Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

July 18, 2024

Question

Presenter: Natalia Saferson

Contact: Contact - CalPERS

The CalPERS system allows employees to change their health plans due to a move outside of open enrollment via the self-service portal. Is the CalPERS system verifying the employee did have a change of address?

Answer: Yes, the system has a validation in place that the member's address has been updated in myCalPERS before it lets the member use that qualifying event.

Question

Presenter: Natalia Saferson

Contact: Contact - CalPERS

Regarding the dependent re-verification (DRV) letters CalPERS sends to employees, can CalPERS letters update the date to the 1st versus the 10th? The letter states that if the re-verification is processed after the 10th of the birth month, then retroactive premiums may be owed resulting in an accounts receivables (A/Rs) with the State Controller's Office (SCO). A CalPERS representative confirmed that myCalPERS system removes the dependents automatically on the 1st of the birth month. SCO system issues an A/R regardless of if the re-verification is done by the 4th of birth month as CalPERS system has already sent the information to SCO.

Answer: Unfortunately, updating our system generated letters is no small ask and requires a system enhancement. And the fact remains, if the verification is processed before the 10th and after the 1st, the deletion is rescinded, and the member will be reinstated. If a member waits a full 90 days to submit documentation or the Health Benefits Officer (HBO) waits until that time to process (as applicable) it is very difficult to prevent A/Rs. The best advice we always state is to start the process when the member gets the first notice 120 days before they are deleted, or when they get the reminder notice that is sent 90 days before deletion. If the member or HBO (or both) delay until the actual birth month, then there is little we can do to prevent A/Rs with verbiage.
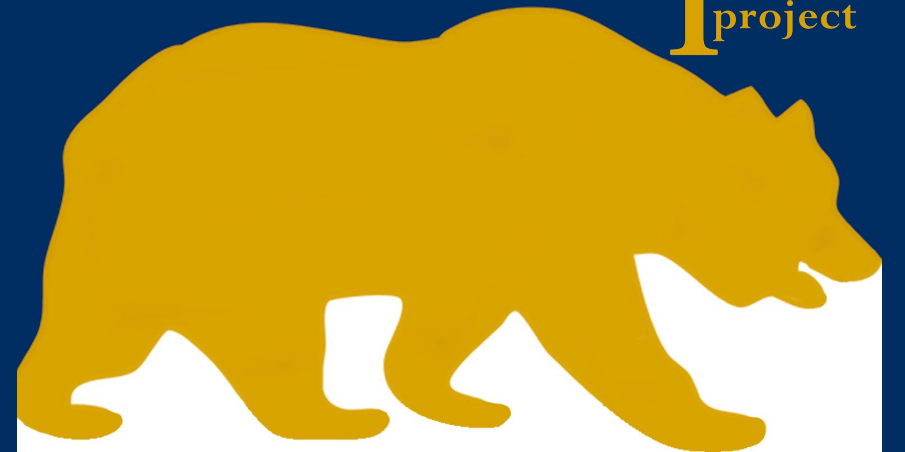
7

SCO KEY INITIATIVES

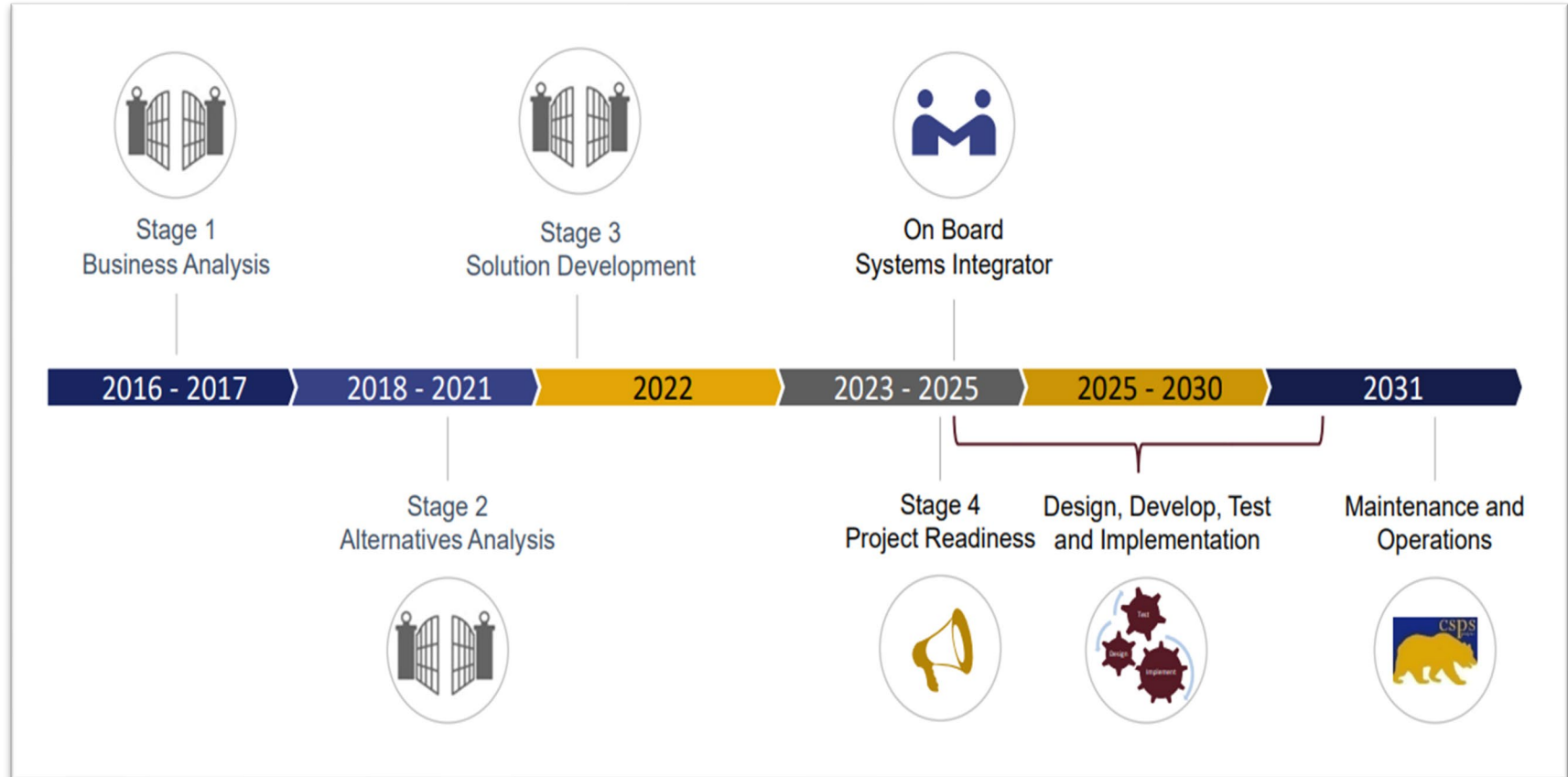# CSPS Project Update – July 2024

Presenter: Jeana O'Ferrall
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

Stage 1
Business Analysis

Stage 3
Solution Development

On Board
Systems Integrator

2016 - 2017 | 2018 - 2021 | 2022 | 2023 - 2025 | 2025 - 2030 | 2031

Stage 2
Alternatives Analysis

Stage 4
Project Readiness

Design, Develop, Test and Implementation

Maintenance and Operations

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 Benefits Administration MBC.

Benefits Administration

Benefits Administration consists of:

- Health, dental, and vision

- Savings and reimbursement plans

- Life insurance options

- Consolidated Omnibus Budget Reconciliation Act

CSPS has also developed business requirements to ensure that benefit eligibility, dependent verification, and sharing of data between SCO and benefit carriers is automated in the new system.

Benefits Administration

Status Updates

- **Procurement Team** held Phase 2 vendor demonstrations and are now evaluating received submittals.

- **Technical Team** is working on Excel export enhancements for Employee and Payment History.

- **OCM's Agency Change Experts** are working with departments to complete the Interface Validation assignment.

- **Functional Team** has been working with OCM on answering interface questions from departments.

Take our quick survey

Check the chat for the link

STATEWIDE BENEFITS ADMINISTRATION

Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

Affordable Care Act (ACA) Training Updates and Reminders

- View 2024 training dates and registration details for ACA Virtual Training Part 1 and Part 2 classes on the ACA Training webpage

- Please be sure to register your staff ahead of time and only registered users are attending the trainings

  o Unregistered users who enter the training will not receive credit

  o Part 2 training requires security access done prior to the training for users to access the ACA training database to participate and complete the training class

  o Part 2 training may be divided into two (2) dates depending on the class size of Part 1

    ➤ This will be determined once the class registration has closed

    ➤ Secondary dates will not be posted on the ACA Training webpage, as users will not be able to register for these class dates

Thank you!

CalHR Benefits Division

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

July 18, 2024

Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

ACAS Updates and Reminders

Permanent Intermittent Employees

Employees who were credited with at least 480 paid hours in the January to June 2024 Control Period.

If employee is newly eligible for health benefits, the employee's ACAS record should be updated to reflect:

- **2D, effective 7/1/24** (to indicate the employee is newly eligible for health benefits)
- **1A, effective 8/1/24** (the earliest date the employee can enroll in health benefits)
- **3A**, effective the date the employee's health coverage is effective (to indicate the employee enrolled in health benefits) **OR**
- **4A**, **effective 8/1/24**, if the employee declines health coverage by returning the HBD-12 (or 4B, effective the 61st day following the permitting event date if no HBD-12 is received declining coverage)

Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

ACAS Updates and Reminders

<u>Permanent Intermittent Employees</u>

Employees who were enrolled in health benefits and lost their health benefits eligibility because they were not credited with at least 480 paid hours in the January to June 2024 Control Period (or 960 in two control periods).

The employee's ACAS record should be updated to reflect:

- **5A, effective 7/31/2024** (to indicate that the employee's health benefits were administratively cancelled due to loss of eligibility)

- **2B, effective 8/1/2024** (to indicate that the employee must be credited with a minimum of 480 paid hours in a Control Period to be eligible for health benefits)

- **COBRA Offer (1B, 1C, 1D, or 1E), effective 8/1/2024** (to indicate that the employee (and any dependents) were eligible for and offered COBRA coverage)

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Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

ACAS Updates and Reminders

Permanent Intermittent Employees

Employees who were not enrolled in health benefits and lost health benefits eligibility because they were not credited with at least 480 paid hours in the January to June 2024 Control Period.

The employee's ACAS record should be updated to reflect:

- **2B, effective 8/1/2024** (to indicate that the employee is no longer eligible for health benefits until they are credited with a minimum of 480 paid hours in a Control Period to become eligible again)

Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

Reports to Monitor ACA Compliance

Permanent Intermittent Employees

The SCO's Management Information Retrieval System (MIRS) has reports to help identify Permanent Intermittent employees who may be newly eligible for or lost their health benefits eligibility.

- INT 001A Report - Identifies Permanent Intermittent employees who are eligible for health benefits based on meeting 480 paid hours in a specified Control Period.

- INT 002A Report - Identifies Permanent Intermittent employees and whether they are currently enrolled in health or dental benefits but have become ineligible for benefits based on not meeting 480 paid hours in a specified Control Period (or 960 paid hours in two consecutive Control Periods to continue their coverage).

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Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

Observations from the June 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 have the most 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 the 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.

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Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

ACA SharePoint Site

- The ACA SharePoint site is a platform created to serve as a resource hub for all ACA-related policies, procedures and training documents for departmental personnel office staff.

- To request access to the site, send an email to ACA.Policy@calhr.ca.gov.

Affordable Care Act (ACA)

Presenter: Elaine Smith
Contact: ACA.Policy@calhr.ca.gov

ACA Training

- The next ACA trainings are scheduled for:

  o Wednesday, August 21, from 9:00-10:30 a.m. (Part 1) and Thursday, August 22, from 9:00-12:00 p.m. (Part 2)

  o Wednesday, September 25, from 9:00-10:30 a.m. (Part 1) and Thursday, September 26, from 9:00-12:00 p.m. (Part 2)

- Departments can send an email to 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.

CalHR Benefits Administration Manual Summit

Presenter: Amy Nim
Contact: BenefitsInquiries@calhr.ca.gov

- The Department of Human Resources (CalHR) is planning to host an in-person Benefits Administration Manual (BAM) Summit for HR professionals sometime in 2025. Summit participants will learn the fundamentals of administering state benefits and network with their peers.

- After this presentation, we will send out a survey to gauge interest in summit attendance and topics. The survey will be available for two weeks.

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Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: 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)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: 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)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: 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.

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Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: 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 will conclude at the end of this month, all DRV alerts should be processed for documents received timely.

- October 2024 birth month cycle: 90-day notice was processed with DGS and mailed on July 1st.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: DRV@calhr.ca.gov

Total notices mailed to date:

Birth Month Cycle	1st Notice 90 days before end of birth month	Total Mailings of 1st Notice	2nd Notice 60 days before end of birth month	Total Mailings of 2nd Notice	3rd Notice 30 days before end of birth month	Total Mailings of 3rd 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	17,013
October	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.

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Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

Dependent Re-Verification (DRV)

Presenter: Alison Drummer, Senior Benefit Program Analyst
Contact: 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.

- Current response time is five (5) business days.

Benefits Project Updates

CalHR Benefits Division

July 18, 2024

Benefits Open Enrollment (OE)

Presenter: Amber Neves, OE Specialist
Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment Updates

- The Open Enrollment (OE) season has officially kicked off with all OE Project stakeholders.

- 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.

Open Enrollment Listserv

- To sign up for future OE information and updates, please subscribe to the OE subscription list on the HR Professionals webpage: State HR Professionals | Cal HR (benefitsprograms.info)

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Benefits Open Enrollment (OE)

Presenter: Amber Neves, OE Specialist
Contact: 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, Sept. 10, 2024, 10:00 a.m. – 1:00 p.m.
- Central CA – DSH Coalinga, Sept. 18, 2024, 11:00 a.m. – 3:00 p.m.
- Northern CA – State Capitol, Sept. 25, 2024, 11:00 a.m. – 2:00 p.m.

Virtual Benefits Fair

- Two consecutive days, Sept. 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.

Virtual Lunch and Learn Sessions

- The audience for these sessions will be for HR Professionals, to provide an additional forum to help prepare for OE enrollments.

Benefits Open Enrollment (OE)

Presenter: Amber Neves, OE Specialist
Contact: OpenEnrollment@calhr.ca.gov

Benefits Calculator

- The CalHR Benefits Calculator has been modernized and now includes the following enhancements:

  - An enhanced User Guide.

  - Ability to calculate and compare two different benefit scenarios side by side (i.e. two different bargaining units or different plans.)

  - The option to populate both the Dental Plan Enrollment Authorization (STD. 692) and Vision Plan Enrollment Authorization (STD. 700) enrollment forms.

  - Updated enrollment forms to include the dependent options for Parent-Child Relationship (PCR) and Disabled Child (DC).

    - STD-692: Dental Plan Enrollment Authorization

      Dependent Type:
      S - Spouse   DP - Domestic Partner   C - Child   SC - Stepchild   DC - Disabled Child
      DPC - Domestic Partner Child   PCR - Parent-child Relationship

    - STD-700: Vision Plan Enrollment Authorization

      Dependent Type: S - Spouse   DP - Domestic Partner   C - Child   SC - Stepchild   DPC - Domestic Partner Child   PCR - Parent-child Relationship   DC - Disabled Child

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CalHR Benefits' Resources

Websites

Benefits Website
https://calhr.benefitsprograms.info/

BAM Training Questions
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

Open Enrollment (OE)

Presenter: Amber Neves, OE Specialist
Contact: OpenEnrollment@calhr.ca.gov

Contact

- Departmental personnel offices can send OE related questions via email to OpenEnrollment@calhr.ca.gov.

- Current response time is five (5) business days.

Resources

- CalHR Benefits website

- CalHR Benefits Calculator

Benefit Program Updates

Presenter: Monica Chavez
Contact: vision@calhr.ca.gov

Vision Program

- Improving VSP Membership Profiles for Basic Vision:
  o VSP now receives a demographics file for Basic Vision employees.

  o 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.

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FlexElect Program

Presenter: Monica Chavez
Contact: flexelect@calhr.ca.gov

Flex Program Updates

- Discontinuation of the "10th of the Month Rule"

  - Effective 8/01/2024, 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 8/01/2024 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.

Contacts:

- ACA Program ACA.Policy@calhr.ca.gov

- BAM Training BAMTraining@calhr.ca.gov

- COBRA COBRA@calhr.ca.gov

- Dental Program dental@calhr.ca.gov

- Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov

- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov

- FlexElect/CoBen Program FlexElect@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 vision@calhr.ca.gov

- Open Enrollment OpenEnrollment@calhr.ca.gov

- Virtual Benefits Fair BenefitsInquiries@calhr.ca.gov

Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

FlexElect & Consolidated Benefits (CoBen) Programs "10th of Month Rule" Discontinuation

- As directed by CalHR, effective 8/01/2024 the Civil Service Benefits Unit will no longer follow the rule that determines effective date based on the form coming in before or after the 10th of the month.

- The effective date will be based on permitting event type and the ConnectHR upload date (SCO received date).

- Examples:

  o STD. 702 CoBen Cash Option with a standard event is uploaded on 07/05/2024. If everything is correct, the effective date will be 08/01/2024.

  o STD. 701C FlexElect Cash Option with a standard event is uploaded on 07/17/2024. If everything is correct, the effective date will be 08/01/2024.

  o STD. 701R FlexElect Reimbursement Account with a standard event is uploaded on 08/30/2024. If everything is correct, the effective date will be 09/01/2024.

Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

August 1, 2024 – Transaction Specialists' Educational Forum (TSEF)

- Most of the content for this forum will be Open Enrollment related. Topics include:

  o Demonstrations of filling out/auditing forms

  o Common errors and how to avoid PR250 Irregularity Notices (dings)

  o Where to find key resources

  o Tips and tricks for a successful Open Enrollment season

  Please encourage your staff to attend!

BREAK

5 MINUTES

STATEWIDE PROGRAM UPDATES

Statewide Payroll Program

Presenter: Christina Campbell

Contact: Statewide Customer Contact Center 916-372-7200

The difference between a PR250 (DING) and Misrouted Notification

1. <u>Misrouted Notifications</u>: Clerical staff perform the initial review of all documents to ensure they are uploaded to the correct program area and general STD. 674 form fields are completed.

From: PPSD Civil Service Payroll <ppsdcspayroll@sco.ca.gov>
Sent: Tuesday, July 16, 2024 8:45 AM
To: 'm_SOLPersonnelTransactions@cdcr.ca.gov' <m_SOLPersonnelTransactions@cdcr.ca.gov>
Subject: RE: ConnectHR Uploads

The documents included were uploaded to an incorrect program area. Please review all documents and upload them according to the ConnectHR Directory. Once the documents are received by the appropriate program the documents will be processed according to the received date.

Statewide Payroll Program

Presenter: Christina Campbell

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

The difference between a PR250 (DING) and Misrouted Notification

2. <u>PR250 (DING)</u>: Personnel specialists use a PR250 (DING) to return documents that have been submitted but contain errors.

STANDARD FORM NUMBER: 674

EMPLOYEE NAME
Unit Number:
SSN (Last 4 digits):

****
AUDIT ERROR(S)

ITEM: 6A
ERROR: Please show all activity for the Payment Type shown in Item 6A. Enter what should be paid for that Payment Type in Item 6B.

****
ACCOUNTS RECEIVABLE / PAY PERIOD INFORMATION

Pay Period: 0 - 03 - 24

****
PAYMENT TYPE INFORMATION

****
CUSTOM MESSAGE
None
****
REFERENCE(S)

****
This is a no reply email. If resubmitting a corrected document please resubmit via ConnectHR. If you have any questions please contact the Customer Contact Center at #916-372-7200.

Regards,
Romo, Mered
PERSONNEL and PAYROLL SERVICES DIVISION

Statewide Payroll Program

Presenter: Christina Campbell

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

The difference between a PR250 (DING) and Misrouted Notification

- Documents that are resubmitted using the correct ConnectHR dropdown will be processed according to the new received date.

- Misrouted documents will <u>NOT</u> be prioritized.

- Departments must upload documents to the correct ConnectHR dropdown using the [ConnectHR CS Directory Documents and Processing Needs](#) document available on the SCO website.

Statewide Payroll Program

Presenter: Christina Campbell

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

ConnectHR Upload History

1. Log in to ConnectHR: Go to Upload Files
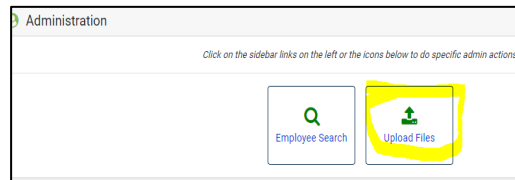
2. Scroll down to Upload History and check the box "Include My Agency's Uploads"
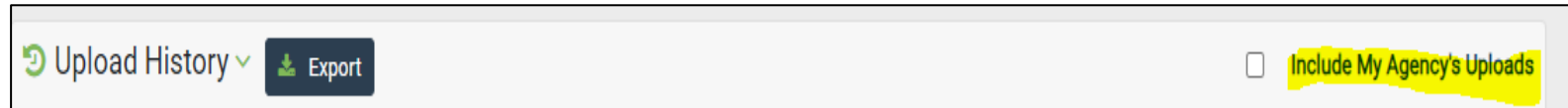
3. HR offices can export to Excel and review all documents submitted. This will help determine which document was uploaded to the incorrect dropdown.
   - Please Note: We are limited to the last 1000 uploads, and this is a "rolling" 1000.

- Further, as a reminder, HR offices must follow all retention requirements.

- You can find some agency schedules by searching "Personnel" or "Human Resources" on the Secretary of State website [Athena](#).

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employees

- **PPSD-21, Deceased Employee Data Form**

  - Submit the [PPSD-21, Deceased Employee Data Form](#) with a copy of W-9 form to SCO, PPSD-W2 Program

    - Deceased Employee – Form W-2, Wage and Tax Statement
    - Designee/Beneficiary - 1099-MISC, Miscellaneous Information

      - Questions should be directed to a tax consultant or the Internal Revenue Service (IRS)
      - **Under no circumstances should the recipient be advised that the payment is not taxable**
      - **NO** payments should be released without receiving a [Form W-9, Request for Taxpayer Identification Number and Certification](#) from the designee/beneficiary

- **Education and Communications:**

  - [Payroll Procedures Manual](#) (PPM), Section I 900: Deceased Employee's Wages
  - [Payroll Letter #23-019](#): Deceased Employee and Designee/Beneficiary Reporting

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Salary Advances

- **Reporting Requirements:**
  - o If the related payroll warrant has not issued within 30 days from payday after providing the advance to the employee, then the loan becomes a salary advance and **must be reported to SCO**.
  - o **Salary advances must be treated as taxable wages.**
  - o Submit the "Initial" Salary Advance, STD. 422 form, to SCO Disbursements with a revolving fund check to report the associated taxes withheld (including state share) on behalf of the employee
    - ➢ Include a copy of the paycheck calculator to show tax breakdown
    - ➢ When issuing a salary advance for multiple pay periods, calculate each pay period separately. <u>DO NOT COMBINE PAY PERIODS</u>, as this may not match when the SCO warrant issues.
  - o Once the SCO warrant issues, submit the "Offset" STD. 422 form to SCO, PPSD-W2 Program
    - ➢ Use the same form reported for the "Initial" completing the warrant information.
    - ➢ A warrant will be issued to the department for the taxes remitted on behalf of the employee.

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Salary Advances continued

- **Education and Communications:**
  - PPM, Section N 103: Salary Advances
  - Payroll Letter #23-018: Salary Advance Initial/Offset Reporting – Year End
  - Payroll Letter #22-003: Salary Advance Reporting Compliance

Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDSTSP@sco.ca.gov

Nonresident Alien Compliance

- **Compliance**
  - January to June reporting compliance is ending
  - Currently 40% of agencies reported
  - New reporting period begins July to December
  - One-time federal (099) deduction

- **Education and Communications:**
  - Personnel Letter #24-001: Verification of Employees Identified as Nonresident Aliens
  - Personnel Letter #24-003: Changes to Federal Tax Withholding Rates for Nonresident Alien
  - Listing of Nonresidents Subject to IRS Notice 2005-76: Nonresident Alien Form

Business System Enhancements Section

Presenter: Arlene Chambers

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

Improving Affordability and Access to Heath Care Payment for Bargaining Unit (BU) 8, Service Employees International Union (SEIU) Related Excluders and Excluded Employees

- [Pay differential 440](#) language

  o For BU 08 employees and related excluded employees, this pay differential will be provided commencing with the December 1, 2022, pay period through June 30, 2024.

- Automated Payment Process

  o BU 08 and related excluded employees will be removed from the automated payment process for the August 1, 2024, processing date.

- Employees in Class Code 7500

  o To prevent a payment from being issued automatically, agencies are required to identify employees in class code 7500 that are tied to a BU not eligible based on the pay differential criteria. The ineligible employee's name, position number, and last four digits of their social security number must be submitted to the [Statewide Customer Contact Center](#) a minimum of two (2) days prior to the automated payment processing date.
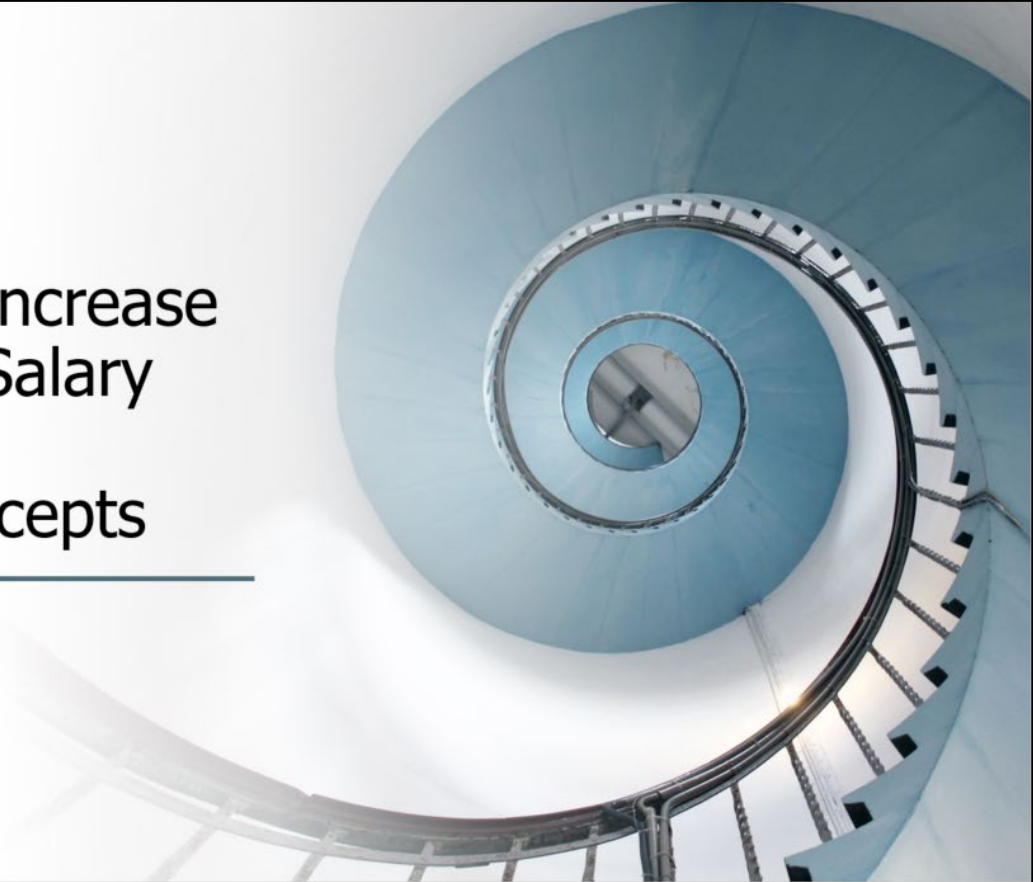
Statewide Training Program

Presenter: Siobhan Hallinan

Contact: PPSDTraining@sco.ca.gov

- Statewide Training Programs: General Salary (GEN) and Other Salary Changes (SAL) Transaction Concepts

General Salary Increase (GEN) & Other Salary Change (SAL) Transaction Concepts

State Controller's Office
Personnel and Payroll Services Division
Statewide Training Unit

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
- 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