



# Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: [SCOTransactionSupervisors@sco.ca.gov](mailto:SCOTransactionSupervisors@sco.ca.gov)

Office of State Controller Malia M. Cohen

August 15, 2024



# SCO KEY INITIATIVES



# **State Controller's Office Personnel and Payroll Services Division ConnectHR and Cal Employee Connect**

Presented By: Moe Adam and Mason Duarte

Contact: [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov)



# ConnectHR Tips and Reminders

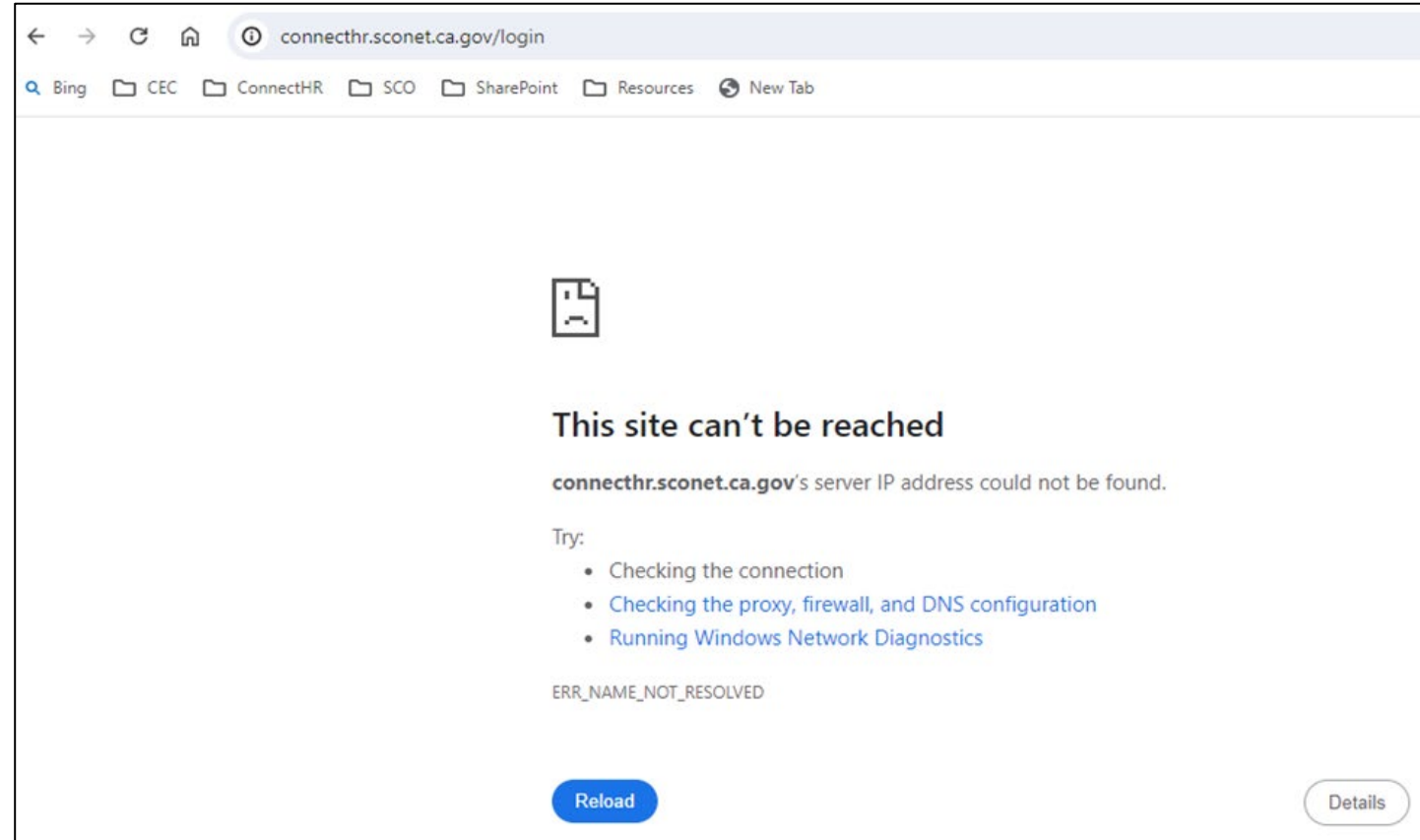
Presented By: Moe Adam

Contact: [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov)



# ConnectHR Tips and Reminders

## Is ConnectHR down?





# ConnectHR Tips and Reminders

The Upload button is grayed-out

Supervisor / Backup Specialist

Name	Email	Phone Number	
<input type="text" value="John Doe"/>	<input type="text" value="Jdoe@sco.ca.gov"/>	<input type="text" value="916-123-4567"/>	<input type="button" value="Save"/>

Comments

0 / 250

# ConnectHR Tips and Reminders



## A/R 035 Cancellation

- SCO is unable to cancel submitted or in process A/R 035 requests. You will need to submit a reversal/refund (STD. 674 or STD. 674 A/R (if it is benefits related) directly to SCO via the ConnectHR Upload feature.

## Upload Error

- Log off and open a new page
- Clear browser cache (CTRL + F5)
- System reboot

## Upload Revoke

- Email the ConnectHR team and provide the upload confirmation or a screenshot of the File Upload details. If requesting to revoke multiple uploads, please attach all confirmation emails in one request. Please do not include a copy of the actual form.



# ConnectHR Tips and Reminders

- Do not have a copy of the Confirmation email?
  - Upload confirmation email delivery delay is possible. If you do not receive the upload confirmation email, please refer to your upload history.

File Upload Details

Upload Information	
Timestamp	2023-03-08 09:20:56
Doc Type	CSU_Benefits_Dual Position 674

File Information	
Filename	std674.pdf
File Type	application/pdf
Size	[Redacted]
Hash	[Redacted]

Submitter Information	
Name	[Redacted]
Username	[Redacted]
Email	[Redacted]
Position Number	[Redacted]
IP Address	10.8.234.52

Employee Information	
Name	[Redacted]
UEID	[Redacted]
Position Number	[Redacted]

Upload History Export Include My Agency's Uploads

Timestamp	User ID	File Name	Doc Type	Empl
2023-03-16 11:55:38	[Redacted]	PDF Test 3 Alves.pdf	CSU_Audits_457	[Redacted]
2023-03-08 10:02:33	[Redacted]	TEST TEST.pdf	Benefits_692_Dental_Change	[Redacted]
2023-03-08 09:20:56	[Redacted]	std674.pdf	CSU_Benefits_Dual Position 674	[Redacted]
2023-03-08 09:19:06	[Redacted]	test 2.pdf	CSU_Benefits_Dual Position 674	[Redacted]
2023-03-08 09:03:39	[Redacted]	TEST 674 Testind Doc [Redacted]	Benefits 692 Dental New	[Redacted]



# ConnectHR Tips and Reminders

## Friendly Reminder

- The ConnectHR team only works with HR offices and does not work directly with employees. When you contact the ConnectHR team, please do not include employees in your email and do not share our contact information with employees.
- If your employees have questions or need assistance, please direct them to contact the CEC team via [CEC – Help and Feedback](#).





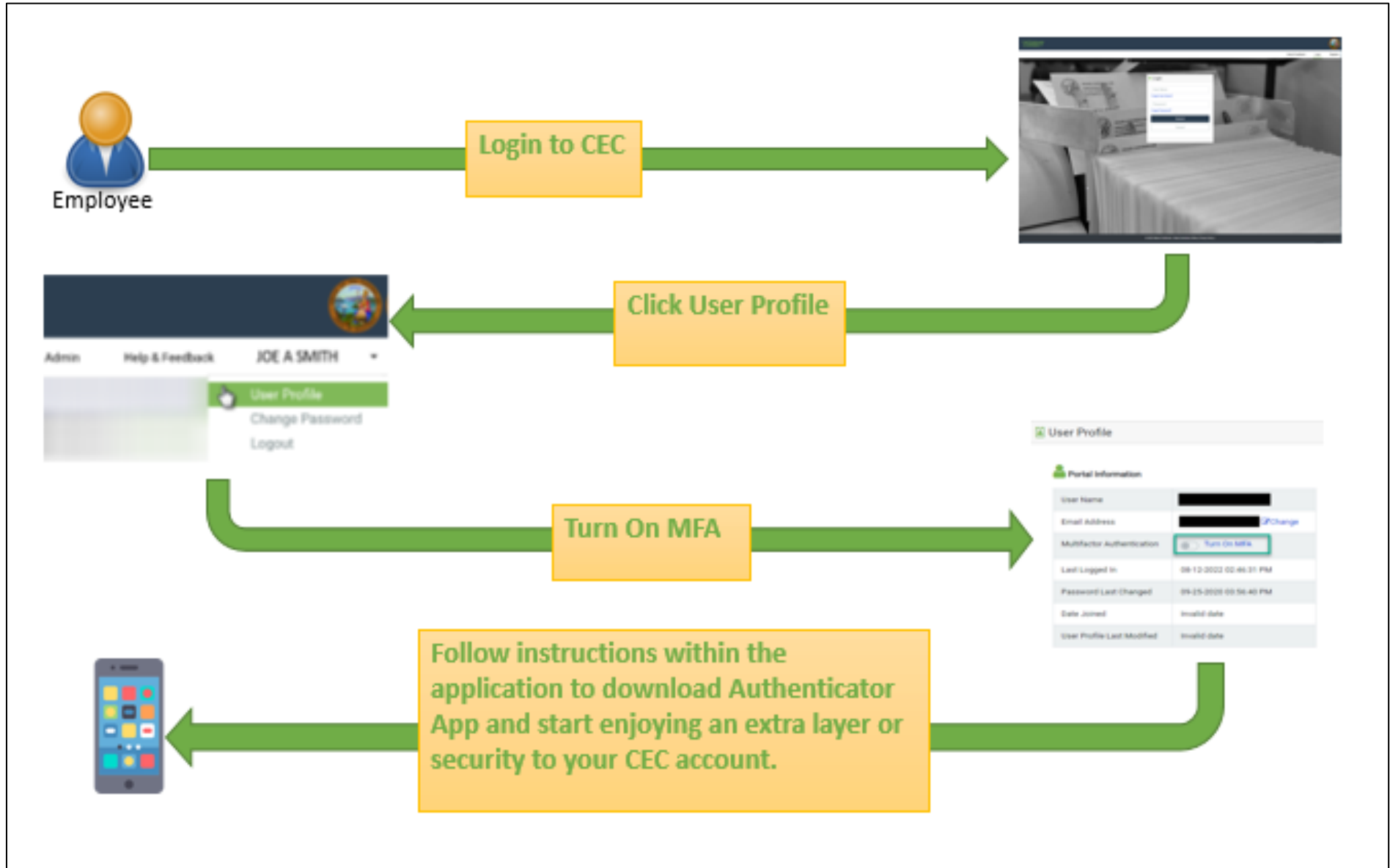
# CEC Multifactor Authentication (MFA)

Presented By: Mason Duarte

Contact: [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov)



# Multifactor Authentication (MFA) Flow





# Cal Employee Connect (CEC) Turn On MFA

To setup Multifactor Authentication, an Authenticator App is needed on a smart device.

- **IMPORTANT:** Once an Authenticator App has been downloaded, **DO NOT DELETE THE APPLICATION.** Employees will need to access their application via their smartphone (preferably to your personal vs. work) each time they log in to Cal Employee Connect (CEC).

Do not have an Authenticator App yet?

- If an employee has not yet acquired an authenticator app on their device, they will need to install one through the respective app store (ex. Google Play or Apple Store).





# CEC: Help and Feedback

Presented By: Mason Duarte

Contact: [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov)

# CEC: Help and Feedback



## Cal Employee Connect:

- **Help and Feedback** - [CEC - Help and Feedback](#)

Cal Employee  
CONNECT

Help & Feedback

Help & Feedback

### Need Assistance or Have Questions?

Please first refer to our [Connect - Frequently Asked Questions \(FAQs\)](#).

### Resources

This area contains links to useful resources for state employees.

#### User Guides & eLearnings

- [Cal Employee Connect User Guide](#)
- [Multifactor Authentication \(MFA\) User Guide](#)
- [eLearning Paycheck Tutorial](#)
- [eLearning Tax Withholdings Change](#)
  - [Tax Withholdings Quick Start Guide](#)



# CEC: Help and Feedback

Help & Feedback

Still need assistance or want to leave feedback?

I need assistance or have questions  I have feedback or would like to leave a suggestion

## Help Submission Form

Problem Category:

Select a category

Problem Type:

Select a problem type

User Name

User Name

Email

Email

Full Name

Full Name

Problem Description

0 / 500



I'm not a robot



Submit

Cancel

2.3.0.rc.2

# CSPS Status – August 2024

Presenter: Jeana O’Ferrall

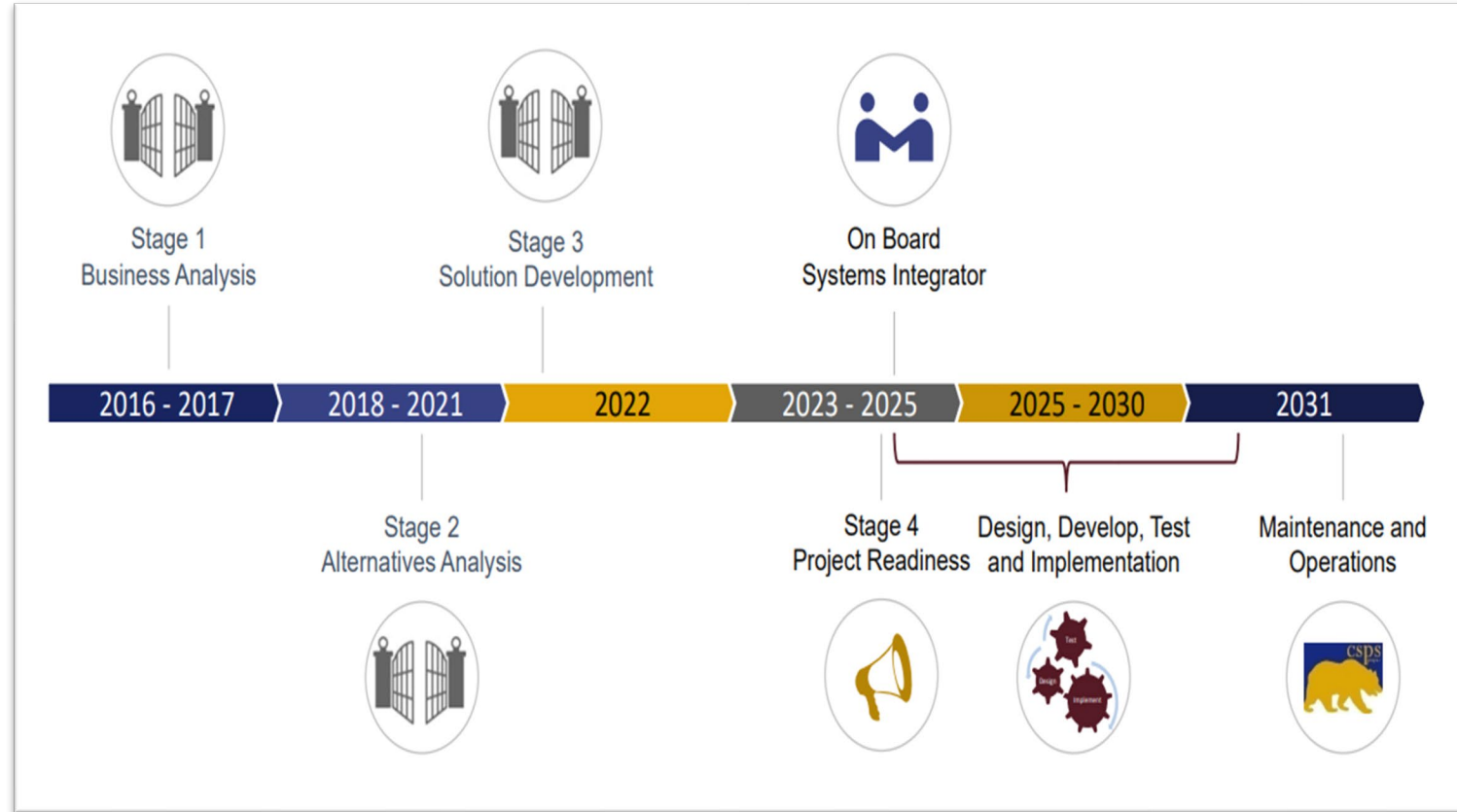
Contact: [CSPSHelp@sco.ca.gov](mailto:CSPSHelp@sco.ca.gov)





# Project Information:

- **Objective:** To modernize and integrate the State’s Human Resource and Payroll systems
- **Goals:** Manager and Employee Self-service, Reduction in manual/paper submissions, Improved reporting capabilities, Efficiencies in processes/workflow



# Project Scope:

- CSPS has defined six (6) Main Business Capabilities (MBCs) to be in-scope of the project.
- Taking a deep dive into each of the six (6) MBCs for the CSPS Project.
- Today we will be covering information on the Time Management MBC.



# Time Management

## Includes:

- Manage timesheets
- Accrue leave based on eligibility and automated accrual waiting periods
- Manage leave buyback programs, including eligibility, lump sum deferral, and lump sum payout
- Manage supplementation with leave credits for disability programs such as Non-Industrial Disability Insurance (NDI), State Disability Insurance (SDI), and Industrial Disability Leave (IDL)
- Manage eligibility and use of programs such as Family Medical Leave Act and Catastrophic Leave
- Calculate qualifying pay periods
- Track and view state service credits and seniority points



Time  
Management

# Status Updates

- **Procurement Team** currently in Phase 2 vendor demos and evaluations; anticipated to go through September 2024.
- **Technical Team** to include information from CalSTRS and Tax Entities in the CSPS Interface Diagram
- **Functional Team** completing the review of Interface Validation Assignment data with **Organizational Change Management Team's** support.
- **Functional Team** continue to identify gaps in the interface inventory.



# STATEWIDE BENEFITS ADMINISTRATION

# Lump Sum Separation Pay Updates

Presented by: Katie Kerr  
Contact: [Leaverollover@calhr.ca.gov](mailto:Leaverollover@calhr.ca.gov)



# Lump Sum Busy Season Approaches



New form went live July 1

Collaboration with SCO to enhance education and resources

Informational memo and employee flyer coming soon!

# SECURE 2.0 – Section 109

## Lump Sum Separation Pay Impacts

- Effective 1/1/2025, participants over age 50 can still take advantage of the existing Age 50+ catch-up option
- Employees who will reach ages **60, 61, 62, or 63** by the end of 2025 are eligible for an increased amount up to \$10,000 (or 150% of the age 50+ catch-up limit for that year, if that amount is greater)
  - This affects employees separating November 1 – December 31 of **this year** who defer into 2025
  - More information will be available on our website and in forthcoming communications



# Upcoming Resources

**Retiring soon?  
You have options for your unused leave time.**

Instead of cashing out and getting taxed on your funds, consider contributing all or a portion of your Lump Sum Separation Pay into your Savings Plus account(s)! This may allow you:

- To maximize your contribution
- To defer your taxes
- The flexibility of how you take payments

View the Lump Sum Separation Pay FAQ, review IRS contribution limits, and download the Lump Sum Separation Pay form by visiting [savingsplusnow.com/lumpsum](https://savingsplusnow.com/lumpsum)

**Option to spread your contributions**  
If your separation date is between November 1 and December 31, you may defer your separation pay into your Savings Plus account into both the current and next tax year! This allows you to maximize contributions for both years.

**Catch up for lost time**  
You may qualify to contribute more than the IRS contribution limit to your 457(b) plan if you did not contribute the maximum in previous years. Learn more about Traditional Catch-up by contacting the Savings Plus Service Center at (855) 616-4776.

**New IRS provision expands limits**  
Starting in 2025, participants over age 50 can still take advantage of the age 50+ catch-up - but for those who will reach ages 60, 61, 62, or 63 by the end of the calendar year, they are eligible for an increased amount up to \$10,000 (or 150% of the age 50+ catch-up limit for the calendar year that amount is greater). Learn more by visiting [savingsplusnow.com](https://savingsplusnow.com)

**Take Action!**  
Your Lump Sum Separation Pay paperwork must be submitted 30 days prior to your separation date.

**savingsplus**  
CALIFORNIA STATE EMPLOYEE 401(a) & 457(b) PLANS

**CAL HR**  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES | Savings Plus Program

Savings Plus Program  
1515 S Street, North Building, Suite 500  
Sacramento, CA 95811  
(916) 909-3717  
[SavingsPlusNow.com](https://SavingsPlusNow.com)

Secretary, Government Operations Agency Amy Tong  
Governor Gavin Newsom  
Director Eraina Ortega

**DATE:** August X, 2024  
**TO:** State of California Personnel Staff  
**FROM:** Katie Kerr, Operations Manager, Savings Plus Program  
**SUBJECT:** **Lump Sum Separation Pay**

Separating employees have the option to transfer their eligible accumulated unused leave time into a Savings Plus account(s). Transferring their Lump Sum into the pre-tax option allows employees to defer taxes until they take a distribution. Employees may also contribute into a Roth option.

Generally, if employees separate from state employment between November 1 and December 31, they may use **Lump Sum Separation Pay to contribute to the plan for both the current and the following tax year.**

Employees may contribute up to the maximum IRS limit for both the 457(b) account and the 401(k) account. For 2024, the annual limit for either plan is \$23,000. Employees aged 50 or over are allowed an additional \$7,500, up to an annual limit of \$30,500.

**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 50% catch-up increase, whichever is greater), up to an annual limit of \$34,250. **Therefore, if an employee is separating between November 1 and December 31, 2024, and they contribute into a second tax year (2025), this provision will apply to them.**

More information about this new IRS provision is available on our website here: [IRS Rules](https://savingsplusnow.com)

# We are here to help!

- Incorporating feedback to improve our internal messaging and training for Field and Solutions Center staff
- Working with SCO Program Management and Analysis Bureau (PMAB) - Statewide Training to update Lump Sum Toolkit and Training Modules
- HR/Payroll/Personnel Representatives can contact us directly at [leaverollover@calhr.ca.gov](mailto:leaverollover@calhr.ca.gov) or (916) 909-3717
- Please continue to direct employees to the Solutions Center at (855) 616-4776





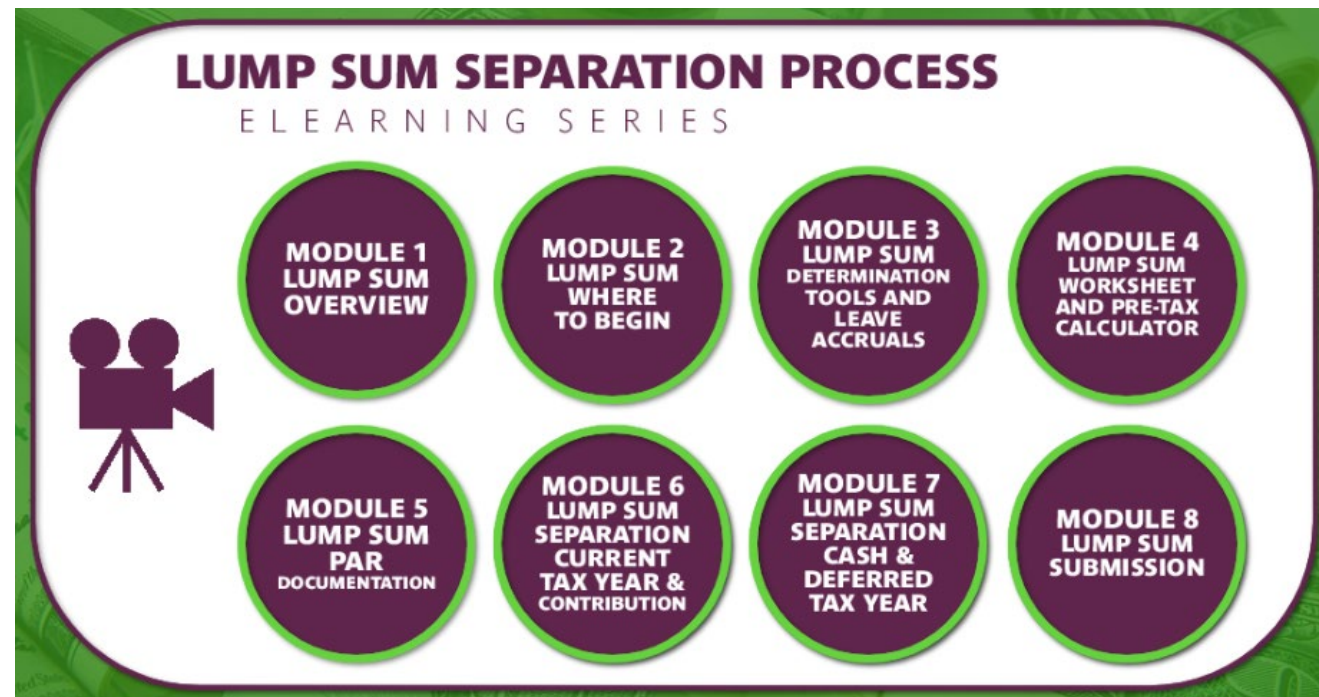
# Statewide Training Program

Presenter: Siobhan Hallinan

Contact: [PPSDTraining@sco.ca.gov](mailto:PPSDTraining@sco.ca.gov)

## Training Spotlight for Human Resources Specialists

- Virtual Self-Paced Learning
  - Today's Highlight: [Lump Sum Separation Process eLearning Series](#)
    - Lump Sum Separation Process Overview:  
<http://cacontrollers.adobeconnect.com/p72davr44hxz/>





# Affordable Care Act Program

Presenter: Steve Hallett

Contact: [ACASupport@sco.ca.gov](mailto:ACASupport@sco.ca.gov)

## 2021 1095-C Corrections

- 2021 Corrected 1095-C are expected to be mailed to employees by the end of the month
  - SCO will release an email blast once the mailing of the forms is complete, along with the anticipated date the Corrected 1095-C Issued report will be available
- 1095-C Mailing
  - All 1095-Cs are printed with a SCO return address
  - All undeliverable 1095-Cs will be returned to the agency to be forwarded to the employee
  - All Corrected 1095-Cs will be mailed to the employee address on file as of April 2024
- SCO will now provide a Corrected 1095-C Issued report on Mobius View and ViewDirect
  - This report will include
    - Employees who qualified for a New 2021 1095-C through the corrections process
    - Employees who received a corrected 2021 1095-C
    - Employees with no change to their original 2021 1095-C
    - Original 2021 1095-C Issued will be removed\*



# Affordable Care Act Program

Presenter: Shirley Chau

Contact: [ACASupport@sco.ca.gov](mailto:ACASupport@sco.ca.gov)

## 2021 Information Reporting Penalties (IRP)

### What's New?

- Check out the new [Affordable Care Act \(ACA\) Information Reporting Penalties \(IRP\)](#) webpage

### What's Coming?

- IRP Report
  - A listing of all corrected records submitted to the IRS for your agency
- IRP Appeals Process
  - ACA Virtual Appeals Process Overview coming in Fall 2024
    - ACA will review the IRP Appeals form and process
    - Answer any questions you may have about how to prepare and submit your appeals



# Affordable Care Act Program

Presenter: Jordan Kergan

Contact: [ACASupport@sco.ca.gov](mailto:ACASupport@sco.ca.gov)

## 2024 Virtual Affordable Care Act System (ACAS) Training

### Part 2 ACAS Virtual Training Class Updates and Reminders:

- **CalHR Part 1 ACA Policy:** Wednesday, August 21, 2024: 9:00 a.m. to 10:30 a.m.
- **ACAS Training Part 2:** Thursday, August 22, 2024, Scheduled training will be divided into the following dates to accommodate current waitlist:
  - Tuesday, August 27, 2024: 9:00 a.m. to 12:00 p.m.
  - Thursday, August 29, 2024: 9:00 a.m. to 12:00 p.m.
  - Wednesday, September 4, 2024: 9:00 a.m. to 12:00 p.m.
- All Training sessions will be held virtually via Microsoft Teams
- ACAS Training Database access required to attend, only those registered for the specific time and date will be able to attend. (Forwarded invites will not have access)

Thank you!

# BREAK



## 5 MINUTES



# CalHR Transaction Supervisors' Forum Update



CalHR Benefits Division  
August 15, 2024



# CalHR Benefits Division

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The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by 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.

# Benefits Program Updates



CalHR Benefits Division  
August 15, 2024

# Affordable Care Act (ACA)

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Presenter: Sarah Brateng  
Contact: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)

- ACA Quarterly Compliance Review
  - Departments notified of their outstanding errors in the Affordable Care Act System (ACAS) have until **September 13, 2024**, to certify that the errors were corrected by returning the Quarterly ACA Compliance Review Notification document to [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov).
  - As we approach the end of the year, it is important that **all** errors on the compliance reports are corrected. Information that is incorrectly reported to the Internal Revenue Service could result in information reporting penalties.

# Affordable Care Act (ACA)

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Presenter: Sarah Brateng  
Contact: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)

- Observations from the ACA Compliance Reports
  - The compliance reports that reflect employees with a 350-health deduction in pay history without an “acceptance of health coverage” (e.g., 3A ACA status code) and employees with a 2D ACA status code (indicating the employee is newly eligible for health benefits) but does not have an “offer of health coverage” (e.g., 1A ACA status code) captured in the ACAS continue to have the greatest number of errors.
  - The “Health Event Transaction” COGNOS Report in myCalPERS can help identify ACAS updates for employees that have elected to enroll health benefits and the effective date of coverage.
  - While SCO implemented an auto population program for the 2D ACA status code for certain positions that are eligible for health benefits, departments are still responsible for updating the employee’s ACAS record to indicate that the employee was offered and/or enrolled in health coverage. The effective date of the offer of health coverage (e.g., 1A ACA status code) should reflect the first of the month following the qualifying event.

# Affordable Care Act (ACA)

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Presenter: Sarah Brateng  
Contact: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)

- Information Reporting Penalties up to **\$660** for incorrect reporting for the 2024 Reporting Year
  - Failure to file a correct information return (1095-C) with the IRS: **\$330**
  - Failure to furnish a correct employee statement (1095-C): **\$330**

**Note:** Departments will be responsible for 100 percent of any information penalties assessed for the 2024 reporting year.

# Affordable Care Act (ACA)

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Presenter: Sarah Brateng  
Contact: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)

- ACA Training
  - The next ACA trainings are scheduled for:
    - Wednesday, August 21, from 9:00 a.m. – 10:30 a.m. (Part 1) and Thursday, August 22, from 9:00 a.m. – 12:00 p.m. (Part 2)
    - Wednesday, September 25, from 9:00 a.m. – 10:30 a.m. (Part 1) and Thursday, September 26, from 9:00 a.m. – 12:00 p.m. (Part 2)
  - Departments can send an email to [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov) to register for training.
  - Additional training dates through the end of the year are available on SCO's "[Affordable Care Act Training](#)" webpage.

# Dependent Re-Verification (DRV)

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Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## What is DRV

The Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and Premier Vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.

Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental and Premier Vision benefits. The bargaining unit contracts specify that family member eligibility for dental and Premier Vision benefits shall be the same as that prescribed for health benefits.

# Dependent Re-Verification (DRV)

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Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## DRV Updates

- CalHR automated the DRV process for dental and Premier Vision effective January 2023.
- The current health Dependent Eligibility Verification (DEV) process through CalPERS and the MyCalPERS system will remain unchanged.
- Departmental personnel offices are required to update dental and Premier Vision dependent re-verifications through the Family Connect Portal (FCP).
- All state agencies must have an administrative account, who is at the supervisor or above class, in the Family Connect Portal (FCP) to manage each agency's authorized user accounts to update DRV transactions.
- Department compliance with DRV regulation will be monitored and addressed by Health Benefit Officers and FCP Department Administrators.



# Dependent Re-Verification (DRV)

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Presenter: Delia Baulwin

Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## DRV Updates

- [CalHR 781 Dependent Eligibility Checklist](#) and [CalHR 025 Affidavit of Parent-Child-Relationship](#) (dental/vision) have been updated to comply with CalPERS documentation revisions provided in the December 1, 2023, [Circular Letter #600-046-23](#), Eligibility Criteria for Dependents in a Parent-Child Relationship.
- CalHR has officially launched FCP Enhancements for Disabled Dependent and Parent-Child Relationship certifications.
  - Dependents enrolled in dental and/or Premier Vision only who require certification as a disabled dependent or PCR, will be processed by CalHR's DRV unit.
- The CAHP and CCPOA enrollment data in FCP is still pending.

# Dependent Re-Verification (DRV)

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Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## **DRV Birth Month Cycle Updates:**

- The following birth month cycles have been completed and departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits:
  - 2023: March, June, September and December 2023
  - 2024: January and April
- July 2024 birth month cycle concluded on July 30, all DRV alerts should be processed for documents received timely.
- October 2024 birth month cycle: 90-day notices and 60-day notices have been processed with DGS for mailing on July 1 and August 1.

# Dependent Re-Verification (DRV)

Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

Total notices mailed to date:

<b>Birth Month Cycle</b>	<b>1<sup>st</sup> Notice 90 days before end of birth month</b>	<b>Total Mailings of 1<sup>st</sup> Notice</b>	<b>2<sup>nd</sup> Notice 60 days before end of birth month</b>	<b>Total Mailings of 2<sup>nd</sup> Notice</b>	<b>3<sup>rd</sup> Notice 30 days before end of birth month</b>	<b>Total Mailings of 3<sup>rd</sup> Notice</b>	<b>Total Mailings</b>
<b>March</b>	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
<b>June</b>	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
<b>September</b>	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
<b>December</b>	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
<b>January</b>	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
<b>April</b>	Jan-2024	8,196	Feb-2024	7,862	Mar-2024	6,254	22,312
<b>July</b>	Apr-2024	8,783	May-2024	8,230	Jun-2024	7,942	17,013
<b>October</b>	Jul-2024	9,108	Aug-2024	N/A	Sep-2024	N/A	9,108

\*90 notice for March birth month cycle only included DRV notices for Health benefits.

# Dependent Re-Verification (DRV)

Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## Disabled Dependent Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is organized into several sections:

- Header:** Includes the Family Connect logo and navigation links for Main Page, Reports, Admin, and FAQ. The user is logged in as Delia Baulwin.
- Form Fields:**
  - Dependent Type \*:** A dropdown menu set to 'Disabled Child'. A red box highlights this field, and a red arrow points to the 'Dependent Type Locked' checkbox.
  - Status:** A dropdown menu set to 'Pending'.
  - Birth Date \*:** A text field containing '04/04/1989', highlighted with a red box.
  - Dental Plan \*:** A dropdown menu set to 'Yes'.
  - Vision Plan \*:** A dropdown menu set to 'Yes'.
  - Re-verification Effective Date:** A text field containing '05/01/2020'.
  - Dental Plan Effective Date:** A text field containing '01/01/2022'.
  - Vision Plan Effective Date:** A text field containing '01/01/2024'.
  - Record Source:** A dropdown menu set to 'Carrier File'.
  - Last Name \*:** A text field with a blurred name.
  - Re-verification End Date:** A text field containing '04/30/2025'.
  - Dental Permitting Event:** A dropdown menu set to '-- Record Source --'.
  - Vision Permitting Event:** A dropdown menu set to '-- Record Source --'.
- Buttons:** A 'Delete Dependent' button is located below the form fields. At the bottom, there are 'Save' and 'Cancel' buttons.
- Comments:** A text area containing the comment 'Added by Carrier File 2022-07-21'.

# Dependent Re-Verification (DRV)

Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## Disabled Dependent Certification

The screenshot displays the 'Disabled Dependent Certification' form within the Family Connect system. The interface includes a top navigation bar with a home icon, a settings gear, and the Family Connect logo. Below the navigation bar are icons for 'MAIN PAGE', 'REPORTS', 'ADMIN', 'FAQ', and a 'Logout Delia Baulwin' link. The main content area is divided into several sections:

- 1 Year Notification: April 2019:** Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 90 Day Notification: January 2020:** Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 60 Day Notification: February 2020:** Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 30 Day Notification: March 2020:** Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- Certify Dependent:** Includes a 'Certified' checkbox (checked), a 'Document Received Date \*' text input field (04/30/2020), a 'Re-certification Effective Date \*' text input field (05/01/2020), a 'Re-certification End Date \*' text input field (04/30/2025), and a 'Dependent Certified By' dropdown menu (CalPERS). This section is highlighted with a red border.
- Certification Document List \*:** A list of checked items: 'Authorization to Disclose Protected Health Information (CalHR XXX) \*', 'Dependent Eligibility Verification Checklist (CalHR Form 781) \*', and 'Disabled Dependent Member Questionnaire and Medical Report (CalHR XXX) \*'.
- Notes:** A text area for additional information.

# Dependent Re-Verification (DRV)

Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## Parent-Child Relationship Certification

Review Dependent

**Dependent Type \***  
Parent Child Relationship

**Dependent Type Locked**

**Status** Status History  
Pending

**Status Date**  
5/10/2023

**Record Source**  
Carrier File

**First Name \***

**Middle Name**

**Last Name \***

**Birth Date \***  
09/10/2012

**Re-verification Effective Date**  
10/01/2023

**Re-verification End Date**  
09/30/2024

**Dental Plan \***  
Yes

**Dental Plan Effective Date**  
01/01/2023

**Dental Permitting Event**  
-- Record Source --

**Vision Plan \***  
Yes

**Vision Plan Effective Date**  
01/01/2020

**Vision Permitting Event**  
-- Record Source --

Delete Dependent

**Comments**  
Added by Carrier File 2022-07-21

Save Cancel

Alerts

# Dependent Re-Verification (DRV)

Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## Parent-Child Relationship Certification

CalHR Family Connect

Settings

FAMILY CONNECT  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Baulwin

90 Day Notification: June 2023

Is Notified

Notified Date

Notified By

60 Day Notification: July 2023

Is Notified

Notified Date

Notified By

30 Day Notification: August 2023

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Document Received Date \*

09/30/2023

Dependent Certified By

CalPERS

Re-certification Effective Date \*

10/01/2023

Re-certification End Date \*

09/30/2024

Date Coverage History

Certification Document List \*

- Affidavit of Parent-Child Relationship (CalHR 025) \*
- Dependent Eligibility Verification Checklist (CalHR Form 781) \*
- Copy of first page of employee's federal or state income tax return such as IRS Form 1040 from the previous tax year listing child as a tax dependent (i)
- One Primary and two Secondary Supporting PCR Documents (see Supporting PCR Documentation on the CalHR 781) (i)

Notes

4:00 PM  
5/3/2024

# Dependent Re-Verification (DRV)

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Presenter: Delia Baulwin  
Contact: [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)

## Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources from BAM, FCP Manual, and Human Resources Manual.
- Contact the DRV Unit at CalHR with questions and processes related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or Premier Vision benefits only.
- Departmental personnel offices can send DRV and FCP related questions via email to [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov).
- Current response time is five (5) business days.



# Benefits Project Updates



CalHR Benefits Division  
August 15, 2024

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# Benefits Open Enrollment

Presenter: Bobby Saetern

Contact: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Open Enrollment (OE) Updates

- The 2024 OE period will take place September 16 to October 11, 2024.
- State employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, Flex, COBRA, long-term disability and legal insurance.
- All changes made during the 2024 OE period will be effective January 1, 2025.

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# Benefits Open Enrollment

Presenter: Bobby Saetern

Contact: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Open Enrollment Events

- The CalHR Benefits Team is collaborating with stakeholders to plan, prepare and host OE events for the 2024 season.

## In-Person Fairs

- Southern CA – DSH Norwalk, September 10, 2024, 10:00 a.m. – 1:00 p.m.
- Central CA – DSH Coalinga, September 18, 2024, 11:00 a.m. – 3:00 p.m.
- Northern CA – State Capitol, September 25, 2024, 11:00 a.m. – 2:00 p.m.

## Virtual Benefits Fair

- Two consecutive days, September 11–12, 2024, 10:00 a.m. – 1:00 p.m.
- Hosted on Teams. Registration form will be distributed in August.
- The same information is shared across both days.

For more information, please visit the [Open Enrollment](#) webpage on the Benefits website.

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# Benefits Open Enrollment

Presenter: Bobby Saetern

Contact: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Virtual Lunch and Learn Sessions

- CalHR is planning to host two Virtual Lunch and Learn Sessions for HR Professionals on September 24, 2024, and October 8, 2024, from 11:30 a.m. – 12:30 p.m.
- During these sessions, information will be shared by CalHR and SCO.
- The first 30-minutes of these sessions will provide OE updates and reminders followed by a 30-minute Q&A session for HR Professionals to ask OE related questions.
- Communication regarding the Virtual Lunch and Learn Sessions will be shared, and information will also be updated on the CalHR Benefits website later this month.
- To attend a Virtual Lunch and Learn, please subscribe to the subscription list on the [HR Professionals](#) webpage and a meeting notice will be sent to you within seven (7) days of the meeting.

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# Benefits Open Enrollment

Presenter: Bobby Saetern

Contact: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

**Reminder:** Please connect with your employees regarding their specific Open Enrollment questions.

## Contact

- Departmental personnel offices can send OE related questions via email to [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov).
- Current response time is five (5) business days.

## Resources

- [CalHR Benefits website](#)
- [CalHR Benefits Calculator](#)

# Benefit Program Updates

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Presenter: Monica Chavez  
Contact: [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)

## Vision Program

- Improving VSP Membership Profiles for Basic Vision:
  - VSP now receives a demographics file for Basic Vision employees.
  - All State of CA employees now have access to Eyeconic, VSP's online store.
- New Vision Handbook coming soon.

## Training Recommendations

- Benefits Administration Manual Training – [online CalLearns](#)
- Employee Benefits Orientation Training – [online CalHR Webpage](#)

## Benefit Premiums

- Premiums cannot be waived for months when services are not used.

# FlexElect Program

Presenter: Monica Chavez

Contact: [flexelect@calhr.ca.gov](mailto:flexelect@calhr.ca.gov)

## Flex Program Updates

- Discontinuation of the “10<sup>th</sup> of the Month Rule”
  - Effective 8/1/2024, CalHR will no longer adhere to the 10th of the month rule for FlexElect/CoBen Cash Options or FlexElect Reimbursement Program.
    - All forms within the posted SCO processing dates on 8/1/2024 and forward will also be excluded from the 10th of the month restriction.
  - We will be updating the Flex BAM language to match what is in the Flex handbook.

# CalHR Benefits' Resources Cont.

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## Contacts:

- ACA Program [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)
- BAM Training [BAMTraining@calhr.ca.gov](mailto:BAMTraining@calhr.ca.gov)
- COBRA [COBRA@calhr.ca.gov](mailto:COBRA@calhr.ca.gov)
- Dental Program [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)
- Dental/Vision Authorization Portal [VisionDental.Authorization@calhr.ca.gov](mailto:VisionDental.Authorization@calhr.ca.gov)
- Dependent Re-verification (DRV) Program [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)
- FlexElect/CoBen Program [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)
- Group Legal [Grouplegal@calhr.ca.gov](mailto:Grouplegal@calhr.ca.gov)
- Life Insurance [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov)
- Long Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)
- Third Party Pre-Tax Parking Reimbursement Account [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)
- Vision [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)
- Open Enrollment [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)
- Virtual Benefits Fair [BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)



# CalHR Benefits' Resources

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## Websites

### Benefits Website

<https://calhr.benefitsprograms.info/>

### BAM Training Questions

[BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)

### Healthier U Connections

<https://www.calhrwellness.com/en/welcome-california-state-employees/>

### Human Resources

<https://calhr.benefitsprograms.info/state-hr-professionals/>

### State Employees

<https://calhr.benefitsprograms.info/state-employee/>

### HR Manual

<http://hrmanual.calhr.ca.gov/Home/ManualItem>



# Statewide Benefits Program

Presenter: Ryan Baughman

Contact: [ppsdcsbenefits@sco.ca.gov](mailto:ppsdcsbenefits@sco.ca.gov)

## SCO Open Enrollment Resources Overview

The following are available on the SCO's [2024 Open Enrollment Resources](#) webpage:

- Checklists - FlexElect/CoBen Cash Option, FlexElect Reimbursements, Dental
- Examples and Common Errors - Dental, FlexElect/CoBen Cash Option, FlexElect Reimbursements
- Open Enrollment Frequently Asked Questions (FAQs)
- SCO Tips for 2024 Open Enrollment on STD. 701C, STD. 702, and STD. 701R



# Statewide Benefits Program

Presenter: Ryan Baughman

Contact: [ppsdcsbenefits@sco.ca.gov](mailto:ppsdcsbenefits@sco.ca.gov)

## Important Dates

- 2024 Open Enrollment Period: **09/16/2024 - 10/11/2024**
- Permitting Event Date: **09/16/2024**
- Effective Date: **01/01/2025**
- Last day to upload Open Enrollment forms: **11/01/2024**
- Last day to upload forms corrected as a result of PR250: **11/20/2024**
- Last day for employees to submit cancellation/changes to Cash Option or Reimbursement Accounts: **12/31/2024**
- Last day for agencies to submit cancellation/changes to Cash Option or Reimbursement Accounts: **01/02/2025**



# Statewide Benefits Program

Presenter: Ryan Baughman

Contact: [ppsdcsbenefits@sco.ca.gov](mailto:ppsdcsbenefits@sco.ca.gov)

## VSP Premier Vision - Deduction 361-475

- Vision Service Plan (VSP) had a system reporting error for 2024 plan year, resulting in erroneous cancellation of approximately 24 State Employee's 361-475 deduction.
- VSP has corrected the issue; however, it will be a manual process of adding back Premier Vision deductions to the employee's warrant.
- If you have an employee whose Premier Vision deduction appeared to have dropped for no known reason, please email [stateofca@vsp.com](mailto:stateofca@vsp.com) who will research to see if the employee was impacted. Affected employees will be reinstated retroactively, and their premiums will be covered by VSP.



# STATEWIDE PROGRAM UPDATES



# Personnel Civil Service Audits

Presenter: Renee Menefee

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

## Personnel Action Request (PAR) Reminders

- PARs must be submitted using blue or black ink
  - Red ink will not be accepted
  - [Personnel Action Manual \(PAM\)](#) Section 2.1
- Signature/Date is a required field
  - Line 11 must be completed
  - PAM Section 2.206
- Turnaround (TAD) PARs must be used as page one of the PAR package
  - Turnaround PARs can be accessed using Mobius View
  - PAM Section 2.1
- Follow the format requirements in the PAM
  - Complete the PAR fields following the PAM instructions
- 960 code must be completed for PAR corrections/voids
  - PAM Section 2.148
- Item 620 must be in the correct field/format for vacation/annual leave
  - PAM Section 2.82

A ding notice will be sent to the department's universal mailbox for PARs that are received on or after **August 19, 2024**, when the above items are submitted incorrect/incomplete



# Personnel Civil Service Audits

Presenter: Renee Menefee

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

## PAR Documentation Training

- Please review the [Statewide Training Program](#) webpage for available eLearning modules



# Statewide Tax Support Program

Presenter: Monique Perez

Contact: [PPSDSTSP@sco.ca.gov](mailto:PPSDSTSP@sco.ca.gov)

## Verification of Employees Identified as Nonresident Aliens

- [Personnel Letter #24-011](#): Verification of Employees Identified as Nonresident Aliens
- [ViewDirect and Mobius View](#) Reports are on ViewDirect until December 31, 2024. Report name in ViewDirect, PDW7170
- The Statewide Tax Support Program does a bi-annual verification so if you submitted a form within the first half (January through June) of the year, then you would have to submit a form for the second half (July through December).
- **ALL agencies** are required to submit the verification forms bi-annually to indicate any Additions, Deletions, or if you do not have any Nonresident Aliens to report.
- Forms are **due by September 15, 2024**
- SCO will contact the department Chiefs if forms are not received by September 15, 2024





# Business Systems Enhancements Section

Presenter: Arlene Chambers

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

## Employees with blank EID but populated associated amount

- [Personnel Letter #24-007](#): Employees with Blank EID but Populated Associated Amount – ViewDirect Report
  - Instructed departments to review Employment History (EH) transactions listed on [ViewDirect or Mobius View](#) under report ID PDSQ0122 and correct all records by May 31, 2024.
  - **To date, approximately 40% of records have been corrected.**
- If departments have not already done so, please review and correct identified records as soon as possible.
- A refreshed version of the ViewDirect report will be forthcoming. In the meantime, please continue to use the existing version of the ViewDirect report to identify and key corrections.

# Business Systems Enhancements Section

Presenter: Arlene Chambers

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

## Invalid alternate range for the class codes

- Emails were sent to departments on August 7, 2024, to request correction of employee records that contain an invalid alternate range for the class code.
  - **Corrections should be completed by August 19, 2024.**
- Please remember that alternate range (Item 335) is allowable on the following miscellaneous transactions:
  - GEN
  - SAL
  - PUN
- If processing an out-of-sequence transaction and the alternate range for your transaction is different from what is in the current record, one (1) of two (2) values should be key entered in that data item:
  - An '\*' if the alternate range is not valid for that transaction/class code; **or**
  - The appropriate alternate range at the time of the transaction.
- Otherwise, an incorrect alternate range may carry forward to subsequent transactions and result in an invalid alternate range for the class code.
- Education: Resources
  - [PAM Section 2.45](#): Item 335 - Alternate Range
  - [PAM Section 9](#): PAR Corrections Out of Sequence Voids
  - [Statewide Customer Contact Center](#) (916) 372-7200





# Human Resources (HR) Suggestions

Presenter: Nastassja Johnson

Contact: [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)

- We received 11 HR suggestions in the last three (3) months.
- We are in the process of implementing two (2) of the suggestions and will share as soon as they are live.
- Remember to submit your HR suggestions to the SCO HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov).

# 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
- Include the employee's complete social security number (SSN) when sending documents through ConnectHR
- Check [Weekly Processing Dates](#) before sending inquiries
- 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
- 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!

# SCO Resources

## 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](mailto: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](mailto:CLAS@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or [DSA@sco.ca.gov](mailto:DSA@sco.ca.gov)
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- Management Information Retrieval System (MIRS) Email [PPSDMIRS@sco.ca.gov](mailto:PPSDMIRS@sco.ca.gov)
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200

