



Transaction Supervisors' Forum

Presented By: Nastassja Johnson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

December 17, 2024

Survey Questions





Question

Presenter: Erin Leight

Contact: PPSDTraining@sco.ca.gov

Regarding the change allowing Personnel Specialists to self-schedule their own training, will there be a component for Supervisor approval before the registration is accepted? Personnel Specialists are not privy to other's vacation schedules, upcoming special project workload, and other factors that affect their work area. This could become a cycle of multiple cancellations if Supervisors don't have any insight.

Answer: Enhancements to our registration process now allow for the immediate supervisor to be notified upon their staff's class registration. However, we continue to highly recommend that Personnel specialists coordinate and gain permission from their immediate supervisor prior to enrolling in virtual instructor led classes offered by PPSD.



Question

Presenter: Rebecca Garcia

Contact: ppsdcsbenefits@sco.ca.gov

The State Controller's Office is sending post audit notice emails with deadlines, and one of the deadlines states, "Last day for agencies to submit cancellation/changes to Cash Option or Reimbursement Accounts: January 2, 2025". However, the Benefits Administration Manual (BAM) states agencies have until January 10, 2025. Can you please confirm the true deadline?

Answer: The Benefits Administration Manual states that the employee must sign a change or cancel of open enrollment form by December 3. The first date for personnel to send that in if your employee sent it in on December 31 would be January 2 due to the holiday. The document must have a received date before January 10 for it to be accepted.



SCO KEY INITIATIVES

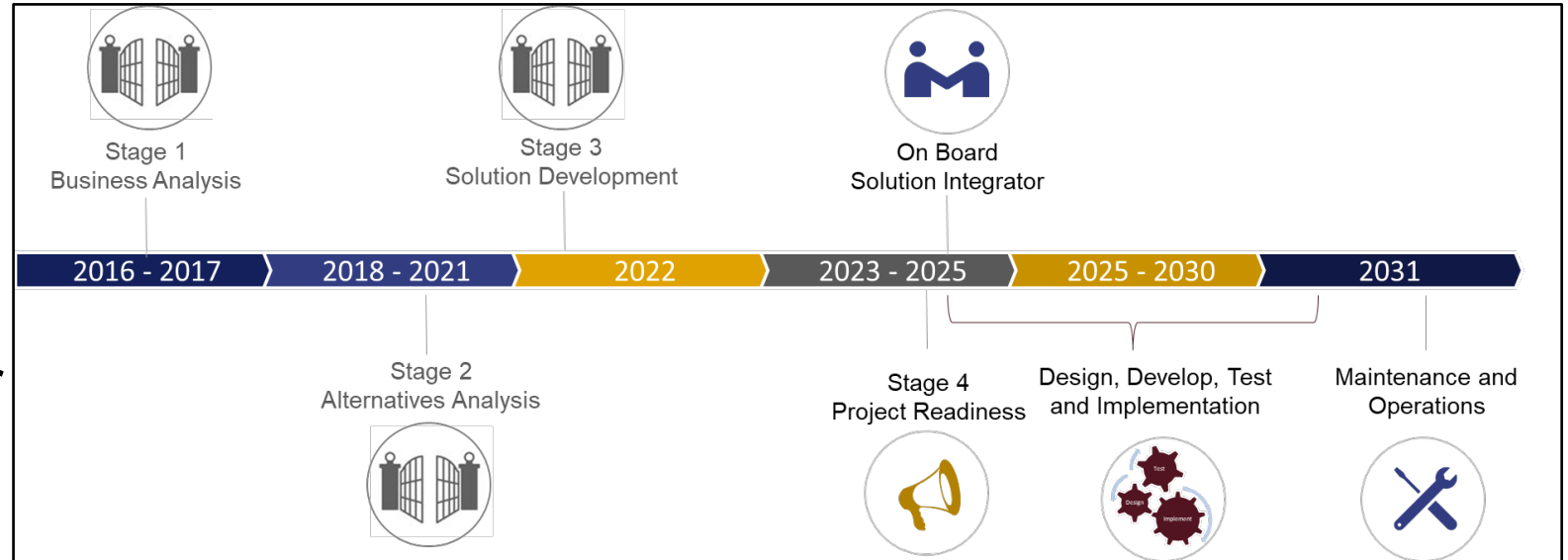
CSPS Status – December 2024

Presenter: Dominick Mullane, Agency Change Expert (ACE)

Contact: 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



Status Updates

- **Project Management Office** will submit project artifacts to CDT for Stage 4 Project Readiness and Approval.
- **Technical Team** will complete updates to the Employee History page utilizing state web template.
- **Functional Team** completed reviewing and adding Retroactive considerations for Position Control Use Cases.
- **Organizational Change Management Team** will gain approval of wireframe/site map design for the “CSPS Re-Imagined Webpages” effort.



STATEWIDE BENEFITS ADMINISTRATION



Transaction Supervisors' Forum:

December 17, 2024

CalHR Benefits Division Updates

*Benefits That Support
a Life Well Lived.*

About the Benefits Division

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





ACA Updates

Presenter: Lisa Hatten

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Detailed Safe Harbor Outreach

- CalHR has reached out to departments with errors observed on the Detailed Safe Harbor Report for the state's full-time employees who are eligible for health benefits but the health benefits status data in the ACAS reflects otherwise.
- Correction instructions were provided to departments, as well as a summary of all errors on the monthly compliance reports, with a reminder to correct all errors in the ACAS by December 27, 2024.
- Note: The ACA compliance reports pick up most, but not all errors in the ACAS. Departments are expected to utilize other reports available on SCO's Management Information Retrieval System (MIRS) and the COGNOS reports in myCalPERS to monitor their ACA compliance.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

December Monthly Compliance Review

- The December Monthly ACA compliance reports are available on SCO's ViewDirect/Mobius. All errors on the reports need to be corrected by December 27, 2024, to be reflected in the annual reporting to the IRS and reduce the state's exposure to information reporting penalties.

Affordable Care Act (ACA)

Presenter: Lisa Hatten

Contact: aca.policy@calhr.ca.gov

Information Reporting Penalties

- The state may be subject to information reporting penalties up to \$660 per corrected 1095-C for the 2024 reporting year if the health benefit status data on the 1095-C form issued to the employee and reported to the IRS is incorrect.
 - \$330 penalty for each failure to file a correct information return with the IRS.
 - \$330 penalty for each failure to furnish a correct statement (1095-C) to the employee.

Reminder: Departments will be responsible for 100% of any information penalties assessed for the 2024 reporting year.



Benefit Program Reminders

Presenter: Monica Chavez

Benefit Program Reminders

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

- CalHR does not have access to update or correct addresses or name changes.
- Prior to submitting benefit enrollment forms, verify the employee's information within the SCO database.
- If the employee's information is incorrect within the SCO database, please follow your agency's policies/rules on correcting the employee's information.
- If the information is correct within the SCO database but incorrect with the carrier, then the agency's authorized personnel specialist should contact the carrier to correct the information.
- For program-specific questions, please email the specific program inbox, not multiple inboxes, to ensure the inquiry reaches the correct program staff.
- Prior to sending an inquiry, please review CalHR's websites: [Benefits Administration Manual](#), [HR Manual](#), [Employee Benefits webpage](#).
- Please remind employees to contact their departmental personnel office for benefits related inquiries.

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

A complete appeal package includes:

- Justification memo explaining why the enrollment was not processed in a timely manner.
- Complete and error-free forms.
- Written confirmation that the employee acknowledges an Accounts Receivable will be established for retroactive enrollment (if applicable).

Important notes:

- Please verify that the employee is eligible to enroll in the program they have elected.
- Once an appeal is approved by CalHR and processed by SCO, we will not cancel or reverse the appeal.

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

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. It is the responsibility of the employee to notify their department of any changes to their dependent eligibility.

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquires@CalHR.ca.gov

- If an employee made changes to their benefits during Open Enrollment, they should review their December 2024 pay warrant to confirm Open Enrollment changes took effect. Employees must contact their departmental personnel office immediately if the changes were not processed.
- Each program provided confirmation receipts during Open Enrollment. If changes made during Open Enrollment did not take effect, employees should provide the confirmation receipt to their departmental personnel office for the appeal.



Benefit Program Updates

Presenter: CalHR Benefits Division

Vision Program Updates

Presenter: Monica Chavez

Contact: Vision@calhr.ca.gov

Program Updates

- Improving VSP membership profiles for Basic Vision:
 - VSP now receives a demographics file for employees enrolled in Basic Vision.
 - All State of CA employees now have access to Eyeconic, VSP's online store.
- New Vision Handbook posted for Open Enrollment.
- Departments must not send VSP Premier enrollment or change forms directly to VSP for processing.
- Only permitting event transactions submitted beyond the 60-day eligibility window should be sent to CalHR as an appeal.

Benefit Premiums

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

Dental Program Updates

Presenter: Monica Chavez

Contact: Dental@calhr.ca.gov

Program Updates

- Please allow 30 calendar days for an appeal to be reviewed.
 - Confirm that the employee is aware of applicable accounts receivables.
 - Once an appeal is approved, it cannot be retracted.
- STD. 692s older than 2020 will be rejected and returned to the agency.
- STD. 692s must be complete and error free.
- Please do not submit bulk appeals (multiple appeals in one email). Each appeal must be submitted individually.
- Please consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.

FlexElect Program Updates

Presenter: Monica Chavez

Contact: FlexElect@calhr.ca.gov

Program Updates

- Discontinuation of the “10th of the Month Rule”
 - Effective 8/1/24, the "10th of the month rule" no longer applies to the FlexElect/CoBen Cash Options or FlexElect Reimbursement Programs.
 - All forms within the posted SCO processing dates on 8/1/24 and forward will also be excluded from the 10th of the month restriction.
- We will be updating the FlexElect BAM language to match what is in the FlexElect handbook.
- Do not redact Social Security Numbers (SSNs) from the STD. 701R FlexElect Reimbursement forms to avoid processing delays with appeals. Instead, include the last four digits of the SSN on the STD. 701R and send a separate email to FlexElect@calhr.ca.gov with the first five digits of the SSN, or call and leave a voicemail with the full SSN at (916) 909-2863.

Third Party Pre-Tax Parking Reimbursement Program Updates

Presenter: Monica Chavez

Contact: Pre-TaxParking@calhr.ca.gov

Program Updates

- The maximum monthly deduction an employee can deduct for the cost of parking for the 2025 calendar year has been increased to \$325/month, which is a \$10 increase from the 2024 maximum monthly deduction of \$315.
- The maximum monthly deduction is set by the Internal Revenue Service (IRS).
- An HR Announcement will be coming out soon confirming the increased amount.
- CalHR webpages will be updated soon.

CoBen Cash Updates

Presenter: Monica Chavez

Contact: CoBen@calhr.ca.gov

Program Updates

- The 2016 ruling on the Petition to Vacate TRICARE Arbitration – CalHR v. CASE allowed rank and file employees in Bargaining Unit 2 (BU2) who are covered under TRICARE to begin receiving the CoBen Cash Option.
- The Benefits Administration Manual, FlexElect Handbook, and CoBen Handbook were updated to include this information earlier this year, and the information will be updated in the CalHR HR Manual Section 1406 soon.
- This change took effect June 1, 2024, and personnel offices do not need to offer appeals to BU2 employees.
- Retroactive enrollments for TRICARE effective June 1, 2024, or later will require an approved CalHR appeal. Retroactive enrollments for the CoBen Cash Option that were previously rejected for using TRICARE prior to June 1, 2024, will not be considered.

Benefit Program Resources

Presenter: Monica Chavez

- CoBen CoBen@calhr.ca.gov
- Dental Dental@calhr.ca.gov
- FlexElect FlexElect@calhr.ca.gov
- Group Legal Services Insurance GroupLegal@calhr.ca.gov
- Life Insurance LifeInsurance@calhr.ca.gov
- Long-Term Disability LTD@calhr.ca.gov
- Third Party Pre-Tax Parking Reimbursement Program Pre-TaxParking@calhr.ca.gov
- Vision Vision@calhr.ca.gov



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of an employee's spouse, domestic partner, 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 vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Highlights

- 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 DRV transactions through the Family Connect Portal (FCP).
- All state agencies must have an administrative account in the FCP, assigned at the supervisor classification or higher, 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)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program 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 and require certification as a disabled dependent or PCR, will be certified by CalHR's DRV unit.
- The CAHP and CCPOA enrollment data in FCP is pending.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Updates

FCP System Fix – 26-Year-Old/COBRA alerts

- On or about October 30, 2024, CalHR discovered a system error in the FCP that resulted in spouses, domestic partners, and disabled dependents having an active 26-year-old/COBRA alert applied to their profiles. CalHR was able to program a fix where we are confident the error has been resolved with minimal impact to FCP users.
- If this error is found in an employee's FCP profile, please report this information to the DRV Unit via email.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- March, June, September, December 2023 and January, April, July, October 2024 birth month cycles: departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- February 2025 birth month cycle: The 90-day mailing was generated on or about October 15, 2024, and mailed November 1, 2024, by the Department of General Services.
 - The next mailing (60-day notice) for the February birth month cycle was generated on or around November 15 and mailed December 2, 2024.
- Please note all employees in the current birth cycle will continue to receive DEV and DRV notices until their dependent verifications have been processed.
 - DRV mailings generate from FCP on the 15th of the month prior to all scheduled mailings. All mailings are sent 90, 60 and 30 days prior to an employee's birth month.
- Please Note: DEV transactions must be processed in myCalPERS by the 1st of the birth month to avoid the automatic deletion from health coverage.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Total Notices Mailed to Date

Birth Month Cycle	1 st Notice - 90 days before end of birth month	Total Mailings of 1 st Notice	2 nd Notice - 60 days before end of birth month	Total Mailings of 2 nd Notice	3 rd Notice - 30 days before end of birth month	Total Mailings of 3 rd Notice	Total Mailings
March	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
June	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
September	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
December	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
January	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
April	Jan-2024	8,196	Feb-2024	7,862	Mar-2024	6,254	22,312
July	Apr-2024	8,783	May-2024	8,230	Jun-2024	7,942	24,955
October	Jul-2024	9,018	Aug-2024	8,511	Sep-2024	6,501	24,030
February	Nov-2024	7,548	Dec-2024	6,965	Jan-2025	TBA	14,513

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is for a dependent of type 'Disabled Child'. The status is 'Pending' with a status date of 5/10/2023. The dependent's birth date is 04/04/1989. The form also includes fields for dental and vision plans, their effective dates, and permitting events. A 'Delete Dependent' button is located at the bottom left of the form. A 'Comments' section at the bottom contains the text 'Added by Carrier File 2022-07-21'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red box highlights the 'Dependent Type' dropdown menu, and another red box highlights the 'Dependent Type Locked' checkbox, which is checked. A red arrow points to the checkbox.

Field	Value
Dependent Type *	Disabled Child
Status	Pending
Status Date	5/10/2023
Record Source	Carrier File
First Name *	[Redacted]
Middle Name	[Redacted]
Last Name *	[Redacted]
Birth Date *	04/04/1989
Re-verification Effective Date	05/01/2020
Re-verification End Date	04/30/2025
Dental Plan *	Yes
Dental Plan Effective Date	01/01/2022
Dental Permitting Event	-- Record Source --
Vision Plan *	Yes
Vision Plan Effective Date	01/01/2024
Vision Permitting Event	-- Record Source --

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

The screenshot displays the 'Family Connect' web application interface. At the top, there is a navigation bar with a home icon, a 'Settings' gear icon, and the 'FAMILY CONNECT CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' logo. Below the logo are navigation links for 'MAIN PAGE', 'REPORTS', 'ADMIN', 'FAQ', and a 'Logout Delia Baulwin' button. The main content area is titled '1 Year Notification: April 2019' and contains five notification rows. Each row has an 'Is Notified' checkbox (all are unchecked), a 'Notified Date' input field, and a 'Notified By' dropdown menu. Below these is a 'Certify Dependent' section with a checked 'Certified' checkbox, a 'Document Received Date' field (04/30/2020), and a 'Dependent Certified By' dropdown menu (CalPERS). There are also fields for 'Re-certification Effective Date' (05/01/2020) and 'Re-certification End Date' (04/30/2025). A 'Date Coverage History' link is visible. At the bottom, a 'Certification Document List' includes three 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) *'. A red box highlights the 'Dependent Certified By' dropdown menu.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent Child Relationship Certification

Review Dependent

Dependent Type *
Parent Child Relationship

Status Status History
Pending

First Name *
[Redacted]

Birth Date *
09/10/2012

Dental Plan *
Yes

Vision Plan *
Yes

Dependent Type Locked

Status Date
5/10/2023

Middle Name
[Redacted]

Re-verification Effective Date
10/01/2023

Dental Plan Effective Date
01/01/2023

Vision Plan Effective Date
01/01/2020

Record Source
Carrier File

Last Name *
[Redacted]

Re-verification End Date
09/30/2024

Dental Permitting Event
-- Record Source --

Vision Permitting Event
-- Record Source --

Comments
Added by Carrier File 2022-07-21

Buttons: Delete Dependent, Save, Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent Child Relationship Certification

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Bautwin

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

Re-certification Effective Date *

10/01/2023

Document Received Date *

09/30/2023

Dependent Certified By

CalPERS

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

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources including [BAM](#), [FCP Manual](#), and the [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 vision benefits only.
- Departmental personnel offices can send DRV and FCP related questions via email to DRV@calhr.ca.gov.
- Current response time is five (5) business days.



CalHR Benefits Website

Presenter: Leili Khalessi

CalHR Benefits Website

Presenter: Leili Khalessi

Contact: BenefitsInquiries@calhr.ca.gov

Upcoming website changes

- On January 1, 2025, we will have a new benefits website: benefits.calhr.ca.gov
- The new website will feature a modern design, improved functionality and easier navigation to better serve departmental personnel offices and employees.
- The password to access the State HR Professionals section of the website will stay the same.
- The current CalHR Benefits website is calhr.benefitsprograms.info. Old website links and bookmarks will not work after January 31, 2025.

How to prepare

- Plan to update your bookmarks, intranet pages, new hire information and other communications after January 1 to benefits.calhr.ca.gov.

What's next

- We will continue to present at forums and send email updates to Personnel Officers with reminders and relevant links.
- For questions, please contact: BenefitsInquiries@calhr.ca.gov.

Resources – CalHR Benefits Webpages

- [Benefits Website](#)
- [State HR Professionals](#)
- [State HR Professionals Benefits Toolkit](#)
- [State HR Professionals OE Resources](#)
- [HR Manual](#)
- [Open Enrollment](#)
- [CalPERS Open Enrollment for Active Members](#)
- [Virtual Library](#)
- [Benefits Calculator](#)
- [State Employees](#)
- [Health](#)
- [Dental](#)
- [Vision](#)
- [Voluntary Benefits](#)
- [Consolidated Benefits \(CoBen\)](#)
- [FlexElect Reimbursement Account](#)
- [Life Insurance for Excluded Employees](#)
- [Group Legal Services](#)
- [Group Long-Term Disability Insurance \(LTD\)–
Excluded Employees Only](#)
- [Work Engagement Resources](#)

Resources – CalHR Benefits Contacts

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



Statewide Benefits Program

Presenter: Rebecca Garcia

Contact: ppsdcsbenefits@sco.ca.gov

Open Enrollment (OE) Updates

- All documents processed
 - Received over 30,000 OE documents
- Verify all deductions are present and accurate after cutoff
 - Call the [Statewide Customer Contact Center](#) if anything is missing or incorrect
- PR250 or ding notices
 - Please return any outstanding ding notices that were sent for OE
 - Return in a timely manner



STATEWIDE PROGRAM UPDATES



Statewide Payroll Program

Presenter: Renee Menefee

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

Personnel Action Request (PAR) Submission Reminders

- Package Dates for November and December Separations
 - Separating November 1-15, 2024
 - 1st PAR must be received at SCO by 11/22/24
 - 2nd PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
 - Separating November 16-30, 2024
 - 1st PAR must be received at SCO by 12/02/24
 - 2nd PAR (if applicable) must be received at SCO between 12/16/24 to 12/24/24
 - Separating December 1-31, 2024
 - 1st PAR must be received at SCO by 12/13/24
 - 2nd PAR (if applicable) must be received at SCO between 12/30/24 to 1/10/25
- **Redeposits - Lump Sum Payments**
 - Contact SCO if there is an issue with lump sum payments
 - Statewide Customer Contact Center – Civil Service Payroll
 - SCO can provide information regarding the pay that issued and next steps
 - Indicate in the remarks of the coversheet when a redeposit has occurred



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Employee Address Change and Annual Withholding

- Employees should ensure current mailing address on file
 - Update via Cal Employee Connect or STD. 686, Employee Action Request (EAR)
 - Sign up for electronic Form W-2, Wage and Tax Statement
- Annual Withholding
 - Employees should review their withholdings every year if they have any of the following:
 - Lifestyle – Marriage, divorce, birth or adoption of a child, or home purchase
 - Wage income – Increase in income, spouse starts or stops working
- For additional information:
 - [Personnel Action Manual \(PAM\)](#): Section 6 - EAR Processing
 - [QuickStart Guide and EAR Samples](#)
 - Internal Revenue Service - [Tax Withholding Estimator](#)



Business System Support and Maintenance Section

Presenter: Allan Fong

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

R01 Transactions to Correct CalPERS Enrollment Level

- In 2021, State Controller's Office (SCO) added CalPERS Enrollment Level (E-LVL) to Employment History (EH) to track when an employee reaches maximum compensation for CalPERS retirement
 - On Personnel Information Management System (PIMS) screen
 - E-LVL indicator
- SCO conducted an audit and found some records were incorrectly updated
 - To correct records that were incorrectly updated, SCO is processing R01 transactions
 - Some records will have E-LVL updated
 - Some records will have Account Code updated
 - Some records will have both updated



Business System Support and Maintenance Section

Presenter: Allan Fong

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

R01 Transactions to Correct CalPERS Enrollment Level

- SCO will process the mass update to post the R01 transactions this week
 - Any Retirement Account Code updates will be made with the effective date in which the R01 is run
- Departments will need to follow the Personnel Letter that is forthcoming to process 505 transactions with the correct effective date for the Account Code change
 - A report will be provided on [Mobius View](#) to identify impacted employee records
 - Retirement Account Codes must match the E-LVL as Classic or PEPRA
- Employee records that only required an E-LVL update will not require departmental action
 - CalPERS determines the E-LVL



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

- 2025 PPSD Training Open Enrollment
- More classes offered
- Lump Sum Webinar
 - Now offered as part of our regular curriculum



Human Resources (HR) Suggestions

Presenter: Nastassja Johnson

Contact: PPSDHRSuggestions@sco.ca.gov

- We received 15 HR suggestions in the last three (3) months.
- We forwarded the suggestions to the appropriate programs and will share if any suggestions are implemented in the future.
- Remember to submit your HR suggestions to the SCO HR Suggestions Email (All HR Staff) 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
- Please **do not** email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- 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 (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- 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
- [Cal Employee Connect \(CEC\) Help and Feedback](#)
- [ConnectHR Help and Feedback](#)
- California Leave Accounting System (CLAS) Email CLAS@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or DSA@sco.ca.gov
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email PPSDMIRS@sco.ca.gov
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200

