

TRANSACTION SUPERVISORS' FORUM QUESTIONS & ANSWERS – NOVEMBER 2025

The following questions were submitted during the forum:

Question: Is the STD. 639 still required to be completed if we are using this feature since we aren't sending/uploading the STD. 639 anymore?

Answer: The HR office is required to keep documents based on the Secretary of State retention.

Question: By processing the garnishment this way, do these garnishments still show in the Upload History?

Answer: Yes, you will receive an email for the upload history.

Question: If a garnishment was set up prior to the ConnectHR feature, will we still be able to cancel it in Connect HR or will we have to submit a STD. 639?

Answer: No, if it is active on the payroll, then you will be able to change it on ConnectHR.

Question: Will we need to add the modification/cancel documents to SCO or just keep it for our records?

Answer: You must follow the Secretary of State retention requirements.

Question: Will we receive confirmation emails for the cancellations in the same manner as the creation, so we have something dated with the submission date on our end?

Answer: Yes.

Question: I submitted a garnishment in ConnectHR to modify the amount on November 12, 2025; Monthly Payroll Certification has passed and looking at the employee's 11/2025 warrant, the garnishment was not changed. What did I do incorrectly?

Answer: Please reach out to our email at ConnectHRHelp@sco.ca.gov.

Question: The Affordable Care Act (ACA) classes for 2025 are full. When can we expect the 2026 classes to open?

Answer: CalHR will collaborate with SCO to implement the 2026 ACA training schedule. We hope to announce those dates soon.

Question: When should the 5B/3A be keyed?

Answer: You should key a 5B status code in the Affordable Care Act System, effective 12/31/25 (to indicate the employee voluntarily cancelled their health coverage but remains eligible for health benefits).

Question: Will the processes for Affordable Care Act (ACA) change next year with the ACA things going on federally?

Answer: We will follow any updates with federal guidelines and communicate as soon as possible.

Question: Can you provide the link to the Request Tracking System (RTS)?

Answer: The link to RTS is [CalHR Request Portal](#).

Question: We would love to have our Specialists attend these forums, but the schedules always interfere with processing/keying dates; is there any way it could be done at the end of the month when they have more time to spare and would not have any pay, especially OT or PT pay, to process?

Answer: The State Controller's Office is currently doing its best to coordinate with multiple control agencies to attend these meetings. While we wish the dates could accommodate everyone, unfortunately, we can only work with the availability of schedules and state holidays. We appreciate your understanding.

Question: Can an employee still rescind the form submitted through Open Enrollment or is it for an appeal at this time?

Answer: Please contact the [Statewide Customer Contact Center](#) Benefits unit to request the document to be pulled.

Question: Do you know if pre-tax parking was approved for the \$340 annual limit?

Answer: Please contact Pre-taxparking@calhr.ca.gov.

Question: If they are approved for Traditional Catch-Up (TCU) and have maxed Social Security of \$150,000, can employees still defer into 2026 pre-tax?

Answer: Yes, the TCU can still be pre-tax. Traditional Catch-Up is not impacted by Section 603, only age-based catch-up is impacted.

Question: To clarify, does pre-tax equal before taxes and Roth equal after taxes?

Answer: Yes.

Question: When was the new form effective?

Answer: The new form was effective November 1, 2025.

Question: if they are approved for Traditional Catch-Up, do they need to complete the worksheet? Can they just complete the Election Form?

Answer: Yes, you must have the employee complete the election form.

Question: Can an employee who has already submitted an election form change his amount for 2026 since at the beginning he did not know the IRS limits?

Answer: No, that would break the labor code law. If the employee elected MAX on the form, we will process the new amounts.

Question: Do you require approval for the age 50+ Catch-up?

Answer: Age based does not require CalHR Savings Plus Program approval, only Traditional Catch-Up does. If they are over the age of 50, they automatically qualify, no approval is needed. It is the same for age 60-63 catch-up, only Traditional Catch-Up requires approval. If you have more questions, please contact us at Leaverollover@calhr.ca.gov.

Question: Our agency received a notice that an employee's Savings Plus account was underfunded due to a processing error. We are not sure what caused the error, do we need to contact Savings Plus?

Answer: Yes, contact the Savings Plus Program.

Question: If an old form is submitted and rejected, can the employee complete a new form, or is it irrevocable?

Answer: The form must be signed five days prior to their separation date. The form has a sample of how to count these days.

Question: How do I request the training for lump sum?

Answer: Please send an email to Leaverollover@calhr.ca.gov to request the Savings Plus Lump Sum form training.

Question: Can you please provide a link to the new lump sum coversheet?

Answer: The link to the cover sheet is [Coversheet – Lump Sum Separation PAR Package](#)

Question: Can we use two 962 codes on a PAR?

Answer: It should only be one code.

Question: if we key the S70, do we need to send the package with the Turnaround PAR?

Answer: The Padded Par is fine.

Question: If an employee is retiring December 29, should we mark the “pay immediate” box if the employee wants December pay to issue in 2025.

Answer: Yes.

Question: If an employee wants to defer into both tax years and also wants lump sum, what PAR should we put the lump sum on?

Answer: This is discussed in our [Lump Sum Separation Toolkit](#). HR may issue the cash payment and then send the first tax year PAR. Please follow the deadline dates.

Question: Our department submitted a deferral package in September and it was brought to our attention that it was sent to payroll for processing on September 17. We've reached out to Payroll and Payroll reminded us that they have 60 days from the separation, effective date (9/30/2025) to process. Is this message a guarantee that it will be processed? We're concerned because two others were sent up after September 30, and residual has already processed for those two.

Answer: All PAR separation requests must be submitted to CS Audits via ConnectHR. If you sent it to Civil Service Payroll, you may have received a misrouted notification. Please contact the [Statewide Customer Contact Center](#) Audits unit for further assistance.

Question: CalHR used to have language stating: “An employee who has always been in the Vacation/Sick Leave Program may switch to the Annual Leave Program (ALP) at any time. Once an employee elects either the ALP or the Vacation/Sick Leave Program, the employee may not elect to enroll in the other program until 24 months has elapsed from the date of enrollment.” This is no longer stated on their site. Is the first statement no longer valid?

Answer: A quote from Section 2103 - Vacation of the HR Manual: "After the initial election, employees in Bargaining Units (BU) 1, 3, 4, 11, 14, 15, 17, 20, and 21 are subject to an open enrollment period. Open enrollment occurs each April 1 through April 30, and enrollment changes are effective the first day of the June pay period. During the open enrollment period, employees may elect to opt in or out of the program.

Excluded and employees represented by BUs 2, 5, 6, 7, 8, 9, 10, 12, 13, 16, 18, and 19 maintain a continuous enrollment eligibility period. Employees must remain in the ALP or Vacation/Sick Leave Program for at least 24 months from the last date of election."

Question: Can you clarify how Personal Leave Program (PLP) 2025 is used; what month can employees use it?

Answer: Please refer to Human Resources Manual [2113 - Personal Leave Program \(PLP\)](#).