



Transaction Supervisors' Forum

Presented By: Natalia Saferson

Contact: SCOTransactionSupervisors@sco.ca.gov

Office of State Controller Malia M. Cohen

May 15, 2025



Survey Questions





Question

Presenter: Tommy Fong

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

Do appointment Personnel Action Requests (PARs) for non-citizens (Code A in 545 field) have to be sent to SCO for keying?

Answer: Yes, oath A PARs must be sent to SCO for keying.



SCO KEY INITIATIVES

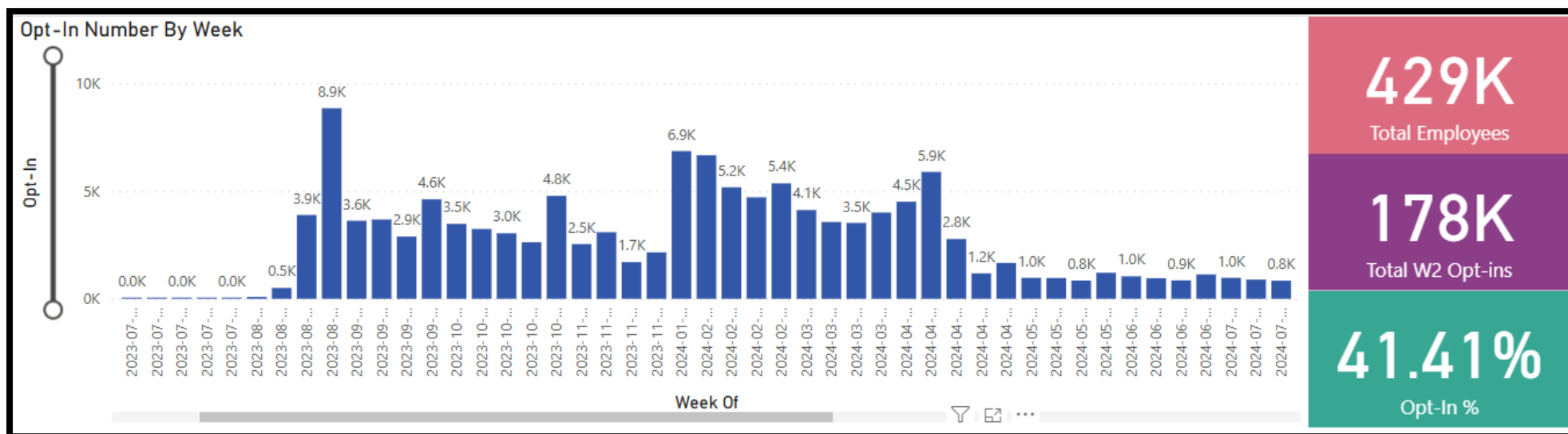


SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

Cal Employee Connect: W-2 Paperless highlights



- **Goal for 2025 is 50%**
 - As of May 13, 2025: 41% adoption rate
 - Enrollment now open until November 30
 - Please encourage your employees to Opt-in



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

- Garnishment Feature Demonstration
 - The electronic Garnishment feature is an alternative to the paper Standard Form (STD.) 639 and will allow Human Resources (HR) staff the ability to key "New" Garnishments via a [ConnectHR](#) account.
 - Within the first iteration of the electronic Garnishment feature we currently allow submissions of "New" 339-004 Garnishments via a ConnectHR account, with plans to expand beyond this.
 - The Garnishment feature has been deployed and utilized by a few pilot agencies and has processed more than 300 garnishment transactions.
 - We have begun the process for the ConnectHR Garnishment feature deployment.



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Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

Step one – Login:

Log in to a [ConnectHR](#) account.

CONNECTHR

Help & Feedback Login

Login

User Name
[Forgot User Name?](#)

Password
[Forgot Password?](#)

Submit

Cancel

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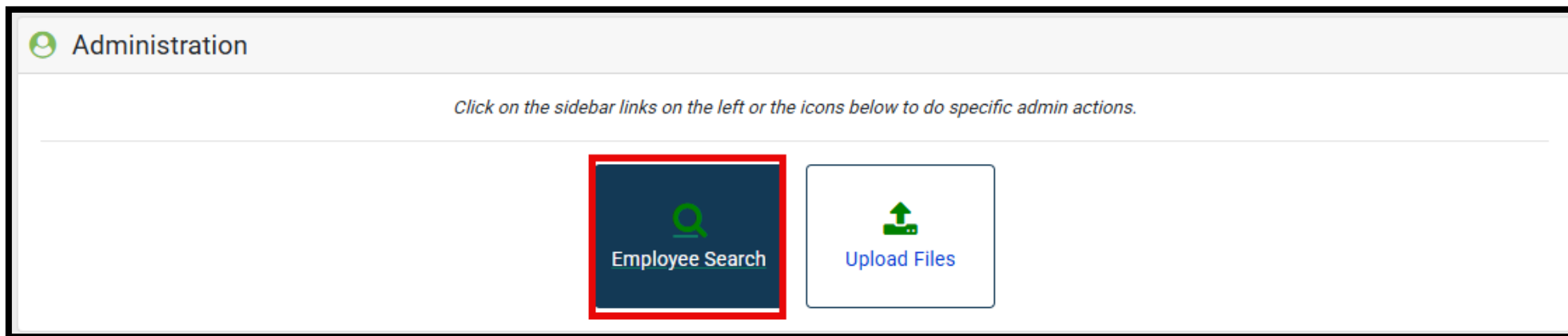
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Step two – Find an Employee:

After logging in to ConnectHR, the next step is to search for the employee you wish to establish a Garnishment for. To do this, navigate to the "Employee Search" feature.





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Within the "Employee Search" section, select a search option from the dropdown.

Employee Search

First Name Last Name [Search]

4 department(s) selected

Search By: Name ▾

- Name
- Employee ID (UEID)
- SSN

The search will produce an employee record. Click anywhere on the record that is to the right of the left most feature icons.

	UEID	Last Name	First Name	DOB	Address
	9999-9999-0	DOE	JOHN D	07/04/1970	300 CAPITOL MALL



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After selecting an employee's record, ConnectHR will display an "Employee Detail" screen. Within the bottom right corner of the "Employee Detail" screen, the Garnishment feature will be listed within the "HR Operations" dropdown.

Employee Detail

First Name

JOHN D

Last Name

DOE

Date of Birth

07/04/1970

UEID

9999-9999-0

UUID

Address

300 CAPITOL MALL

Position

Agency

Address 2

SACRAMENTO CA

Zip Code

Classification

CBID

WWG

←

HR Operations ▾

035 Agency Collect Deduction
339/004 Garnishment




SCOConnect: Cal Employee Connect/ConnectHR

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Contact: ConnectHRHelp@sco.ca.gov

Step three – Garnishment Form:

Selecting "Garnishment" from the "HR Operations" dropdown, will open the electronic Garnishment form within ConnectHR. For "Step 1" of the Garnishment form, select the Garnishment type from the dropdown. If a Garnishment type is not listed within the available dropdown options, please utilize the Standard Form 639.

 Garnishment - (339 - 004)

Step 1: Select the type of garnishment deduction to be established.

Select Garnishment Type

Select garnishment type. Type here to filter

FTB - State Taxes

FTB - Court Ordered Debt

FTB - Registration Collections

FTB - Student Loan Collections

Board of Equalization for Taxes

Unemployment Insurance



SCOConnect: Cal Employee Connect/ConnectHR

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Contact: ConnectHRHelp@sco.ca.gov

For "Step 2" of the Garnishment form, fill in the required fields.

Step 2: Fill in the required information below

Case number ⓘ

12345678

Effective date ⓘ

05/12/2025

Total garnishment amount ⓘ

\$ 0.00

If more information on a section is needed, the "i" information icon can be clicked next to each section.

Effective date ⓘ

Effective Date

Must be 10 calendar days after the date on which the garnishment was served. If the garnishment is a "Jeopardy" withholding order for state taxes, the effective date must be the date served.



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For "Step 3" of the Garnishment form, ConnectHR has the optional Garnishment fields listed.

Step 3: Complete **ONLY** one of the following if the court order specifically states

Maximum amount deductible per month ⓘ

\$ 0.00

Specific amount to be deducted per month ⓘ

\$ 0.00

Please check and confirm the address listed within "Payee Address Preview" matches the Garnishment. This field is pre-populated based on the selected Garnishment from the "Step 1" dropdown. After reviewing all fields, click "Submit Garnishment" at the bottom of the form.

Payee Address Preview:

FRANCHISE TAX BOARD

PO BOX 942867

SACRAMENTO CA 94267-0011

Submit Garnishment



SCOConnect: Cal Employee Connect/ConnectHR

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A Garnishment Confirmation window will allow an additional opportunity to review the keyed information. Please note, submitted Garnishment forms are not subject to revoke requests. A "Cancellation" or "Modification" Garnishment will need to be submitted via a STD. 639.

After submitting, the ConnectHR user will receive a confirmation email.

ConnectHR - Garnishment Request Confirmation

This is confirmation that your Garnishment Request has been submitted. Details below:

General Request Information	
Request Timestamp	
Employee UEID	
Employee Name	
Case Number	
Effective Date	
Total Garnishment Amount	
Specific Amt. per Month	
Max Amt. per Month	

CSPS Status – May 2025

Presenter: Dominick Mullane

Contact: CSPSHelp@sco.ca.gov

Project Information:



2025 Current Activities: System Integrator (CGI) onboarding; Project Kick Off; Project Planning; Project Schedule Development

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:

- **Organizational Change Management Team** continues to make progress on the CSPS Awareness and Modernizing Pay Day Campaigns and the Re-Imagined CSPS webpages
- **Functional Team** continues to work on reconciliation of Use Cases with requirements and workflows
- **Project Management Office** continues to onboard System Integrator (SI) staff and update project artifacts

What to Expect When Expecting a Solution Integrator

<https://www.youtube.com/watch?v=wtPjYOpF6PM>



STATEWIDE BENEFITS ADMINISTRATION

SECURE 2.0 Updates

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



SECURE 2.0: Section 603

“High Earner Rothification” Provision

Starting January 1, 2026, most **catch-up contributions** for employees aged 50 and older, who earn more than \$145,000 in FICA wages* in the prior year, **must** be made as Roth contributions.

*subject to Social Security withholding

Lump Sum Separation Pay Impacts

This new provision goes into effect 1/1/2026, but will impact employees who separate in November and December of **this year** (2025) and choose to defer into a second tax year (2026).

How can you prepare?

- Encourage employees who are interested in retiring at the end of the year to consult with a tax professional or financial advisor
- HR offices may use MIRS to help identify the affected population
- Stay educated – visit SavingsPlusNow.com, utilize the SCO toolkits and resources, attend educational forums, and contact Savings Plus with questions **early!**

What's Next?

- Updating the Lump Sum Separation Pay form to reflect new regulations
- Developing internal controls to identify and “warn” employees who are nearing limits
- Ongoing collaboration with SCO to update toolkits, guides, and resources

Stay Tuned!

- Savings Plus is preparing training opportunities for HR offices across the state
- Videos, FAQs, and other resources and tools will be added to SavingsPlusNow.com for employees and HR offices

We are here to help!

- HR/Payroll/Personnel may contact us at LeaveRoller@calhr.ca.gov or **916-909-3717**
- Please direct employees with questions to the Savings Plus Solutions Center at **(855) 616-4776**



Transaction Supervisors'

Forum: May 15, 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.





Open Enrollment

Presenter: Amber Neves

Special Open Enrollment – FlexElect Dependent Care Reimbursement Account (DCRA)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

- This Special Open Enrollment (OE) period for DCRA is in response to [Executive Order N-22-25](#).
- The Special OE period for DCRA started on May 1 and will run through May 30, 2025.
- Eligible state employees may newly enroll in the program or increase their current DCRA contribution amount. State employees who are currently enrolled will not have the option to cancel or decrease contributions.
- Deductions begin: June 2025 pay period (appears on the July 1, 2025, pay warrant)
- Contribution period: June – November 2025, pay periods (six months)
- For additional information, you can view the Special Open Enrollment webpage on our [Benefits website](#).
- **Please process enrollment forms as you receive them and submit to SCO on flow basis.**
- **All enrollment forms must be submitted to SCO by June 10, 2025.**

Open Enrollment (OE)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment (OE) Updates

- The CalHR OE Team is collaborating with stakeholders to plan, prepare and host both In-Person and Virtual OE events for the 2025 season.
- The 2025 OE period will take place September 15 – October 10, 2025.
- Eligible state employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, FlexElect, COBRA, long-term disability and legal insurance.
- All changes made during the 2025 OE period will be effective January 1, 2026.

Open Enrollment (OE)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

Coming this season:

- Expanding In-Person Benefit Fairs throughout California
- Three Open Enrollment virtual events
- Monthly communication emails beginning in June
- New [Benefits website](#)
- Monthly Open Enrollment updates at Transaction Supervisors' Forum

Open Enrollment (OE)

Presenter: Amber Neves

Contact: OpenEnrollment@calhr.ca.gov

Reminder:

- Please subscribe to the Personnel Officers CalHR Subscription list on the [CalHR website](#) to receive future updates.

CalHR Subscriptions

To receive updates by email, please fill out this form.

Send me updates on

- ☐ CEA Action Proposals
- ☐ Diversity, Equity, and Inclusion (DEI) Toolkit
- ☐ Pay Letters (State HR professionals only)
- ☒ Personnel Officers (State HR professionals only)
- ☐ Policy Memos
- ☐ State Recruiters (State HR professionals only)
- ☐ State Trainers (State HR professionals only)

My contact info

Email Address:

First Name:

Last Name:

Title:

Agency:

Phone:



Affordable Care Act (ACA) Updates

Presenter: Elaine Smith

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Quarterly ACA Compliance Review

- The May ACA Quarterly Compliance Review is currently underway.
- Departments who were notified of their outstanding ACAS errors are to correct and certify the errors were corrected by returning the Quarterly ACA Compliance Notification to ACA.Policy@calhr.ca.gov by June 13, 2025.
- Refer to the [ACAS User Guide](#) and [Scenario-Based Job Aid for Updating the ACAS](#) on SCO's website for information on how to correct these errors.

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

ACA Training

- CalHR and SCO will facilitate the next ACA training on:
 - Monday, June 23, from 9:00am – 10:30am (Part I Module) and
 - Tuesday, June 24, from 9:00am – 11:30am (Part II Module)
- Departments can send their training requests to SCO at: ppsdacatraining@sco.ca.gov.
- Additional training dates for 2025 are available on SCO's [Affordable Care Act Training webpage](#).

Affordable Care Act (ACA)

Presenter: Elaine Smith

Contact: aca.policy@calhr.ca.gov

Observations from the ACA Compliance Reports

- Employees with a health deduction in pay history and no “acceptance of health coverage” captured in the ACAS continues to have the greatest number of errors, followed by employees who are newly eligible with no offer of health coverage.
 - The “Health Event Transaction” COGNOS report in myCalPERS can help identify the effective date of ACAS updates for employees that elected to enroll in health benefits.
 - While the 2D ACA status code is auto-populated by the SCO 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 health benefits. The effective date of the “offer” of coverage (e.g., 1A ACA status code) should reflect the first of the month following the qualifying event.



Benefit Program Reminders

Presenter: Susan Garrett

Benefit Program Reminders

Presenter: Susan Garrett

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.

Benefit Program Reminders

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

- Please remind employees to first contact their departmental personnel office for benefits-related inquiries.
- Prior to sending an inquiry or appeal, please review CalHR's BAM and website to confirm eligibility and ensure proper completion of enrollment forms. [Benefits Administration Manual](#), [HR Manual](#), [Employee Benefits webpage](#) and check the SCO Pay History screen to verify the benefit deduction.
- Email the specific program inbox for program-specific questions, not multiple inboxes, to ensure the inquiry reaches the correct program staff and for tracking purposes. To assist us in directing your inquiry, please use the following subject line when sending an email: Department - EE Name, Program.

Example: CalHR - S. Smith, Dental

- As a further reminder, please do not:
 - Email and leave a voicemail for the same issue as it creates duplicate work
 - Include the program inbox on email conversations within your department's HR Office and/or the EE

Benefit Program Reminders

Presenter: Susan Garrett

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 enrollment forms using the current form version.
 - Written confirmation the employee acknowledges an accounts receivable will be established for retroactive enrollment (if applicable).
- Important reminders:
 - Do not submit an inquiry or appeal for multiple employees in one email.
 - 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.
 - After CalHR responds to the agency the appeal is approved. Do not upload the enrollment form into ConnectHR as CalHR stamps the form, uploads and completes this portion as part of the appeal process.

Benefit Program Reminders

Presenter: Susan Garrett

Contact: BenefitsInquiries@calhr.ca.gov

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.

Training recommendations:

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

Benefit Program Reminders

Presenter: Susan Garrett

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.



Vision and Dental Updates

Presenter: Parwana Mohabbat

Vision Program Updates

Presenter: Parwana Mohabbat

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 cannot be waived for months when services are not used by employees or dependents.

Dental Program Updates

Presenter: Parwana Mohabbat

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 forms must be complete and error free, and the most current version must be used.
- Do not submit an inquiry or appeal for multiple employees.
- Inquiries and appeals must be submitted to the dental email box. Do not send emails to individual email boxes.

Dental Program Updates

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

Program Updates

- Make sure to consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - If an employee permanently separates from state service before completing 24 months of state service and subsequently returns, their time before separation does not count towards meeting the 24-month restriction.
 - Mandatory deletions cannot be on a current month basis, they must take effect the month following the event.
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.
 - Please refer to available resources online such as BAM, HR Manual, Open Enrollment Resources for more information.



FlexElect and CoBen Cash Updates

Presenter: Monica Hernandez

FlexElect Program Updates

Presenter: Monica Hernandez

Contact: FlexElect@calhr.ca.gov

Program Updates

- Outside of Open Enrollment, the enrollment will be effective the first day of the month following the month the enrollment form is received by the departmental personnel office. For example, if an enrollment form is received February 20, then the enrollment will be effective March 1.
- To avoid processing delays with appeals, do not redact the Social Security Number (SSN) 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.



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- 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 and CCPOA enrollment data is visible.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- January, April, July, October 2024, February 2025 birth month cycles have concluded. Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- May 2025 birth month cycle: All notifications have been mailed, and all alerts should be processed by the end of June 2025 in FCP for all employees who submit their documents by May 31.
- The current birth month cycle is August 2025, and the 90-day mailing was generated on or about April 15, and mailed May 1, 2025, by the Department of General Services.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- 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.
- DEV for health benefits must be processed in myCalPERS by the first day of the birth month to avoid the automatic deletion from health coverage.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Total Notices Mailed to Date

Birth Month Cycle	1 st Notice - 90 days before end of birth month	Total Mailings of 1 st Notice	2 nd Notice - 60 days before end of birth month	Total Mailings of 2 nd Notice	3 rd Notice - 30 days before end of birth month	Total Mailings of 3 rd Notice	Total Mailings
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
May	Feb-2025	8,671	Mar-2025	8,321	Apr-2025	6,461	23,453
August	May-2025	10,493	Jun-2025	TBD	Jul-2025	TBD	TBD

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

FAMILY CONNECT

CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Logout Delia Baulwin

Review Dependent

Dependent Type *

Disabled Child

Status

Status History

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)

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Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

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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

Re-certification Effective Date *

05/01/2020

Re-certification End Date *

04/30/2025

Dependent Certified By

CalPERS

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

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Review Dependent

Dependent Type *

Parent Child Relationship

Status

Status History

Pending

First Name *

Birth Date *

09/10/2012

Dental Plan *

Yes

Vision Plan *

Yes

Delete Dependent

Comments

Added by Carrier File 2022-07-21

Dependent Type Locked

Status Date

5/10/2023

Middle Name

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 *

Re-verification End Date

09/30/2024

Dental Permitting Event

-- Record Source --

Vision Permitting Event

-- Record Source --

Save

Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

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Logout Delia Baultwin

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

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)

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CAL HR

CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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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 on 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.

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 Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

2025 Special Open Enrollment – Dependent Care Reimbursement Accounts

- Dropdown for Special Open Enrollment is live
 - Open Enrollment Period: **May 1 – May 30, 2025**
 - Last day personnel offices can submit new forms: **June 10, 2025**
 - Last day personnel offices can submit corrected forms: **June 30, 2025**
 - Effective date of Benefit: **July 1, 2025**
- Please note that employees can enroll above the max of \$416.66 **if**:
 - They are not currently deducting the max from their warrants
 - There will only be six months of deductions, so max contribution can be \$833.33
- Resources are available on the SCO and CalHR websites
 - [SCO – Special Open Enrollment Resources](#)
 - [CalHR – Special Open Enrollment](#)



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- Basic vision coverage will be effective the first of the following month if the employee's Personnel Action Request (PAR) document is keyed into the SCO system prior to the 10th of the month. The vision coverage will be effective the first of the following second month if the employee's PAR document is keyed into the SCO system after the 10th of the month.
- *Example 1:* An employee is appointed on the 3rd and the PAR document is keyed prior to the 10th of the month. The coverage is effective on the first of the following month.
- *Example 2:* An employee is appointed on the 3rd and the PAR document is keyed after the 10th of the month. The coverage is effective on the first of the following second month.



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- Due to automatic enrollment, very few situations require a STD. 700 to be sent to SCO
 - The four scenarios where a STD. 700 is needed are:
 - Enrolling Permanent Intermittent (PI) employee
 - Canceling PI employee coverage
 - Non-Consolidated Benefits (non-CoBen) employee cancelling coverage
 - Non-CoBen employee re-enrolling after previously canceling via STD. 700



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- 52% of STD. 700 forms received do not require action by SCO
 - Common Errors include:
 - Trying to add/change dependents
 - Enrolling employees with benefit already established
 - Enrolling/canceling Premier Vision (CalHR 774 form directly to VSP)
 - Canceling CoBen employee Basic Vision (mandatory benefit)
- To assist the personnel offices, SCO will be changing the ConnectHR dropdown to:
 - Benefits – STD. 700 Basic Vision PI ONLY (See exceptions in ConnectHR Directory)



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Premier Vision – CalHR 774

- All Premier Vision is done between employees, personnel offices, and VSP
 - CalHR 774 includes:
 - Enrolling into Premier Vision (outside of Open Enrollment)
 - Add/change/delete dependents
 - Canceling Premier Vision
- Please refer to [CalHR Benefits Administration Manual](#) for more information



STATEWIDE PROGRAM UPDATES



California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: CLAS@sco.ca.gov


Employee Statement of Leave

- When do you see this?
 - Annually, during the month your department has elected
- What is it used for?
 - Employees:
 - To keep tabs on their leave balances
 - To audit their balances
 - To be informed on accrual information – rate changes and over max
 - To predict balances or plan for usages
 - Managers/Supervisors:
 - To be prepared when employees request time off, to avoid dock situations without prior knowledge, and to know which employees need to have a leave reduction plan.



California Leave Accounting System (CLAS)

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

		065/001			
EMPLOYEE STATEMENT OF LEAVE INFORMATION STATE CONTROLLER'S OFFICE - PPSD CALIFORNIA LEAVE ACCOUNTING SYSTEM AS OF 04/25					
NAME : <input type="text"/>		CBID : E99			
SSN : <input type="text"/>		TIME BASE : FT			
POSITION NBR : 065-001-4167-001		ACCRUAL RATE : ANNUAL 20.00			
MAX CARRYOVER : 640 HOURS ANNUAL					
STATE SERVICE : 335 MONTHS					
LEAVE TYPE	BALANCE	LEAVE TYPE	BALANCE	LEAVE TYPE	TOTAL
ANNUAL	651.00	PH	0.00 UNIT	TRNG/DEV	16.00 FYTD
YOU ARE AT THE MAXIMUM ACCRUAL RATE FOR ANNUAL YOU WILL EXCEED THE MAXIMUM FOR ANNUAL BY 191.00 HOURS ON 01/01/26					



California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: CLAS@sco.ca.gov

[illegible]



California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: CLAS@sco.ca.gov

Employee Statement of Leave Updates

- Beginning July 2025, SCO will no longer print the Employee Statements of Leave (ESL) for departments.
 - New digital versions – produced monthly for all CLAS-using departments
 - PDESLA – entire department as one file
 - PDESLU – entire department in multiple files, broken up by unit number
 - Other availability
 - Employees can access their own ESLs on Cal Employee Connect (CEC)
 - HR Professionals cannot view the Leave tab in ConnectHR
- Communication:
 - Leave Letter coming soon!



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

- New Employees: Create their Registration Management System (RMS) User Accounts
 - [PPSD Training Registration](#)
- Do you have a new employee who's an existing RMS user?
 - Update Contact Information
 - Need Help? Contact PPSD Training
- [PPSD Training Website](#)
 - Updates coming soon!



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



Roundtable Question

1. What are other agencies using to manage and save their Disability and Family Medical Leave Act (FMLA) case files?
2. The California Department of Tax and Fee Administration is gathering information on electronic Official Personnel Files (OPFs). If your agency currently utilizes electronic OPFs and you are willing to share your experiences with electronic OPFs, then please reach out to the contact listed below:

Desiree Perez
Personnel Operations Manager
California Department of Tax and Fee Administration
Email: Desiree.Perez@cdtfa.ca.gov
Phone: (916) 309-0259