

## TRANSACTION SPECIALISTS' EDUCATIONAL FORUM QUESTIONS & ANSWERS – OCTOBER 2025

The following questions were submitted during the forum:

**Question:** Is the priority necessary for catch-up sections too? If employees leave the priority order blank on the catch-up section, will SCO assume catch-up contribution is the same priority order as the standard contribution?

**Answer:** Yes. For clarification, please review the slide titled, Section 2: Current Year/IRS Limit.

**Question:** If an employee (EE) selected "MAX" on the catch-up section, is SCO going to determine the MAX contribution amount based upon the EE's age?

**Answer:** Yes, if the employee qualifies for the 50+ or 60-63 Age-based catch-up, SCO will apply this amount when they select the "Maximum" box under the catch-up section. Current contribution limits are available at [IRS Contribution Limits](#). SCO will follow the priority level described on the form.

**Question:** If employees are doing age based catch-up, can they check MAX for both the Standard section and Catch-Up Sections?

**Answer:** Please review the slide titled, Section 2: Current Year/IRS Limit, for clarification.

**Question:** How should employees add dependents to their Basic Vision plan?

**Answer:** Enrollment in basic vision is defaulted to family coverage. Dependents access services through the employee's social security number and date of birth through the eye care provider.

**Question:** If a lump sum PAR package was sent on August 14, 2025, for separation August 30, 2025, and pay has still not been posted as of today, who do we contact to see when the PAR package will be keyed since it has been more than 30 days?

**Answer:** If the employee's separation date is August 30, 2025, SCO has 2.5 months to process the lump sum deferral separation.

**Question:** I have some employees who are paying into Dental/Vision but it does not appear in the portal; is it because the website is still updating?

**Answer:** Please send an email to us at [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov) with the employees' and the dependents' names, so that we can look into this further.

**Question:** Can you elaborate more on slide #26 - Dental Program Updates and Reminders, regarding:

"If an employee permanently separates from state service before completing 24 months of state service and subsequently returns, their time before separation does not count towards meeting the 24-month restriction."

**Answer:** As an example, if an employee works for the state starting May 1, 2020, and separates on March 1, 2022, then the employee joins back on July 1, 2025, the time the employee worked from May 2020 to March 2022 does not count towards the 24 months.

**Question:** Does the employee have to be employed for 24 months and then be allowed to enroll into a non-state sponsored plan, such as a Delta Dental plan, or do they have to be a member of the state sponsored plan for 24 months before being allowed to enroll into a Dental Dental plan?

**Answer:** An employee must complete 24 consecutive months in state service before they are eligible to enroll in indemnity or PPO dental plans. In the meantime, they can enroll in state sponsored prepaid plans. Indemnity, PPO, and prepaid plans are all state sponsored plans.

**Question:** Is there a way to reset the pin?

**Answer:** Yes! If you have issues with our pin, we can help you reset your account.

**Question:** Who monitors the type of requests a user has access to submit?

**Answer:** Once the user creates an account, they will have access to submit any public requests within the Request Tracking Portal. CalHR will monitor tickets that are submitted and ensure they are routed to the correct teams.

**Question:** Is the CalHR Request Portal replacing the email appeal request or can we still do both?

**Answer:** Correct, this is replacing the email appeals. We encourage you to start using the Request Tracking System now. Starting January 1, 2026, appeals submitted through email will not be accepted.

**Question:** How do we access the presentation slides after the training?

**Answer:** The slides will be available on the [Transaction Specialists Educational Forum](#) webpage of the SCO website.

**Question:** The confirmation of an Accounts Receivable (A/R), would that just be an email from the employee stating the acknowledgement that they will be getting an A/R?

**Answer:** Yes, that is correct.

**Question:** When will the link to the portal be provided?

**Answer:** This hyperlink to the portal is [CalHR Request Portal](#). We will send out Frequently Asked Questions and a User Guide.

**Question:** Does the answer go to the creator or the supervisor?

**Answer:** The answer will go to the creator of the ticket.

**Question:** If there will not be Accounts Receivables (A/Rs), do you still need to upload a document in that area?

**Answer:** No, but be sure to confirm the A/Rs will not issue retroactively.

**Question:** Regarding the Request Tracking System, will a template be provided for the A/R form that has to be uploaded for the appeal?

**Answer:** An email confirmation from the employee (EE) stating the EE acknowledges A/Rs will issue for retroactive benefit premiums is fine.

**Question:** We received a ding notice saying an employee was in the wrong retirement code and referred us to the Personnel Action Manual (PAM) 505 section. When will the PAM get updated, as we are following the Personnel Letter that has updated codes?

**Answer:** The [Payroll Procedures Manual](#) (PPM) is updated. Please see PPM Section B – Codes. The PPM is related to payroll processing and should be used as a reference.

**Question:** Some appointments require a 335 the same day. Will this cause an error in the system since two transactions will be keyed, or does this only mean not to key two appointment transactions with the same effective date?

**Answer:** No, this will not cause an issue, as you can key an appointment and a 335 the same effective date.

**Question:** Could employees continue prescription drug coverage for their spouse only, but drop other medical benefits, including medical, dental, and vision coverage if the spouse is enrolled in Medicare?

**Answer:** This is a health benefit question, please contact CalPERS for assistance at (888) 225-7377.

**Question:** When will agencies be notified of which part of the roll-out they are in?

**Answer:** We will send a broadcast email during the first week of December.

**Question:** Will we get a notice from CalPERS when we need to fix something?

**Answer:** You would check myCalPERS and access the Preprocessing Area tool to check if you need to fix something. You will not receive notification via email, mail, or phone call.

**Question:** Are we adding another step to our tasks after we key an appointment or separation?

**Answer:** This is correct. After you key your transaction in PIMS, please check myCalPERS the next day to see if the transaction posts in myCalPERS, as untimely reported transactions can incur a late reporting admin fee. Any transaction that did not post will be in the Preprocessing Area for your review, and action on your end will be needed.

**Question:** Will there be a child support garnishment option?

**Answer:** Not at this time.

**Question:** Is the decentralized civil service calendar up to date for the last week of October? September 29 & September 30 did not indicate no cycle but pay keyed those days did not issue until this morning.

**Answer:** Yes, the decentralized calendar is up to date; September 29 & September 30 are not cycle dates and it shows that.

**Question:** Is there any way to speed up the STD. 674 adjustment processing?

**Answer:** We are doing our best to work on all incoming documents.

**Question:** What section of the Payroll Procedures Manual (PPM) are the retirement codes located?

**Answer:** Please see [PPM](#) Section H 214.

**Question:** How can we obtain or request physical marketing materials from health providers for open enrollment? For example, Kaiser, Blue Shield, etc.

**Answer:** To request materials, please view [CalPERS](#)’ website.