDE BENEFITS ADMINISTRATION



Savings Plus: Lump Sum Updates

Presented by Sarah Reeder
LeaveRollover@calhr.ca.gov

SECURE ACT: Section 603

DELAYED

Effective January 1, 2027

Age Based Catch-up only

- Age 50+
- Age 60 to 63

Only Impacts high earners

- \$145K in Social Security taxable wages in the PRIOR tax year
- Safety does not pay into Social Security
- Not aggregate across employers
- Lump Sum is included in this total

Lump Sum Separation Pay Election Workbook

- Form is Irrevocable
- 5-Day Rule
- Amount OR Max – not both
- Catch-up Amounts
- Resources Available
- SIGN, DATE, SUBMIT
- Traditional Catch-Up Approval Letter
- Personnel Action Request Packages



Lump Sum Separation Pay Election Workbook

We've updated the Lump Sum Separation Pay Contribution Election Form to help simplify and streamline the deferral process. In response to recent changes in tax law, we've also included step-by-step instructions and a worksheet to guide you through completing the election form with confidence.



Work with your HR Office to determine the dollar amount of your unused leave time.



Meet with a Savings Plus rep or request your Traditional Catch-Up approval (if applicable.)



Complete the worksheet starting on page 4 to help determine how you would like your lump sum to be applied.



Complete and return the form **at least five (5) working days prior to separation from service to your HR Office.**

Submit the completed form to your HR Office **at least five (5) workdays** (Monday through Friday, excluding Saturdays, Sundays and legal holidays) **prior to separation from service** to ensure timely processing. Be sure to keep a copy for your records.

Note: Your election is irrevocable, and this form cannot be changed, amended, or revoked once signed, dated and submitted to your HR Office.

If you have questions, please contact us or your HR Office **before submitting** your form for processing.

We're here to help! Contact us today for more information.



Call the Savings Plus Solutions Center at (855) 616-4776



Scan the QR code to visit savingsplusnow.com/lumpsum

Before you Begin

Let's set up our participants for success!

- What Information is needed to complete the form
- Where to find the information
- Important reminders about timelines and the process
- Impact of SECURE Act and section 603 on Catch-up Contributions

Before you begin...

To ensure a smooth deferral process, please review the following steps before submitting your Lump Sum Separation Pay Contribution Election Form.

- **Meet with your HR Office** — Discuss your retirement plans and request an estimated dollar amount of your lump sum separation pay
- **Understand the IRS limits** — Review current IRS contribution and catch-up limits at savingsplusnow.com/irslimits
- **Track your contributions** — Know how much you've already contributed this year to your Savings Plus account, as it affects how much you can defer; use the worksheet to calculate any additional amounts you are allowed to contribute
- **Confirm your account** — Make sure you have an active Savings Plus 457(b) and/or 401(k) account; to enroll, visit savingsplusnow.com/enroll
- **Complete the worksheet** — The worksheet provided will help you accurately complete the Lump Sum Separation Pay Contribution Election Form — **It is strongly recommended that you complete the worksheet before completing the form**

If your Lump Sum Separation Pay exceeds contribution limits, consider applying for Traditional Catch-Up to increase your eligible deferral amount.

If you plan to separate from service in November or December, you may be eligible to contribute a portion of your Lump Sum Separation Pay into a second tax year. Complete Section 4 of the form, if applicable.

Important reminders before submitting your form

- **The form is irrevocable once signed, dated and submitted to your HR Office; changes or cancellations are not allowed**
- Submit your form at least 30 days before your separation date; it must be received no later than five (5) workdays (**Monday through Friday, excluding Saturdays, Sundays, and legal holidays**) prior to separation
- To defer the maximum IRS-allowed amount, check the "Maximum Amount" box on the election form; to defer a custom amount, enter a dollar value in the "Contribution Amount" column; **do not complete both columns**
- Sections 2 & 3 apply to the current tax year; Sections 4 & 5 apply to the tax year following your separation year and can be used only for separations in November or December
- There are three types of Catch-Up contributions available:
 - Age-Based Catch-Up (For employees age 50 and older)
 - Special Age-Based Catch-Up (For employees ages 60-63)
 - 457(b) Traditional Catch-Up
- Please note:
 - Under Section 603 of the SECURE Act 2.0 beginning in 2026, age-based catch-up contributions may be required to be made as Roth contributions, depending on your prior-year gross Social Security wages
 - Traditional catch-up contributions must be requested at least 60 days prior to separation; for tax years 2026 and beyond, these contributions aren't subject to the Roth requirement under Section 603 and may remain pre-tax; if approved, include your approval letter with your submission form
- Leave the table blank if you do not wish to contribute to Catch-Up
- Visit savingsplusnow.com/lumpsum for more details

Lump Sum Separation Worksheet

Lump Sum Separation Worksheet (Do not submit with form)

Step 1: Determine the amount of your Lump Sum Separation Pay

SECTION 1: LUMP SUM SEPARATION PAY SAVINGS PLUS CONTRIBUTION

Work with your HR Office to obtain an estimate of your lump sum separation pay.

You may also estimate the cash value of your leave by using the following formula:

Monthly gross base pay / 173.33 = hourly wage. Hourly wage x eligible hours = cash value of lump sum separation pay.

Validate the estimate with your HR Office as other factors may impact your final lump sum calculation

1.1	Enter the estimated amount of your Lump Sum Separation Pay:	\$
1.2	Enter the amount that you wish to receive as a direct cash payment:	\$
1.3	Subtract the amount in Line 1.2 from Line 1.1. This will be the total amount used as your Lump Sum Separation Savings Plus Contribution.	\$

Step 2: Understand your options and limits for contributions

SECTION 2: STANDARD IRS CONTRIBUTIONS LIMIT — CURRENT TAX YEAR

This will help you determine the amount that you are eligible to contribute in the current tax year, based on allowable amounts, minus any contributions you have already contributed.

	401(k)	457(b)
2.1		
Enter the standard IRS contribution limit for the current tax year. <i>Tip: You can find these amounts at savingsplusnow.com/irs/limits</i>		
2.2		
Enter your year-to-date contributions here. <i>Tip: You can find your year-to-date contribution amount by logging in to Cal Employee Connect or working with your personnel specialist.</i>		
2.3		
Subtract the amount(s) of Line 2.2 from the amount(s) on Line 2.1. These are the remaining balances that you may contribute without exceeding the standard contribution limit per IRS. Allocate the amount(s) here, between pre-tax and Roth in the Standard IRS Contribution table in Section 2 of the form.		

If the amount you're deferring falls within the standard contribution limits, you can stop here and go to the form.

- Walks participants through determining their leave value and the limits
- Resources on where to find information needed
- Sections coordinate for easy translation from worksheet to election form

Election Form Instruction Checklist

Instructions for the Lump Sum Separation Pay Contribution Election Form

Before you begin

While not required, it is strongly recommended that you complete the Lump Sum Separation Worksheet before filling out this form. Refer to the worksheet sections noted below for guidance on each part of the form.

Section 1 — Participant Information (Required)

Provide your:

- Full name, mailing address and contact details
- Separation date (mm/dd/yyyy)
- Personal email address for departmental communication

Note: Double-check your contact info to avoid delays

Section 2 — Standard IRS Limits (Current Tax Year Deferral) (Required)

Use this section to allocate your lump sum for the current tax year. Refer to Worksheet Section 2 for assistance in completing this section.

- Choose either a specific dollar amount or the Maximum IRS limit—not both
- Indicate your plan priority (1st, 2nd, etc.)

Note:

- If left incomplete, your deferral will default to: 457(b) Pre-tax, then 401(k) Pre-tax
- Catch-Up contributions go in Section 3

Section 3 — Catch-Up Contribution (Current Tax Year) (Required if applicable)

Complete this section if you are eligible to make Catch-Up contributions: Refer to Worksheet Section 3 for assistance in completing this section.

- Age-Based Catch-Up: For employees 50+
- Special Age-Based Catch Up: For employees 60–63
- Traditional Catch-Up: Requires prior approval and attached approval letter

Note:

- Enter only Catch-Up amounts
- Leave blank if not contributing Catch-Up

Reminder: If this section is incomplete, Catch-Up contributions will not be processed. Visit savingsplusnow.com/lumpsum for details.

Section 4 — Standard IRS Limits (Second Tax Year) (Optional)

Complete this section only if separating in November or December and deferring into a second tax year. Refer to Worksheet Section 4 for assistance in completing this section.

- Choose either a specific dollar amount or the Maximum IRS limit
- Indicate plan priority

Section 5 — Catch-Up Contribution (Second Tax Year) (Optional)

Use this section only if deferring Catch-Up contributions into a second tax year. Refer to Worksheet Section 5 for assistance in completing this section.

- Age-Based Catch-Up: For employees 50+
- Special Age-Based Catch Up: For employees 60–63
- Traditional Catch-Up: Requires prior approval and attached approval letter

Note:

- Enter only Catch-Up amounts
- Leave blank if not contributing Catch-Up
- Age-Based Catch-Up contributions may be required as Roth under SECURE Act 2.0, Section 603, depending on your current year Social Security wages
 - If you elect pre-tax, but are subject to the Section 603 provisions, the State Controller's Office (SCO) will process your catch-up contributions as Roth
 - **Traditional Catch Up is excluded, and can be Pre-tax**

Reminder: If this section is incomplete, Catch-Up contributions will not be processed. Visit savingsplusnow.com/lumpsum for details.

Section 6 — Acknowledgment and signature

Read and sign to certify:

- You understand the election is irrevocable
- You've verified your contribution amounts and plan priorities
- You've attached any required documentation (e.g., Traditional Catch-Up approval)

Note: Any unused or excess leave funds not directed via this form will be paid directly to you and taxed accordingly.



visit savingsplusnow.com/lumpsum

Lump Sum Separation Pay Contribution Election Form

Return completed forms to your personnel specialist at least five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to your separation of service. **Note: Your election is irrevocable, and this form cannot be changed, amended, or revoked once submitted to your HR Office.**

SECTION 1 — PARTICIPANT INFORMATION (REQUIRED)

Last Name, First Name, MI

Mailing Address

City, State, ZIP

Personal Telephone Number

Separation Date (mm/dd/yyyy)

Alternate Contact Telephone Number

Please provide your personal email address so that your department can contact you.

SECTION 2: STANDARD IRS CONTRIBUTION LIMITS — CURRENT TAX YEAR DEFERRAL (REQUIRED)

If the table to the right is incomplete or incorrect, we will process your deferral in the following order: 457(b) Pre-tax; 401(k) Pre-tax. The order of priority is the order in which you would like the funds to be allocated to the plan (ex: 1st, 2nd, etc.)

For help completing this section, see **Section 2 on the worksheet**. Amounts entered in line 2.3 on the worksheet will be used for this section.

Use Section 3 of the worksheet to ensure your allocation is aligned.

Standard deferral	Plan	REQUIRED Priority order (1-4)	REQUIRED - Choose Amount or Max Contribution amount	OR	Maximum IRS limit
	457(b) Pre-tax	1	\$ 23,500		
	401(k) Pre-tax	2	\$ 23,500		
	457(b) Roth		\$		
	401(k) Roth		\$		

SECTION 3: CATCH-UP CONTRIBUTION — CURRENT TAX YEAR (REQUIRED)

If you are not using catch up, please enter "0" in the table to the right. If the table is not completed, no catch-up contributions will be processed.

For help completing this section, see **Section 3 on the worksheet**. Amounts entered in line 3.6 on the worksheet will be used for this section.

Note: If utilizing Traditional catch-up, you **must** complete this table **and** attach a copy of your Traditional Catch-up Approval Letter.

Catch-up deferral	Plan	REQUIRED Priority order (1-4)	REQUIRED - Choose Amount or Max Contribution amount	OR	Maximum IRS limit
	457(b) Pre-tax	1	\$ 7,500		
	401(k) Pre-tax	2	\$ 7,500		
	457(b) Roth		\$		
	401(k) Roth		\$		

The New Lump Sum Election Form

Lump Sum Separation Pay Contribution Election Form

- Important reminders
 - 5 workday rule
 - Irrevocable
 - Keep a copy for records
- Section 1
 - Complete all sections
 - Include PERSONAL contact information

Return completed forms to your personnel specialist at least five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to your separation of service. **Note: Your election is irrevocable, and this form cannot be changed, amended, or revoked once submitted to your HR Office.**

SECTION I — PARTICIPANT INFORMATION (REQUIRED)

Last Name, First Name, MI

Mailing Address

City, State, ZIP

Personal Telephone Number

Separation Date (mm/dd/yyyy)

Alternate Contact Telephone Number

Please provide your personal email address so that your department can contact you.

Section 2: Current Year/IRS Limit

- Captures CURRENT YEAR election up to the IRS STANDARD LIMIT
- Enter AMOUNT OR MAX
- Indicate priority of election

SECTION 2: STANDARD IRS CONTRIBUTION LIMITS — CURRENT TAX YEAR DEFERRAL (REQUIRED)

If the table to the right is incomplete or incorrect, we will process your deferral in the following order: 457(b) Pre-tax; 401(k) Pre-tax. The order of priority is the order in which you would like the funds to be allocated to the plan (ex: 1st, 2nd, etc.)

For help completing this section, see **Section 2 on the worksheet**. Amounts entered in line 2.3 on the worksheet will be used for this section.

Use Section 3 of the worksheet to ensure your allocation is aligned.

Standard deferral	REQUIRED		REQUIRED - Choose Amount <u>or</u> Max	
	Plan	Priority order (1-4)	Contribution amount	Maximum IRS limit
	457(b) Pre-tax		\$	OR
	401(k) Pre-tax		\$	
	457(b) Roth		\$	
	401(k) Roth		\$	

Section 3: CURRENT year/Catch-up

- Captures the CURRENT year Catch-Up election
- Enter AMOUNT OR MAX
- Indicate priority of election

SECTION 3: CATCH-UP CONTRIBUTION — CURRENT TAX YEAR (REQUIRED)

If you are not using catch up, please enter "0" in the table to the right. If the table is not completed, no catch-up contributions will be processed.

For help completing this section, see **Section 3 on the worksheet**. Amounts entered in line 3.6 on the worksheet will be used for this section.

Note: If utilizing Traditional catch-up, you **must** complete this table **and** attach a copy of your Traditional Catch-up Approval Letter.

Catch-up deferral	Plan	REQUIRED Priority order (1-4)	REQUIRED - Choose Amount <u>or</u> Max Contribution amount	OR	Maximum IRS limit
	457(b) Pre-tax		\$		
	401(k) Pre-tax		\$		
	457(b) Roth		\$		
	401(k) Roth		\$		

Section 6: Sign and Date

- Read Disclosures
- Sign and date the form
- Attach TCU Approval letter
- Make a copy
- Submit to HR
- CA Labor Code 201(b) and 202(b)
 - Aka: 5 Workday Rule

SECTION 6 — ACKNOWLEDGMENT AND SIGNATURE (REQUIRED)

If you are unsure about the tax implications of your choices, you should consult a Tax Professional before completing, signing, and submitting this form.

- I request a contribution of Lump Sum Separation Pay in accordance with my choice above, and pursuant to California and federal law. I take full responsibility for providing my request to my HR Office no later than five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to my separation date as required under California Labor Code sections 201(b) and 202(b) and understand the terms and conditions of deferring all or a portion of my Lump Sum Separation Pay. I have verified my request prior to submission.
- By signing here, I accept that if my table in Sections 2 and/or 3 is Incomplete or Incorrect, my Lump Sum Separation Pay may get defaulted into 457(b) first, then 401(k).
- I understand that if I allocate my funds into pre-tax plan(s) but are subject to provisions in Section 603 based on your prior year earnings, SCO will process your catch-up contribution(s) into a Roth 457(b) account.
- If applicable, I have attached a copy of my Traditional Catch-Up Approval Letter. NOTE: IF CLAIMING TRADITIONAL CATCH-UP, YOU MUST COMPLETE THE CATCH-UP TABLE(S) IN SECTION 2 AND/OR 3 AND ATTACH YOUR APPROVAL LETTER.
- I understand that if the value of the leave I have available is for an amount less than I have requested, my request will be reduced to the lesser amount. Please make sure you have an established 457(b) and/or 401(k) prior to submitting this form to ensure that the funds are promptly and appropriately distributed.
- I hereby certify under penalty of perjury that the information on this form is true and accurate to the best of my knowledge.

Any leave funds that are not directed to your Savings Plus account using this form, or any extra funds that remain after your plans reach the limit, will be paid directly to you upon separation from the State. Applicable taxes apply.

I understand that my election is irrevocable, and this form cannot be changed, amended, or revoked once submitted to my HR Office.

Signature

Date

Additional Resources

- HR / Personnel Specialists may request training or email questions to Leaverollover@calhr.ca.gov
- View more information and download the form at savingsplusnow.com/lumpsum
- Review the trainings and resources provided by SCO
- Please direct employees with questions to contact the Savings Plus Solutions Center at (855) 616-4776



Transaction Supervisors'
Forum: September 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 Reminders and Updates

Presenter: Bobby Saetern

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

General Open Enrollment Reminders

- The 2025 OE period will take place September 15 to 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.
- View all Virtual and In-Person OE events on the [Benefits Fair webpage](#) located on the CalHR Benefits website.

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov



- The Virtual Lunch and Learn Session for HR Professionals will be on Thursday, September 25, 2025. Register [here](#).
- HR Professionals are highly encouraged to subscribe to the HR Professionals subscription list found on the [Benefits website](#). Subscribers will receive notifications for Open Enrollment and benefits information.

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

General Open Enrollment Reminders

- Visit the [Open Enrollment Resources](#) webpage for resources available for HR Professionals.
- The Instructions for Completing Open Enrollment Forms has been converted to a webpage. Visit the [Open Enrollment Resources](#) webpage to view the updated information.
- Additional resources, including premiums and contributions can be found on the [Open Enrollment webpage](#).
- Reminder: To receive OE communication, subscribe to the Personnel Officers subscription list on the [CalHR Subscriptions webpage](#).



Vision Dental Health Authorization (VDHA) Portal Update

Presenter: Marisa McKain

Vision Dental Health Authorization Portal Updates

Presenter: Marisa McKain

Contact: VisionDental.Authorization@calhr.ca.gov

Vision Dental Health Authorization Portal Updates

- The benefits division will be decommissioning the Vision Dental Authorization Portal (VDP) in SharePoint and replaced with the Vision Dental Health Authorization (VDHA) list within the Family Connect Portal (FCP).
- This change is anticipated to be completed by the end of 2025.
- Effective July 1, 2025, no new request will be processed in the VDP. The list of authorized personnel will remain as is until the transition of VDHA to FCP is complete. All carriers are aware of this change and will use the current list available until an updated list can be provided.
- CalHR will provide the list of authorized personnel to all dental carriers and VSP.
- CalPERS will be providing the list of authorized personnel to all Health carriers.



Request Tracking System (RTS)

Presenter: Alison Drummer

Request Tracking System (RTS) coming October 1, 2025

Presenter: Alison Drummer

Contact: Dental@calhr.ca.gov, FlexElect@calhr.ca.gov, Vision@calhr.ca.gov

- CalHR is excited to announce a new process for submitting Dental, FlexElect and Vision Appeals through the new Request Tracking System (RTS).
- RTS is an on-line software solution to manage and track various appeal requests from team members, managers/supervisors, and state administrative offices.
- Streamlines the submission, tracking and resolution of requests through a centralized platform for state employees, managers, supervisors and any stakeholders needing a transparent appeal request process.
- Key RTS Features:
 - User-friendly
 - Real-time updates on status from submission to resolution
 - Reporting tools to analyze patterns, response times and service metrics

Request Tracking System (RTS) coming October 1, 2025

Presenter: Alison Drummer

Contact: Dental@calhr.ca.gov, FlexElect@calhr.ca.gov, Vision@calhr.ca.gov

- Dental, FlexElect and Vision appeals needing CalHR approval can be submitted to CalHR through RTS as 'Customer Service and Support Appeals Requests.'
- CalHR will communicate RTS resources at the October Transaction Specialists' Education Forum. Resources will include a live demo, FAQ's and a User Manual.
- The programs will continue to accept Dental, FlexElect and Vision appeals submitted via email to the program inboxes for a limited time (until January 1, 2026).
- **After January 1, 2026, Dental, FlexElect and Vision appeals submitted through RTS will be processed.**



Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Updates and Reminders:

- The November 2025 birth month cycle notification letters were paused. The re-verification cycle expiration date for the November birth month cycle was extended by one month and authorized by CalHR due to a reconciliation process with CalPERS Dependent Eligibility Verification (DEV) program for child dependents.
- Per Government Code 19815.9 (a) that all verification documents for dependents are to be saved in the employees Official Personnel File (OPF) without a purge date.
- The CalHR DRV notification letter will be updated for consistency with the March 2026 cycle .
- An HR announcement will be issued outlining these changes soon.

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

Open Enrollment is Here!

- Important Dates:
 - Open Enrollment Period: September 15 to October 10, 2025
 - Last day agencies can submit new forms: November 1, 2025
 - Last day agencies can submit corrected forms: November 19, 2025
 - Effective date of benefits: January 1, 2026



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

- **Reminders:**

- All Open Enrollment forms must be uploaded via [ConnectHR](#), including responses to PR250s (Ding Notices)
- Employees CAN use self-enrollment feature on [myCalPERS](#) for health benefits
- Please ensure the correct form is being used for Cash Options:
 - 701C Flex Cash: Bargaining Units 1, 3, 4, 5, 6, 9, 10, 11, 12, 13, 14, 15, 20, and 21
 - 702 Consolidated Benefits: Bargaining Units 2, 7, 8, 16, 17, 18, 19, and Excluded
- Attach any associated STD. 692 (New or Cancel) to either the STD. 701C or STD. 702 prior to ConnectHR upload
- If you upload the STD. 701C or STD. 702 form with an included STD. 692, DO NOT upload the same STD. 692 separately.



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Open Enrollment is Here!

- State Controller's Office Educational Materials:
 - [2025 Open Enrollment Resources](#)
 - Checklists
 - Examples & Common Errors Guides
 - 2025 Open Enrollment FAQs
 - SCO Tips for 2025 Open Enrollment on STD. 701C, STD. 702, and STD. 701R
 - Benefit Form Tutorials
- CalHR Resources:
 - [CalHR Benefits Division - Open Enrollment](#)
 - [Benefits Administration Manual](#)
 - [Dental](#)
 - [FlexElect Cash Options and Reimbursement Accounts](#)



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

ConnectHR Rescinds for Open Enrollment

- To minimize errors, please only submit ConnectHR Form Rescind Requests for Open Enrollment Forms when:
 - An employee wants to delete the benefit request entirely
 - The form was accidentally uploaded under a different employee name
- No ConnectHR Form Rescind Request is needed when:
 - Open Enrollment form uploaded under incorrect Benefits dropdown
 - Example – OE 701R accidentally uploaded under OE 701C
 - The Statewide Benefits Program reviews each form received and will move that form to the correct folder
 - Employee wants to change a previously uploaded benefit request
 - In this case, write “REVISED” at the top of the form and upload updated form under correct dropdown



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

ConnectHR Rescinds for Open Enrollment (continued)

- To assist staff with finding the correct dropdown, SCO is planning to:
 - Rename the open enrollment dropdowns to include type of benefit
 - Group open enrollment dropdowns together in the menu
 - Benefits – Open Enrollment (OE) CoBen Cash Std.702
 - Benefits – Open Enrollment (OE) Dental Std.692 Cancel
 - Benefits – Open Enrollment (OE) Dental Std.692 Change
 - Benefits – Open Enrollment (OE) Dental Std.692 New
 - Benefits – Open Enrollment (OE) Flex Cash Std.701C Cancel
 - Benefits – Open Enrollment (OE) Flex Cash Std.701C Change
 - Benefits – Open Enrollment (OE) Flex Cash Std.701C New
 - Benefits – Open Enrollment (OE) Flex Reimbursement Std.701R



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

2025 Affordable Care Act Training Updates

- Users can find registration information by visiting the [Affordable Care Act \(ACA\) Training](#) website or by visiting [Statewide Personnel and Payroll Services Training Registration](#)
- Upcoming ACA Virtual Training Part I and Part II courses are open for registration
 - November 17-18
 - December 1-2
- 2026 training dates will be posted by the end of 2025
- Please reach out to PPSDACATraining@sco.ca.gov with any questions



STATEWIDE PROGRAM UPDATES



Department Enrollment Error Resolution Project

Presented by: Natasha Washington and Gundy Pinero

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



Project Scope

The purpose of the Department Enrollment Error Resolution Effort is to transition the role and responsibility of the clearing of enrollment errors in myCalPERS to all departmental Human Resources.



Why Are We Doing This?

As the Employer (defined in [Public Employees' Retirement Law Article 2 Section 20030](#), [Government code 20030](#)), you will be able to:

- Have instant access to verify retirement appointment details, which is pertinent to an employee's benefit provisions such as health coverage.
- Avoid late enrollment administrative fees.
- Prevent inaccurate retirement contributions that could lead to costly disputes or corrections.
- Avoid future complications, such as lawsuits from an employee, by ensuring timely and accurate retirement appointment reporting from day one.



What Can You Expect?

- myCalPERS training opportunities provided by CalPERS.
- myCalPERS Retirement Enrollment Student Guide - will be available on the CalPERS webpage beginning January 2026.
- Step-by-step job aid “*Retirement Enrollment Preprocessing Toolkit*” to help navigate error correction processes - will be available soon on the [SCO Statewide Civil Service Retirement Program](#) webpage.
- Assistance from SCO will be available for any enrollment errors that cannot be cleared after necessary steps were taken.
- Access to escalation pathways when more complex issues arise beyond departmental control.



Preparation

Preparation is crucial prior to implementation of this project; so, we ask the departments' HR:

- To ensure Personnel Specialists (PSs) have access to [California Public Employees' Retirement System](#) at which your designated myCalPERS system administrator can provide.
 - Verify that the PSs have permissions including access levels needed to clear errors, update appointment information, and view error reports via COGNOS.
- To work with their satellite offices (if applicable) and organize/coordinate delegation and permission roles to the rosters assigned.
- If your department manages HR work of another agency, then ensure that the PSs have access to the information of the employees in the other department in myCalPERS.



Implementation Strategy

There are 200+ departments that will be participating in this transition phase; we envision a seamless transition by implementing it in waves. This means that departments would have to immerse themselves in the clearing of the enrollment errors during their assigned “Immersion Period” by availing and/or using the:

- [CalPERS Online or In-person Trainings](#)
- [myCalPERS Student Guides & Resources](#)
- [SCO Job aid Toolkit](#)



Implementation Strategy

- This also means that SCO-CalPERS Payroll Reporting Unit will prioritize inquiries related to errors that cannot be cleared (even after following the steps in the procedure) during this assigned “Immersion Period.” (This information will be added in a Broadcast Email)
- All other myCalPERS membership related inquiries will be handled by CalPERS Membership Team.
 - You can contact the CalPERS Membership Team at 888-225-7377.
- SCO will send a Broadcast Email to keep departments apprised of their “Immersion Period” schedule—1st week of December 2025.



Implementation Timelines

Events	Assigned To	Target Completion Date
Batch 1 (50 Departments)	CalPERS/SCO	1 st Quarter of 2026
Batch 2 (50 Departments)	CalPERS/SCO	2 nd Quarter of 2026
Batch 3 (50 Departments)	CalPERS/SCO	3 rd Quarter of 2026
Batch 4 (50 Departments)	CalPERS/SCO	1 st Quarter of 2027

Retirement Enrollment Errors

Veronica Silva-Gil

Employer Account Management Division

Topics

- What are pre-processing errors
- How to access pre-processing errors
- Resources

What are Enrollment Pre-Processing Errors

- Nightly Personnel Information Management System (PIMS) generates a file to send new information keyed in by all state agencies to myCalPERS.
- The file is designed to translate PIMS transaction codes to myCalPERS terminology.
- If multiple changes are reported in one day for one appointment, myCalPERS might not be able to determine what action to post and sends the transaction to the pre-processing area.

Why do they occur?

myCalPERS will move the new appointment into the enrollment pre-processing area for various reasons:

- Is unable to identify the correct transaction that should be updated.
- myCalPERS has conflicting information.
- Information sent contains corrections to original data sent the same day.

What happens to the Pre-Processing Errors?

When the appointment is in the pre-processing area, the member's appointment/transaction is not officially posted and it requires manual intervention to verify information in PIMS and match it in myCalPERS, once that happens the appointment/transaction will be officially posted.

Tools needed to correct

Employees assigned to correct the pre-processing errors will need to have the following:

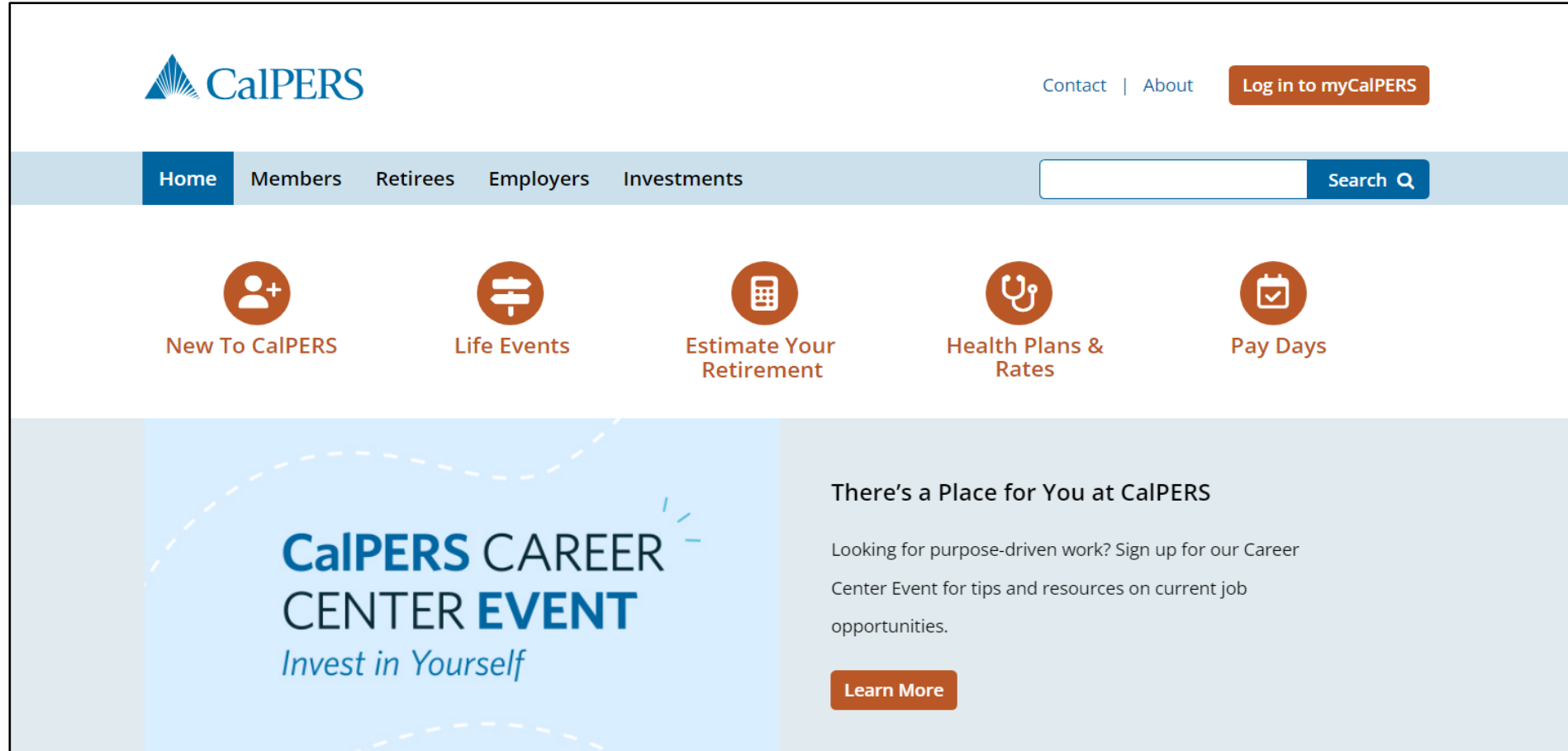
- myCalPERS Permission set: Business Partner Retirement Enrollment
- Knowledge of PIMS
- Knowledge of myCalPERS

If you do not have the permission set, consult with your agency's System Access Administrator to provide you with the permission set that you need.

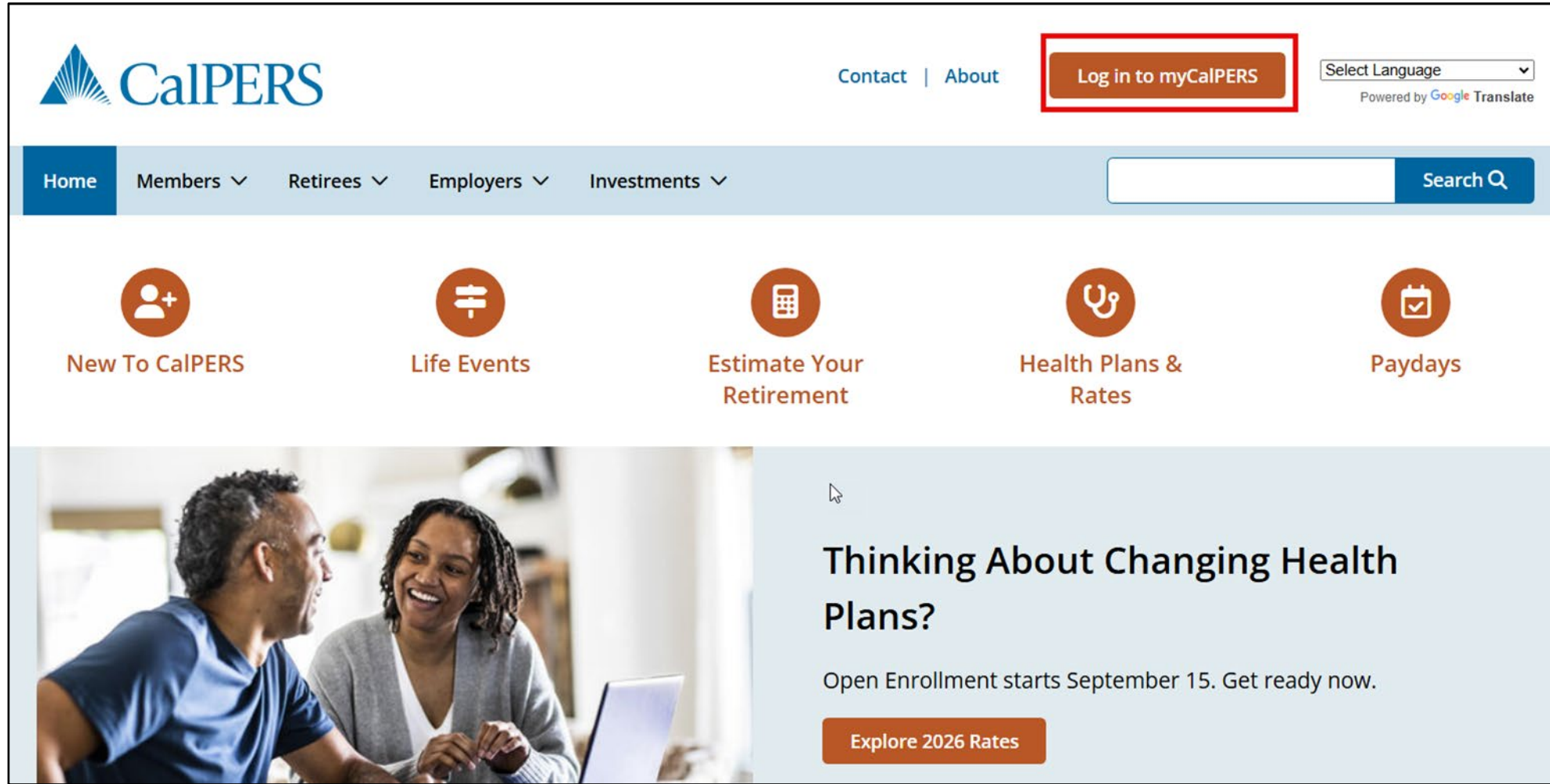
myCalPERS login

How to access Pre-Processing Area 1 of 2

www.calpers.ca.gov

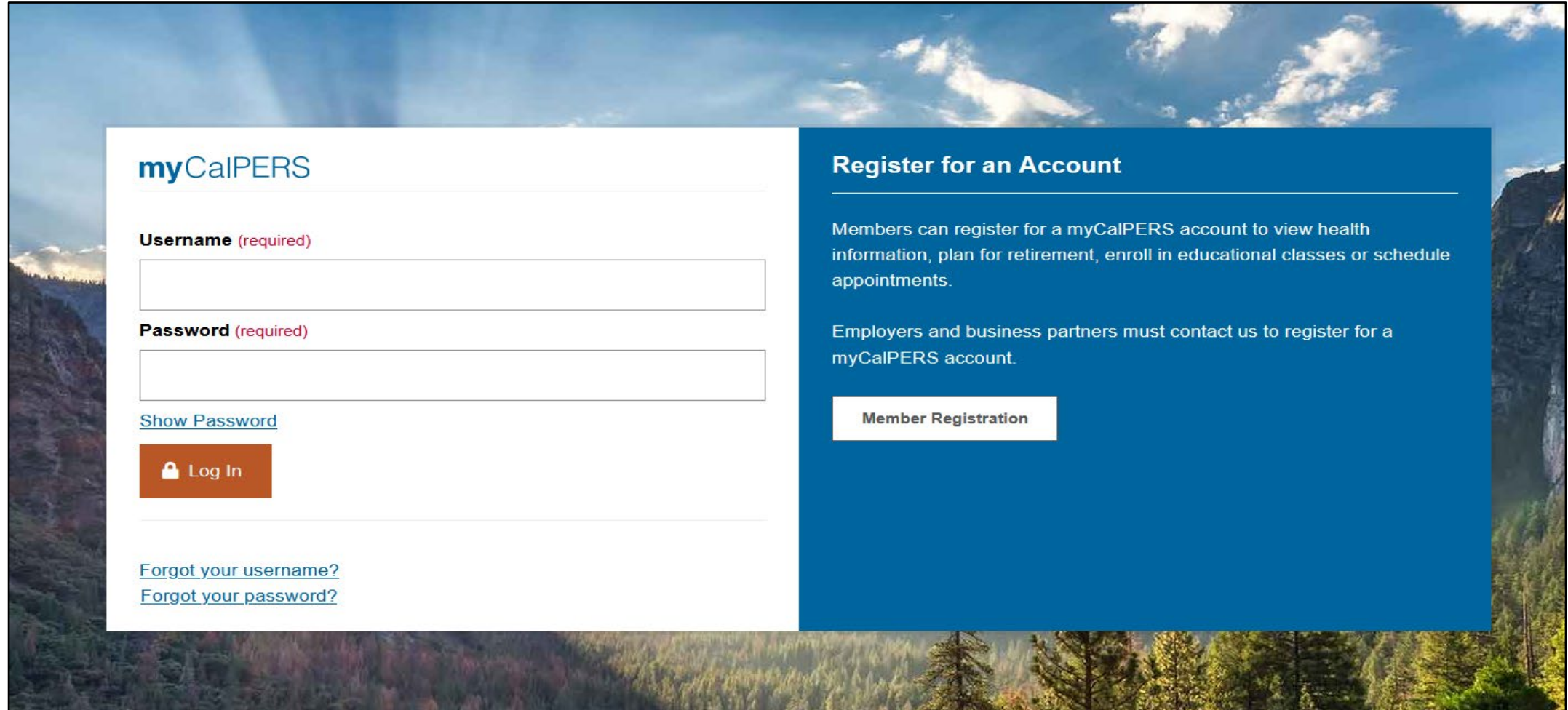


How to access Pre-Processing Area 2 of 2



The screenshot displays the CalPERS website homepage. At the top left is the CalPERS logo. To its right are links for 'Contact' and 'About'. A red rectangular box highlights the 'Log in to myCalPERS' button. Further right is a 'Select Language' dropdown menu with a small 'v' icon, and below it, the text 'Powered by Google Translate'. A horizontal navigation bar below the header contains links for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments', each followed by a downward arrow. To the right of these links is a search bar with a 'Search Q' button. Below the navigation bar are five circular icons with corresponding text: 'New To CalPERS' (person with plus icon), 'Life Events' (calendar icon), 'Estimate Your Retirement' (calculator icon), 'Health Plans & Rates' (stethoscope icon), and 'Paydays' (calendar with checkmark icon). At the bottom, there is a large banner image of a man and a woman looking at a laptop. To the right of the image, the text reads 'Thinking About Changing Health Plans?' followed by 'Open Enrollment starts September 15. Get ready now.' and a button labeled 'Explore 2026 Rates'.

myCalPERS log in 1 of 3


The image shows a screenshot of the myCalPERS website. The background is a scenic landscape with mountains and a forest. The website is divided into two main sections. The left section is a white box containing the myCalPERS logo, a login form with fields for Username (required) and Password (required), a 'Show Password' link, a 'Log In' button with a lock icon, and links for 'Forgot your username?' and 'Forgot your password?'. The right section is a blue box with the heading 'Register for an Account'. It contains text explaining that members can register to view health information, plan for retirement, enroll in educational classes, or schedule appointments. It also states that employers and business partners must contact the organization to register. A 'Member Registration' button is located at the bottom of this section.

myCalPERS

Username (required)

Password (required)

[Show Password](#)

 **Log In**

[Forgot your username?](#)
[Forgot your password?](#)


Register for an Account

Members can register for a myCalPERS account to view health information, plan for retirement, enroll in educational classes or schedule appointments.

Employers and business partners must contact us to register for a myCalPERS account.

Member Registration

myCalPERS log in 2 of 3

 **Security Reminder**


By logging into our secure services on myCalPERS, you're acknowledging that you've read and understood our [security policy](#) and are attesting that you're the CalPERS member of this account.

myCalPERS

Username (required)

Password (required)

[Show Password](#)

 **Log In**

[Forgot your username?](#)
[Forgot your password?](#)


Register for an Account

Members can register for a myCalPERS account to view health information, plan for retirement, enroll in educational classes or schedule appointments.

Employers and business partners must contact us to register for a myCalPERS account.

Member Registration


myCalPERS log in 3 of 3



Username (required)

Password (required)

[Show Password](#)

 Log In

[Forgot your username?](#)

[Forgot your password?](#)

Register for an Account

Members can register for a myCalPERS account to view health information, plan for retirement, enroll in educational classes or schedule appointments.

Employers and business partners must contact us to register for a myCalPERS account.

Member Registration

To begin, please choose the role that corresponds with the person or organization you are representing, and then select the Continue button.

▼ **Primary Roles**

Business Partner	Business Partner ID	Service Provided
<input checked="" type="radio"/> Department Of Food And Agriculture		Default

▼ **Other Roles**

Business Partner	Business Partner ID	Service Provided
<input type="radio"/> Department Of Food And Agriculture 10-A District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 10th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 12th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 13th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 14th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 15th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 16th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 17th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 18th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 19th District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement Payroll Services
<input type="radio"/> Department Of Food And Agriculture 1-A District Agricultural Association		Enrollment Services - Health Enrollment Services - Retirement

myCalPERS log in

myCalPERS

Conditions of Use for Business Partners (Employers)

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

By accessing this application, you acknowledge that training is available to you. In addition, all information accessible to you will be used only to assist you in conducting official business with CalPERS.

[Contact Us](#) | [CalPERS Website](#) | [Privacy Policy](#) | [Conditions of Use](#) | [Accessibility](#) | Copyright © 2025 California Public Employees' Retirement System (CalPERS)

[DataSource Shifter](#) | [Time Shifter](#) | [Dev Console](#)

Build: v12.5 Baseline: 250808_152056_v12.5_release **UID: 897**

Username: SCOLogin4 Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPXA Server: Env91_node3

Last imported dataset name: 2025/08/08 00:01:08 FULL UNMASKED

Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV

Action class :

psr.web.mvc.general.login.BpEmployerConditionsAction

JSP : general/login/bpEmployerConditions.jsp

SQL query executed by this page: 3 in seconds with 199 rows received.

Duplicate queries executed by this page: 0 in seconds with 0 rows received.

Action execution time: seconds

Accessing Enrollment Pre-Processing Area 1 of 3

The screenshot displays the myCalPERS web application interface. At the top, the 'myCalPERS' logo is on the left, and a navigation bar contains tabs for 'Home', 'Profile', 'Reporting' (highlighted with a red box), 'Person Information', 'Education', and 'Other Organizations'. Below the navigation bar, a sidebar on the left lists 'My Home', 'Common Tasks', and 'Menu'. The main content area features a 'My Cases' section and a 'Health Plan Search by ZIP Code' form. The form includes instructions, a 'Search Year' dropdown, a 'Member Category' with radio buttons for 'State/CSU' and 'Public Agency/School', a 'Zip Code' text field, and a 'Search' button. A red asterisk indicates required fields. The footer contains links for 'Contact Us', 'CalPERS Website', 'Privacy Policy', 'Conditions of Use', and 'Accessibility', along with copyright information for 2024. Technical details like 'DataSource Shifter', 'Time Shifter', 'Dev Console', and various system parameters are also visible at the bottom.

myCalPERS

Home Profile **Reporting** Person Information Education Other Organizations

My Home

Common Tasks

Menu

Person Search

Contact Personal Security Settings

My Cases

Health Plan Search by ZIP Code

To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results.

Search Year:*

Member Category:* ☐ State/CSU ☐ Public Agency/School

Zip Code:*

Search

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[DataSource Shifter](#) | [Time Shifter](#) | [Dev Console](#)

Build: v11.8 Baseline: 241015_165303_v11.8_Int.2049 UID: 832

Username: StateofCaliforniaVSG Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPXA Server: Env91_node4

Last imported dataset name: 2024/09/06 00:01:02 FULL UNMASKED

Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV

Action class :
psr.web.mvc.general.login.HomePageExternalAction

Accessing Enrollment Pre-Processing Area 2 of 3

The screenshot displays the myCalPERS web application interface. At the top, the 'myCalPERS' logo is visible. Below it, a navigation bar contains tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Under the 'Reporting' tab, there are sub-tabs: 'Manage Reports', 'Out-of-Class Validation', 'Member Requests', and 'Retirement Appointment Reconciliation'. On the left side, a 'Common Tasks' menu is shown, with 'Preprocessing Area' highlighted by a red box. The main content area features a form with 'Name:' and 'CalPERS ID:' input fields, a 'Create or Edit Report' button, and a 'Method:' dropdown menu. At the bottom of the page, there is a footer with links for 'Contact Us', 'CalPERS Website', 'Privacy Policy', 'Conditions of Use', and 'Accessibility', along with copyright information for 2024 California Public Employees' Retirement System (CalPERS). Technical details such as 'Build: v11.8', 'Baseline: 241015_165303_v11.8_Int.2049', 'UID: 385', and 'Action class : psr.web.mvc.contributions.common.employerreporting.ViewExistingPayrollReportsAction' are also present.

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Out-of-Class Validation Member Requests Retirement Appointment Reconciliation

Common Tasks

Menu

Adjustment Reports

Preprocessing Area

File Upload History

Furlough Reduction

Retirement Contract Summary

Maintain Employer Supporting Documents

Name: CalPERS ID:

Create or Edit Report

Method: Continue

Contact Us | CalPERS Website | Privacy Policy | Conditions of Use | Accessibility | Copyright © 2024 California Public Employees' Retirement System (CalPERS)

DataSource Shifter | Time Shifter | Dev Console

Build: v11.8 Baseline: 241015_165303_v11.8_Int.2049 UID: 385

Username: StateofCaliforniaVSG Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPA Server: Env91_node4

Last imported dataset name: 2024/09/06 00:01:02 FULL UNMASKED

Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV

Action class :

psr.web.mvc.contributions.common.employerreporting.ViewExistingPayrollReportsAction

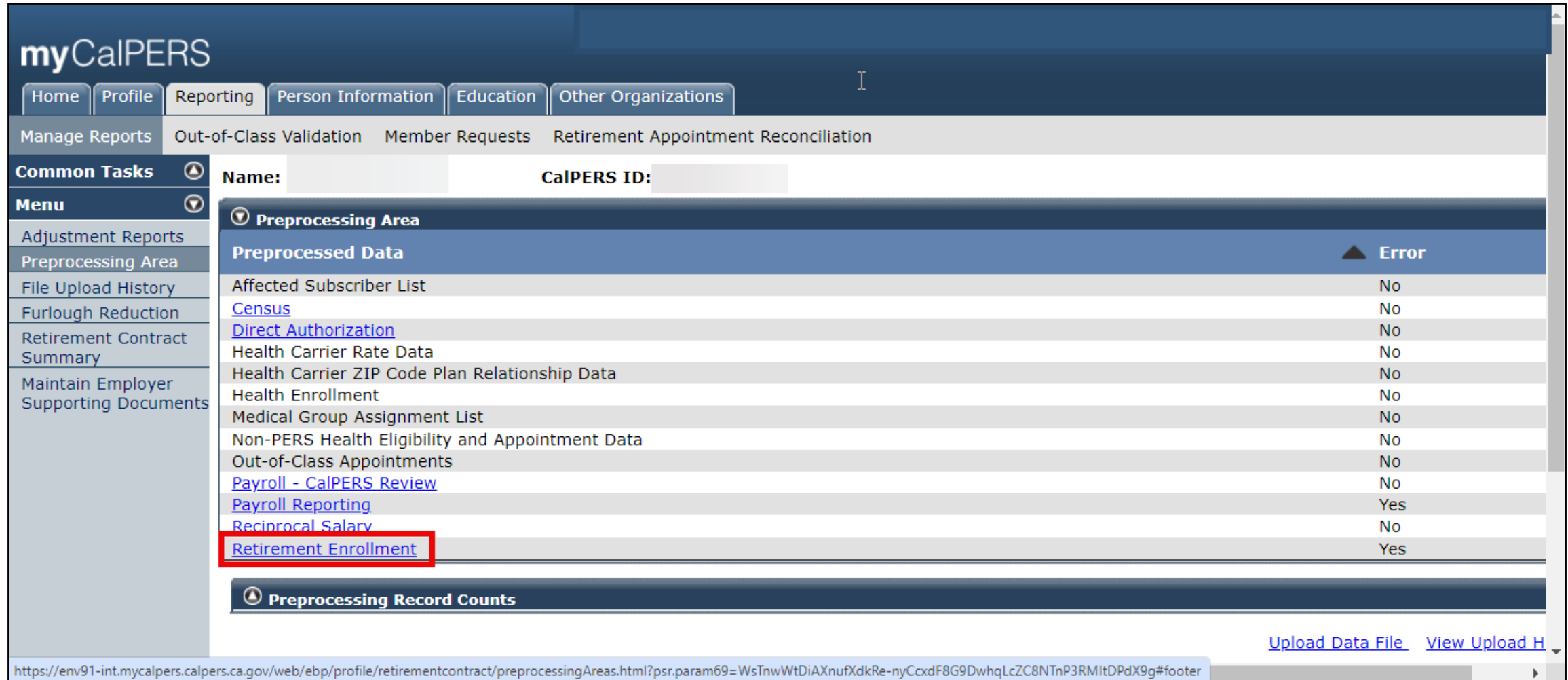
JSP : employerreporting/common/ViewExistingReports.jsp

SQL query executed by this page: 175 in seconds with 272 rows received.

Duplicate queries executed by this page: 4 in seconds with 4 rows received.

Action execution time: seconds

Accessing Enrollment Pre-Processing Area 3 of 3



myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Out-of-Class Validation Member Requests Retirement Appointment Reconciliation

Common Tasks

Menu

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Furlough Reduction
- Retirement Contract Summary
- Maintain Employer Supporting Documents

Name: **CalPERS ID:**

Preprocessing Area

Preprocessed Data	Error
Affected Subscriber List	No
Census	No
Direct Authorization	No
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Non-PERS Health Eligibility and Appointment Data	No
Out-of-Class Appointments	No
Payroll - CalPERS Review	No
Payroll Reporting	Yes
Reciprocal Salary	No
Retirement Enrollment	Yes

Preprocessing Record Counts

[Upload Data File](#) [View Upload H](#)

https://env91-int.mycalpers.calpers.ca.gov/web/ebp/profile/retirementcontract/preprocessingAreas.html?psr.param69=WsTnwWtDiAXnufXdkRe-nyCcxdf8G9DwhqLcZC8NTnP3RMltDPdX9g#footer

Pre-Processing Errors screen

myCalPERS

[Home](#)
[Profile](#)
[Reporting](#)
[Person Information](#)
[Education](#)
[Other Organizations](#)

[Manage Reports](#)
[Billing and Payments](#)
[Payroll Schedule](#)
[Out-of-Class Validation](#)
[Member Requests](#)
[Health Reconciliation](#)
[Retirement Appointment Reconciliation](#)

Common Tasks

Menu

[Organization Search](#)
[Adjustment Reports](#)
[Search Payroll Records by Participant](#)
[Maintain Payroll Records](#)
[Preprocessing Area](#)
[File Upload History](#)
[Furlough Reduction](#)
[Retirement Contract Summary](#)
[Maintain DA Deductions](#)
[Current DA Errors](#)
[Unresolved Historical DA Errors](#)
[Maintain Employer Supporting Documents](#)

Name:

CalPERS ID:

Search Preprocessing Data

CalPERS ID:

SSN:

Event:

Event Date Range from:

Last Name:

Preprocessed Status:

Program:

Event Date Range to:

Error:

Search

Clear

To generate a report of erred transactions, select search criteria within this panel (or Clear all values if you want all records), click the Search button, then click the "Generate Error Report" button within the Retirement Enrollment panel below.

Retirement Enrollment

[Select All](#)
[Add to Process List](#)
[Generate Error Report](#)

Process	Name	CalPERS ID	Event Date	Event	Program	Preprocessed Status	Error
<input type="checkbox"/>			02/21/2025	Begin Leave	CalPERS	Error - Held	ENB00012 - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.
<input type="checkbox"/>			02/21/2025	Begin Leave Deletion	CalPERS	Error	ENI00060 - A Begin Leave Event cannot be deleted when a corresponding End Leave Event exists. Please review the Member's appointment history and remove the corresponding End Leave event first, or if you are trying to correct the Begin Leave date, submit a Begin Leave

Training

Once your agency has been notified that they may begin to clear pre-processing errors

- Sign up for training via myCalPERS for virtual and in person classes. The retirement enrollment class will be available in 2026.
- Request in person training from our trainers at:
CalPERS_employer_communications@calpers.ca.gov
- Classes are free of charge.

Resources

Resources available

- [System Access Administrators](#)
- [Retirement Enrollment Student Guide](#)
- [State Reference Guide](#)



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 in 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.
- Currently 50% of agencies are complying
- SCO has created a guide with any questions on the reporting process.
 - [Deceased Employee Reporting Guide](#)

Please under no circumstances should the recipients should be advised that payments are not taxable.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

- **Resources**

- [PPSD-21 Form Deceased Employee Data](#) - fill and print
- [Payroll Letter #24-012](#): Deceased Employee and Designee/Beneficiary Reporting
- [Payroll Procedures Manual, Section I 900](#): Deceased Employee's Wages - for additional department requirements
- [Deceased Employee Reporting Guide](#) - guide on the reporting process

REMINDER: SCO cannot give tax advice. Questions should be directed to a tax consultant.



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 Contacts

Web Resources:

- [For HR Personnel](#)
- [For State Employees](#)

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](#)
- [PPSD Contacts and Additional Information](#)