



# Transaction Specialists' Educational Forum

Presented By: Natalia Saferson

Contact: [TSEF@sco.ca.gov](mailto:TSEF@sco.ca.gov)

Office of State Controller Malia M. Cohen

April 4, 2024

# Survey Questions





# Question

Presenter: Tommy Fong

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

How, or what, do we do with employees who were at another agency at the time the Special Salary Adjustment (SSA) took effect? We cannot key the Personnel Action Request (PAR) and the other agency cannot key it either since the employee is now at our agency.

**Answer:** Your human resources (HR) office must coordinate a PAR package with the previous HR office; upload the package in ConnectHR, selecting **CS Audits PAR Package** from the drop-down list.



## Features Update

Multifactor Authentication (MFA)  
Employee Services  
W-2 Paperless  
Leave Center

Presented By: Moe Adam

Contact: [ConnectHRhelp@sco.ca.gov](mailto:ConnectHRhelp@sco.ca.gov)

Personnel and Payroll Services Division/ Cal Employee Connect (CEC)



# SCOConnect: Cal Employee Connect (CEC)

## Cal Employee Connect – Employee Services features:

**As of April 2:**

Feature	Deployment Status	Stats
Multifactor Authentication (MFA)	100%	More than 75,000 employees, nearly a 20% adoption rate
Direct Deposit	95%	Processed more than 32,000 requests
Address Change	95%	Processed more than 8,000 requests
Withholdings	95%	Processed more than 13,000 submissions
W-2 Paperless Opt-In	100%	Over 102,000 employees, 27% adoption
Leave Center	100%	Available to most agencies who use CLAS
Paycheck Calculator	50%	Available to 22 pilot agencies and Wave A agencies





Cal Employee  
CONNECT



# Multifactor Authentication (MFA)

# SCOConnect: Multifactor Authentication (MFA) Demonstration



## Cal Employee Connect:

- Multifactor Authentication (MFA) Feature Demonstration:
  - [MFA User Guide](#)

Cal Employee CONNECT

Help & Feedback Login Register

### Help & Feedback

**Need Assistance or Have Questions?**  
Please first refer to our Connect - Frequently Asked Questions (FAQs).

**Resources**  
This area contains links to useful resources for state employees.

**User Guides & eLearnings**

- Cal Employee Connect User Guide
- **Multifactor Authentication (MFA) User Guide**
- eLearning Paycheck Tutorial
- eLearning Tax Withholdings Change
  - Tax Withholdings Quick Start Guide

**Frequently Requested Self-Help Resources**

- SCO | Additional Resources
- SCO | Direct Deposit Information
- SCO | Wage and Tax Information
- SCO | Personnel and Payroll Services - State Employees HR Page
- CalHR - Other Post-Employment Benefits (OPEB) FAQs
- CalPERS - Retirement
  - Retired Employees

**Still need assistance or want to leave feedback?**  
 I need assistance or have questions  I have feedback or would like to leave a suggestion

**Help Submission Form**

**Problem Category:**

**Problem Type:**

**User Name:**

**Email:**

**Full Name:**

**Problem Description:**



# Cal Employee Connect (CEC) Turn On MFA

To setup Multifactor Authentication, you will need an Authenticator App installed on your smartphone.

- **IMPORTANT:** Once you download the Authenticator App to your smartphone, **DO NOT DELETE THE APPLICATION.** You will need to access this application on your smartphone (preferably to your personal vs. work) each time you need to log into your Cal Employee Connect (CEC) account.

Don't have an Authenticator App yet?

- If you do not yet use an authenticator app on your smartphone, you will need to install one through the respective app store that you use (ex. Google Play or Apple Store).

Google Authenticator



Microsoft Authenticator







# Cal Employee Connect (CEC) Turn On MFA

Google Authenticator



Microsoft Authenticator



- If you have both a personal and work phone, we recommend you enable MFA using your **personal phone**.
  - Your Cal Employee Connect account follows you from agency to agency, and if you lose access to your work phone, you could be locked out of your account.
- Once you have installed the app, click close to return to the previous screen and click "Get Started."
- If you already use an Authenticator App for other purposes such as email, banking, etc. we recommend you use that app for Cal Employee Connect.



# Cal Employee Connect (CEC) Turn On MFA

## Which Authenticator Apps should I use?

- The apps listed below are the ones we have tested and recommend.

Google Authenticator



Free OTP

Microsoft Authenticator



2FA Authenticator



Lastpass Authenticator



Aegis Authenticator



Yubico Authenticator



Duo Authenticator



Twilio Authy





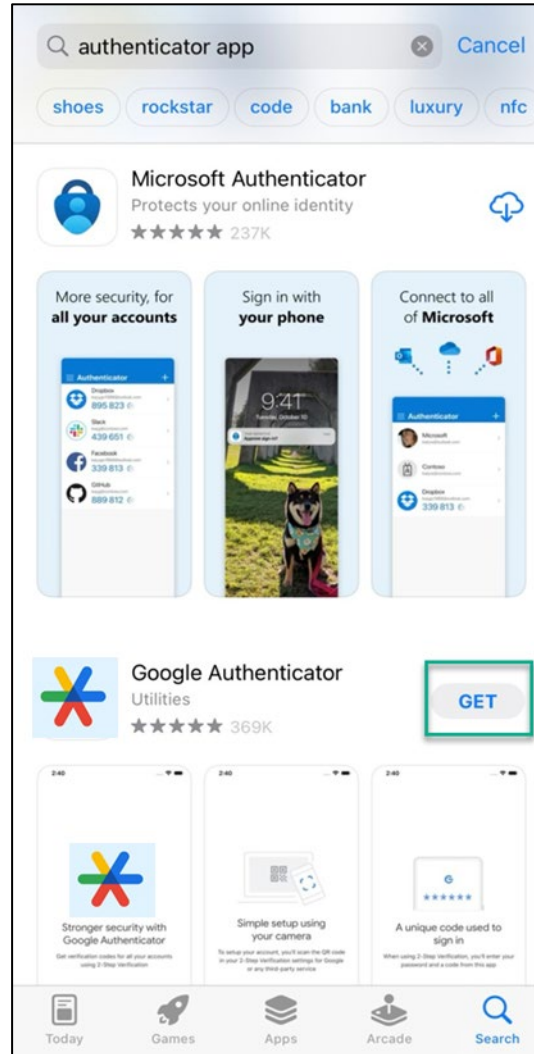
# Cal Employee Connect (CEC) Turn On MFA

## Example: Download Authenticator App:

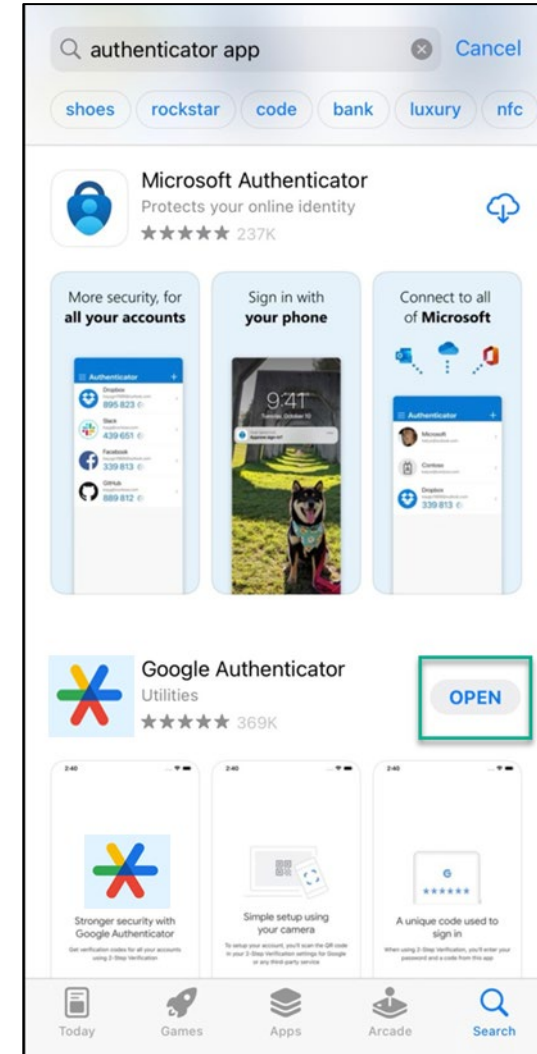
- In your phone App Store, search Authenticator App to select an application.
- The following is an illustrative example for Google Authenticator. Other applications may have slight variations to their access steps to obtain the needed six-digit code:

## STEP ONE:

- Click **GET** to download the chosen App



- Click **OPEN**



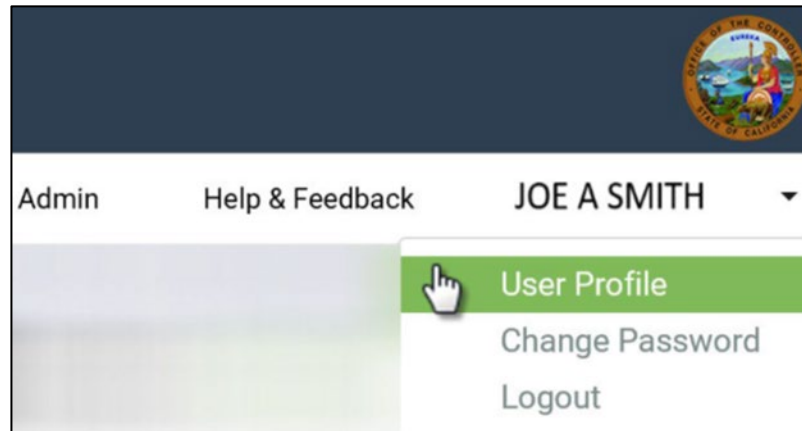




# Cal Employee Connect (CEC) Turn On MFA

## STEP TWO - Turn on MFA

- Click **your name** at the top right side of the screen, then click **User Profile**.




- Click **Turn On MFA**

### User Profile

**Portal Information**

User Name	[REDACTED]
Email Address	[REDACTED]
Multifactor Authentication	<input type="checkbox"/> Turn On MFA
Last Logged In	03-15-2023 11:22:44 AM
Password Last Changed	11-09-2020 08:43:09 AM
Date Joined	Invalid date
User Profile Last Modified	Invalid date

**i Our Promise Campaign**



Donate now to your favorite nonprofit(s)



# Cal Employee Connect (CEC) Turn On MFA

Cal Employee  
CONNECT

Home Earnings W-2 Leave Time Employee Services

Employee Services

Note: For your security and protection, we require you to enable Multifactor Authentication (MFA) in order to use the Employee Services features. You may browse around but you will not be able to submit any requests or changes until you enable MFA. To enable MFA, [click here](#)

Click on the icons below to perform specific employee services

Withholdings Change Address Change Direct Deposit

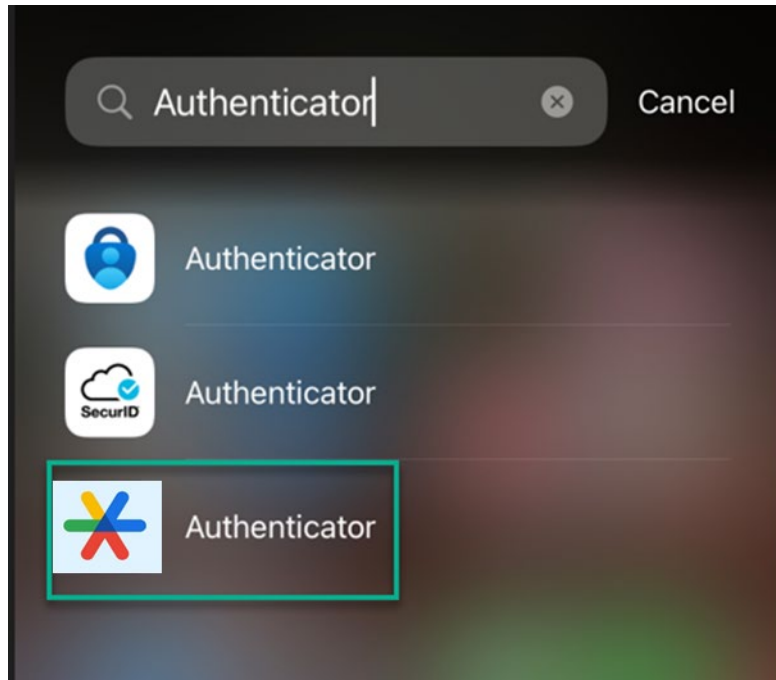




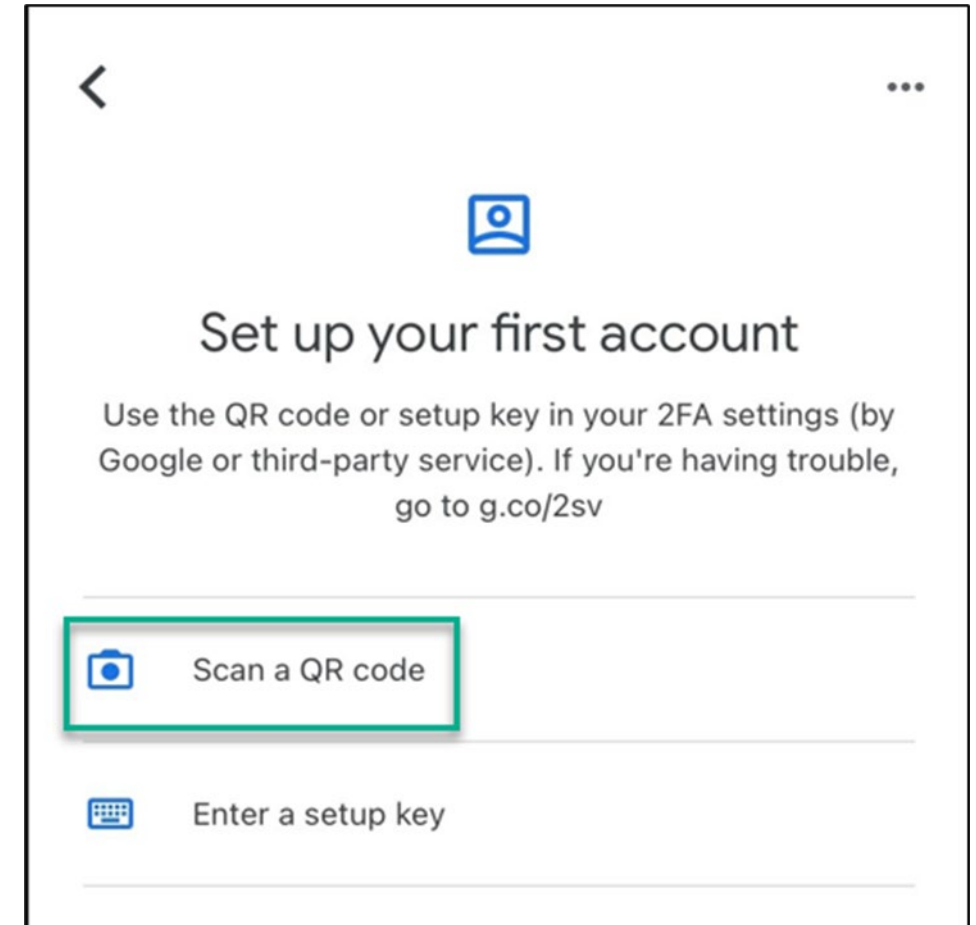
# Cal Employee Connect (CEC) Turn On MFA

## STEP THREE:

- **Open your Authenticator App** to retrieve your six-digit code.
- For quick access, you can search your phone's Library.



- Click **Scan a QR Code**





# Cal Employee Connect (CEC) Turn On MFA

## Enable Multifactor Authentication

1. Scan the QR Code using your authenticator app. Or if you would like to manually enter the secret, click Copy Secret



[Can't scan the QR Code? ▾](#)

2. Enter the 6 digit verification code from your authenticator app


**Enable**


Cancel





# Cal Employee Connect (CEC) Turn On MFA

**Congratulations! Your CEC account is now protected!**

 User Profile

**Congratulations! You have enabled multi-factor authentication on your account.** 

 Portal Information  Employee Information

# SCOConnect: Cal Employee Connect (CEC)



Cal Employee  
CONNECT



## Cal Employee Connect (CEC) Features Demonstration

Employee Services

**Direct Deposit**

Address Change

**Withholding**

**W-2 Paperless**

Leave Center

# SCOConnect: Cal Employee Connect (CEC)



Cal Employee  
CONNECT



## Direct Deposit






# Cal Employee Connect (CEC) Submit Direct Deposit Request


Cal Employee  
**CONNECT**


Home Earnings W-2 Leave Time **Employee Services**

Employee Services

*Click on the icons below to perform specific employee services*

 Withholdings Change

 Address Change

 Direct Deposit



# Cal Employee Connect (CEC) Submit Direct Deposit Request

## Direct Deposit Request

[More Info](#)

This form will allow you to enroll in Direct Deposit or change your current Direct Deposit enrollment. Select the type of enrollment (New or Change), the account type (Checking or Savings), and then fill in the routing, account, and bank information requested.

Note: If you wish to cancel your Direct Deposit, you must use the Direct Deposit Form in the [More Info](#) link and submit it to your departmental HR office.

### Financial Institution Information

Current Pay Frequency

Monthly

Type of Enrollment

Change

Account Type

Checking

Financial Institution Name

Chase Bank

Routing Number

122000661

Deposit Account Number

5899988844

Institution Address

4026 Sunrise Blvd

City

Rancho Cordova

State

CA

Zip

95742

Submit

# Cal Employee Connect (CEC) Submit Direct Deposit Request



### Direct Deposit Authorization and Consent

[Redacted]

By clicking "I Agree" you consent to the following:

- I. I hereby authorize the State Controller's Office to provide for direct deposit of any salary or wages due me, less any mandatory or authorized withholding or deductions therefrom, in the above designated account. If at any time the amount of salary or wages so deposited exceeds the amount of salary or wages actually due and payable to me, I hereby authorize the State Controller's Office to either:
  - a. Withhold a sum equal to the overpayment from future salary or wages; or
  - b. Recover such overpayment from the above-designated account.
- If the State is legally obligated to withhold any part of my wage or salary payment for any reason, or if I no longer meet eligibility requirements for the Direct Deposit program, I understand the State Controller's Office may terminate my enrollment in the program. If any action taken by me results in nonacceptance of a direct deposit by the designated financial institution, I understand that the State assumes no responsibility for processing a supplemental salary or wage payment until the amount of the nonacceptance deposit is returned to the State by the financial institution.
- II. 100% of the net deposit will not be sent to a financial institution outside the jurisdiction of the United States



# Cal Employee Connect (CEC) Submit Direct Deposit Request

### Direct Deposit Confirmation ✕

Please confirm your direct deposit submission before we check and validate your employee information:

Direct Deposit Contents	
Pay Frequency	Monthly
Action Type	New
Account Type	Checking
Bank Account Number	54646545
Institution Name	kj
Routing Number	122000661
Institution Address	300 Capitol Mall
Institution City	Sacramento
Institution State	Ca
Institution Zip	95814

# Cal Employee Connect (CEC) Submit Direct Deposit Request



### Employee Validation

In order to validate your identity, please supply your Social Security Number (SSN) and Date of Birth (DOB) below.

**Social Security Number**

\*\*\* - \*\*\* - \*\*\*

[Why are you asking me for my SSN?](#)

**Date of Birth**

08 28 1988

**Submit** Cancel





# Cal Employee Connect (CEC) Submit Direct Deposit Request

Your Direct Deposit request has been submitted ✕

We would really appreciate your feedback!

*Please take a moment and tell us about your experience submitting your direct deposit.*

1. The form is easy to understand and fill out.

★ ★ ★ ★ ★

2. This process is simple and easy to use.

★ ★ ★ ★ ★

3. Is there anything we can do to improve this process?

I love the CEC Direct Deposit Feature. It is very easy and user friendly!!!

0 / 500

Submit



# Cal Employee Connect (CEC) Submit Direct Deposit Request



Wed 3/15/2023 11:42 AM

ConnectHRHelp@sco.ca.gov

Cal Employee Connect - Direct Deposit Request Confirmation

From: [ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov) <[ConnectHRHelp@sco.ca.gov](mailto:ConnectHRHelp@sco.ca.gov)>

Sent: Wednesday, March 15, 2023 11:42 AM

To: [john.doe@yahoo.com](mailto:john.doe@yahoo.com)

Cc: [SNCPersonnelTransactions@siemanevada.ca.gov](mailto:SNCPersonnelTransactions@siemanevada.ca.gov)

Subject: Cal Employee Connect - Direct Deposit Request Confirmation

## CAUTION:

This email originated from outside of the organization.

Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.

## Cal Employee Connect - Direct Deposit Request Confirmation

This is confirmation that your Direct Deposit Request has been submitted.

For more information: [https://sco.ca.gov/ppsd/se\\_direct\\_deposit.html](https://sco.ca.gov/ppsd/se_direct_deposit.html)

Direct deposit submission details below:

Request Information	
Request Timestamp	03-15-2023 11:41:41 AM
Employee UEID	****-7559-0
Employee Name	John D Doe
Pay Frequency	M (Monthly)
Request Type	2 (Change)
Account Type	C (Checking)
Institution Name	Chase Bank
Institution Address	4006 Sunrise Blvd
Institution City	Rancho Cordova
Institution Zip	95742
Institution Routing Number	122000661

If you did not make this request, please contact your departmental HR office

# SCOConnect: Cal Employee Connect (CEC)



Cal Employee  
CONNECT



## Address Change



# Cal Employee Connect (CEC) Submit Address Change Request

Cal Employee  
CONNECT

Home Earnings W-2 Leave Time **Employee Services**

Employee Services

Click on the icons below to perform specific employee services

Withholdings Change Address Change Direct Deposit

# Cal Employee Connect (CEC) Submit Address Change Request



## Address Change

Help -

This form will allow you to easily update your current mailing address on file with the State Controller's Office for Personnel and Payroll related information. This mailing address is used to send various mailings to employees including California Public Retirement System (CalPERS) member statements and other California Human Resource correspondence.

**Note:** Please allow 24 hours for your address change to reflect in Cal Employee Connect.

### Current Address

Your current mailing address for your reference.

Street Address

5222 CONSUMNES DR APT 42

City

STOCKTON

State

CA

Zip Code

95219

### New Address

Enter your new mailing address. If applicable, enter 'APT', 'STE', or 'UNIT'.

If you have a post office box (PO BOX), please submit an [Employee Action Request form STD. 686](#) to your departmental Human Resource office.

Street Address

4205 SUNRISE RD

City

SACRAMENTO

State

CA

Zip Code

95814

Submit

Cancel



# Cal Employee Connect (CEC) Submit Address Change Request



## Address Change Authorization and Consent



By clicking "I Agree" you authorize the State Controller's Office to update your mailing address and understand the following:

- I. This form will *only* update your address on file with the State Controller's Office for Personnel and Payroll related information and California Public Retirement System member statements. *You will still need to reach out to your departmental personnel office if you need to complete any additional forms for change of address, for example, Designation of Person(s) Authorized to Receive Warrants (STD. 243) or Nondisclosure of Employee Home Address (STD. 677).*
- II. This form *does not* update your addresses on file with deduction companies and departmental employment lists. *You will still need to reach out to these entities to change your address.*

I Agree

Cancel



# Cal Employee Connect (CEC) Submit Address Change Request

## Address Change Confirmation ✕

Please select 'I Agree' to confirm your address change submission before validating your identity.

Address Change Details	
Address	4205 SUNRISE RD
City	SACRAMENTO
State	CA
Zip Code	95814

# Cal Employee Connect (CEC) Submit Address Change Request



### Employee Validation

In order to validate your identity, please supply your Social Security Number (SSN) and Date of Birth (DOB) below.

**Social Security Number**

\*\*\* - \*\*\* - \*\*\*

[Why are you asking me for my SSN?](#)


**Date of Birth**


08 / 28 / 1988

**Submit** Cancel




# Cal Employee Connect (CEC) Submit Address Change Request

 Rate Your Experience


Your Address Change request has been submitted 

We would really appreciate your feedback!  
*Please take a moment and tell us about your experience submitting your address change.*

1. The form is easy to understand and fill out.



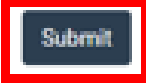
2. This process is simple and easy to use.



3. Is there anything we can do to improve this process?

I love the CEC Address Change Feature. It is very easy and user friendly!!!


0 / 500







# Cal Employee Connect (CEC) Submit Address Change Request

 Wed 3/15/2023 12:17 PM  
ConnectHRHelp@sco.ca.gov  
Cal Employee Connect - Mailing Address Change Request Confirmation

To: [jordan@hdm.com](mailto:jordan@hdm.com)  
Subject: Cal Employee Connect - Mailing Address Change Request Confirmation

**CAUTION:**  
This email originated from outside of the organization.  
Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.

**Cal Employee CONNECT**

### Cal Employee Connect

#### Address Change Request Confirmation

This is confirmation that your Address Change Request has been submitted via Cal Employee Connect (CEC).  
Please allow 24 hours for your address change to reflect in CEC. Address Change requests made over weekends and holidays will not process until the next business day.  
**If you did not make this request, please contact your departmental Human Resource office immediately, and forward this email confirmation to Cal Employee Connect at [connecthelp@sco.ca.gov](mailto:connecthelp@sco.ca.gov) for further investigation.**

Request Information	
Request Timestamp	03-15-2023 12:17:23 PM
Employee CEID	****0113-B
Employee Name	John D Dow

**CONFIDENTIALITY NOTICE:** This communication with its contents may contain confidential and/or legally privileged information. It is solely for the use of the intended recipient (s). Unauthorized interception, review, use or disclosure is prohibited and may violate applicable laws including the Electronic Communications Privacy Act. If you are not the intended recipient, please contact the sender and destroy all copies of the communication. Nothing in this email, including any attachment, is intended to be a legally binding signature or acknowledgment. Any views or opinions presented are solely those of the author and do not necessarily represent those of the State Controller's Office or the State of California.

**PRIVACY NOTIFICATION:** The Information Practices Act of 1977 (California Civil Code Section 1798.17) and the Federal Privacy Act (5 USC 552a, subk, (4)(3)) require this notice to be provided when collecting personal information from individuals. The information provided to the Office of the State Controller, Personnel/Payroll Services Division will be used by the State Controller's Office for personnel, payroll, retirement, and health benefits processing.

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Cal Employee  
CONNECT



## Withholdings



# Cal Employee Connect (CEC) Submit Withholdings Request

Cal Employee  
**CONNECT**

Home Earnings W-2 Leave Time **Employee Services**

Employee Services

*Click on the icons below to perform specific employee services*

**Withholdings Change** Address Change Direct Deposit



# Cal Employee Connect (CEC) Submit Withholdings Request

## Withholdings Change

- 1 Pre-Verification
- 2 Federal
- 3 State
- 4 Summary

Please visit [California Personnel Office Directory \(CPOD\)](#) for your Departmental HR contact information, if you have an IRS Lock, are filing withholdings for IL or NY, or are a NonResident Alien.

Employees may change personnel related data by completing a [Standard Form 686 \(Employee Action Request\)](#).

Are you filing withholdings for IL or NY

Yes

No

[Cancel](#) [Prev Step](#) [Next Step](#)





# Cal Employee Connect (CEC) Submit Withholdings Request

## Withholdings Change

1 Pre-Verification      2 Federal      3 State      4 Summary

**Note:** Changes made after hours and on non-cycle days will be processed through the system in the next payroll cycle. Please see the [Decentralized Payroll Calendars](#) for more information.

Are you filing withholdings for IL or NY

Yes

No

Are you a non-resident citizen? ⓘ

Yes

No



# Cal Employee Connect (CEC) Submit Withholdings Request

## Withholdings Change

1 Pre-Verification      2 Federal      3 State      4 Summary

**Note:** Changes made after hours and on non-cycle days will be processed through the system in the next payroll cycle. Please see the [Decentralized Payroll Calendars](#) for more information.

For important information regarding these items, you must read the [Employment Development Department \(EDD\) Form DE-4](#).

What filing status will you use for your state tax return? ⓘ

Single

Married

Head of Household

Exempt

Enter the number of regular withholding allowances ⓘ

Enter the number of additional withholding allowances (Optional) ⓘ

Enter any additional monthly state withholding (Optional) ⓘ



# Cal Employee Connect (CEC) Submit Withholdings Request

1 Pre-Verification 2 Federal 3 State 4 Summary

**Note:** Changes made after hours and on non-cycle days will be processed through the system in the next payroll cycle. Please see the [Decentralized Payroll Calendars](#) for more information.

For important information regarding these items, you must read the [Internal Revenue Service \(IRS\) W-4 Form](#) .

What filing status will you use for your federal tax return? ⓘ

Single

Married

Head of Household

Exempt

Do you wish to claim higher withholding? ⓘ

Yes

No

Enter your claim dependent amount (Optional) ⓘ

\$ 0.00

Enter your other income (not from jobs) amount (Optional) ⓘ

\$ 0.00

Enter your deductions amount (Optional) ⓘ

\$ 0.00

Enter any additional monthly federal withholding (Optional) ⓘ

\$ 0.00

Cancel Prev Step Next Step



# Cal Employee Connect (CEC) Submit Withholdings Request

## Withholdings Change

1 Pre-Verification      2 Federal      3 State      4 Summary

**Note:** Changes made after hours and on non-cycle days will be processed through the system in the next payroll cycle. Please see the [Decentralized Payroll Calendars](#) for more information.

Please review the below withholding options you have made.

Federal Withholdings	
Filing Status	Head of Household
Higher Withholding	No
Claim Dependents	\$ 0.00
Other Income	\$ 0.00
Deductions	\$ 0.00
Additional Deductions	
Federal Additional Deductions	\$ 0.00

State Withholdings	
Filing Status	Head of Household
Regular Allowances	3
Additional Allowances	0
Additional Deductions	
State Additional Deductions	\$ 0.00

If the withholding selections above are correct, type your name in the below field and selecting "I Agree" you hereby authorize the State Controller's Office (SCO) to initiate the below withholdings from your warrant for the purpose of tax withholdings.

I certify that the information provided in this electronic form is true and correct and that I have read the IRS Form W-4 and the applicable State form. Under the penalties of perjury, I certify that the number of withholding exemptions and allowances claimed on this certificate does not exceed the number to which I am entitled. If claiming exemption from withholding, I certify that I incurred no tax liability for last year and that I anticipate that I will incur no liability this year. I authorize my employer via the State Controller's Office to refund any overcollection of current/prior year Social Security and Medicare taxes; I certify that I shall not claim a tax refund or credit for these overcollections.





# Cal Employee Connect (CEC) Submit Withholdings Request

### Employee Validation

**Note:** Changes made after h  
[Decentralized Payroll Calend](#)

Please review the below with

In order to validate your identity, please supply your Social Security Number (SSN) and Date of Birth (DOB) below.

**Social Security Number**

\*\*\* - \*\*\* - \*\*\*

[Why are you asking me for my SSN?](#)

**Date of Birth**

08 28 1988

Cancel **Submit**

State Withholdings	
Filing Status	Head of Household
Regular Allowances	3
Additional Allowances	0



# Cal Employee Connect (CEC) Submit Withholdings Request

## Cal Employee Connect

### Withholdings Change Request Confirmation

This is confirmation that your Withholdings Change Request has been submitted via Cal Employee Connect (CEC).

**Please allow 24 hours for your withholdings change to reflect in CEC. Withholdings Change requests made over weekends and holidays will not process until the next business day.**

**If you did not make this request, please contact your [departmental Human Resource](#) office immediately, and forward this email confirmation to Cal Employee Connect at [connecthelp@sco.ca.gov](mailto:connecthelp@sco.ca.gov) for further investigation.**

Request Information	
Request Timestamp	07-12-2023 02:15:43 PM
Employee UEID	**** [REDACTED]
Employee Name	[REDACTED]
Federal Filing Status	Head of Household
Federal Higher Withholding	No
Federal Claim Dependents	\$ 0.00
Federal Other Income	\$ 0.00
Federal Deductions	\$ 0.00
Federal Additional Deductions	\$ 0.00
State Filing Status	Head of Household
State Regular Allowances	3
State Additional Allowances	0
State Additional Deductions	\$ 0.00



Cal Employee  
CONNECT



## W-2 Paperless Opt-In and Leave Center



# FUNDAMENTALS OF PAYROLL

Presented By: Siobhan Hallinan and Michael Berlanda

Contact: [PPSDTraining@sco.ca.gov](mailto:PPSDTraining@sco.ca.gov)

Personnel and Payroll Services Division/Statewide Training Program





# Certifying Payroll and 674 Payroll Adjustments

Presenters: Siobhan Hallinan and Michael Berlanda

Contact: [PPSDTraining@sco.ca.gov](mailto:PPSDTraining@sco.ca.gov)

## Training Videos - Certifying Payroll and 674 Payroll Adjustments Overview

- 672 Certifying Payroll
  - [Payroll Certification Process](#) - Video
  - Questions and Answers with Siobhan and Michael
- STD. 674 Payroll Adjustments
  - [STD. 674](#) – Video
  - [STD. 674 Examples](#) – Video
  - [STD. 674 A/R](#) – Video
  - [STD. 674D](#) – Video
  - Questions and Answers with Siobhan and Michael

All videos are available on the [SCO website](#)!





# BREAK



## 5 MINUTES



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Services Employees International Union (SEIU) Open Enrollment

- Bargaining Units 1, 3, 4, 11, 14, 15, 17, 20, and 21 are subject to an open enrollment period where they can elect to change whether they accrue vacation (VA) and sick or annual leave (AL).
- Goes both ways – VA to AL or AL to VA
- Occurs annually, each April
- Changes for SEIU employees are effective the first day of the June pay period




# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Form CalHR 875: Annual Leave Sick/Vacation Leave Election Form

  
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

**Annual Leave-Sick/Vacation Leave Election Form**  
California Department of Human Resources  
State of California

Print Form Reset Form

**1. EMPLOYEE INFORMATION**

Name	Unit Number	Work Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Department/Location

**2. EMPLOYEES NOT COVERED BY SEIU BARGAINING UNITS**

I elect to participate in the following leave program effective the first day of the pay period this election is received by my personnel office.

Annual Leave  
 Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa no more than once every 24 months.

**3. EMPLOYEES IN SEIU BARGAINING UNITS**

Annual Leave  
 Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa annually during an open enrollment period during the month of April. The effective date of the election shall be the first day of the June pay period.

**4. APPROVAL**

I understand the accrual rate and usage provisions differ in the Annual Leave and Sick Leave/Vacation Programs. Further, if I am a current employee, I understand when I change from one program to another, all provisions of the program I enter apply upon the effective date. However, the annual leave, sick leave, or vacation (converted to annual leave) balances I have on the effective date of the new program will continue to be available to me to use. If I have a sick leave balance upon retirement, I may convert it to PERS service credit according to Government Code section 20963.

I make this election freely and voluntarily.

Signature _____	Date _____
-----------------	------------

Note: New Employees: If this election form is not returned to the Personnel Office, it will be deemed an election for the sick leave/vacation program.

**5. FOR PERSONNEL OFFICE USE ONLY**

After processing election, place in employee's personnel file.

SSN: \_\_\_\_\_

Date Election Received: \_\_\_\_\_ Received By: \_\_\_\_\_

Effective Date: \_\_\_\_\_ Date Eligible to Change: \_\_\_\_\_

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# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Important Dates for 2024:

- April 1 to 30: Enrollment period
- June 1: Effective date
- June 12: Earliest date to process the change







# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

```
LASF001 TRNG          B10 - LEAVE BENEFIT INQUIRY

SSN: 000-03-6040          NAME: 00 SERVICE

SEL LEAVE BENEFIT          BALANCE          YTD          PSN
                           TOTAL          SEQ EMPLOYER

- VACATION                  5.39
- SICK LEAVE                4.00
- PERSONAL HOLIDAY         0.00 U
- HOLIDAY CREDIT           4.50          01 CONTROLLER'S

D6000433 ONLY PAGE
ACTN: B20 SSN: _____ LB: _____ LV PRD: _____
```





# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

```
LASF001 TRNG          B10 - LEAVE BENEFIT INQUIRY

SSN: 000-03-6108          NAME: Y  SOUPE

SEL LEAVE BENEFIT          BALANCE          YTD          PSN
                           TOTAL          SEQ EMPLOYER

_ ANNUAL LEAVE              43.00
_ SICK LEAVE                 32.00
_ PERSONAL HOLIDAY           0.00

DC982411 ONLY PAGE
ACTN:  ___  SSN:  ___  ___  ___  LB:  ___  LV PRD:  ___  ___
PF4=REFRESH PF7=PREVIOUS PF8=NEXT PF12=PRINT CLEAR=MENU
```



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

**Retroactivity:** Process before June 30!

Retroactive Corrections  
Rev. 01/19

## RETROACTIVE CORRECTIONS AFTER CHANGING FROM VA TO AL OR AL TO VA

**IF VA OR AL WAS ESTABLISHED IN ERROR OR IN THE WRONG LEAVE PERIOD  
REFER TO THOSE CONDITIONS IN THIS SECTION OF THE WORKBOOK.**

**NOTE: IT IS NOT NECESSARY TO MODIFY OR DELETE THE ESTABLISHMENT  
PERIODS IN ORDER TO KEY THESE CORRECTIONS.**

1. Use the B52 - LB Void Transaction Entry screen to void the transfer transaction on both benefits (VA & AL) as well as any other incorrect transactions.
2. Use the B50 - LB Transaction Entry screen to key all retroactive attendance and accruals as necessary.
3. Use the B14 - LB History Summary screen to determine the correct transfer amount.

**NOTE: The 'end balance' should be keyed as the transfer amount from the "old" benefit in one month, and the combined amount of the 'end balance' plus the 'credit' should be keyed as the transfer amount to the "new" benefit in the next month.**

4. Use the B50 - LB Transaction Entry screen to key the correct transfer amounts to both benefits using transaction codes 46 & 47 respectively.
5. Use the B14 - LB History Summary screen or the B16 - LB Transaction History screen to verify your corrections.

# California Leave Accounting System (CLAS)

Presenter: Megan Vinson

Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## References: Education

- [CLAS Workbook](#), Conditions Section:
  - Annual Leave (AL) to Vacation (VA)/Sick Leave
  - Vacation/Sick Leave to Annual Leave
  - Retroactive Corrections After Changing from VA to AL or AL to VA
- CalHR HR Manual, Leave Policy:
  - [2102 - Annual Leave](#)
  - [2103 - Vacation](#)





# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## References: Education

- [Bargaining Unit Contracts](#)
- [Leave Benefit Election Change eLearning](#)

## Communications

- [Leave Accounting Letter #24-002](#): SEIU Open Enrollment for Annual Leave and Vacation/Sick Leave

**Call us at (916) 327-0756 for questions**



# 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.



# PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Include the employee's complete social security number (SSN) when sending documents through ConnectHR
- Check [Weekly Processing Dates](#) before sending inquiries
- Update [California Personnel Office Directory \(CPOD\)](#)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- Review Communication from State Policy and Instructional Departments for Business Process impacts
- It is recommended that the Human Resources (HR) staff follow [Section M](#) of the Payroll Procedures Manual (PPM) for certifying payroll, which requires HR staff to validate that both mandatory and voluntary deductions have been withheld appropriately and to certify the employee's payroll is accurate.
- 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) [https://sco.ca.gov/ppsd\\_state\\_hr.html](https://sco.ca.gov/ppsd_state_hr.html)
- State Employees [https://sco.ca.gov/ppsd\\_se\\_payroll.html](https://sco.ca.gov/ppsd_se_payroll.html)

## SCO Key Initiatives:

- [SCOConnect](#)
- [California State Payroll System Project](#)

## Contacts:

- Affordable Care Act (ACA) Email [ACASupport@sco.ca.gov](mailto: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](mailto:CLAS@sco.ca.gov)
- CS Escalation Email (HR Supervisors and Managers) [PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)
- Decentralized Security Administration & ViewDirect Access (916) 619-7234 or [DSA@sco.ca.gov](mailto:DSA@sco.ca.gov)
- HR Suggestions Email (All HR Staff) [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov)
- Management Information Retrieval System (MIRS) Email [PPSDMIRS@sco.ca.gov](mailto:PPSDMIRS@sco.ca.gov)
- [Statewide Customer Contact Center \(SCCC\)](#) (916) 372-7200



## FORUM QUESTIONS:

The following questions were submitted during the forum:

**Question:** Regarding the Recruitment and Retention (R&R) Pay Differential 493, if the employee is off pay status (disability), do we submit STD. 674 or STD. 674D? Do we put the gross in the comments box? Also, which document type from the drop-down in ConnectHR do we upload it to?

**Answer:** Submit a STD. 674 via ConnectHR to Disability using the drop-down STD. 674 (EID not on PAR); in the comments box indicate the R&R, and in Section B provide the Payment Type and total gross.

**Question:** When signing up for Direct Deposit in Cal Employee Connect (CEC), will a confirmation email be sent to the employee directly?

**Answer:** Yes, an employee will receive their own confirmation email upon completion of their Direct Deposit transmission with a copy to their agency's human resources universal email address.

**Question:** Can we turn off the prompt that offers to enroll in paperless W-2 in Cal Employee Connect (CEC)? It asks me every time I log in to my personal CEC account.

**Answer:** In support to our paperless initiative, currently there is not an option to turn off the prompt. This is to encourage all users to consider receiving their future W-2s electronically and have the ability to download all past W-2s.

**Question:** Regarding the Withholdings feature on Cal Employee Connect (CEC), are there any warnings or disclaimers when employees change their withholdings, advising them to check with tax professionals and/or links to resources? We have seen an increase in employees asking us why their paychecks are different after they have changed their withholdings.

**Answer:** Yes, there are disclaimers noted prior to completing the form on CEC, and there are also links to the Internal Revenue Services (IRS) resources located as an "i" hyperlink next to most questions to assist them when completing each question.

**Question:** How can an employee (EE) reset Multifactor Authentication (MFA) for Cal Employee Connect (CEC) with a new phone?

**Answer:** If the EE was not able to turn off their MFA in their profile prior to changing their phone, then have the EE contact CEC via [Help and Feedback](#) and select Login/Account and MFA as the problem type. From there, CEC Team will assist them to turn off their MFA so they can reset it to their new phone.

**Question:** How many pay periods does it take for a withholding change to take effect?

**Answer:** If the withholding change is keyed prior to monthly cut off, the employee should see the change within the same pay period. Please see Section 6 - EAR Processing of the [Personnel Action Manual](#) (PAM) for further questions.

**Question:** I have a few employees telling me they cannot get through to the Disability unit without providing a phone number and pin. Is this correct?

**Answer:** There was a known issue with the voicemail that has since been resolved.

**Question:** Do employees need to submit a new authenticator code every time they log into their Cal Employee Connect (CEC) account to authenticate who they are?

**Answer:** Yes, they do.

**Question:** Some employees are not able to have their phones at work (for example, Department of Corrections and Rehabilitation (CDCR) employees in institutions) and do not want to use Multifactor Authentication (MFA) for that reason. Is there another authentication method available to them?

**Answer:** Currently, MFA is required to use the Cal Employee Connect (CEC) Employee Services. In CDCR employees' case, employees will need to submit their requests directly to their departmental HR office.

**Question:** What if an employee (EE) is told ahead of time not to enroll in Direct Deposit (DD) until an Accounts Receivable (A/R) has cleared, but I receive confirmation that the EE enrolled anyway. Do I reply to the confirmation email and request for the DD form not to be processed?

**Answer:** Yes, you would respond to the confirmation email and deny the Direct Deposit enrollment.

**Question:** Does the leave screen show Leave Accounting System (LAS) balances?

**Answer:** The leave screen shows a snapshot of the LAS at Monthly Payroll. It is not current or up to date.

**Question:** What if we issued a salary advance and need the paper check to clear the advance, but they are enrolled in Direct Deposit, what do we do?

**Answer:** Remove the employee from Direct Deposit. The employee will need to re-enroll in Direct Deposit.

**Question:** What is the number to reach the Direct Deposit unit?

**Answer:** To reach the Direct Deposit Program, call the [Statewide Customer Contact Center](#) (SCCC) at 916-372-7200 and select option 1.

**Question:** The employee (EE) closed his bank account and got a new account, but the Direct Deposit (DD) retro pay got redeposited back to SCO due to the closed bank account. How do we resend the retro pay that was redeposited from SCO to EE?

**Answer:** Re-key the pay once the redeposit shows in pay history.

**Question:** I transferred from another agency, and I think my Cal Employee Connect (CEC) account is still connected to my old state email. How can I recover access to my account?

**Answer:** Please contact the CEC Team via [Help and Feedback](#).

**Question:** For fractional employees that worked their full fraction, is that marked as a standard or is it still broken down by days and hours?

**Answer:** Fractional employees would be marked as a standard if they worked their full-time base.

**Question:** Is there a module that goes into more detail regarding Form STD. 666?

**Answer:** There is not a module for STD. 666, but this will be discussed in the upcoming months when we are ready to release our virtual instructor-led Fundamentals of Payroll training.

**Question:** When you are requesting a transfer of funds for lump sum from the position number to the blanket, do you need to process a correction in the Personnel Information Management System (PIMS) to the S01 or S70?

**Answer:** Yes. You need to key the S70C or S01C and add the 630/635 blanket information before submitting the STD. 674.

**Question:** Can you use a STD. 674 to continue benefit deductions for an employee on State Disability Insurance/Non-Industrial Disability Insurance (SDI/NDI)?

**Answer:** A STD. 674 A/R must be used for continuation of benefits for SDI. For employees on Enhanced Non-Industrial Disability Insurance (ENDI), please reference Section E 107 from the [Payroll Procedures Manual](#) (PPM). Section E 107 states: "If there is sufficient NDI gross, all miscellaneous deductions (including flexible benefit deductions) will be withheld unless canceled by the employee. Flexible benefit deductions may only be canceled by the participant if there is a permitting event. If an employee's health benefit, dental, vision, or life insurance deductions are withheld, the state contribution will also be made."

**Question:** In the previous screen, Salary Type in part B is not color coated, is that required?

**Answer:** The color coding in the video is used to illustrate the differences in the form. Salary Type was coded as discretionary. Please refer to Section D 010 of the [Payroll Procedures Manual](#) (PPM) for clarification.

**Question:** I have a situation where I need to transfer funds and issue payment for the same pay period, and I am not sure what the correct processing need is to fulfill these tasks. Do I upload the form to Premium Pay-STD. 674 Adjustments or to STD. 674 Transfer of Funds in ConnectHR? Or do I need to address one issue at a time? For example, wait for SCO to issue the payment first and then submit form to do the transfer of funds?

**Answer:** You must wait for pay to issue before you can transfer funds.

**Question:** Regarding the STD. 674 form, the dock section does not allow for electronic filling of decimal amounts for fractional time case employees (e.g. 6.4, 4.5). It cuts off the numbers.

**Answer:** Specialists must print the forms and complete them manually to include fractional time and avoid cutting off the numbers.

**Question:** Why are some Accounts Receivables (A/Rs) issued with a position number of 1320 or 0804?

**Answer:** That is the class code for a fringe benefit. Please refer to Section N 173 of the [Payroll Procedures Manual](#) (PPM) for clarification.

Regarding A/R inquiries and/or requests, please be sure to use the position number on the A/R. Those that are related to fringe benefits have a different class code (serial 999) from the employee's regular position number. This will ensure they are uploaded to the correct program (W2 Program). Questions on why the A/R was established should be directed to your Accounting Office.

**Question:** Regarding 674 A/R for late dock/no leave credit available, does it require a STD. 674 A/R and keying both 603 and 966, or just the STD. 674?

**Answer:** For late dock (dock after Monthly Payroll Cutoff), you should not release the warrant to the employee. You must first call SCO and have the warrant stripped or pulled, and then key the 603 and 966 to re-issue pay after the warrant redeposits. If a pay warrant is released to the employee, then a STD. 674 A/R only is needed for the overpayment.



**Question:** It was not mentioned that all payment types that are the same must be listed when requesting additional pay. For example, all payment type 1s must be listed. Is this still the case?

**Answer:** Yes, that is the best practice. All the like payment types should be listed to prevent any delays or dings.

**Question:** Is there a hold on establishing Accounts Receivables (A/Rs) for payment type 0? We have submitted several STD. 674 A/Rs in August and we have not seen them established. We also have not received ding notices.

**Answer:** Please review the [PPSD Weekly Processing Dates](#) for clarification on whether your documents have been processed.

**Question:** Late dock is often reported on pay day after paychecks are issued, but by then it is too late to strip; would a STD. 674 A/R be submitted since it cannot be redeposited?

**Answer:** In this case, the warrant was released so you would submit a STD. 674 A/R indicating late dock. You would not key a 603/966, as those are to certify and issue pay

**Question:** In what situation would we send a STD. 674 and/or a STD. 674 A/R to Administration and Disbursements Division?

**Answer:** A STD. 674 might be used to return a warrant to Disbursements.

**Question:** If an employee transfers to another state agency and chose leave credit offset, which agency should submit the STD. 674 A/R?

**Answer:** The agency that the Accounts Receivable (A/R) occurred will submit the STD. 674 A/R, but you must work with the new agency's Specialist to ensure the employee has enough leave credits and that the correct adjustments are made to the employees leave balances.

**Question:** Do we need to send an "inquiry" if Accounts Receivables (A/Rs) have not been established? I sent a few of them via ConnectHR last year that still have not been established.

**Answer:** SCO does not accept document inquiries. Please contact the [Statewide Customer Contact Center \(SCCC\)](#) for assistance.

**Question:** Can we request a new form to be created for requesting Temporary Disability (TD) supplementation, instead of having to modify a STD. 674?

**Answer:** We are always looking for ways to improve. Please send your specific suggestion to [PPSDHRSuggestions@sco.ca.gov](mailto:PPSDHRSuggestions@sco.ca.gov).

**Question:** Can you please explain the following different transactions listed from the weekly processing dates:

1. Industrial Disability Leave (IDL) Regular
2. IDL Special
3. IDL Complex
4. State Disability Insurance (SDI) Regular
5. SDI Special
6. SDI Complex
7. Non-Industrial Disability Insurance (NDI) Regular
8. NDI Special
9. NDI Complex

**Answer:** Please review the [Workload Definitions for Statewide Civil Service Disability Program](#) document on the SCO website for clarification.

**Question:** Will SCO ever offer a trainer-lead class for Non-Industrial Disability Insurance/State Disability Insurance (NDI/SDI)?

**Answer:** Yes! Our newest version of the Needs Assessment will help us gather data on the most important needs throughout the year. Any data collected will be used to continuously improve our course offerings.

**Question:** I have an employee where her salary increased due to the July General Salary Increase while she was on disability. We need an adjustment; how do I reflect the salary for what the payment should be? Do I explain in the remarks section?

**Answer:** Yes, that is correct. You would explain the salaries in the remarks.

**Question:** Is SCO working to get backlog for "Special" and "Complex"?

**Answer:** Yes, we are diligently working to get out of the "Special" workloads. The "Complex" workloads are not in a backlog.

**Question:** Can Cal Employee Connect (CEC) allow changes from agency collection to payroll deduction? If so, will a STD. 674 A/R need to be completed too?

**Answer:** CEC is for timesheets, checking leave balances, and Form W-2s. Yes, ConnectHR does allow you to make the change by documenting a new STD. 674 A/R, changing the method of collection and uploading it. ConnectHR is the file upload feature that makes it possible to conveniently submit secure personnel and payroll documents to SCO.

**Question:** If an employee goes out on Family Medical Leave Act (FMLA), Paid Family Leave (PFL) but they do not tell you if they plan to collect PFL or not, or when we can contact them while they are on leave, what do we do then?

**Answer:** Generally, HR Offices should remain in frequent communication with their employees. If this is related to a specific situation, please contact our operations area. Please reference [Section 2107](#) of the Human Resources Manual for further clarification.

**Question:** In the slides (of the STD. 674D video), it spoke about breaking the time off work. However, we were always told you put the full month if they had intervening time, and you use the bar with time off or working.

**Answer:** SCO recommends that you follow your departmental procedures. Please see Section E 800 and Section E 805 of the [Payroll Procedures Manual](#) (PPM) for additional business processing rules.

**Question:** If an excluded employee changed from annual leave (AL) to vacation (VA) last year and they need to go on Enhanced Non-Industrial Disability Insurance (ENDI), can we switch them back to AL or do they have to wait another year?

**Answer:** The policy states that they must remain in their election for 24 months before they can switch again.

**Question:** Which document type do we upload a STD. 674 A/R for Out of Class (OOC) in ConnectHR?

**Answer:** Please refer to the [ConnectHR Civil Service Directory and Processing Needs](#) document available on ConnectHR to find where all documents should be routed. As a general reminder, OOC pay can be keyed into Payroll Input Process (PIP). A STD. 674 A/R would be prepared for overpayment for OOC.

**Question:** Can Form STD. 674 A/R be revised to include the Section 6C that used to be on it to identify the overpayment?

**Answer:** Thank you for your feedback, this will be taken under advisement for future enhancement opportunities.

**Question:** We have some employees (EEs) that we submitted STD. 674 A/Rs for, but the forms were not processed, and EEs were dropped from benefits. Are there ways to address this while we wait for SCO to process the Accounts Receivables (A/Rs)?

**Answer:** Please check the [Civil Service \(CS\) Weekly Processing Dates](#). If the processing date is past the upload date of the STD. 674 A/R, you may call the [Statewide Customer Contact Center](#) or complete an [escalation](#) as instructed on the SCO website. With Health benefits, there tends to be a grace period of three months before coverage will drop. For dental, you can call the carrier and authorize the employee's benefits for 30 days.

**Question:** How do I complete a reversal of an Accounts Receivable (A/R)?

**Answer:** To reverse an A/R, refer to Section I 025 of the [Payroll Procedures Manual](#) (PPM). If an A/R is established erroneously, a STD. 674 A/R form must be prepared indicating that a reversal is required. If the A/R was established as a payroll deduction, "X" the box - Reverse Payroll Deduction A/R and complete the net amount to be collected in Item 5, Change Method of Collection, on the STD. 674 A/R form. If the A/R was established as an agency collection, "X" the box - Reverse Agency Collection A/R in Item 5 and indicate in the Remarks that the agency/campus will provide the refund. Refer to [PPM](#) Section I 017 for completion requirements of STD. 674 A/R form. See [PPM Section Z](#) Attachment I-1 samples for examples.

If the collection was made by payroll deduction, Payroll Operations will refund the amount on the next monthly payroll warrant, or if the employee has separated, Payroll Operations will prepare a credit issue warrant. If no collection has been made, no further action is required.

**Question:** To clarify, a STD. 674D form is not used for Temporary Disability (TD)?

**Answer:** That is correct, a STD. 674D is not used for a TD; a STD. 674 is used to document TD. If this is related to a specific situation, please contact Disability via [Statewide Customer Contact Center](#) (SCCC). This was an error in the eLearning course and will be corrected.

**Question:** When will training on Military Pay be available?

**Answer:** Military Pay Training is currently under development and in partnership with CalHR.

**Question:** When is the next Industrial Disability Leave (IDL) training?

**Answer:** We are currently evaluating the needs assessment survey and will be posting our next trimester class calendar soon.