



THE PPSD REGISTER

It is the mission of the Personnel and Payroll Services Division to provide accurate and timely personnel and payroll services through quality customer service.

October 2024

VOL 5, ISSUE 10

State Controller's Office
Personnel and Payroll Services
Division



Key Highlights This Month

- ✓ [Open Enrollment Reminder](#)
- ✓ [Our Promise Campaign](#)
- ✓ [ConnectHR Tips and Tricks](#)
- ✓ [Lump Sum Separation Peak Workload Season Is Almost Upon Us](#)
- ✓ [California State Payroll System Project Monthly Snapshot](#)

SCO KEY INITIATIVES

SCOCONNECT:
[CAL EMPLOYEE
CONNECT/
CONNECTHR](#)

[CALIFORNIA STATE
PAYROLL SYSTEM
\(CSPS\) PROJECT](#)

CONTACT US

(916) 372-7200

ppsdops@sco.ca.gov

Open Enrollment Reminder

The annual Open Enrollment period for health, dental, Premier Vision, Consolidated Benefits (CoBen) and all FlexElect accounts runs from September 16 to October 11. All open enrollment actions will be effective January 1, 2025. Please submit your documents to [ConnectHR](#) on a flow basis and use the [2024 Open Enrollment Resources](#). Check out the [August 2024 PPSD Register](#) for more information on 2024 open enrollment.

Our Promise Campaign

The [Our Promise: California State Employees Charitable Campaign](#) is an annual effort that allows state employees across California to support their favorite nonprofits through payroll giving or one-time donations. This campaign is managed by United Way California Capital Region and raised more than \$44.2 million last year for more than 2,500 nonprofits.

This year's campaign runs from October 1 through December 31 and state employees can donate through their [Cal Employee Connect \(CEC\) account](#). Each department must identify a Campaign Liaison who plans the campaign in their local department alongside United Way/Our Promise staff. They decide campaign timeframes, plan out all campaign communications for their teams, and plan and coordinate campaign events for their offices alongside a designated staff person from United Way/Our Promise. Identify your department's campaign liaison [here](#) and United Way/Our Promise staff will reach out.

Join us to support the causes you care about!

HELPFUL TOOLS



[Email Subscriptions](#)

[Civil Service Weekly Processing Dates](#)

[Decentralized Payroll Calendars](#)

[SCO Letters](#)

[Personnel Action Manual \(PAM\)](#)

[Payroll Procedures Manual \(PPM\)](#)

[Requesting Employment History](#)

[Requesting Pay History](#)

[Statewide Training](#)

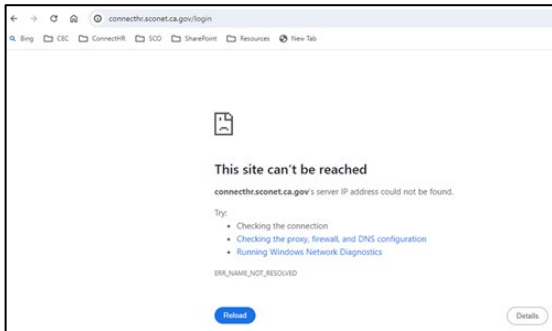
[Payroll Flyers and Global Messages](#)

[Verification of Employment](#)

ConnectHR Tips and Tricks

If you encounter technical issues with ConnectHR, here are some helpful tips and tricks to assist you in troubleshooting and resolving these issues. By following these tips, the process will be expedited when the ConnectHR team's assistance is needed.

Tip 1: "This site can't be reached"



This message indicates that you are not connected to your departmental network or your agency's Internet Protocol (IP) address(s) has been recently updated and needs to be added to the ConnectHR IP Whitelist. To whitelist your new IP address(s), please contact [ConnectHR Help](#) and provide your new IP address(s).

Tip 2: "Upload error message"

If you receive an upload error message, this may mean that the application timed out due to inactivity. The following steps will help resolve the issue:

- 1) Close all opened pages and open a fresh page.
- 2) Clear your browser cache (CTRL + F5).
- 3) If the previous two solutions do not resolve the issue, then a system reboot will be necessary.

You can find additional ConnectHR tips and tricks from the [August 2024 Transaction Supervisors' Forum Presentation](#).

Lump Sum Separation Peak Workload Season Is Almost Upon Us

Fall marks the beginning of the lump sum separation peak workload season. Employees retiring in November or December have the option to defer accrued leave time into two (2) tax years, as well as to maximize contributions to [Savings Plus](#) accounts. Here are some tips to help you and your employees prepare:

1. What's New for the 2023-2024 Peak Season?

- Higher age-based catch-up limit to apply at ages 60, 61, 62, and 63 in 2025
 - Beginning January 2025, separating employees who will reach ages 60, 61, 62, or 63 by the end of the 2025 calendar year may use an alternate increased amount of an additional \$10,000 (or 150% of the regular catch-up amount for 2025, whichever is greater). Therefore, if an employee is

separating between November 1 and December 31, 2024, meets the age requirement, and they contribute into a second tax year (2025), this provision will apply to them.

- For more information, go to: [Catch up for lost time with your Lump Sum Separation Pay \(savingsplusnow.com\)](https://savingsplusnow.com)

2. Utilize the [SCO Lump Sum Toolkit](#) When Documenting Lump Sum Separations

- This toolkit includes:
 - Separation Checklist for Personnel Specialists
 - A Guide for Avoiding Common Errors
 - FAQ
 - Lump Sum Worksheet and Pre-Tax Calculator

3. Communicate Retirement Resources to Your Employees

- SCO and Savings Plus provide information for employees to better understand retirement planning and lump sum separation pay. Consider including the following information via email to your employees:
 - SCO provides the [Civil Service State Employee Guide to Retirement](#) for pertinent information regarding separating from state service.
 - Savings Plus offers [webinars and on-demand presentations](#) for employees on retirement planning topics including: Lump Sum Separation and 457(b) Catch-Up, Enrolling in Savings Plus, and Nearing Retirement.
 - Employees may [schedule an appointment](#) with a retirement specialist to help:
 - Complete the [Savings Plus Lump Sum Separation Pay Contribution Election Form](#);
 - Open a Savings Plus account;
 - Better understand retirement preparation;
 - Become acquainted with investment choices.

4. Remember the Five (5) Workday Threshold on the Savings Plus Lump Sum Separation Pay Contribution Election Form

- The Savings Plus Election Form must be signed, dated, and officially submitted by the employee at least five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to the separation effective date.
- Tip: 30-Day Rule of Thumb— Personnel Specialists should encourage employees to submit necessary documentation at least 30 days prior to their separation date to allow time to address questions, verify calculations of the lump sum, and prepare the Personnel Action Request (PAR).

5. Provide Year-to-Date Accrued Leave and Leave Accrual Payout to your Employees

- To help your separating employees decide how much to cash out or contribute to a Savings Plus account, provide them the following leave information:
 - A printout or PDF of the employee's dated leave balance from the California Leave Accounting System (CLAS) or your departmental leave system;
 - An estimate of their lump sum leave accrual payout amount available at the time of separation;

- A printout or PDF of the employee's year-to-date Savings Plus contributions obtained in Year-To-Date Inquiry (TAXI).
- **Tip:** Be sure to delete or redact the Social Security Number (SSN) when providing confidential information to the employee.

6. Complete the [Lump Sum eLearning Training](#) for Personnel Specialists

- SCO provides [self-paced training modules](#) on many topics for Personnel Specialists, including processing lump sum separation pay. Personnel Specialists can learn the process over eight (8) modules. This course should be supplemented with relevant manuals and departmental training documents.

California State Payroll System Project Monthly Snapshot

The California State Payroll System (CSPS) Project will modernize the current state personnel and payroll system. One hallmark of a modern system is automation. Many manual processes will be automated and physical data entry will be reduced. Jeana O’Ferrall, currently a manager on the CSPS Project’s Organizational Change Management (OCM) Team, has firsthand experience in California State personnel and payroll work. She has over seven (7) years of experience as a Senior Payroll Specialist for SCO and the California Department of Forestry and Fire Protection (CAL FIRE), and as a Personnel Specialist for the California Department of Corrections and Rehabilitation (CDCR).

“Having an automated system would have greatly improved my job by streamlining repetitive tasks that take place in data entry. Additionally, an automated system would have helped ensure compliance with government codes, regulations, benefits and reduce the risk of human error in tasks such as tracking employee data manually and processing payroll and overtime.”

Today, Jeana is focused on getting people ready for the changes that will come with implementing a new system. She works with change leaders in state agencies and departments to bring awareness about the CSPS Project, and she and her team will help support them throughout the change process.

“My department liaisons are most excited about the reduction in manually processing and creating an environment for personnel specialists to work in a more automated system, reducing the workload and turnover in the personnel departments.”

Jeana’s unique perspective brings to light how implementing a modern personnel and payroll system can provide future benefits. Be sure to look out for more testimonials from fellow state colleagues and leaders coming your way every other month.

We are dedicated to information sharing and will continue to keep you updated on progress and milestones. If any questions or inquiries arise, please feel free to reach out to us at CSPSHelp@sco.ca.gov. We also invite you to explore our [CSPS Project](#) website.