

STATE CONTROLLER'S OFFICE  
PERSONNEL AND PAYROLL SERVICES DIVISION  
P.O. BOX 942850  
SACRAMENTO, CA 94250-5878

DATE: August 6, 2018

PERSONNEL LETTER #18-014  
(Civil Service Only)

TO: All Agencies in the Uniform State Payroll System

FROM: Marissa Revelino, Chief  
Personnel and Payroll Services Division

**RE: CALHR CONSERVATIONIST SERIES AND RESEARCH DATA SERIES  
CLASSIFICATION CONSOLIDATION**

CalHR approved the consolidation of classifications in the Conservationist Series, effective July 12, 2018 and the Research Data Series, effective August 1, 2018. Please refer to CalHR Pay Letter #18-18 for further information regarding the consolidation. This letter can be accessed via the following link: [CalHR login page](#).

DEPARTMENTAL ACTION REQUIRED - EH DOCUMENTATION/PROCESSING INSTRUCTIONS

Departments are responsible for identifying and processing A20 transactions for employees, to change the classification and WWG (if applicable), with the exception of non-permanent employees; see below.

**Position Number Evaluations**

Departments should review serial numbers prior to processing the reallocation to avoid duplicating position numbers.

**Employees Serving a Probationary Period**

For employees in designated classifications who are currently serving, and will continue, a probationary period in the new classification, probationary code 3 should be used to identify that the employee "must complete probationary period now serving."

e.g.: If an employee is currently in a classification with a six month probationary period and has served two months at the time of reallocation, the employee will only be obligated to serve four additional months to satisfy their probationary period and gain status in the new classification.

**Alternate Range Evaluations**

Departments should review each impacted employee's alternate range placement according to the new Alternate Range Criteria. Movement for employees eligible for a same day range change should be processed as follows:

1. An A20 transaction to effect the reallocation.
2. A 335 transaction to place them in the appropriate alternate range.

NOTE: If an employee is currently in a Conservationist or Research Data classification affected by the reallocation but remains in the same classification code, process a 335 transaction.

### **Employees in Excluded Ranges**

For employees in designated classifications who are currently in excluded ranges, movement is subject to SPB Rule 431 and transactions should be processed as follows:

1. A 335 transaction to return incumbents to the appropriate status range for their current classification.
2. An A20 transaction to reallocate incumbents from the status range(s) of existing classifications to the status range(s) of new classification.
3. A 335 transaction to place incumbents in the appropriate excluded alternate range of the new classifications and to apply the applicable salary rule based on the range differential between the status range and the excluded range.

### **Employees in Training and Development Assignments (T&D)**

If an employee is currently in a Conservationist or Research Data classification affected by the reallocation and serving a T&D in a classification not affected by the reallocation, process per PAM Section 5.50:

1. An A20 effective XX/XX/18
2. An A04 to return the employee to T&D assignment.

If an employee is currently in a classification not affected by the reallocation and serving a T&D in a Conservationist or Research Data classification affected by the reallocation, evaluate that the T&D is still valid. If the T&D is found to be valid, departments should process an A04 transaction.

### **Nonpermanent Employees**

Departments are responsible for identifying and processing an A02 transaction for nonpermanent employees to change the classification and WWG, if applicable, for employees in designated classifications who are in nonpermanent positions. (PMPPM 315.14) Nonpermanent employees include:

- TAU Appointments
- Limited Term Appointments
- Retired Annuitants
- Emergency Appointments

### **STD. 607 Requirements**

Departments are required to submit the STD. 607 form for all positions impacted by the reallocation (filled and vacant), to SCO by October 30, 2018 (PPM Sections C310 & C315). Please indicate “‘Conservationist’ or ‘Research Data’ Consolidation Effective XX/XX/18” in the remarks.

### **Out-of-Sequence**

Per DPA rule 599.689, MSA/SIS transactions must be posted prior to the reallocation, if applicable. If correcting a transaction that was processed prior to the MSA/SIS being posted, enter the GSI Code O (alpha O) in the GSI field on the PAR1 update screen on the correct transaction to denote the old salary rate. Failure to enter the GSI Code O could result in an incorrect base salary rate and/or anniversary date (i.e., overpayment).

## Lump Sum

Employees who separated from state service without fault prior to the effective date of the consolidation with lump sum pay extending beyond the reallocation effective date, and who were in a designated classification at the time of the separation, should have their lump sum adjusted. Departments must identify and process a 215 transaction to indicate the new classification code and reference the Pay Letter 18-18; prior to submitting a STD. 674.

e.g.: Item 215 Remarks: 1400/18-18

Submit a STD. 674 and indicate “‘Conservationist’ or ‘Research Data’ Consolidation Effective XX/XX/18” in the remarks.

## PAYROLL ADJUSTMENTS

Departments will need to submit form STD. 674/674D to request adjustments for the following payments that have issued for the July/August 2018 pay period:

- Regular pay with dock applied for employees with a mid-month change.
- Regular pay for employees on an alternate work schedule or working a shift and time paid does not equal time possible for the pay period.
- Industrial Disability Leave (IDL)
- Temporary Disability (TD)
- Nonindustrial Disability Leave (NDI)
- State Disability Insurance (SDI)
- Out-of-Class pay – Earnings ID 8G and 8G2 only

Please direct questions regarding the Conservationist or Research Data Consolidation as follows:

SUBJECT AREA	CONTACT	TELEPHONE NUMBER
Program Management (e.g., policy and implementation)	Personnel Management Division CalHR	(916) 324-9381
Program Administration (e.g., rules, regulations, benefits/pay impacts)	Personnel Services Branch CalHR	(916) 323-3343
General Payroll Procedures Disability Payroll Procedures Employment History Procedures	Customer Contact Center SCO	(916) 372-7200

MR:AVB:PMAB