



Transaction Supervisors' Forum

Presented By: Natalia Saferson

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Office of State Controller Malia M. Cohen

November 20, 2024



Statewide Communications Program

Presenter: Natalia Saferson

Contact: scotransactionssupervisors@sco.ca.gov

New Question/Answer Feature Demonstration



Information Security Office

Presenter: Ronna Vandertorren

Contact: rvandertorren@sco.ca.gov

Payroll Security





Voice and Video Cloning Attacks Now Common

- Criminals are stealing people's voice and pictures and using deepfake technology to appear as their victims.
 - Posing as executives, employees, business reps, friends and family in live video calls, on demand videos, meetings, social media sites, etc.
 - More than half (53%) of all adults share their voice at least once a week (online or on social media) making it easy for someone to steal their identity.~ *2023 McAfee study*
 - It only takes three (3) seconds of audio for Artificial Intelligence (AI) to clone your voice. Criminals can use it to masquerade as you to win the trust of others and commit fraud.
 - Scammers often combine using a deepfake with a scenario that creates a sense of urgency to get you to quickly take the action they want.
- Identity theft is on the rise thanks to AI and voice and video cloning.

**Could Someone be Using
Your Face or voice to
Commit Fraud?**

**AI can create 10,000
people/profiles that appear real
on the fly with AI tools.**





Chances and Costs of a Data Breach


- Data breaches nearly **doubled** between 2023 and 2024. ~ *Verizon 2024 Data Breach Report*
 - Nearly **half of all breaches** (46%) **involved** customer personally identifiable information (**PII**). ~ *IBM Study*
 - Social Security #s, other ID numbers, bank information, email addresses, phone numbers, home addresses, etc.
- Data compromise typically results in financial damages, litigation, reputational harm, disruption of business and services, and harm to individuals.
 - The U.S. had the highest average data breach cost at 9.36 million. ~ *IBM Study*
 - Payroll fraud schemes generally last 18 months before detection, averaging a loss of \$2,800 per month. ~ *ACFE*



Government payroll is a top target for cybercriminals!



Preventing Fraud

- Conduct surprise audits and management reviews to help uncover discrepancies and suspicious activity.
- Limit access to only what a person needs to do their job.
- Implement Separation of controls.
 - Those responsible for processing should not be responsible for entering changes or amending employee records and vice versa.
- Rotate employees into different job roles from time to time. 
- Maintain policies and procedures. Make sure employees are familiar and policies are enforced.
- Train employees not to share their passwords with anyone. Not even supervisors or managers.
- Implement security awareness training and make it an ongoing topic at staff meetings.





Observe and Report Suspicious Activity

- **Remind employees to err on the side of caution.**
 - Teach employees to observe and report any suspicious activity to your agencies Information Security Office.
 - Give people the option to report suspicious activity anonymously.
- **Trust your gut and act cautiously when something seems amiss.**





BACK UP



Cyber Caution: Payroll Security Tips

1. Payroll Security Training for all Workers

- Anyone with access to your payroll software should complete security training annually. Even when their access to the payroll systems is minimal.
- Teach workers how to protect sensitive information and inform them on policies and expectations.
- Provide Training at least annually, plus whenever there are software updates to your system or procedural changes.

2. Perform Payroll Security Audits

- This will help identify current security practices and areas for improvement.
- Closely evaluate your payroll data to determine if there have been security breaches in the past.
- If you find something, try to determine the root cause and make appropriate changes to prevent it from happening again.

3. Keep Payroll Software Updated

- Be aware of new software updates and implement them immediately. If possible, set up automated updates.

4. Restrict Payroll Access

- Limit access to those whose jobs require access. For example, those in the payroll and human resources departments, plus business owners or those in leadership roles.



Cyber Caution: Payroll Security Tips

5. Separate Payroll Duties

- Delegate payroll management responsibilities across your workforce to ensure that payroll preparation is separated from payroll submission and payroll verification. Splitting these duties reduces the threat of an individual employee committing payroll fraud.

6. Encrypt Sensitive Data

- Encrypt sensitive data on your computers and other devices and encourage employees to log out of the payroll system before they leave their desk or other work area.

7. Protect Physical Payroll Data

- Keep any paper files with sensitive information locked up. Store away any documents with confidential data and lock cabinets when leaving work areas. Use confidential bins or shred unwanted papers. Collect file room keys from employees who are leaving.

8. Be Mindful of Security When Employees Leave

- Remove access immediately when a worker leave the organization.
- Disable their access to your payroll software and any hardware that would allow them to connect to your network.

9. Manage Login Credentials

- Be aware of new software updates and implement them immediately. If possible, set up automated updates.



SCO KEY INITIATIVES

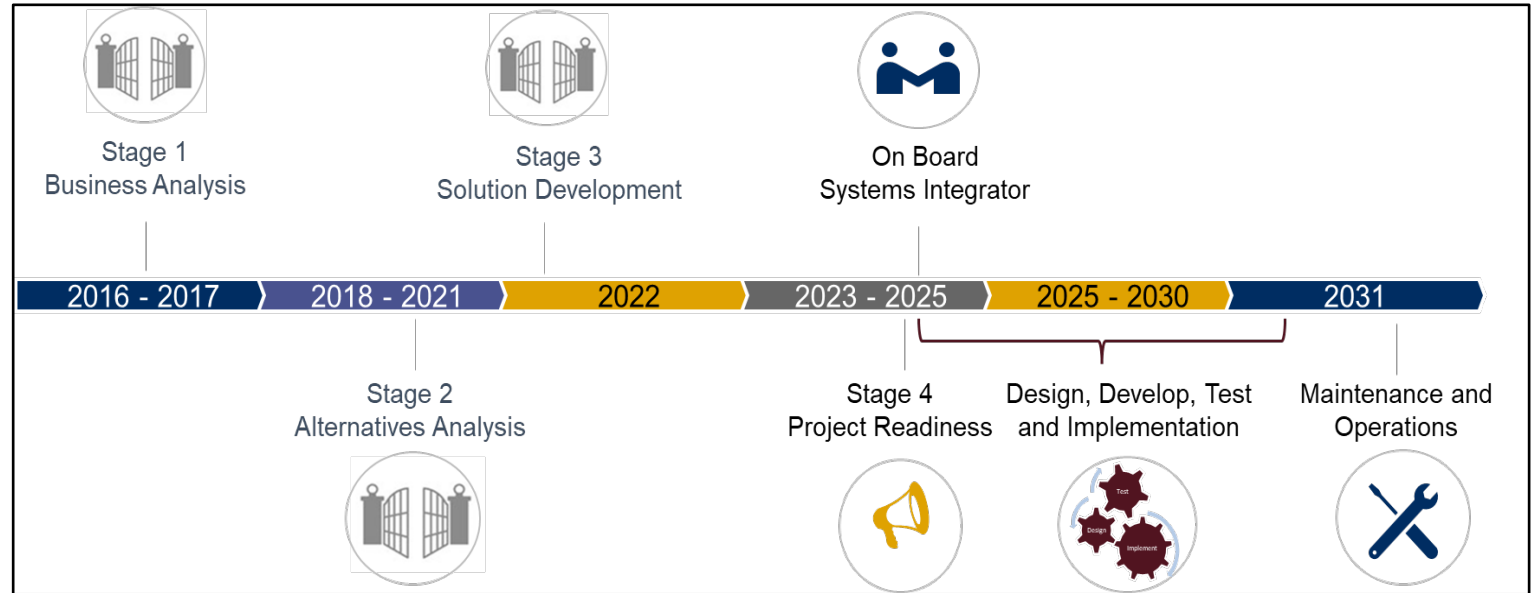
CSPS Status – November 2024

Presenter: Dominick Mullane

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



Project Scope:

- CSPS has defined six (6) Main Business Capabilities (MBCs) to be in-scope of the project.
- Today we will be doing a quick review of the six (6) MBCs.



Main Business Capabilities

- Position Control Administration
- Personnel Administration
- Benefits Administration
- Time Management
- Travel Advance and Expense Management
- Payroll



Status Updates

- **Project Management Office** prepared and finalized project artifacts for PAL Stage 4 submission
- **Technical Team** completed the high-level CSPS Interface Diagram to illustrate interface information for the Solution Implementer (SI)
- **Functional Team** completed linking of interfaces to requirements and conducted gap analysis for any interfaces not associated to a use case
- **Organizational Change Management Team** launched the Validate Human Capital Management (HCM) Information Assignment that is running November – December 2024



STATEWIDE BENEFITS ADMINISTRATION

Savings Plus Leave Buy-Back

Presented by: Katie Kerr
Contact: Leaverollover@calhr.ca.gov





Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

2024 Annual 1095-C Process

- 2024 1095-C statements will be printed and mailed no later than March 3, 2025, to qualifying employees
- Departments should:
 - Correct all errors on Affordable Care Act (ACA) Compliance Reports by December 27, 2024
 - Ensure employee addresses are updated in the Employment History System
 - Verify address corrections for your department on the "Employee Without Appropriate Address" report on [ViewDirect and Mobius View](#)



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

Information Reporting Penalty (IRP) Update

With the completion of the corrected 2021 1095-Cs, the state is anticipating receiving an IRP assessment. IRP amounts increase annually and are comprised of two (2) penalty amounts per corrected 1095-C statement. Below is an example for the current reporting year correction IRP:

- The 2021 IRP is \$560.00 per corrected 1095-C
 - \$280 for each corrected 1095-C statement reported to the Internal Revenue Service (IRS)
 - \$280 for each corrected 1095-C statement sent to the employee
- 2022 total IRP amount: \$580.00
- 2023 total IRP amount: \$620.00
- 2024 total IRP amount: \$660.00



Affordable Care Act Program

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Contact: ACASupport@sco.ca.gov

Information Reporting Penalties Update

With the IRP Phased Approach, departments will be responsible for assessed IRPs as follows:

- 2021 corrections year: Responsible for 50% of total penalties assessed
 - For each IRP assessed at \$560.00, the department would be responsible for \$280.00 per corrected 1095-C
- 2022 corrections year: Responsible for 75% of total penalties assessed
 - For each IRP assessed at \$580.00, the department would be responsible for \$435.00 per corrected 1095-C
- 2023 corrections year and after: Responsible for 100% of penalties assessed
 - For each IRP assessed at \$620.00, the department would be responsible for \$620.00 per corrected 1095-C



Affordable Care Act Program

Presenter: Korinn Revelino

Contact: ACASupport@sco.ca.gov

Information Reporting Penalty (IRP) Appeal Process Update:

Human Resource office staff will have the opportunity to review the corrected records submitted to the IRS for their departments, and appeal eligible records through the SCO IRP Appeal Process

- An overview of the IRP Appeal Process will be available to departments by the end of 2024
- Departments will be able to access the IRP Report for their department to review records prior to the IRP Appeal Submission process
- Departments can expect to begin submitting IRP appeals in Spring of 2025
- SCO will release communication regarding the IRP Overview, IRP report, and Appeal process in the coming months
- For the most updated information on IRPs, please visit the [IRP webpage](#)



Transactions Supervisors Forum:

November 20, 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: Elaine Smith

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

November ACA Quarterly Compliance Review

- Departments who were notified of their outstanding errors in the Affordable Care Act System (ACAS) as part of CalHR's November Quarterly Compliance Review are to correct and certify that the errors were corrected by returning the *Quarterly ACA Compliance Notification* to ACA.Policy@calhr.ca.gov by **December 13, 2024**.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

December Monthly Compliance Review

- The December Monthly ACA Compliance Reports will be available on SCO's ViewDirect by December 2, 2024. 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: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Detailed Safe Harbor Outreach

- In early December, CalHR will reach 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 will be 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**.

Affordable Care Act (ACA)

Presenter: Elaine Smith

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 if the health benefit status data reported on the 1095-C form that is 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 percent of any information penalties assessed for the 2024 reporting year.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Summary of Errors on October Detailed Safe Harbor Report and Potential Impact on Annual ACA Reporting

TENURE	TIME BASE	ACA STATUS CODE				TOTAL ERRORS
		2A (Indicates EE Not Eligible for HB)	2B (Code for PIs only – Indicates EE Not Eligible for HB Until they Meet 480 Hours in 6-Month Control Period)	2D (Indicates EE is Newly Eligible for HB but Not Offered HB)	NO ACA STATUS CODE	
C	FT			1	7	8
E	FT				9	9
L	FT		1	10	111	122
P	FT	9	19	1,607	105	1,740
T	FT			2	42	44
T	INT			1		1
TOTAL		9	20	1,621	274	1,924

Note: The compliance and detailed safe harbor reports capture 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 COGNOS reports in myCalPERS to monitor their ACA compliance by comparing an employee’s employment and pay history with the health benefit status data in the ACAS.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Reports Available to Departments to Actively Monitor ACA Compliance

- CalPERS COGNOS Reports
 - Employer Health Event Transaction Report: Identifies employees who have either voluntarily elected to enroll in or cancel their health coverage or had their benefits administratively cancelled due to loss of eligibility.
 - ACAS record should be updated to reflect the date of enrollment or cancellation of health coverage and applicable effective date.
 - Employer Health Enrollee Report: Identifies employees who have elected to continue their health benefits while on COBRA.
 - For employees who elected to continue their health benefits on COBRA, the employee's ACAS record should have an offer of COBRA coverage keyed in the ACAS (e.g., 1B, 1C, 1D or 1E).

This is important as these codes inform the SCO that they need to report the full premium for the month on the 1095-C for the employee and the full premium is used to determine affordability for ACA purposes.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Reports Available to Departments to Actively Monitor ACA Compliance

- SCO's Management Information Retrieval System (MIRS) Reports
 - INT 001A: Identifies Permanent Intermittent (PI) employees eligible for health/dental benefits based on meeting 480-paid hours in a Control Period.
 - HR Offices can use the report to identify PIs who must be offered health benefits or who continue to be eligible for health benefits.
 - INT 002A: Identifies PI employees who have become ineligible for benefits based on not meeting 480 paid hours in the Control Period that are currently enrolled in health/dental benefits.
 - HR Offices are responsible for disenrolling ineligible PIs from health/dental, offering COBRA (if applicable), and updating the employee's ACAS record.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Reports Available to Departments to Actively Monitor ACA Compliance

- SCO's Management Information Retrieval System (MIRS) Reports and ViewDirect
 - COM-035: Identifies all active and temporarily separated employees. The report can be used to identify employees that are on a temporary separated or unpaid status who may be eligible to continue their health benefits via Direct Pay.
 - Intermittent Benefit Tracking Report (IBT): Identifies PI employees eligible for health/dental benefits based on meeting 480 paid hours in a Control Period and PI employees who do not meet 480 paid hours in a Control Period who may have lost their health benefits eligibility.

Affordable Care Act (ACA)

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Contact: aca.policy@calhr.ca.gov

Training

- The next ACA trainings are scheduled for:
 - Tuesday, December 10, 9:00-10:30 a.m. (Part 1)
 - Wednesday, December 11, 9:00 a.m.-12:00 p.m. (Part 2)
- Departments can send an email to ppsdacatraining@sco.ca.gov to register for training.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Open Enrollment Transactions (Impacts 2025 Reporting)

- Employee elected to cancel their health coverage during the 2024 Open Enrollment: Key a 5B status code in ACAS, effective 12/31/24 (to indicate the employee voluntarily cancelled their health coverage but remains eligible for health benefits)
- Employee elected to enroll in health coverage during the 2024 Open Enrollment: Key a 3A status code in ACAS, effective 1/1/25 (to indicate the first of the month in which the employee's health coverage is effective)

Note: Departments should prioritize the correction of errors on the monthly ACAS compliance reports before entering updates from this year's Open Enrollment as these updates do not impact the state's ACA reporting for the 2024 reporting year.



Benefit Programs Reminders

Presenter: Catherine Rude

Benefit Program Reminders

Presenter: Catherine Rude

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 agencies policies/rules on correcting the employee's information.
- If the information is correct within the SCO database, and 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 and not multiple inboxes as this will ensure the inquiry is getting to 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 that they should contact their departmental personnel office prior to contacting CalHR.



Benefit Program Updates

CalHR Benefits Division

Vision Program Updates

Presenter: Catherine Rude

Contact: Vision@calhr.ca.gov

Program Updates

- Improving VSP membership profiles for Basic Vision:
 - VSP now receives a demographics file for employee 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.

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 Updates

Presenter: Catherine Rude

Contact: FlexElect@calhr.ca.gov

Program Updates

- Discontinuation of the “10th of the Month Rule”
 - Effective 8/1/24, 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 8/1/24 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.

Pre-Tax Parking Program Updates

Presenter: Catherine Rude

Contact: Pre-TaxParking@calhr.ca.gov

Program Updates

- The maximum 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 deduction of \$315.
- The maximum deduction is set by the Internal Revenue Service (IRS).
- An HR Announcement will be coming out soon confirming the increased amount.
- CalHR is working on updating the webpages soon.

CoBen Cash Updates

Presenter: Catherine Rude

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, Flex 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: Catherine Rude

- 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, 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
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 still pending.

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

- On or about 10/30/2024, CalHR discovered a system error in the Family Connect Portal (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 will generate on or around November 15th and is scheduled to be 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)

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 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	TBA	Jan-2025	TBA	7,548

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Review Dependent

Dependent Type *
Disabled Child

Status Status History
Pending

First Name *

Birth Date *
04/04/1989

Dental Plan *
Yes

Vision Plan *
Yes

Dependent Type Locked

Status Date
5/10/2023

Middle Name

Re-verification Effective Date
05/01/2020

Dental Plan Effective Date
01/01/2022

Vision Plan Effective Date
01/01/2024

Record Source
Carrier File

Last Name *

Re-verification End Date
04/30/2025

Dental Permitting Event
-- Record Source --

Vision Permitting Event
-- Record Source --

Delete Dependent

Comments
Added by Carrier File 2022-07-21

Save **Cancel**

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Baulwin

1 Year Notification: April 2019

Is Notified

Notified Date

Notified By

90 Day Notification: January 2020

Is Notified

Notified Date

Notified By

60 Day Notification: February 2020

Is Notified

Notified Date

Notified By

30 Day Notification: March 2020

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Document Received Date *

04/30/2020

Dependent Certified By

CalPERS

Re-certification Effective Date *

05/01/2020

Re-certification End Date *

04/30/2025

Date Coverage History

Certification Document List *

- Authorization to Disclose Protected Health Information (CalHR XXX) *
- Dependent Eligibility Verification Checklist (CalHR Form 781) *
- Disabled Dependent Member Questionnaire and Medical Report (CalHR XXX) *

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent Child Relationship Certification

The screenshot shows the 'Review Dependent' page in the Family Connect system. The page header includes the logo for Family Connect (California Department of Human Resources) and navigation links for Main Page, Reports, Admin, and FAQ. The user is logged out as Delia Baulwin. The main content area is titled 'Review Dependent' and contains a form with the following fields:

- Dependent Type ***: A dropdown menu with 'Parent Child Relationship' selected. This field is highlighted with a red box.
- Dependent Type Locked**: A checkbox that is checked, indicating that the dependent type is locked. This checkbox is also highlighted with a red box, and a red arrow points to it from the right.
- Status**: A dropdown menu with 'Pending' selected. A link for 'Status History' is visible next to it.
- Status Date**: A text field containing '5/10/2023'.
- Record Source**: A dropdown menu with 'Carrier File' selected.
- First Name ***: A text field with a redacted name.
- Middle Name**: A text field with a redacted name.
- Last Name ***: A text field with a redacted name.
- Birth Date ***: A text field containing '09/10/2012'.
- Re-verification Effective Date**: A text field containing '10/01/2023'.
- Re-verification End Date**: A text field containing '09/30/2024'.
- Dental Plan ***: A dropdown menu with 'Yes' selected.
- Dental Plan Effective Date**: A text field containing '01/01/2023'.
- Dental Permitting Event**: A dropdown menu with '-- Record Source --' selected.
- Vision Plan ***: A dropdown menu with 'Yes' selected.
- Vision Plan Effective Date**: A text field containing '01/01/2020'.
- Vision Permitting Event**: A dropdown menu with '-- Record Source --' selected.

At the bottom of the form, there is a 'Delete Dependent' button and a 'Comments' section containing the text 'Added by Carrier File 2022-07-21'. At the very bottom, there are 'Save' and 'Cancel' buttons.

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)

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

- The current CalHR Benefits website is **calhr.benefitsprograms.info**
- On January 1, 2025, we will have a new website: **benefits.calhr.ca.gov**
- The new website will feature a new design and easier-to-find information
- Old website links and bookmarks will not work after January 31, 2025

How to prepare

- Plan to update your website, intranet and bookmarks in January 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 Form Counts

November 19, 2024

Dental STD. 692	FlexElect Cash Option STD. 701C	Consolidated Benefits Cash Option STD. 702	FlexElect Reimbursement STD. 701R
Received ~ 15,804	Received ~ 2,333	Received ~ 955	Received ~ 9,984
Completed ~ 15,580	Completed ~ 2,323	Completed ~ 939	Completed ~ 9,968



Statewide Benefits Program

Presenter: Rebecca Garcia

Contact: ppsdcsbenefits@sco.ca.gov

Open Enrollment (OE) Reminders

- Deadline for PR250 responses is this Thursday, November 20th
- You do not need to “rescind” incorrect OE forms, just upload the “Corrected” version
- Write "Correction" at the top of any form submitted that is correcting a previous upload
- CalPERS to present Cognos Health Reconciliation Report Training at December [Transaction Specialists Educational Forum](#)



STATEWIDE PROGRAM UPDATES



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Document Cut-off Dates for 2024 Calendar Year-End Processing

- [Payroll Letter #24-011](#)
 - Fringe Benefit reporting – December 6
 - Nonresident Alien with Tax Treaty Exemption - December 6
 - Labor Code (LC) 4800/LC 4811 - December 13
 - Salary Advance/Offsets - December 2
 - Form STD. 675 - December 2
 - Form STD. 995(A) and 995(R) - December 6
 - Form PSD21 - December 4



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Employees with Address Changes and Annual Withholding

- Employees should review their withholdings every year if they have any of the following:
 - Spouse who works as an employee
 - Two (2) or more jobs simultaneously
 - Worked partially during the year
 - Have dependents who are at least 17 years old

Employees may need to update their W-4 if they experience life changes, such as:

- Marriage
- Divorce or legal separation
- Childbirth
- Retirement
- STD. 686 Employee Action Request (EAR) Resources:
 - [Personnel Action Manual \(PAM\)](#): Section 6 - EAR Processing
 - [QuickStart Guide and EAR Samples](#)



California Leave Accounting System (CLAS)

Presenter: Megan Vinson
Contact: CLAS@sco.ca.gov

Reproductive Loss Leave (RLL)

- Each occurrence covers up to five (5) days, for a total allowance of 20 days per year
- Leave Benefit and Transaction Code for RLL
 - Each usage requires two transactions keyed:
 - One under the RLL Benefit (RL)
 - One under the accompanying Leave Benefit with the RLL transaction (RP)
 - Allowable benefits are: Annual Leave, Vacation, Sick Leave, Compensating Time Off, Personal Leave Time, and Dock
 - Benefit will be reset every January
- Resources:
 - Policy: [Human Resources Manual - 2129 Reproductive Loss](#)
 - Leave Letter: [Leave Accounting Letter #24-006](#)



Statewide Training Program

Presenter: Siobhan Hallinan

Contact: PPSDTraining@sco.ca.gov

Exciting changes to the Registration Management system!

	<p>PERSONNEL AND PAYROLL SERVICES DIVISION</p> <p>REGISTRATION MANAGEMENT SYSTEM</p>	
	<p>Presented By: PPSD Statewide Training Unit</p>	

<http://cacontrollers.adobeconnect.com/potluej1znad/>

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 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
- 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