

## TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – FEBRUARY 2025

The following questions were submitted during the forum:

**Question:** Can you please provide an update regarding the deferrals that were submitted timely? There are several that we are waiting to be established for the first and second tax year.

**Answer:** There may have been some type of fringe benefit reported for the 12/2024 pay period. Please review TAXI (Year-to-Date Inquiry) for any type of fringe benefit or imputed income reporting; this would have been reported from your Accounting Office.

**Question:** Can you clarify the reason for tax adjustments regarding Federal State Social Security/Medicare and State Disability Insurance that was reflected on some employees 01/2025 paycheck for the 12/2024 pay period?

**Answer:** This could be a fringe benefit reporting. Fringe benefits are reported on TAXI (Year-to-Date Inquiry) and are identified with a special class code and serial number of 999. Refer to Section N 173 of the [Payroll Procedures Manual](#) (PPM) for a listing of the class codes for fringe benefits.

**Question:** Are you able to select classes by Class Type in Power Bi? There are some classes that share a class code but have different Class Types.

**Answer:** No, we do not have a class type slicer, but the classification is searchable by class code and class title. Therefore, if you type in a class code it will give you the option from the two classes, and you can select the one you want.

**Question:** Recently we have been receiving a higher volume of issues regarding employees not being able to access their Cal Employee Connect (CEC) account. Is there a direct SCO contact for employees to reach out for log in issues?

**Answer:** Our SCO direct contact is our ConnectHelp mailbox via the [Connect - Help and Feedback](#) feature. Please encourage your employees to submit their questions and our team will respond to them as soon as possible. Our current response turnaround time varies, but we will respond to all employees' questions within 1 to 2 business days, or sooner, depending on the volume of emails received per day. Please instruct your employees to use their current email address when submitting their questions.

**Question:** How does a department cancel or opt out of receiving physical copies of the annual leave statements available in Cal Employee Connect?

**Answer:** Please email [clas@sco.ca.gov](mailto:clas@sco.ca.gov) to start the cancellation process.

**Question:** Can separated employees that elected "W-2 Paperless" still log into their Cal Employee Connect (CEC) account if they were using their work email? If not, how do we give them their Form W-2?

**Answer:** Yes, a separated employee who opted into W-2 Paperless can still access their CEC account to download their Form W-2s as long as they remember their log-in information. If they had forgotten their log in information and also did not update their email on file, they can use the [Connect - Help and Feedback](#) to reset their account. They will need to provide us with their current email in the 'Email' field when submitting their request. They will be sent instructions to verify their identity. Once they complete the verification, we will reset their account. Once reset, they will be able to re-register using information from any past direct deposit advice or pay warrant.

Or the human resources staff of the separated employee can log into ConnectHR, shadow the employee, and then download and print the requested Form W-2 for the employee.

**Question:** We are having issues with employees that have transferred to us because we are not able to see them in ConnectHR. Is this because they need to change their email in Cal Employee Connect (CEC) to the current department?

**Answer:** The ability to view employees in your department is not dependent on their CEC email address on file. There are two reasons why an employee is not viewable in ConnectHR. The first one, the employee has not been keyed into the Employment History under your department yet. The second one, the employee has multiple active positions or multiple position sequences in the Employment History and your department's position sequence is not the first one. This happens when employees worked as student assistants for the California State University system, or the employee holds another part-time or seasonal job in another civil service department. For additional information, please contact [ConnectHRhelp@sco.ca.gov](mailto:ConnectHRhelp@sco.ca.gov).

**Question:** If employees are having issues with their Multifactor Authenticator, who do they contact?

**Answer:** Please direct them to Cal Employee Connect at [Help and Feedback](#) for assistance.

**Question:** If I have an employee that is not showing up in ConnectHR on the Transactions side, then who would we contact to possibly get this corrected?

**Answer:** Please reach out to the ConnectHR Team at [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov) for assistance. As a generalization, ConnectHR users are able to utilize and select the "New to State/No History in Database" option within the File Upload feature as a workaround.

**Question:** Where can we get information regarding the Affordable Care Act System (ACAS) Training for all of our Transactions staff?

**Answer:** You can find Affordable Care Act (ACA) training dates and registration information on the [Affordable Care Act \(ACA\) Training](#) webpage. For any questions you can email to [pdsdacaatraining@sco.ca.gov](mailto:pdsdacaatraining@sco.ca.gov) for assistance.

**Question:** Regarding dependents being removed from the Dependent Re-Verification (DRV) system due to reaching the age limit, does SCO automatically delete the dependents from benefits or does the Human Resources (HR) office also need to administratively delete the dependents?

**Answer:** Please email your inquiry to [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov). The State Controller's Office does not automatically delete dependents. Human Resources offices must submit a STD. 692 Change to remove non-disabled dependents over the age of 26 who do not have proper documentation to continue otherwise. Please refer to [CalHR Benefits Administration Manual](#) for instructions.

**Question:** Are there any other departments having issues with Dental carriers dropping dependents? This issue has taken up a lot of our time as we are constantly calling dental providers to temporarily reinstate employees and their dependents. We have seen an uptick regarding this issue since November.

**Answer:** We are working with the carriers to resolve this issue. If you are having this issue on a monthly basis, please send the STD. 692 forms to [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov) for assistance.

**Question:** How do you verify dual/split coverage for Dental?

**Answer:** There is language on Form STD. 692, Section D - Box 2, that employees check to confirm there is no dual coverage. Also, you can check by using the spouse's social security number to verify if the spouse/domestic partner is also a state employee. If they are, you can check and confirm with their carrier. Please send an email to [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov) for additional questions.

**Question:** If we have an employee that has a disabled dependent, then do we email [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov) to provide the paperwork that has been submitted so the employee does not lose their coverage?

**Answer:** Yes, that is correct.

**Question:** Semi-monthly is rarely the same gross in each pay period. Will the exclusion be split in half regardless of the gross?

**Answer:** Yes, the total monthly exclusion amount will be split in half.

**Question:** When will Section 505 of the Personnel Action Manual be updated?

**Answer:** We will begin working on that soon. In the interim, the Payroll Procedures Manual has more detailed information and can be used by departments until the PAM updates are complete.

**Question:** Are corrected Form W-2s accessible to the employee through Cal Employee Connect (CEC)? Or are they only mailed?

**Answer:** Corrected Form W-2s are available in CEC.

**Question:** Can departments request SCO training courses to reoccur? For example, requesting for the State Disability Insurance/Non-Industrial Disability Insurance (SDI/NDI) courses to be available. I have not seen these courses posted in a while.

**Answer:** Please reach out to [PPSDTraining@sco.ca.gov](mailto:PPSDTraining@sco.ca.gov) with any requests regarding training you need. Even if we are not able to accommodate your request, we can document your agency's need for training. This helps us prioritize our development and scheduling efforts for the future. Available [self-paced training modules](#) regarding SDI/NDI are on the SCO website.

**Question:** Regarding Merit Salary Adjustments (MSAs), for employees who have a plus salary, do departments have to process the MSA manually? We have several employees who are currently receiving a Section 5 Hire Above Minimum (HAM) plus salary and were not included in the MSA mass update.

**Answer:** Yes, departments must key the MSA manually and follow the keying instructions and calculations provided in Section 5. Additionally, if an employee receives a HAM, their anniversary date is reset per Section 5 but will be accelerated if the employee does not receive a full five percent increase with the HAM rate.

**Question:** I originally thought to upload a STD. 674 accounts receivable (A/R) form change method of collection to Civil Service Payroll, since the payments are being deducted out of monthly payroll, Payment Type 0. However, I was told it should be uploaded to Civil Service Premium Pay instead because the A/R was for Payment Type 1, is this correct?

**Answer:** Yes, that is correct.

**Question:** If we have to go back and change a retirement code, will the accounts receivables (A/Rs) automatically be established if the employee under paid into retirement?

**Answer:** The A/Rs will be issued by the Retirement Unit. We will automatically receive the Employment History change; therefore, there is no need to send an STD. 674 form.

**Question:** I called to cancel direct deposit for two employees and did not receive an email confirmation, how can I get this addressed?

**Answer:** Please send an email to [PPSDDirectDeposit@sco.ca.gov](mailto:PPSDDirectDeposit@sco.ca.gov) with the employees' information.

**Question:** Is it possible to include the referenced document and date uploaded categories in the body of ding notices? All the information we receive is that there was a document uploaded to the wrong category. As our personnel specialists' roster continues to change, it is a challenge to find the information to correct the error in a timely manner.

**Answer:** PR250 notifications always include the employees first and last name.

**Question:** Is it normal to receive a misrouted notification three months later? If so, will we have then lost our place in line?

**Answer:** If the support staff did not catch the misroute during their initial review, then yes.

**Question:** For employees (EEs) working while on State Disability Insurance (SDI), where do we upload the Telework Stipends that they are eligible for? We received a ding notice from Premium Pay Unit that it was misrouted.

**Answer:** This falls under Document Type, Disability- STD. 674 (EID not locked on PAR). Please review the [ConnectHR CS Directory Documents and Processing Needs](#) for clarification.

**Question:** When we receive misrouted notices, it only lists the name of the employee. We upload multiple documents for the same people. Is there a way for what was misrouted to be included in the notice?

**Answer:** Yes, agencies have the ability to view all documents submitted via Excel and may filter the spreadsheet to locate the employees name and document types.

**Question:** We submitted a STD. 674 form to the Civil Service (CS) Benefits Unit to set up an accounts receivable (A/R) for health benefits; however, we were told to send it to the Disability Unit, and shortly after we received another ding notice. They then told us to send it back to the CS Benefits Unit and they dinged us again. Can you advise where we should send it to?

**Answer:** If the A/R is to be set up as a result of a disability or leave of absence, then please submit the form under Benefits – STD. 674 A/R Continuation of Benefits for Disability/FMLA/CFRA Leave.

If the A/R is to be set up to correct or add missing health benefits retroactively (i.e. Cognos reconciliation), then submit under Benefits - STD. 674 A/R Benefits Accounts Receivable.

**Question:** A few months ago, our department submitted several STD. 674 accounts receivables (A/Rs) to be established but we have not seen anything issued and we have not received any ding notices. How do we get this resolved?

**Answer:** Please review the [Weekly Processing Dates](#). If we have passed your upload date, then please have a manager follow the [Escalation Email Guidelines](#).

**Question:** Regarding Personnel Letter #25-003: Mass R01 to Correct CalPERS Enrollment Level, it states, "departments are responsible for researching when the corrected Retirement Account Code should be effective and for keying a 505 EH Transaction with the correct Retirement Account Code back to the appropriate effective date." If we notice that the account code was keyed in error within the initial appointment coming into the department, should we correct the appointment or key a 505 on top of that appointment?

**Answer:** If the Account Code was incorrect from the appointment, then please key an appointment correction.

**Question:** What is the wait time for getting STD. 435 responses back from the Disbursements Unit?

**Answer:** When a STD. 435 is emailed to [disbstd435@sco.ca.gov](mailto:disbstd435@sco.ca.gov), there is no response other than the automated response. Due to the high volume of STD. 435s that come in, we cannot respond individually to each, unless of course there is something in question on the form or from the sender. The 435 Team prints the 435 forms as they come in. Processing times is the standard 7 to 10 business days.

**Question:** Do we need to list the redeposited checks on the STD. 674 forms?

**Answer:** No, you do not.

**Question:** Who do we submit military questions too? I have questions regarding orders and pay.

**Answer:** Please have your designated analyst reach out to the Personnel Services Branch at [PSB@calhr.ca.gov](mailto:PSB@calhr.ca.gov) for policy related questions.

**Question:** When an employee is separating and has accounts receivables (A/Rs) that have yet to be set up, can we call and have those expedited so we can collect with final pay?

**Answer:** Please contact the Statewide Customer Contact Center at 916-372-7200 to get your inquiry addressed. Also, refer to Section I of the [Payroll Procedures Manual](#), for more information.