



# Transaction Supervisors' Forum

Presented By: Natalia Saferson

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

Office of State Controller Malia M. Cohen

September 18, 2024

# 2024 Hiring Above Minimum (HAM) Update HR Manual Section 1707



Primary point of contact  
[EmployeeComp@calhr.ca.gov](mailto:EmployeeComp@calhr.ca.gov)

California Department of Human Resources  
2024

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# HAM Update

- Effective **10/1/24**, HAM delegation for individuals is being eliminated.
- As part of this change in policy, CalHR created a one-time HAM transition process. Departments were given the opportunity to submit requests to add additional classifications to the list of approved HAM classifications found in Section 5 of the Pay Scales.
- A final determination of classes to be added to Section 5 of the Pay Scales was emailed to departments on 8/19/24.

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# HAM Update (Continued)

- Effective **10/1/24**, employees who are appointed to one of these classifications would receive the HAM rate specified for the department/location listed.
- Any employee already in the classification will be eligible for the authorized HAM rate if they are currently below the rate specified.
- Any employee who was appointed with a discretionary HAM salary rate prior to 10/1/24, will retain their salary.

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# HAM Update (Continued)

- HAMs are considered a form of employee compensation that can be provided when justified.
- Departments who are experiencing recruitment difficulty for a classification may submit a request through the Employee Compensation Request Policy ([HR Manual 1715](#)), provided it meets the criteria outlined in the policy.



# SCO KEY INITIATIVES

# SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Moe Adam

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

## ConnectHR:

- File Upload feature enhancement demonstration



# CSPS Status – September 2024

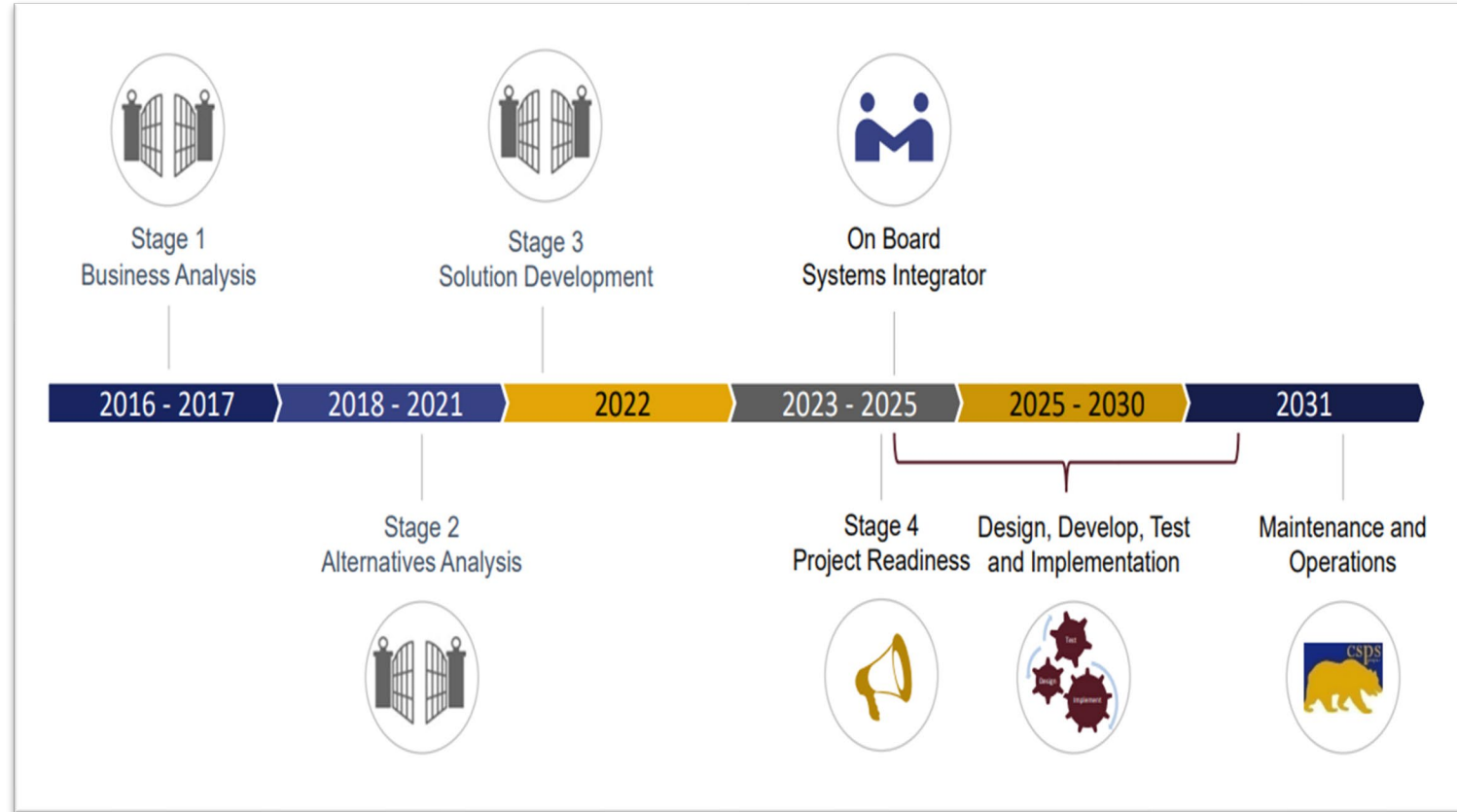
Presenter: [Jeana O’Ferrall](#)  
Contact: [CSPSHelp@sco.ca.gov](mailto:CSPSHelp@sco.ca.gov)





# Project Information

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



# Project Scope

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



# Travel Advance and Expense Management

- Users will be able to submit travel advance and expense reimbursement requests.
- Users will be able to manage new and previously submitted travel advance and reimbursement requests.
- Users will be able to apply expense reimbursement requests to clear a travel advance.
- The system will integrate with other accounting systems.
- This Main Business Capability and corresponding functionality of the CSPA Project is expected to replace the California Automated Travel Expense Reimbursement System (CalATERS).



**Travel  
Advance and  
Expense  
Management**

# Status Updates

- **Procurement Team** completed Phase 2 vendor demonstrations moving into phase 3 which is vendor negotiations.
- **Technical Team** added information from CalSTRS and Tax Entities in the CSPS Interface Diagram.
- **Functional Team** completed linking interface requirements to the Benefits Use Cases. Currently reviewing and adding retroactive scenarios in Use Cases.
- **Organizational Change Management Team** launched the Supplemental Time Off Verification Assignment to the Department Agency Readiness Team liaisons on September 9.



# STATEWIDE BENEFITS ADMINISTRATION

# CalHR Transaction Supervisors' Forum Update



CalHR Benefits Division  
September 18, 2024

# CalHR Benefits Division

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The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by CalHR offered to state employees, retirees and dependents. Our goal is to ensure access to competitive, quality, and affordable benefits. Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and maintaining a top-performing workforce.

# Benefits Program Updates



CalHR Benefits Division  
September 18, 2024



# Affordable Care Act (ACA)

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Presenter: Lisa Hatten

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

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

# Affordable Care Act (ACA)

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Presenter: Lisa Hatten

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

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

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

# Affordable Care Act (ACA)

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Presenter: Lisa Hatten  
Contact: [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)

- ACA Training
  - The next ACA trainings are scheduled for:
    - 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)
    - Wednesday, October 23, from 9:00-10:30 a.m. (Part 1) and Thursday, October 24, from 9:00-12:00 p.m. (Part 2)
  - Departments can send an email to [ppsdacatraining@sco.ca.gov](mailto:ppsdacatraining@sco.ca.gov) to register for training.
  - Additional training dates through the end of the year are available on SCO's "[Affordable Care Act Training](#)" webpage.

# Dependent Re-Verification (DRV)

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

## What is DRV

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

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

# Dependent Re-Verification (DRV)

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

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

## DRV Updates

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

# Dependent Re-Verification (DRV)

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

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

- The following birth month cycles have been completed and departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits:
  - 2023: March, June, September and December
  - 2024: January, April and July
- October 2024 birth month cycle: 90-day, 60-day and 30-day notices have been sent by DGS.

# Dependent Re-Verification (DRV)

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

Total notices mailed to date:

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

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



# Dependent Re-Verification (DRV)

Presenter: Alison Drummer

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

## Disabled Dependent Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is for a dependent of type 'Disabled Child' with a status of 'Pending' and a birth date of '04/04/1989'. The dependent type is locked, as indicated by the checked checkbox and the red arrow. The form also includes fields for dental and vision plans, both set to 'Yes', and their respective effective dates. The record source is 'Carrier File'. A 'Delete Dependent' button is visible, and the form is currently in a 'Save' state.

Field	Value
Dependent Type *	Disabled Child
Status	Pending
Birth Date *	04/04/1989
Dental Plan *	Yes
Vision Plan *	Yes
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
Re-verification End Date	04/30/2025
Dental Permitting Event	-- Record Source --
Vision Permitting Event	-- Record Source --

# Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: [DRV@calhr.ca.gov](mailto: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 the 'FAMILY CONNECT' logo and the text 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES'. To the right of the logo are icons for 'MAIN PAGE', 'REPORTS', 'ADMIN', and 'FAQ', along with a 'Logout Delia Baulwin' link. Below the navigation bar, the main content area is titled 'Disabled Dependent Certification'. It contains several sections: '1 Year Notification: April 2019', '90 Day Notification: January 2020', '60 Day Notification: February 2020', and '30 Day Notification: March 2020'. Each notification section has an 'Is Notified' checkbox, a 'Notified Date' input field, and a 'Notified By' dropdown menu. The 'Certify Dependent' section is currently active, showing a checked 'Certified' checkbox, a 'Document Received Date' of 04/30/2020, a 'Re-certification Effective Date' of 05/01/2020, and a 'Re-certification End Date' of 04/30/2025. A red box highlights the 'Dependent Certified By' dropdown menu, which is set to 'CalPERS'. Below this, there is a 'Date Coverage History' section. At the bottom, there is a 'Certification Document List' with three checked items: 'Authorization to Disclose Protected Health Information (CalHR XXX) \*', 'Dependent Eligibility Verification Checklist (CalHR Form 781) \*', and 'Disabled Dependent Member Questionnaire and Medical Report (CalHR XXX) \*'. A 'Notes' section is also present at the very bottom.

# Dependent Re-Verification (DRV)

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

## Parent-Child Relationship Certification

Review Dependent

**Dependent Type \***  
Parent Child Relationship

**Dependent Type Locked**

**Status** Status History  
Pending

**Status Date**  
5/10/2023

**Record Source**  
Carrier File

**First Name \***

**Middle Name**

**Last Name \***

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

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

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

**Dental Plan \***  
Yes

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

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

**Vision Plan \***  
Yes

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

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

Delete Dependent

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

Save Cancel

Alerts

# Dependent Re-Verification (DRV)

Presenter: Alison Drummer

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

## Parent-Child Relationship Certification

CalHR Family Connect

Settings

FAMILY CONNECT  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Baulwin

90 Day Notification: June 2023

Is Notified

Notified Date

Notified By

60 Day Notification: July 2023

Is Notified

Notified Date

Notified By

30 Day Notification: August 2023

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Document Received Date \*

09/30/2023

Re-certification Effective Date \*

10/01/2023

Re-certification End Date \*

09/30/2024

Dependent Certified By

CalPERS

Date Coverage History

Certification Document List \*

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

Notes

4:00 PM  
5/3/2024

# Dependent Re-Verification (DRV)

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

## Contact

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

# Benefit Program Updates

Presenter: Monica Chavez

## Program Reminders

- CalHR does not have access to update or correct addresses or name changes.
- Prior to submitting 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 Websites: [Benefits Administration Manual](#), [HR Manual](#), [Employee Benefits webpage](#).

# Benefit Program Updates

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Presenter: Monica Chavez

## Program Updates

- Please remind employees that they should contact their Departmental Personnel Office prior to contacting CalHR.

## Program Updates/Reminders include:

- Vision [Vision@calhr.ca.gov](mailto:Vision@calhr.ca.gov)
- FlexElect [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)
- Coben [Coben@calhr.ca.gov](mailto:Coben@calhr.ca.gov)
- Dental [Dental@calhr.ca.gov](mailto:Dental@calhr.ca.gov)
- Pre-Tax Parking [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)
- Long-Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)
- Life Insurance [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov)
- Group Legal [GroupLegal@calhr.ca.gov](mailto:GroupLegal@calhr.ca.gov)

# Vision Program Updates

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

## Vision Program

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

## Training Recommendations

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

## Benefit Premiums

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



# FlexElect Program Updates

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

## FlexElect Program Updates

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

# Benefits Project Updates



CalHR Benefits Division  
September 18, 2024

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# Benefits Open Enrollment

Presenter: Bobby Saetern

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

## Open Enrollment (OE) Updates

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

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# Benefits Open Enrollment

Presenter: Bobby Saetern

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

## Open Enrollment Events

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

## In-Person Fairs

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

## Virtual Benefits Fair

- The Virtual Benefits Fair was held on September 11 – 12, 2024
- Virtual Resources are available year-round on the [Benefits Fairs webpage](#)

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

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# Benefits Open Enrollment

Presenter: Bobby Saetern

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

## Virtual Lunch and Learn Sessions

- CalHR is planning to host two Virtual Lunch and Learn Sessions for State HR Professionals on September 24 and October 8, 2024, from 11:30 a.m. – 12:30 p.m.
- During these sessions, information will be shared by CalHR and SCO.
- The first 30-minutes of these sessions will provide OE updates and reminders followed by a 30-minute Q&A session for HR Professionals to ask OE related questions.
- To register and learn more about the Virtual Lunch and Learn Sessions, please visit the [State HR Professionals](#) webpage.

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# Benefits Open Enrollment

Presenter: Bobby Saetern

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

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

Please also connect with your employees who are on leave to provide Open Enrollment updates.

**Contact:** Departmental personnel offices can send OE related questions via email to [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov).

Current response time is five (5) business days.

## Resources

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

# CalHR Benefits Resources Cont.

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## Contacts:

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

# CalHR Benefits Resources

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## Websites

### Benefits Website

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

### BAM Training Questions

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

### Healthier U Connections

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

### Human Resources

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

### State Employees

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

### HR Manual

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





# Statewide Benefits Program

Presenter: Ryan Baughman

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

## Open Enrollment is Here!

- Important Dates:
  - Open Enrollment Period: September 16 to October 11, 2024
  - Last day agencies can submit new forms: November 1, 2024
  - Last day agencies can submit corrected forms: November 20, 2024
  - Effective Date of Benefits: January 1, 2025



# Statewide Benefits Program

Presenter: Ryan Baughman

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

## Open Enrollment is Here!

- Reminders:
  - All Open Enrollment forms must be uploaded via [ConnectHR](#), including responses to PR250s
  - Employees CAN use self-enrollment feature on [myCalPERS](#) for health benefits
  - Please ensure the correct form is being used for Cash Options:
    - 701C Flex Cash: Bargaining Units 1, 3, 4, 5, 6, 9, 10, 11, 12, 13, 14, 15, 20, and 21
    - 702 Consolidated Benefits: Bargaining Units 2, 7, 8, 16, 17, 18, 19, and Excluded
  - Attach any associated STD. 692 (New or Cancel) to either the STD. 701C or STD. 702 prior to ConnectHR upload
  - If you upload the STD. 701C or STD. 702 form with an included STD. 692, DO NOT upload the same STD. 692 separately.



# Statewide Benefits Program

Presenter: Ryan Baughman

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

## Open Enrollment is Here!

- State Controller's Office Educational Materials:
  - [2024 Open Enrollment Resources](#)
    - Checklists
    - Examples & Common Errors Guides
    - 2024 Open Enrollment FAQs
    - SCO Tips for 2024 Open Enrollment on STD. 701C, STD. 702, and STD. 701R
- CalHR Resources:
  - [CalHR Benefits Division - Open Enrollment](#)
  - [Benefits Administration Manual](#)
    - [Dental](#)
    - [FlexElect Cash Options and Reimbursement Accounts](#)

# BREAK



## 5 MINUTES





# STATEWIDE PROGRAM UPDATES



# Statewide Tax Support Program

Presenter: Monique Perez

Contact: [PPSDW2MiscDED@sco.ca.gov](mailto:PPSDW2MiscDED@sco.ca.gov)

## Undeliverable Form W-2, Wage and Tax Statement

- Cal Employee Connect (CEC)
  - Employees can log into their [CEC](#) account to make changes within the portal.
- Submit New Employee Action Request Form
  - [Employee Action Request Form, STD. 686](#)
    - Submit to personnel/payroll office
- Increase in cost of Paper Form W-2
  - Service fee of \$0.92 for each Form W-2
    - \$0.21 increase from last year
    - Encourage employees to sign up for electronic Form W-2 via CEC
- Corrected Form W-2
  - Revised and is now on a 2-page format

# Statewide Training Program

Presenter: Siobhan Hallinan

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

- New Trimester Dates Posted
  - Through December 2024
- [Self-Paced Training Modules](#)
- Next [Transaction Specialists' Educational Forum](#)
  - Thursday, October 3, 2024
    - All new Lump Sum videos!



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

# Roundtable Question



Are any agencies willing to share a copy of their Leave of Absence (LOA) form, used for when employees request LOA?

If so, kindly forward the form to Linda Newson at [linda.newson@ota.ca.gov](mailto:linda.newson@ota.ca.gov), thank you!