



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

January 16, 2025

Survey Questions





Question

Presenter: Tracy Gutierrez

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

The Vision Service Plan (VSP) Premier rate for December paychecks reflected the 2024 rates at random. I understand that the State Controller's Office (SCO) and VSP are aware of this issue. How, and when, will SCO collect the difference? We want to notify our employees of this issue and how this will be resolved.

Answer: SCO is aware that the December 2024 pay period deduction for existing VSP Premier participants was at the 2024 level, as opposed to the new 2025 level. SCO is working with VSP to update the deduction for the January 2025 pay period to include the new 2025 rate.



Question

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

CalHR's Dental Benefits webpage states that employees will receive an identification (ID) card once enrolled in a Prepaid or Preferred Provider Organization (PPO) dental plan. We have never heard about cards being sent to employees. Is this new?

Answer: Dental carriers will send new enrollment packages to employees once enrolled, this can include ID cards. Employees can obtain this information by logging in to their dental carrier's website.



Question

Presenter: Kim Herlache

Contact: PSB@calhr.ca.gov

When separating a Retired Annuitant (RA), are they subject to timely payment of wages? How do we process their pay prior to the first of the following month?

Answer: Yes, all separations are subject to timely payment of wages. I recommend working with the RAs to get the timesheet in advance, so it is processed timely.



SCO KEY INITIATIVES

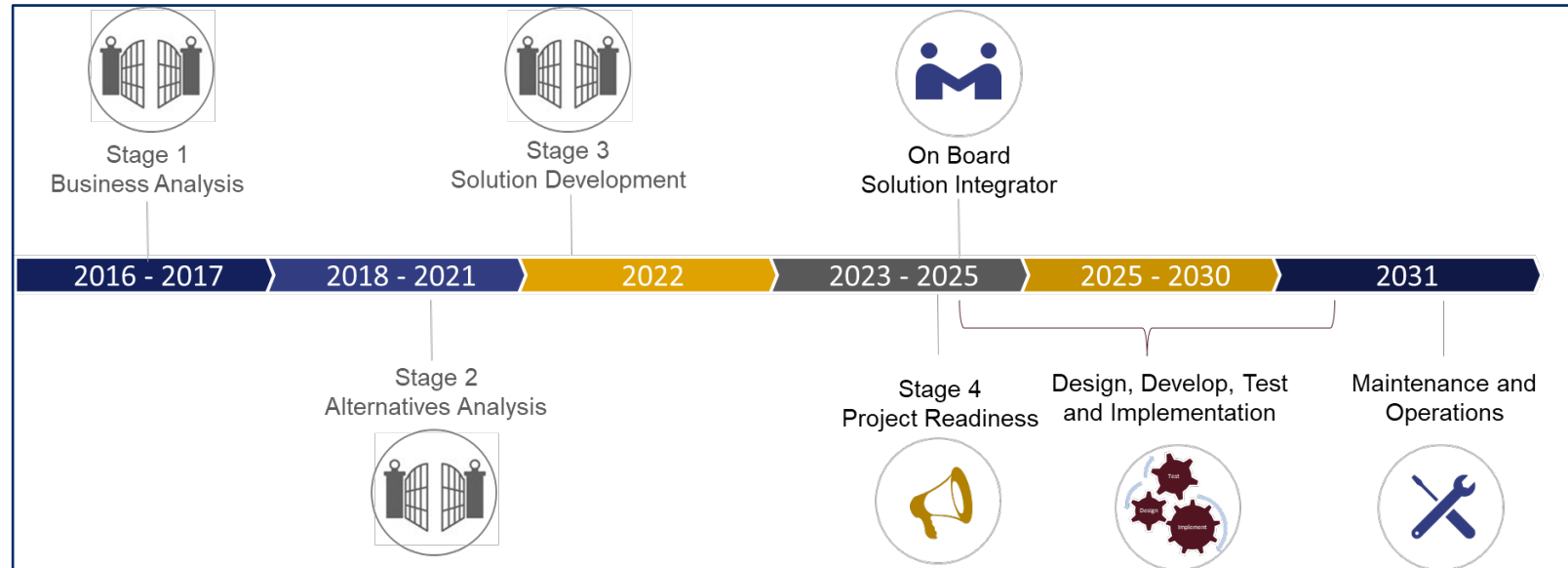
CSPS Status – January 2025

Presenter: Dominick Mullane, ACE

Contact: CSPSHelp@sco.ca.gov

Project Information:

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



Status/Progress Updates

- **Evaluation Team** presented the selected bidder package to ESC and received approval to submit PAL Stage 4 documents to CDT for final review.
- **Technical Team** is developing a validation strategy for the interface gap identification process.
- **Functional Team** completed analysis of current State Interface Inventory with ISD and PPSD.
- **Organizational Change Management Team** created an introduction video with Controller Cohen for the CSPS Project Awareness Campaign.



STATEWIDE BENEFITS ADMINISTRATION

Refresher Training

Savings Plus Over Deferral Process

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

What is an Over Deferral?

When a participant contributes more than the Internal Revenue Service (IRS) annual limits to a single IRS Plan type.

How is an over deferral determined?



Based on the employee's W-2 information

Based on the date the pay was issued to the employee - NOT the date the contribution was posted to their account



May include Plans outside of Savings Plus

457(b) and Federal Thrift Plan
401(k) and 403(b)

High-Level Overview

- At the end of the year, Savings Plus receives SCO Year-to-Date (YTD) information
- Identify participants who have exceeded the limit
- Notification and Corrective payment is issued
 - Letter sent to participant explaining they exceeded the limit
 - Check is issued to individual for the Over Deferred amount
 - Second check is issued for any earnings associated with the Over Deferral amount
- 1099-R issued the **next** January; 1 for the over deferral, 1 for earnings

Ongoing Process

Our Operations Team works year-round to help participants understand the contribution limits and what their options are.

Notifications

- Savings Plus sends three letters a year:
 - March – End of year letter, for prior tax year Over-Deferrals
 - May and September – two warning letters for potential Over-Deferrals

We generate data for these letters based on:

 - YTD information from SCO
 - Contribution elections on file
- Three Different Types of Warning Letters:
 - Approaching the Limit
 - Employed, Exceeded the Limit
 - Separated, Exceeded the Limit

So, I am nearing the limit...now what?

You will receive a letter with the following information:

- Reminder of the annual limit
 - Includes catch-up amounts, if applicable
- An alert that you may exceed the limit based on your current contribution amount
- Reminder that Savings Plus will NOT stop your contributions
- List of alternative ways to contribute more
- Details the automatic corrective action if you exceed the limits

So, I over deferred...now what?

- Distribution holds placed on account
- Letter sent with information on what to expect
- Corrective distribution issued via check(s)
 - Includes over deferral and associated earnings on amount

You have exceeded the IRS contribution limit for 2023

Access your information online
View your information online at savingsplusnow.com

Our records indicate you exceeded the contribution limit for the tax year 2023 for your retirement account. Please see the details below.

Plan details

Plan name: [Plan name]
Account number: [Account number]

Understanding the details

The Internal Revenue Service (IRS) allowed you to contribute up to \$22,500 for the 2023 tax year to your account. If you have obtained age 50, you are eligible to participate in Age-Based Catch-Up, which allows you to contribute an additional \$7,500 per year.

NOTE: If you are enrolled in the Traditional Catch-Up provision, that amount was added to your total contribution limit.

What to expect

We will send the check(s) to your address on record in the amount of your excess contribution, including any applicable gains or losses, no later than April 15, 2024. You will receive Form 1099-R(s) by January 31, 2025 for this amount, which will be subject to ordinary income tax.

Common Questions from Employees

- Do they need to have their Over Deferral fixed immediately?
 - No action required by the employee – Savings Plus has a process!
 - Two 1099-Rs will be issued in January 2025 for the correction (per money type – Roth/Pre-tax)
 - one (1) for the over deferral, coded as income earned in the prior year
 - one (1) for the associated earnings related to the over deferred amount, earned in the current tax year
- What if they want to deal with the Over Deferral before the end of the tax year?
 - Anyone who has been identified as Over Deferred can request a corrective distribution at any point
 - This allows for the correction to happen in the same tax year as the contribution was earned
 - If they are active, we ask they turn their contribution to \$0 before we send the corrective payment to them

Where can I get more information?

- **Employees** may call the Savings Plus Solutions Center at (855) 616-4776
- **HR/Payroll/Transactions staff** can call Savings Plus at (916) 909-3717



Transaction Supervisors' Forum:

January 16, 2025

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.





Benefit Program Reminders

Presenter: Monica Chavez

Benefit Program Reminders

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Contact: BenefitsInquiries@calhr.ca.gov

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

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

A complete appeal package includes:

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

Important notes:

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

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

Training recommendations:

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

Benefit Premiums:

- Premiums cannot be waived for months when services are not used. It is the responsibility of the employee to notify their department of any changes to their dependent eligibility.

Benefit Program Reminders Continued

Presenter: Monica Chavez

Contact: BenefitsInquiries@calhr.ca.gov

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



Benefit Program Updates

Presenter: CalHR Benefits Division

Benefits Resources

Presenter: Delia Baulwin

Contact: BenefitsInquiries@calhr.ca.gov

- We understand that the ongoing wildfires in Southern California are a challenging time for both you and the employees you support. To help, we have compiled a [benefits resources](#) webpage with important information on benefits and services available as a guide during wildfires and other natural disasters.
- Please bookmark the [benefits resources](#) webpage and encourage your employees to check it regularly for benefits updates. We will continue to update the webpage on an ongoing basis as new information becomes available from our benefit vendors and carriers.
- Thank you for your care and support during this evolving situation. If your departmental personnel office has additional questions regarding benefits administration or need assistance processing employee appeals, please contact the [Benefits Inquiries](#) inbox.

Vision Program Updates

Presenter: Monica Chavez

Contact: Vision@calhr.ca.gov

Program Updates

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

Benefit Premiums

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

Dental Program Updates

Presenter: Monica Chavez

Contact: Dental@calhr.ca.gov

Program Updates

- Please allow 30 calendar days for an appeal to be reviewed.
 - Confirm that the employee is aware of applicable accounts receivables.
 - Once an appeal is approved, it cannot be retracted.
- STD. 692 form versions older than 2020 will be rejected and returned to the agency.
- STD. 692 forms must be complete and error free.
- When submitting an inquiry or appeal please include the employee's name in the subject line.
- Do not submit an inquiry or appeal for multiple employees.
- Make sure to consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.

FlexElect Program Updates

Presenter: Monica Chavez

Contact: FlexElect@calhr.ca.gov

Program Updates

- Discontinuation of the “10th of the Month Rule”
 - Effective August 1, 2024, the "10th of the month rule" no longer applies to the FlexElect/CoBen Cash Options or FlexElect Reimbursement Programs.
 - All forms within the posted SCO processing dates on August 1, 2024, 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.
- To avoid processing delays with appeals, do not redact Social Security Numbers (SSNs) from the STD. 701R FlexElect Reimbursement form. Instead include the last four digits of the SSN on the STD. 701R and send a separate email to FlexElect@calhr.ca.gov with the first five digits of the SSN or call and leave a voicemail with the full SSN at (916) 909-2863.

Third Party Pre-Tax Parking Reimbursement Program Updates

Presenter: Monica Chavez

Contact: Pre-TaxParking@calhr.ca.gov

Program Updates

- The maximum monthly deduction an employee can deduct for the cost of parking for the 2025 calendar year has been increased to \$325/month, which is a \$10 increase from the 2024 maximum monthly deduction of \$315.
- The maximum monthly deduction is set by the Internal Revenue Service (IRS).
- An HR Announcement was released on January 7, confirming the increased amount.

CoBen Cash Updates

Presenter: Monica Chavez

Contact: CoBen@calhr.ca.gov

Program Updates

- The 2016 ruling on the Petition to Vacate TRICARE Arbitration – CalHR v. CASE allowed rank and file employees in Bargaining Unit 2 (BU2) who are covered under TRICARE to begin receiving the CoBen Cash Option.
- The Benefits Administration Manual, FlexElect Handbook, and CoBen Handbook were updated to include this information, and the information will be updated in the CalHR HR Manual Section 1406 soon.
- This change took effect June 1, 2024, and departmental 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.



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of an employee's spouse, domestic partner, children, stepchildren and domestic partner children (family members) enrolled in state health, dental and Premier Vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.
- Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental and Premier Vision benefits. The bargaining unit contracts specify that family member eligibility for dental and vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Highlights

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

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Updates

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

Dependent Re-Verification (DRV)

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Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- March, June, September, December 2023 and January, April, July, October 2024 birth month cycles have concluded. Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- February 2025 birth month cycle: The 30-day mailing was generated on or about December 13, 2024, and mailed December 31, 2024, by the Department of General Services.
- The next birth month cycle will be May 2025, and the 90-day mailing will be generated on or about January 15, 2025, with an expected mailing date of February 3, 2025, by the Department of General Services.
- 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 approximately 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	6,965	Jan-2025	5,748	20,261

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

The screenshot displays the 'Review Dependent' form in the Family Connect system. The form is for a dependent of type 'Disabled Child'. A red box highlights the 'Dependent Type' dropdown menu, which is currently set to 'Disabled Child'. Another red box highlights a 'Dependent Type Locked' checkbox, which is checked, with a red arrow pointing to it from the right. The form includes fields for 'Status' (Pending), 'Status Date' (5/10/2023), 'First Name', 'Middle Name', 'Last Name', 'Birth Date' (04/04/1989), 'Re-verification Effective Date' (05/01/2020), 'Re-verification End Date' (04/30/2025), 'Dental Plan' (Yes), 'Dental Plan Effective Date' (01/01/2022), 'Dental Permitting Event' (-- Record Source --), 'Vision Plan' (Yes), 'Vision Plan Effective Date' (01/01/2024), and 'Vision Permitting Event' (-- Record Source --). There is a 'Delete Dependent' button and a 'Comments' section with a text area containing 'Added by Carrier File 2022-07-21'. At the bottom, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows the 'Family Connect' web application interface. At the top, there is a navigation bar with icons for 'MAIN PAGE', 'REPORTS', 'ADMIN', and 'FAQ', along with a 'Logout Delia Baulwin' link. The main content area is titled 'Disabled Dependent Certification' and contains several sections:

- 1 Year Notification: April 2019**: Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 90 Day Notification: January 2020**: Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 60 Day Notification: February 2020**: Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- 30 Day Notification: March 2020**: Includes an 'Is Notified' checkbox (unchecked), a 'Notified Date' text input field, and a 'Notified By' dropdown menu.
- Certify Dependent**: Includes a 'Certified' checkbox (checked), a 'Document Received Date *' text input field (04/30/2020), a 'Re-certification Effective Date *' text input field (05/01/2020), a 'Re-certification End Date *' text input field (04/30/2025), and a 'Dependent Certified By' dropdown menu (CalPERS). The 'Dependent Certified By' field is highlighted with a red border.
- Certification Document List ***: A list of 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) *'.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent Child Relationship Certification

Review Dependent

Dependent Type *
Parent Child Relationship

Status Status History
Pending

First Name *
[Redacted]

Birth Date *
09/10/2012

Dental Plan *
Yes

Vision Plan *
Yes

Dependent Type Locked

Status Date
5/10/2023

Middle Name
[Redacted]

Re-verification Effective Date
10/01/2023

Dental Plan Effective Date
01/01/2023

Vision Plan Effective Date
01/01/2020

Record Source
Carrier File

Last Name *
[Redacted]

Re-verification End Date
09/30/2024

Dental Permitting Event
-- Record Source --

Vision Permitting Event
-- Record Source --

Comments
Added by Carrier File 2022-07-21

Buttons: Delete Dependent, Save, Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent Child Relationship Certification

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Delia Bautwin

90 Day Notification: June 2023

Is Notified

Notified Date

Notified By

60 Day Notification: July 2023

Is Notified

Notified Date

Notified By

30 Day Notification: August 2023

Is Notified

Notified Date

Notified By

Certify Dependent

Certified

Re-certification Effective Date *

10/01/2023

Document Received Date *

09/30/2023

Dependent Certified By

CalPERS

Re-certification End Date *

09/30/2024

Date Coverage History

Certification Document List *

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

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: Ngoc Le

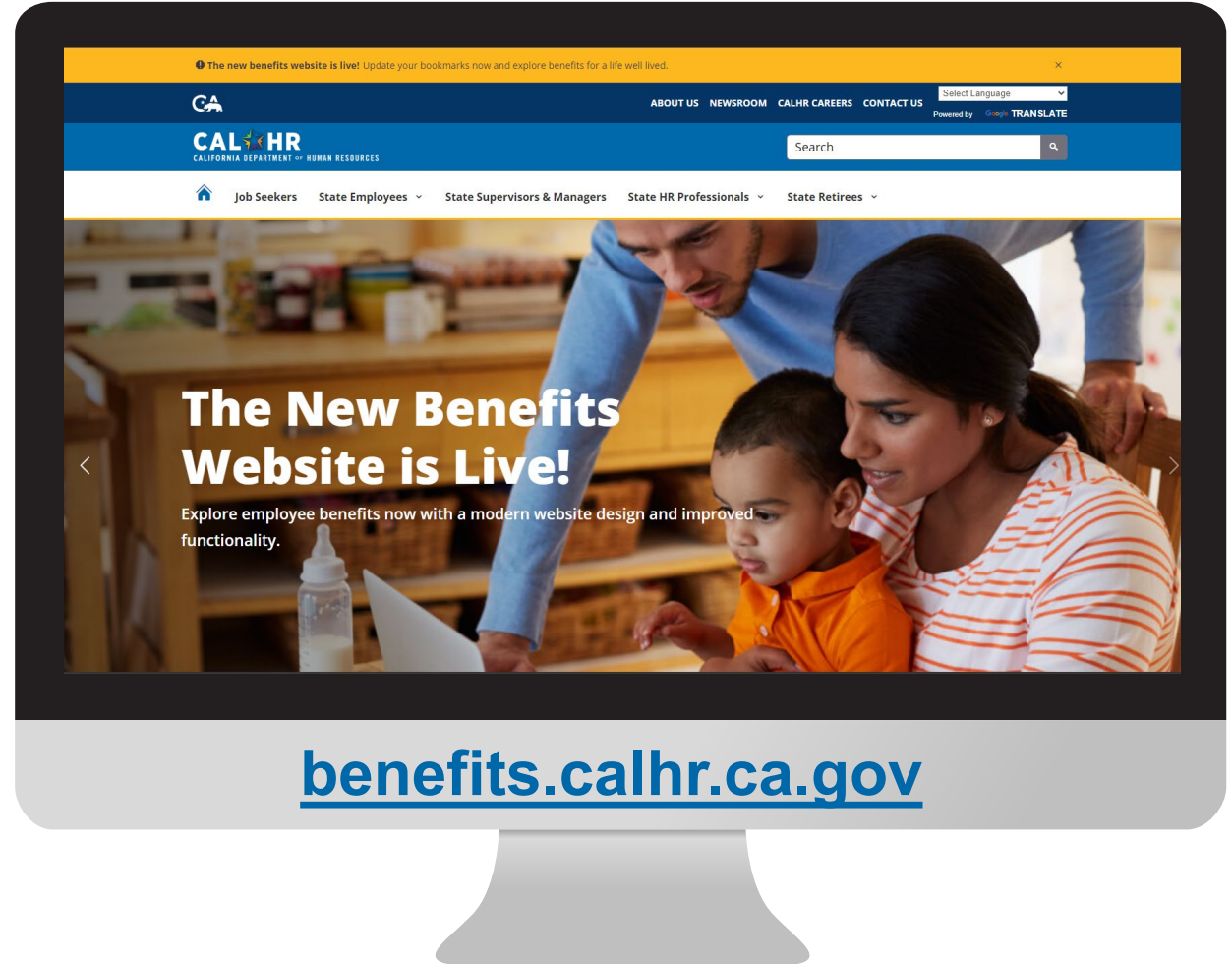
CalHR Benefits Website

Presenter: Ngoc Le

Contact: BenefitsInquiries@calhr.ca.gov

New benefits website

- On December 19, we launched a new benefits website: benefits.calhr.ca.gov
- The new website features a modern design, improved functionality and easier navigation to better serve departmental personnel offices and employees.
- The password to access the State HR Professionals section of the website will stay the same.



CalHR Benefits Website

Presenter: Ngoc Le

Contact: BenefitsInquiries@calhr.ca.gov

Action requested

- Old website links and bookmarks (calhr.benefitsprograms.info) may not work.
- Update your bookmarks, intranet pages, new hire information and other communications now to benefits.calhr.ca.gov by January 31, 2025.

What is 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](#)
- [Insurance 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 Resources](#)
- [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 PROGRAM UPDATES



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Exempt Employees Reminders:

- Employees who are filing exempt will need to file a new STD. 686 (Employee Action Request) form by February 14, 2025.
 - They will be switched to single for standard withholdings which is equivalent to single and zero for both Federal and State.
 - Listings and notices were sent to the HR offices at the beginning of January regarding those employees who were exempt as of December 2024.

For Additional Information:

- [Employee Action Request \(EAR\) STD. 686 Form and Federal Withholdings Toolkit](#)
- [Request a Duplicate Form W-2, Wage and Tax Statement](#)
- [Form W-2 Wage and Tax Statement FAQs](#)



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Form W-2 Reminders:

- Form W-2 will be distributed by mail no later than January 31, 2025.
- [Cal Employee Connect](#) (CEC)
 - Form W-2s and Corrected W-2s will be available on [CEC](#).
 - If employees have not signed up for an electronic W-2, they will have view only access on CEC.

Duplicate Form W-2:

- The duplicate Form W-2 fee will be waived for W-2s not received through March 10, 2025.
 - [Payroll Letter #24-020](#)
- Employees who have signed up for a paperless copy via the CEC portal will not be eligible for a fee waiver.
- Prior year Form W-2s are in CEC and go back to 2016. Paper copies will go back to 2022.

SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Tiffany Fong-Mao

Contact: ConnectHRHelp@sco.ca.gov

Form W-2 Update/Reminders on Cal Employee Connect (CEC)/ConnectHR:

- [Cal Employee Connect](#) (CEC)
 - 2024 Form W-2s are currently available on [CEC](#).
 - Employees who have opted in for W-2 Paperless can download and print current and previous years' W-2s.
 - Employees not signed up for W-2 Paperless will have view only access.
 - Annual Enrollment for W-2 Paperless will be available starting February 1 through November 30.
- [ConnectHR](#)
 - Human Resources staff with ConnectHR access can shadow employee's account to download and print their W-2s through 2023 tax year.
 - 2024 W-2s will be made available in ConnectHR by this month.





Personnel Civil Service Audits

Presenter: Renee Menefee

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

Lump Sum Reminders

- Check pay daily
- [Check Weekly Processing Dates](#)
- Refer to the 2nd tax year Personnel Action Request (PAR) instructions in the [Lump Sum Separation Toolkit](#)
- Do not redeposit pay without reaching out to SCO Payroll Team
- Make sure the cover sheet is included in the PAR package
- Once the election forms are signed and submitted, they are considered irrevocable.



Personnel Services Branch

Presenter: Kim Herlache

Contact: PSB@calhr.ca.gov

Hire Above Minimum (HAM)

- CalHR received information from at least one union that their employees did not receive an accelerated anniversary date when they transitioned to a HAM rate under Section 5.
 - When an employee become eligible for a Section 5, HAM plus rate, per Section 5 of the [Pay Scales](#), the employee will receive a new anniversary date. If the salary increase for the new HAM plus rate is less than 5 percent, then the anniversary date will need to be accelerated per the normal acceleration chart.
 - This chart can be found in Section 9 of the [Pay Scales](#).



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

- Employee Self-registration in Effect
 - [Additional resources](#)
 - Employees should designate their direct supervisor as a Point of Contact (POC) in their student account
- Contact PPSD Training for Employee Training/Attendance Records
- Training Confirmation and Welcome Emails
 - Search outlook inboxes/deleted items before reaching out to PPSD Training
 - Filter: "Gosignmeup" or Instructor Name

PPSD General Reminders



When you reconcile payroll, check that these *details* are correct:

- Withholdings and deductions
- Employer taxes
- Hours worked, including overtime, vacation time, sick days, etc.
- Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

Resource: Payroll Procedures Manual (PPM) [Section M](#)



PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Please do not email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- Update [California Personnel Office Directory \(CPOD\)](#)
- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- HR offices calling the [Statewide Customer Contact Center](#) [(916) 372-7200] must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.
- Share this information with your Human Resources Team!

SCO Resources

Websites:

- [Human Resources](#) (HR)
- [State Employees](#)

SCO Key Initiatives:

- [SCOConnect](#)
- [California State Payroll System Project](#)

Contacts:

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

