

TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – NOVEMBER 2024

The following questions were submitted during the forum:

Question: We had a Lump Sum Deferral issue for an employee retiring in November, but it was only regarding the regular age-based maximums, and did not include the Traditional Catch-Up (TCU). What is the timeline for redeposits and/or is there a process for redepositing a paper warrant expeditiously to prevent a special process?

Answer: Please contact the [Statewide Customer Contact Center](#) (SCCC) and inform them that you must redeposit warrants. If it is a live check, you must follow the warranty return process as outlined in the [Payroll Procedures Manual](#) (PPM). Please get in touch with the direct deposit team to strip pay if it is a direct deposit. If this is a Savings Plus lump sum distribution, please be aware that effective 7/1/2024 the form is irrevocable. If the employee did not receive approval for the TCU before submitting the application, or the TCU approval letter and amounts were not included, then SCO will not accept a new form.

Question: Does your department enforce the rule of making non-represented employees use their Personal Holiday leave if they have more than two (2) days?

Answer: Please have your designated contact reach out to the Personnel Services Branch at PSB@calhr.ca.gov for clarification.

Question: Does the Affordable Care Act (ACA) PDA1782 report for reporting year 2021, dated 11/14/2024, mean that all employees listed received a corrected Form 1095-C?

Answer: Report PDA1782 has been updated to reflect the most current Form 1095-C data for reporting year 2021 (after the correction process) that was reported to the Internal Revenue Service. This report now includes Form 1095-C data for employees who did not have a change in health benefits status and originally qualified during the annual process, and employees who had a change in health benefits status resulting in a newly issued or corrected Form 1095-C. Any employee voided during the correction process was removed from the report as they no longer qualify for a Form 1095-C for the 2021 reporting year.

Question: Who can we contact for any questions related to the Savings Plus Leave Buy-Back Program or the Lump Sum Separation Pay Form?

Answer: Questions can be addressed at LeaveRollover@calhr.ca.gov or (916) 909-3717. If your employees have questions regarding their account, or getting one set up, please direct them to our Solutions Center at (855) 616-4776.

Question: Does CalHR have information on pre-tax parking for 2025? If so, where can I find it?

Answer: This information was presented at November's Transaction Supervisors Forum. Please review [November's Presentation](#) on the SCO website for clarification.

Question: We received a ScholarShare 529 form from an employee, requesting a change in their payroll deduction amount. Do we send this form to SCO?

Answer: Employees should complete their enrollment through the [ScholarShare 529](#) webpage.

Question: Regarding range changes, we have some confusion as to when they should be in effect. Are range changes effective by the start date of the employee or by first of the month once they have met the qualifying pay periods?

Answer: This is a policy question. For further information, please contact the Personnel Services Branch at PSB@calhr.ca.gov for assistance.

Question: We have an employee (EE) who has a P/FT appointment with us (Department of State Hospitals), and a P/FT appointment with a California State University department. The benefits are covered by the CSU department. This is captured on our compliance report because SCO coded the employee as "2A". What code is appropriate for our reporting?

Answer: The 3A code should be keyed for the agency where the benefits are issued. In this situation the 2A is correct and it is okay that the EE shows up on the compliance report. For example, if there is a change in the EE's benefits status, then the EE's benefits are covered at your agency, which prompts for human resources to update the Affordable Care Act System appropriately.

Question: Our department has a few seasonal Lifeguard IIs (class code 0990) who are eligible for dental and vision only; however, one of the Affordable Care Act System reports captures these employees (EEs) as possible errors because they are missing 3A or 4A when not eligible. How can this be corrected to where the EEs are no longer listed as receiving possible errors because they are not eligible for health benefits?

Answer: Please send an email to acasupport@sco.ca.gov for assistance.

Question: Where can I find information on the CalHR website confirming that Veterans Administration (VA) are not eligible for Consolidated Benefits (CoBen) cash?

Answer: Group coverage is typically maintained by an employer or employee organization and must conform to the federal Affordable Care Act's (ACA's) minimum value standards. The ACA establishes a minimum value standard of benefits of a health plan. For a qualifying group health plan to meet the ACA's minimum value standards, the plan must cover at least 60 percent of the total allowed costs of benefits provided under the plan.

All CalPERS sponsored health plans meet the minimum value standards. Employees covered under individual coverage, such as TRICARE, Medicare, Medi-Cal, and Covered California are not eligible for the CoBen Cash, even if they meet the minimum value standards.

Rank and File employees in Bargaining Unit 2 covered under TRICARE are eligible for the CoBen Cash Option.

Question: Where can I send the approved copy of the CalPERS Medical Report for Disabled Dependent (HBD-34) and a copy of the most recent STD. 692 that lists the disabled child, to ensure claims are not denied due to the dependent being over age 26? Is it sent to the dental carrier, CalHR Dental, or Dependent Re-Verification Team?

Answer: Please review the [Benefits Administration Manual](#) Dental Program, Section 508 "Dependent Eligibility" and the [Medical Report](#) for the CalPERS Disabled Dependent Benefit Form for clarification on the process.

Question: We have two (2) 2024 FlexElect Reimbursement appeals that are currently at a halt somewhere between CalHR approval being given and SCO receiving the approval to process. Both appeals were CalHR approved on 7/18/2024. We need assistance from SCO in getting these completely processed and the Accounts Receivables (A/Rs) established, as we have followed up a couple times on one and just recently on the other.

Answer: Please send an email to ppsdcsbenefits@sco.ca.gov and provide the employee's information so that we can look into this inquiry further.

Question: What is the link to the Family Connect Portal Manual?

Answer: [CalHR Family Connect - State Human Resources Professionals Manual](#)

Question: If a dental form for open enrollment was submitted late to SCO at no fault to the employee, could this still be processed?

Answer: Please contact the [Statewide Customer Contact Center](#) (SCCC) for assistance.

Question: We have an employee who wishes to change their dental plan as the provider is not within their Network, does this mean we submit a CalHR appeal?

Answer: Please reach out to CalHR Dental at dental@calhr.ca.gov for assistance.

Question: If we have separated employees with Accounts Receivables (A/Rs) that have not been processed, then can we call to have them established sooner?

Answer: Please refer to the [Benefits Administration Manual](#) (BAM) and/or the FlexElect Program Handbook section of BAM for clarification.

Question: We have received a few emails from the State Controller's Office W-2 Unit regarding submitting Form PPSD-21 for deceased employees. However, we noticed some employees listed on the error email have indeed been addressed, but they still remain listed. Is the staff from the W-2 Unit able to look into this?

Answer: If the error that was listed in the error email has been corrected and submitted, then please disregard. For additional questions, please send an email to ppsdw2miscded@sco.ca.gov.

Question: Are the new California Leave Accounting System reproductive loss leave transactions required for departments to use?

Answer: You should only be using it if the employee is claiming Reproductive Loss Leave.

Question: Has SCO completed processing for all Bargaining Unit 10 employees eligible for salary increases? We have about 90 employees who did not receive their increase; therefore, do we need to process these manually?

Answer: Yes, you will need to process them manually. For further clarification, please refer to the appropriate [Personnel Letter](#).

Question: Is there any update from CalHR regarding Section 5 Hire Above Minimum (HAM) policy that was effective 10/1/2024? We would like to ensure we processed the HAM correctly for our attorney classifications.

Answer: All mass updates are complete. The department will need to complete all fallout.

Question: Will there be any in-person trainings available in 2025?

Answer: At this time there are no immediate plans for in-person classes, but we are always looking at what resources we have at our disposal.

Question: SCO processed the first Personnel Action Request (PAR) package, and we believe it was keyed incorrectly. We have already left a voicemail message, but is there a certain person we can contact right away?

Answer: Please allow two (2) business days for SCO to respond.

Question: Regarding the State Controller's Office Deceased Employee Data Form PPSD-21, who signs as the Reporting Officer? Is this a manager or personnel officer?

Answer: The reporting officer can be the personal officer/specialist or manager. If you have additional questions, please send an email to ppsdw2miscded@sco.ca.gov.

Question: We are looking at our current I-9 storage practice and would like to know how they are stored at other agencies?

Answer: Search for information regarding the federal I-9 and see what the federal government recommends.

Question: Is there a point of contact to subscribe to the Transaction Supervisors' Forum?

Answer: Please send an email to scotransactionssupervisors@sco.ca.gov for assistance.