



Transaction Specialists' Educational Forum

Presented By: Natalia Saferson

Contact: TSEF@sco.ca.gov

Office of State Controller Malia M. Cohen

April 3, 2025



Disbursements Contact Information

Presenter: Hector Garcia-Gonzalez
Contact: hgarcia-Gonzalez@sco.ca.gov

- **Main Line:** (916) 445-7789
- **Fax:** (916) 445-5759
- **General Inquiries Email:** disbgeneral@sco.ca.gov
- Payroll and Garnishments Technician: Valente Yanez Vega Vyanezvega@sco.ca.gov
- Post Issuance Supervisor: Shanel Watts Swatts@sco.ca.gov
- General Disbursements Manager (Effective 4/14/2025): Cameron O'Shaughnessy coshaughnessy@sco.ca.gov
- [Frequently Asked Questions about Payments Issued by the State Controller's Office](#)



STATEWIDE BENEFITS ADMINISTRATION



Transaction Specialists' Educational Forum:

April 3, 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.





Public Service Recognition Week

Presenter: Victoria Calles

Public Service Recognition Week (PSRW)

SAVE THE DATES

This year's PSRW will be observed from Sunday, May 4, 2025, through Saturday, May 10, 2025.

Proposed Theme Days

Monday – Career Wellbeing


Tuesday – Social Wellbeing

Wednesday – Physical Wellbeing

Thursday – Community Wellbeing

Friday – Financial Wellbeing

Two virtual learning sessions were held for department coordinators, supervisors, managers and other appropriate personnel on March 6 and 10. The presentation and other PSRW Resources are available on our [website](#).




Public Service RECOGNITION WEEK


May 4 - 10, 2025

Public Service Recognition Week (PSRW) is a chance to express appreciation to civil servants for the essential work they do. CalHR invites you to appreciate and engage with state employees through the five elements of wellbeing.


Proposed Themes

**Day 1: Career Wellbeing**


Host an in-person or virtual executive meet-and-greet focused on career development or record a video message. Facilitate a career recognition activity for teams or the entire department.

**Day 2: Social Wellbeing**


Have a speed networking event where employees connect by asking questions, or facilitate an activity where employees create a slide about their interests and hobbies outside of work to compile into a fun team presentation.

**Day 3: Physical Wellbeing**

Do a wellness activity such as a healthy snack meeting or a walk and talk break. Share additional physical wellbeing resources from the EAP and Employee Wellness Program.

**Day 4: Community Wellbeing**


Encourage all employees to participate in a statewide virtual presentation designed to support community wellbeing and belonging.

**Day 5: Financial Wellbeing**

Motivate employees to invest in themselves through a collaboration with Savings Plus. Wrap up the week with an activity determined by department or agency leadership.

Pictures of the Week

Highlight some of the best pictures all week. Tag photos on social media with the hashtags #PSRWCA and #CAServingCA.



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



California Leave Accounting System (CLAS)

Service Employees International Union (SEIU) Open Enrollment

Presented By: Megan Vinson

Contact: CLAS@sco.ca.gov



California Leave Accounting System (CLAS)

Presenter: Megan Vinson
Contact: CLAS@sco.ca.gov

Service Employee International Union (SEIU) Open Enrollment

- For SEIU Represented Employees
 - Bargaining Units 1, 3, 4, 11, 14, 15, 17, 20, and 21



California Leave Accounting System (CLAS)

Presenter: Megan Vinson
Contact: CLAS@sco.ca.gov

SEIU Open Enrollment

- Each April, Bargaining Units 1, 3, 4, 11, 14, 15, 17, 20, and 21 are subject to an open enrollment period where they can elect to change whether they accrue Vacation (VA) and Sick or Annual Leave (AL).
- Goes both ways – VA to AL or AL to VA.
- Occurs annually each April, but changes are effective the first day of the June pay period.



California Leave Accounting System (CLAS)

Form CalHR 875

CALHR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

Annual Leave-Sick/Vacation Leave Election Form
California Department of Human Resources
State of California

Print Form

Reset Form

1. EMPLOYEE INFORMATION

Name Unit Number Work Phone Number
Department/Location

2. EMPLOYEES NOT COVERED BY SEIU BARGAINING UNITS

I elect to participate in the following leave program effective the first day of the pay period this election is received by my personnel office.

- ☐ Annual Leave
☐ Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa no more than once every 24 months.

3. EMPLOYEES IN SEIU BARGAINING UNITS

- ☐ Annual Leave
☐ Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa annually during an open enrollment period during the month of April. The effective date of the election shall be the first day of the June pay period.

4. APPROVAL

I understand the accrual rate and usage provisions differ in the Annual Leave and Sick Leave/Vacation Programs. Further, if I am a current employee, I understand when I change from one program to another, all provisions of the program I enter apply upon the effective date. However, the annual leave, sick leave, or vacation (converted to annual leave) balances I have on the effective date of the new program will continue to be available to me to use. If I have a sick leave balance upon retirement, I may convert it to PERS service credit according to Government Code section 20963.

I make this election freely and voluntarily.

Signature

Date

Note: New Employees: If this election form is not returned to the Personnel Office, it will be deemed an election for the sick leave/vacation program.

5. FOR PERSONNEL OFFICE USE ONLY

After processing election, place in employee's personnel file.

SSN:

Date Election Received: Received By:

Effective Date: Date Eligible to Change:



California Leave Accounting System (CLAS)

Presenter: Megan Vinson
Contact: CLAS@sco.ca.gov

SEIU Open Enrollment – 2025 Dates

- April 1 through April 30 enrollment period
- June 1 is the effective date
- June 12: Earliest date to process the change



California Leave Accounting System (CLAS)

SEIU Open Enrollment – Retroactivity: Process before June 30!

Retroactive Corrections
Rev. 01/19

RETROACTIVE CORRECTIONS AFTER CHANGING FROM VA TO AL OR AL TO VA

IF VA OR AL WAS ESTABLISHED IN ERROR OR IN THE WRONG LEAVE PERIOD
REFER TO THOSE CONDITIONS IN THIS SECTION OF THE WORKBOOK.

**NOTE: IT IS NOT NECESSARY TO MODIFY OR DELETE THE ESTABLISHMENT
PERIODS IN ORDER TO KEY THESE CORRECTIONS.**

1. Use the B52 - LB Void Transaction Entry screen to void the transfer transaction on both benefits (VA & AL) as well as any other incorrect transactions.
2. Use the B50 - LB Transaction Entry screen to key all retroactive attendance and accruals as necessary.
3. Use the B14 - LB History Summary screen to determine the correct transfer amount.

NOTE: The 'end balance' should be keyed as the transfer amount from the "old" benefit in one month, and the combined amount of the 'end balance' plus the 'credit' should be keyed as the transfer amount to the "new" benefit in the next month.

4. Use the B50 - LB Transaction Entry screen to key the correct transfer amounts to both benefits using transaction codes 46 & 47 respectively.
5. Use the B14 – LB History Summary screen or the B16 - LB Transaction History screen to verify your corrections.



California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: CLAS@sco.ca.gov

SEIU Open Enrollment - References

- CLAS Workbook, Conditions Section ([Civil Service Workbook](#)):
 - AL to VA/Sick Leave
 - VA/Sick Leave to AL
 - Retroactive Corrections After Changing from VA to AL or AL to VA
- CalHR HR Manual, Leave Policy:
 - [2102 – Annual Leave](#)
 - [2103 - Vacation](#)
- [Bargaining Unit Contracts](#)
- [Leave Benefit Election Change eLearning](#)
- CLAS Unit: (916) 327-0756 or CLAS@SCO.ca.gov

Communications

- Coming Soon: SEIU Open Enrollment for Annual Leave and Vacation/Sick Leave, Leave Accounting Letter



STATEWIDE PROGRAM UPDATES



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Implementation of Existing Contracts

- SCO maintains documentation and analysis of existing contract terms
- CalHR performs activities to create Pay Letters for each bargaining unit's contractual updates
- SCO begins planning for implementation in March
- SCO and CalHR maintain communication regarding the proposed release of Pay Letters and performance of mass updates
- SCO performs mass updates based on Pay Letter authorization to do so



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Scheduling of Mass Updates

- SCO considers many factors when proposing a schedule
 - What types of updates are required [for example, Retirement Contribution, General Salary Increase (GSI), Special Salary Adjustment (SSA), Other Post-Employment Benefits, etc.]
 - Whether a process can be automated (example of SSA with 12 qualifying pay periods needing to be keyed by department)
 - The size of the population subject to the update
 - Generally, the minimum is 1000
 - If less than 1000 records, we also consider if a small number of departments will have an unreasonable number of records to manually process.
- The number of class codes that require Pay Scale updates
 - The timing of keying Pay Scales is very specific
 - The number of Pay Scale updates to key must reasonably fit into the available time



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

The Scheduling of Mass Updates

- The complexity of the population
 - More complex updates may be scheduled later to allow more time for analysis
 - Larger populations may also be scheduled later
- Whether one update depends on another
 - When the same population is receiving both a GSI and an SSA, we process the GSI approximately two (2) weeks prior to the SSA.
- The pay frequency of the population
 - If there are semi-monthly employees in a population, we prioritize processing prior to Semi-monthly Cutoff, especially for Retirement Contribution Updates.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

The Scheduling of Mass Updates

- What days are available for mass updates
 - July has limited availability due to Fiscal Year End processes
 - Priority is given to dates prior to Payroll Cutoff
 - Salary increases can be processed after Payroll Cutoff but will result in a supplemental warrant
- How many bargaining units require updates
 - Bargaining Units may be processed together to accommodate the availability of processing dates
 - The total population and complexity of each update is analyzed to facilitate determination of the groupings



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Processing of Mass Updates

- Retirement Contribution updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit, Retirement Category, and Class.
 - Assuming the update is to the employee contribution and/or exclusion amount, SCO reports on which Account Code(s) impacted employees are in.
 - If there are no records in the impacted Account Code(s) that do not require the update, SCO updates the contribution and/or exclusion amount.
 - If there are other Collective Bargaining Identification Designation (CBID) or Class Codes in the impacted Account Code(s), SCO will identify appropriate Account Codes to move impacted records to.
 - SCO creates a request for our Information Technology (IT) resources to select the required records and update the Account Codes.
 - SCO releases a Personnel Letter informing departments of the population to be updated, the old and new Account Codes (if applicable), and any further instructions.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Processing Mass Updates

- General Salary Increase updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - If yes, SCO determines whether the population is large enough to necessitate a mass update.
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Processing Mass Updates

- Special Salary Adjustment updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - SCO determines whether the update can be automated based on criteria such as qualifying pay periods
 - If yes, SCO determines whether the population is large enough to necessitate a mass update.
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Potential New Contract Implementation

- There are seven (7) Bargaining Units with contracts expiring this year that are in negotiations
- Reminder of the full new contract implementation process
 - CalHR and unions come to an agreement
 - Union membership votes on ratification
 - The Legislature passes legislation to approve the contract
 - The Governor signs off
 - CalHR prepares the technical documentation of Pay Letter(s)
 - SCO processes mass updates, where appropriate, based on the Pay Letter(s).



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Potential New Contract Implementation

- We have received feedback in past new contract implementations from departments as to why the process takes as long as it does
 - Each of the steps we covered can take weeks
 - Each of the steps above can take weeks
 - When contracts are not retroactive, most of the process is invisible to departments.
 - When they are retroactive, there is available time prior to the effective pay period of the implementation to allow for the process to take place.
 - Departments then only are aware of the last step of SCO performing timely mass update(s).
 - SCO spends weeks prior to the effective pay period preparing for the mass update(s)



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

Potential New Contract Implementation

- The mass update process for new contracts is very similar to that for existing contracts
 - There is also a significant amount of analysis that SCO and CalHR must complete with new contracts
 - Additional considerations are whether the contract is retroactive, if there are competing contract implementations, and how complex the implementation is.



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

- Frequently Asked Questions
 - Why does SCO not share the mass update calendar with departments?
 - There are many factors that determine whether a mass update will move forward, and decisions can be made at the last minute
 - The calendar is subject to change
 - Why does SCO prioritize one Bargaining Unit over another?
 - No Bargaining Unit is prioritized; scheduling is based on the factors in the previous slides
- Other Processes that SCO performs
 - Records that fall out from the mass update process are worked by our Operations Team



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez/Allan Fong

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

- What do you need to do when we run mass updates?
 - Reference appropriate contracts on the CalHR website to understand what changes are coming
 - Ensure Employment History is up to date for impacted employees
 - Review letters carefully
 - You may need to manually key some records
 - You are responsible for out of sequence transactions
 - Some payroll adjustments will require you to submit a STD. 674 to SCO
 - Also review the CalHR Pay Letter referenced in our Personnel Letter
 - As always, certify your pay and confirm that all eligible records were appropriately included in the mass update
 - Manually key any records that were incorrectly not included in the mass update



PPSD General Reminders

When you reconcile payroll, check that these *details* are correct:

- Withholdings and deductions
- Employer taxes
- Hours worked, including overtime, vacation time, sick days, etc.
- Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

Resource: Payroll Procedures Manual (PPM) [Section M](#)



PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Please **do not** email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- Update [California Personnel Office Directory \(CPOD\)](#)
- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- HR offices calling the [Statewide Customer Contact Center](#) [(916) 372-7200] must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.
- Share this information with your Human Resources Team!



Helpful Resources

State Controller's Office:

- [SCO Website](#)
- [Library and Resources](#) - Communication. Manuals/Guides/Toolkits. Forms. FAQs.
- [Personnel Action Manual \(PAM\)](#)
- [Payroll Procedures Manual \(PPM\)](#)
- [Statewide Customer Contact Center \(SCCC\)](#)

CalHR:

- [CalHR Website](#)
- [Contact CalHR](#)
- [Human Resources Professionals](#)
- [Benefits Website](#)

CalPERS:

- [CalPERS Website](#)
- [Circular Letters](#)
- [my|CalPERS](#)
- [State Reference Guide \(PDF\)](#)
- [CalPERS Email Subscriptions](#)

When in doubt, ask your Supervisor or Manager for guidance!



SCO Contacts

Websites:

- [Human Resources](#) (HR)
- [State Employees](#)

SCO Key Initiatives:

- [SCOConnect](#)
- [California State Payroll System Project](#)

Contacts:

- Affordable Care Act (ACA) Email ACASupport@sco.ca.gov
- [Cal Employee Connect \(CEC\) Help and Feedback](#)
- [ConnectHR Help and Feedback](#)
- California Leave Accounting System (CLAS) Email CLAS@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or DSA@sco.ca.gov
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email PPSDMIRS@sco.ca.gov
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200