

TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – APRIL 2025

The following questions were submitted during the forum:

Question: Can employees choose which stock to invest in?

Answer: Savings Plus does allow an option where employees can specify their investments. Please contact a [Solutions Center Representative](#) for more information.

Question: Regarding Secure 2.0, will Savings Plus develop resources or a cheat sheet for human resources (HR) offices and employees to have, to know how to accurately plan/apply this new rule? Perhaps they can provide a visual scenario that makes it easy to understand?

Answer: This is a great idea, and yes! We will put together as many resources as possible to assist our HR partners.

Question: Does the Secure 2.0 rule affect employees that are not subject to Social Security?

Answer: Employees who do not receive FICA wages (subject to Social Security and Medicare) are not impacted by this regulation.

Question: Regarding the special age-based (60-63) catch-up, I have an employee (EE) who was 59 at the time of their retirement. He turned 60 in January 2025. At the time of his retirement in November 2024, we based his 2025 deferrals following the traditional catch-up amount. However, SCO keyed the 2025 lump sum deferrals following the special age-based (60-63) catch-up. This caused an overpayment for the salary advance for 2025. To clarify, did the EE have to be 60 at the time of retirement to be eligible for the special age-based catch-up for 2025?

Answer: Please send an email to LeaveRollover@calhr.ca.gov to get your inquiry addressed. If he turned 60 in 2025, then he qualifies for the increased special age-based catch-up; this is automatically applied under the default option.

Question: Do pre-tax parking enrollment/changes still follow the tenth of the month (effective the first of next month) or does it revert to the end of the month (first of the net month) as FlexElect?

Answer: To enroll or make changes in the Third-Party Pre-Tax Parking Reimbursement Account Program, the employee must complete a [CalHR 682 – Account Enrollment Form](#) and submit it to their departmental personnel/payroll office. The CalHR 682 form allows an employee to enroll, make a change to their enrollment, or cancel their enrollment. To be effective for the current pay period, the enrollment form must be processed and forwarded by the departmental personnel/payroll office to the State Controller's Office, Miscellaneous Deduction Unit, by the tenth of the month.

Question: I had an appeal approved (I see the accounts receivable for the retro payments) for an Open Enrollment document, but I did not receive notice that the appeal was approved. Do I reach out to the CalHR appeals email to retrieve the approval notice to send to my employee?

Answer: Yes. If it is a dental appeal and you see the deductions, then please contact the carrier directly to enroll/make the proper changes to the employee's plan.

Question: The Vision Service Plan cannot receive our encrypted emails for submitting documents and our office will be removing our fax soon, will there be another option for submitting enrollment forms?

Answer: Please send enrollment forms to vision@calhr.ca.gov.

Question: Was there a change in effective dates for Premier Vision? I noticed that the effective date box was reapplied to the Vision Service Plan Premier Form last March; however, it is difficult to determine the effective date due to processing times.

Answer: To best address your inquiry, please email to vision@calhr.ca.gov.

Question: Where can I find information on Eyeconic and how does it benefit employees with Basic Vision Service Plan coverage?

Answer: To best address your inquiry, please email to vision@calhr.ca.gov.

Question: Dental carriers are still not receiving dependent information. Do we still need to update all dependents manually?

Answer: We are actively working with the carriers to resolve this, please let us know if this happens on a continuous basis.

Question: Were the notices sent for the May 2025 Dental and Vision?

Answer: Yes, all notices for the May birth month have been sent out.

Question: Will CalHR be sending out letters to employees to verify all their dependents for Dental and Vision? I have so many employees only sending documents for their spouses as that is what the letter calls for from CalPERS; however, they are not receiving CalHR letters.

Answer: Dependent Re-Verification notices from CalHR do not specify which dependents are up for re-verification.

Question: We had a case where an employee's (EE's) dependent was listed three times in the Dependent Re-Verification (DRV) system and they verified the one labeled Vision/Dental, but the EE was still obtaining verification notices. She had to go in and verify the other listings before it acknowledged the verification being complete.

Answer: Please send an email to DRV@calhr.ca.gov, including the EE's name and Employee ID, to best address your inquiry.

Question: Will Family Connect Portal (FCP) Dependent Re-Verification (DRV) ever match CalPERS DRV? After the initial DRV, CalPERS only requires DRV for dependents whose relationship can change (i.e., spouse, stepchildren). FCP still requires DRV for all dependents.

Answer: For DRV, the employee will need to re-verify their child once. After they have re-verified their natural born child, they will not need to re-verify them going forward.

Question: We have noticed a few of our employees' dependents are not listed on Family Connect Portal (FCP), but when we call their benefit, eligibility is confirmed. Is there something we can do to prevent dependents from disappearing or not showing up on FCP?

Answer: Please send an email to DRV@calhr.ca.gov, including the employee's name and Employee ID, to best address your inquiry.

Question: Can SCO provide prerequisite courses for the Management Information Retrieval System (MIRS) again?

Answer: [MIRS training](#) is available on the SCO website.

Question: If a department has enough team members, then is there an opportunity for Salary Determination to be taught in-person by SCO at our agency's facility?

Answer: To best address your inquiry, please send an email to PPSDTraining@sco.ca.gov.

Question: Is there a way to request a status update on a 2025 Lump Sum Deferral after the 2024 Special Process has been completed and we have sent the 2025 Deferral? A retiree is getting understandably impatient and requesting status.

Answer: Please contact the Payroll Unit via the [Statewide Customer Contact Center](#) at (916) 372-7200.

Question: Regarding Holiday Credit and Overtime for a Bargaining Unit (BU) 1/BU 4 Work Week Group 2 employee, if the employee voluntarily works seven hours on a regular holiday (February 17, 2025), then are they entitled to eight hours of holiday credit in addition to being paid for the seven hours of overtime (CTO), and the holiday pay that is already included in the employee's monthly pay warrant? Would that mean they are being compensated three times? Or does the employee only receive the holiday pay in their monthly pay warrant and only get paid for hours worked, either by cashing out or receiving holiday credit for the seven hours of overtime?

Answer: The BU 1 and BU 4 Memorandum of Understanding (MOU) states the employee shall receive eight hours of holiday credit. The employee is overpaid if they receive seven hours of CTO, holiday credit, and holiday pay in their warrant; assuming the holiday fell on a day the employee is regularly scheduled to work and it is a regular (not premium) holiday. The employee who worked seven hours, receives eight hours of holiday credit for the day; therefore, will receive eight hours of pay in their warrant. Since the employee has already been paid the eight hours, they are not owed any additional compensation outside of the eight hours of holiday credit.

Due to being paid eight hours in their warrant and because the MOU provides a mandatory eight hours of holiday credit, the employee needs to use one hour of leave to make it an eight-hour day. For reference, please utilize the Holiday Guidance Charts available on the [CalHR Online Manual, Policy 1712 – Holiday Guidance](#). On the Holiday Policy charts, scroll to page two and there you will see a similar scenario for Service Employees International Union (SEIU).

Please keep in mind the above response only works if the employee works five days, eight hours per day. If there is an Alternate Work Week Schedule (AWWS), then the response would be different to account for the hours the employee normally works that day.

Question: Does Form STD. 422 need to be uploaded before the tenth of every month when a payroll warrant has not been issued within 30 calendar days?

Answer: Yes, if you need further assistance, please send an email to ppsdw2miscded@sco.ca.gov.

Question: Per Personnel Letter #25-003, agencies are responsible for researching when the corrected Retirement Account Code (AC) should be effective and for keying a 505 Employment History (EH) Transaction with the correct Retirement AC back to the appropriate effective date. However, Section 10.2 of the Personnel Action Manual (PAM), states we are not to key R01, R01 Void, R01 Correction with retirement account code change. Are these exemptions, since we are going back to their original A01?

Answer: Per Allan Fong, a revised Personnel Letter will be coming out in the next few weeks. Please refrain from correcting EH until the revised letter comes out.

Question: Who can I contact to add my staff to acquire access to call Delta Dental and the other carriers when updates need to be made for our employees? I used to send an email to CalHR, but the person is no longer there.

Answer: To best address your inquiry, please send an email to Dental@calhr.ca.gov.

Question: Who can we contact regarding Military orders?

Answer: If you have questions regarding how to complete the STD. 674 form, then contact the PPSD civil service military mailbox at PPSDCSMilitary@sco.ca.gov. For questions on interpretation or clarification of orders, contact the Personnel Services Branch at PSB@calhr.ca.gov.

Question: Who can I contact to help with a stuck pay issue? I have a 715 in for the 3/2025 pay period and pay will not issue.

Answer: Please contact the Payroll Unit via the [Statewide Customer Contact Center](#) at (916) 372-7200.

Question: How do you post Sick Leave in the California Leave Accounting System (CLAS) for a Wounded Warrior employee?

Answer: Please manually track leave credits outside of CLAS.