TRANSACTION SPECIALISTS’ EDUCATIONAL FORUM QUESTIONS & ANSWERS – JUNE 2025

The following questions were submitted during the forum:

Question What happens if we accidentally select and submit the wrong 'Garnishment Type' from the dropdown in ConnectHR?
Answer: A STD. 639 form must be submitted to cancel the garnishment.

Question: Regarding the garnishment feature, will there be a dropdown option for child support?
Answer: Not currently.

Question: Do you have a timeline available as to when the garnishment feature will include child support garnishments as an option? If so, when will it become available to all agencies?
Answer: Not currently.

Question: Will we be able to amend garnishments if the order changes?
Answer: Currently, ConnectHR will only allow new garnishments to be established.

Question: If a garnishment is submitted by 5:00 p.m., would it be in effect for the current pay cycle?
Answer: The processing of all submitted forms occurs at 5:00 p.m. every cycle day. The submitted forms are still affected by cutoff dates.

Question: If an employee's name is unviewable in ConnectHR, what should we do to get them added?
Answer: You are unable to view the employee in ConnectHR because the employee’s main position number is shown under a different agency code. We are aware of this issue and are working on a workaround.

Question: Can we still use the upload option in ConnectHR?
Answer: Yes, that option is not changing.

Question: Is the garnishment feature in ConnectHR available to us now?
Answer: Yes.

Question: Do we have to upload both the STD. 639 form and court documents in ConnectHR?
Answer: If an electronic garnishment is submitted via ConnectHR, then a STD. 639 form will not need to be submitted to SCO.

Question: Regarding the 'Garnishment Type' dropdown, are there pay codes included to help us select the correct type?
Answer: Currently, the code is 339.

Question: What are the dates for Special Open Enrollment?
Answer: May 1 to May 30, 2025.

Question: How does an employee enroll in the free basic vision only?

Answer: Please review the Benefits Administrative Manual regarding permanent/full time enrollment for clarification.

Question: I have submitted several Vision Service Plan (VSP) enrollment forms for Premier VSP but have not received a response. When should I expect a response?

Answer: The State Controller's Office (SCO) does not process CalHR 774 forms. Did you check SCO's pay history to see if the request was processed? If it is not processed, then please send an email to vision@calhr.ca.gov for assistance.

Question: Regarding vision, once an appeal is approved, how long does it take for it to reflect with the carrier the employee selected?

Answer: For changes to Premier Vision, the time it takes to reflect depends on when it was approved and the timing of the next payroll cycle. It should always be within two payroll cycles.

Question: Does the new vision information include 2025 Consolidated Omnibus Budget Reconciliation Act (COBRA) updates for dental and vision premiums? If so, where can I locate the information?

Answer: Please see the 2025 rates viewable on the 2025 COBRA Continuation Coverage document.

Question: Is there a way to check if an employee (EE) has dual coverage for dental and/or vision?

Answer: Please allow up to three weeks for SCO to process an appeal. If the EE is in urgent need of dental care, then please send an email to dental@calhr.ca.gov for assistance. You may also contact the carrier to verify.

Question: Can you clarify what dual and/or split coverage is?

Answer: Dual coverage is when two state employees (spouses or domestic partners, parents) are working for the State and are each enrolled in their own state sponsored dental plan along with their dependents and are enrolled in their spouse/domestic partner's dental plan as a dependent. However, it is not allowed if the state employees are enrolled in their own dental plan, but have their dependents enrolled in both dental plans. For additional questions, please send an email to dental@calhr.ca.gov for assistance.

Question: Regarding Open Enrollment (OE) forms for Premier Vision Service Plan (VSP), is it the employee or personnel responsible for processing?

Answer: It is the employee’s responsibility to enroll, make changes or cancel enrollments. This was implemented in 2019. Employees can make changes by calling the toll-free number at (800) 400-4569 or online at VSP Vision Care. Use of the CalHR 774 form during OE is no longer accepted.

Question: How do we get assistance with the Multifactor Authentication (MFA) in Cal Employee Connect (CEC)? Many employees are unable to access their CEC due to the MFA.

Answer: Please send an email to connecthrhelp@sco.ca.gov for assistance.

Question: How do you submit a refund request for an employee (EE) who has already submitted their parking cancellation?

Answer: Please verify the EE's employment history to confirm that the deduction has stopped. If the employee is due for a refund, then submit an appeal request including all documentation, your CEC information, form, and the refund total. Also, you must verify that your employee has not submitted receipts to Application Software, Inc. (ASI).

Question: If an employee (EE) enrolled in the Third-Party Pre-Tax Parking Reimbursement Account Program and wants to cancel, will it be treated as a voluntary transaction where the EE will have to send the request to SCO directly?

Answer: To cancel, the EE must complete and submit a CalHR 682 form to their departmental personnel office and they will send it to SCO for processing.

Question: Who notifies employees that they need to submit the re-verification documents?

Answer: The California Department of Human Resources (CalHR) mails letters to employees with dependent(s) enrolled in dental and/or premier vision.

Question: Since the Dependent Re-Verification (DRV) process has been automated, is it necessary for personnel offices to send DRV notices to employees, considering CalHR is sending them?

Answer: Although it is helpful for employees to receive additional communication, it is not required for the personnel office to send DRV notices to the employees. To ensure an employee receives automated notifications from CalHR, you can check the employee's account in Family Connect Portal.

Question: Will we be able to add/update employees' dependent information via Family Connect Portal (FCP) for dental and/or vision at some point, as we can do with CalPERS Health? It is time consuming when we are required to call the providers to add them.

Answer: The FCP is a database that only receives data uploads of the most recent employee benefit details from the dental and vision vendors that matched against the SCO employee data. Family Connect Portal does not maintain manual date entry outside of completing Dependent Re-Verification transactions.

Question: For initial dependent enrollment and future re-verifications, are we required to have copies of all dependent social security cards on file? Or does the employee only need to provide the social security numbers (SSNs)?

Answer: For re-verifications, it is not required to have copies of dependents' SSN cards. Having an employee provide the dependent's SSN for initial enrollment is sufficient. Please see Form CalHR 781 and the Benefits Administration Manual for all required documents for dependent re-verification.

Question: Is CalHR going to add a process to auto-delete dependents for employees who do not re-verify dependents like CalPERS does?

Answer: At this time, departmental personnel offices must continue to follow the normal process to remove unverified dependents from dental and/or vision benefits.

Question: How should dependents be added to Basic Vision?

Answer: Basic Vision is an automatic party code of 3 for all eligible employees. Dependent data is not currently stored on the member's account. Dependents can access services through the employee's name and social security number by the eye care provider.

Question: Can an employee (EE) add a dependent to Basic Vision at any time? Does the EE call Vision Service Plan (VSP) directly to add the dependent?

Answer: Vision Service Plan (VSP) does not collect dependent data for the Basic Vision plan, and it is not currently collected by the State Controller's Office. The eye care provider verifies the employee's account via their social security number and VSP will authorize payment.

Question: Is there a report that indicates when a dependent turns 26 years old and needs to come off benefits?

Answer: This is viewable on Family Connect Portal.

Question: If the designee's social security number (SSN) is not listed and they do not want to provide it, then do we note that on the PPSD-21 form?

Answer: Please do not release any funds until a W-9 is received. The 1099-MISC form cannot be issued without the SSN.

Question: Regarding requesting a Lock Release letter from the Internal Revenue Service (IRS), can you clarify who needs to contact the IRS? The slide says the employee needs to contact the IRS but how can they if they are deceased?

Answer: The beneficiary/designee can request the release from the IRS.

Question: How do we write off a salary advance for a deceased employee?

Answer: Please review the State Administrative Manual for clarification.

Question: Is there a statute of limitations (to collect) for salary advances?

Answer: The State Controller's Office can only report salary advances for the current year and three years prior (e.g. 2022 to 2025).

Question: Can we collect salary advances older than three years?

Answer: This is now between the employee and the department. By not reporting to SCO when the advance was provided to the employee, the funds were not included on the employee's Form W-2. Please review the Salary Advance Reporting Guide for more information.

Question: For initial dependent enrollment and future re-verifications, are we required to have copies of all dependent social security cards on file? Or does the employee only need to provide the social security number?

Answer: Social Security cards are not required documents for dependent re-verification for benefits eligibility. Please refer to the Dependent Eligibility Verification Checklist (CalHR 781 form) for detailed guidance.

Question: When is the user-friendly retirement code reference going to be available?

Answer: The Payroll Procedures Manual (PPM) has been updated.

Question: If we come across an account code that the Payroll Procedures Manual (PPM) indicates neither social security nor Medicare, but the employee's history shows a Medicare deduction, then who do we contact?

Answer: Please contact the Statewide Customer Contact Center (SCCC) for assistance.

Question: What is the path on the SCO website to access the updated retirement code in the Payroll Procedures Manual (PPM)?

Answer: Section H 214 of the PPM.

Question: How can I sign up to receive Payroll Letters?

Answer: To receive Payroll Letter notifications, subscribe to the distribution list via PPSD Email Subscription Service.

Question: Is there a way to retrieve older Pay Letters that are not currently available in the archives, such as items issued in 2007 or 2000? Is there an email we can use to request Pay Letters that are not in the archives?

Answer: Please have your designated CalHR contact reach out to the Personnel Services Branch.

Question: Can we get a section added to the Payroll Procedures Manual (PPM) for Permanent Intermittent (PI) employees? We find it hard to locate processes and examples directly related to PIs.

Answer: Please send your suggestion to PPSD HR Suggestions at ppsdhrsuggestions@sco.ca.gov.

Question: Will Form CalHR 781 be updated to include the requirements for sending copies of the 'actual' social security cards for all dependents? It is not stated anywhere for the employees to know that this is a required document.

Answer: There are no plans to update the CalHR 781 form currently, as the form is intended to provide a list of documents that determine dependent eligibility only. However, retaining social security card copies are recommended to substantiate the social security number that is required on the benefits enrollment forms.

Question: What happens if the salary amount is over or under $1.00 or is incorrect after the GEN increase mass update? Is the department responsible for correcting it manually?

Answer: It is best practice to go ahead and update it, but also, please notify SCO if you find incorrect salary updates.

Question: Can you confirm that a Merit Salary Adjustment is effective before a range change?

Answer: Please have your designated CalHR contact reach out to the Personnel Services Branch for clarification.

Question: The email address on Form CalHR 695 - Retiree Vision Plan Enrollment, is no longer active. Can the form be updated with the correct email address from Vision Service Plan (VSP)?

Answer: The addresses on the Vision Service Plan CalHR 695 form and CalHR 774 form are correct. If your agency has had any issue with the form(s) being returned, please provide the information to vision@calhr.ca.gov.

Please feel free to send the form(s) to vision@calhr.ca.gov, if you believe it has incorrect email addresses.

Question: Regarding ConnectHR, we have an employee transferring from another agency that requires us to collect an outstanding accounts receivable (A/R). However, the employee's name does not prompt up in ConnectHR when searching for them. How do we get them into the system to be able to use the A/R feature for payroll deductions?

Answer: You are unable to see the employee in ConnectHR because their main position number shows under a different agency code. As an alternative, the standard form can be uploaded via ConnectHR's File Upload feature utilizing the "New to State/No History in Database" option.

Question: Does an employee's Form W-2 change for the year the salary advance was issued or is it the year it paid off?

Answer: Please send an email to ppsdw2miscded@sco.ca.gov for clarification.

Question: I have an employee whose STD. 674 A/R for disability was incorrectly calculated. I called the Statewide Customer Contact Center (SCCC) and left a voicemail, but I have yet to receive a response. What should I do?

Answer: Call the SCCC and select option 6 for Disability, then select option 1 for Industrial Disability Leave or option 2 for Non-Industrial Disability Insurance, State Disability Insurance or Temporary Disability. Leave detailed information, including the employee's name, the last four digits of their social security number, pay period, and what you feel was calculated incorrectly. Please allow 48 hours for a return call.

Question: To confirm, if the pay issues to clear the salary advance within 30 days, then we are not required to submit the documentation to SCO?

Answer: Correct.

Question: How do we know whether an employee is subject to social security?

Answer: You can view that information from the employee's Bargaining Unit Contract/Memorandum of Understanding on the CalHR website.

Question: Is there a statute of limitations for the collection of salary advances like what we have in place for accounts receivables (A/Rs)?

Answer: Please send your policy question to CalHR for clarification.