**August 2023**

**Transaction Specialists' Educational Forum Notes**

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## SURVEY QUESTIONS:

The following questions are submitted prior to the forum via survey monkey.

**Question:** When will we be able to receive Military training: pay for training days, etc.?

**Answer:** The SCO's Statewide Training team is currently working on the development of Military e-Learning modules with an estimated completion date of late Fall 2023.

Additional resources to review are:

- CalHR Military Leave Policy 2118
- CalHR State employee Military information

**Question:** Are NOPAs no longer being printed out for pick up at SCO? I have not received any since April 20th.

**Answer:** NOPAs ceased being printed on April 3, 2023, and are available on Mobius View.

Education: Mobius View

- https://mobiusview.sco.ca.gov/mobius/view/

Communication: Broadcast Emails

- https://www.sco.ca.gov/ppsd_feb_3_2023.html
- https://www.sco.ca.gov/ppsd_apr_26_2023.html

**Question:** We occasionally have another agency key a PAR for an employee that transferred before they even contact us for the documents. Can a reminder go out to let everyone know they need to contact the agency the employee transferred from to request the documents?

**Answer:** To the HR offices, make sure to adhere PAM Section 8.3.

Also, fill out the STD. 612 form by following the instructions included with the form: STD 612 - Employee Transfer Data.

**Question:** Is there a manual on Part Time/intermittent employees?

**Answer:** The DGS Personnel Operations Manual (POM) is a great reference for HR offices to review. We also recommend HR offices to review the Bargaining Contracts.

**BENEFITS ADMINISTRATION:**

**CalHR – Benefits Division**

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by CalHR offered to state employees, retirees and dependents.  Our goal is to ensure access to competitive, quality and affordable benefits.  Successful delivery of these responsibilities enables the state, as an employer, to offer optimal benefits packages for recruiting and maintaining a top-performing workforce.

- Open Enrollment (OE) – Bobby Saetern (Contact: OpenEnrollment@calhr.ca.gov)
  - Updates
    - The 2023 Benefits Open Enrollment period is September 18 – October 13, 2023.
    - Open Enrollment is a set period of time annually for State of CA employees to make changes to their Health, Dental, Vision, & Voluntary Benefits such as Consolidated Benefits, FlexElect, Legal, Long-Term Disability, & Supplemental Life Insurance.
    - Changes made during Open Enrollment will be effective January 1, 2024.
  - Virtual Benefits Fair
    - CalHR will be hosting a Virtual Benefits Fair over the course of 2 days this year. The Virtual Benefits Fair will take place September 13 - 14, 2023.
  - In-Person Benefits Fairs
    - New for 2023, CalHR is working on organizing in-person benefits fairs.  There will be an in-person fair for state employees to attend in Northern and Southern, California.
    - The Benefit Fair announcement will be shared later this month.
  - Brown Bag Sessions
    - CalHR is planning to host two Brown Bag Sessions on September 12 and October 10, 2023, from 11:00am – 1:30pm.
    - During these sessions, information will be shared by representatives from CalHR and SCO.
    - The first 30-minutes of these sessions will provide Open Enrollment updates and reminders followed by a one-hour Q&A session for HR Professionals to ask Open Enrollment related questions.
    - Communication regarding the Brown Bag Sessions will be shared and information will also be updated on the CalHR Benefits website later this month.
  - Contact
    - Department Personnel Offices can send Open Enrollment related questions via email to OpenEnrollment@calhr.ca.gov.
    - Current response time is five (5) business days.

- Dental Program – Parwana Mohabbat (Contact: Dental@calhr.ca.gov)
  - State Sponsored Dental Plans
    - Prepaid Dental Plans
      - DeltaCare USA - Org Code: 009
      - MetLife Enhanced - Org Code: 015
      - Available for excluded employees and retirees only
      - MetLife Standard - Org Code: 016
      - Not available for excluded employees and retirees
      - Premier Access - Org Code: 020
      - Western Dental - Org Code: 025
    - PPO Dental Plans
      - Delta Dental PPO – Org Code: 018
      - Delta Dental PPO Plus Premier Basic – Org Code: 007
        - Not Available for Excluded Employees.
      - Delta Dental PPO Plus Premier Enhanced – Org Code: 008
        - Not Available for Retirees and Represented Employees.
  - Union Sponsored Dental Plans
    - BU 5 CHP
      - CAHP/Blue Cross – Org Code: 013
      - Newly hired employees still subject to 24 month restriction
    - BU6 CCPOA Dues Paying Members
      - CCPOA sponsored Western Dental – Org Code: 249
        - All new dues-paying members must be enrolled in Western Dental for 12 months regardless of how long they have been in state service.
      - CCPOA Primary (Represented Employees) – Org Code: 006
      - CCPOA Primary (Managers and Supervisors) – Org Code: 246

      Important Note: Dues-paying union members are not eligible to enroll in state-sponsored dental plans. Once a CCPOA dues-paying member cancels their membership, they must enroll in a state-sponsored dental plan as they are no longer eligible to enroll in a union-sponsored dental plan.

- Live Demonstration
  - Completing Open Enrollment Forms – STD 692
    - New Enrollment – Permitting Event Code 03
    - Adding or Deleting a Dependent - Permitting Event Code 15
    - Plan Change - Permitting Event Code 28
    - Adding or Deleting a Dependent and Plan Change - Permitting Event Code 29
    - Cancelling Enrolment – Permitting Event Code 41
  - Reviewing Open Enrollment Forms for Processing
    - Confirm employee's eligibility
    - Audit forms for errors
    - Submit forms to SCO in a timely manner

- o If SCO issues PR250 [ding notice] for corrections respond promptly
- o Use resources
  - ➢ [Dental Plan Enrollment Form Authorization (STD 692)](#)
- − Vision Program
  - Employee's make open enrollment changes directly with VSP.
    - o https://stateofcaemployee.vspforme.com/
    - o https://stateofcaretiree.vspforme.com/
    - o Call VSP Customer Care 800.400.4569
  - Review the VSP How to Enroll Document.
  - Make sure the employee keeps a copy of enrollment change.
    - o If the employee goes back into their profile, the change request may be erased. Employee may need to do it again.
- − CalHR Benefits' Resources
  - Websites
    - o CalHR Benefits Website: https://calhr.benefitsprograms.info/
    - o BAM Training Questions BenefitsInquiries@calhr.ca.gov
    - o Healthier U Connections: https://www.calhrwellness.com/en/welcome-california-state-employees/
    - o Human Resources: calhr.ca.gov/state-hr-professionals
    - o State Employees: calhr.ca.gov/employees
    - o HR Manual: hrmanual.calhr.ca.gov/Home/ManualItem
  - Contacts
    - o ACA Program ACA.Policy@calhr.ca.gov
    - o Dependent Re-verification (DRV) Program DRV@calhr.ca.gov
    - o Dental Program dental@calhr.ca.gov
    - o FlexElect/CoBen Program FlexElect@calhr.ca.gov
    - o COBRA COBRA@calhr.ca.gov
    - o Vision vision@calhr.ca.gov
    - o Dental/Vision Authorization Portal VisionDental.Authorization@calhr.ca.gov
    - o Long Term Disability LTD@calhr.ca.gov
    - o Life Insurance LifeInsurance@calhr.ca.gov
    - o Group Legal Grouplegal@calhr.ca.gov
    - o Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov

**SCO – Statewide Benefits Program** – Ryan Baughman (Contact: ppsdcsbenefits@sco.ca.gov)

- Forms
  - FlexElect Cash Option STD. 701C
    - Cash in lieu of state sponsored health and/or dental benefits for R01, R03, R04, R05, R06, R09, R10, R11, R 12, R13, R14, R15, R20, & R21 employees
  - Consolidated Benefits (CoBen) Cash Option STD. 702
    - Cash in lieu of state sponsored health and/or dental benefits for CoBen Employees: R02, R07, R08, R16, R17, R18, R19 & Excluded (S, M, C, E)
  - FlexElect Medical / Dependent Care Reimbursement Accounts STD. 701R
    - Enroll, change, or cancel reimbursement accounts for out-of-pocket medical and dependent care expenses.  These accounts let you set aside money on a pre-tax basis.  This increases take-home pay and decreases taxable income.
- Resources
  - CalHR Benefits Administration Manual - FlexElect Program
  - CalHR Benefits Administration Manual Consolidated Benefits (CoBen)
  - Department of General Services - Forms
  - CalHR Virtual Bookshelf
  - 2023 FlexElect Handbook (2024 FlexElect Handbook coming soon)
  - CalHR Open Enrollment Resources
  - CalHR Benefits Calculator
  - ConnectHR Directory
- SCO Open Enrollment Resources Overview – The following will be available on SCO's Open Enrollment Resources Webpage:
  - Checklists – FlexElect/CoBen Cash Option, FlexElect Reimbursements, Dental

  Also coming soon:
  - Examples & Common Errors - Dental, FlexElect/CoBen Cash Option, FlexElect Reimbursements
  - Open Enrollment Frequently Asked Questions (FAQs)
- ConnectHR Upload STD. 701C / STD. 702
  - Combine any associated STD. 692 (New or Cancel) with STD. 701C / STD. 702 prior to ConnectHR upload.
  - "Microsoft Print to PDF" creates digital scanned version.
  - Make sure the PDF does not have a password or Adobe XML or Adobe Portfolio features.  We cannot process the forms that come in like this!
  - Upload (with included STD. 692 as needed) under appropriate dropdown in ConnectHR:
    - Benefits – STD. 701C Open Enrollment (OE) New
    - Benefits – STD. 701C Open Enrollment (OE) Change
    - Benefits – STD. 701C Open Enrollment (OE) Cancel
    - Benefits – STD. 702 CoBen Cash Option Open Enrollment (OE)

- If you upload STD. 701C / STD. 702 form with an included STD.692, do NOT upload the STD. 692 separately.
- FlexElect Medical / Dependent Care Reimbursement Accounts STD. 701R:  Enroll, change, or cancel reimbursement accounts for out-of-pocket medical and dependent care expenses.  These accounts let you set aside money on a pre-tax basis.  This increases your take-home pay and decreases your taxable income.
  - FlexElect Medical Reimbursement Accounts STD. 701R Tips & Demonstration
    - Monthly Medical Reimbursement Minimum:  $10.00
    - Annual Medical Reimbursement Minimum:   $120.00
    - Monthly Medical Reimbursement Maximum: $254.16
    - Annual Medical Reimbursement Maximum:   $3,050.00

| Reimbursement Account | Minimum Monthly Amount | Maximum Monthly Amount |
|---|---|---|
| Medical | $10 | $254.16 |

  - FlexElect Dependent Care Reimbursement Accounts STD. 701R Tips & Demonstration
    - Monthly Dependent Care Reimbursement Minimum: $20.00
    - Annual Dependent Care Reimbursement Minimum:   $240.00
    - Monthly Dependent Care Reimbursement Maximum: $416.66
    - Annual Dependent Care Reimbursement Maximum:   $5,000.00

| Reimbursement Account | Minimum Monthly Amount | Maximum Monthly Amount |
|---|---|---|
| Dependent Care | $20 | $416.66 |

- Important Dates
  - 2023 Open Enrollment Period: September 18 - October 13, 2023
  - Permitting Event Date: September 18, 2023
  - Effective Date: January 1, 2024
  - Last day to upload Open Enrollment forms: November 1, 2023
  - Last day to upload forms corrected as a result of PR250: November 22, 2023
  - Last day for employees to submit cancellation/changes to Cash Option or Reimbursement Accounts: December 31, 2023
  - Last day for agencies to submit cancellation/changes to Cash Option or Reimbursement Accounts: January 2, 2024
- Final Reminders
  - You are responsible in ensuring the employee is eligible for the benefit being requested.
  - Start processing Open Enrollment Forms as soon as 09/18/2023.  Do not wait until the last day to upload all your Open Enrollment forms.
  - SCO cannot process forms received with passwords or combined in an Adobe XML or Adobe Portfolio document.  Please "Microsoft Print to PDF" the forms prior to upload to expedite to processing.

- If employee is simultaneously enrolling or canceling FlexElect / CoBen Cash and Dental, upload combined forms together as one PDF in ConnectHR.  They shall be uploaded under FlexElect / CoBen Cash dropdowns only.
- If you received a ConnectHR email receipt, then SCO has the form.
- Use your resources, you got this!

**SCO – Affordable Care Act** – Jordan Kergan (Contact: acasupport@sco.ca.gov)

- ACA Open Enrollment
  - New Enrollments
    - Employee elected to enroll in health coverage during the 2023 Open Enrollment
      - Key a 3A status code in ACAS, effective 1/1/2024

```
    ACAM400          AFFORDABLE CARE ACT SYSTEM (ACAS)              07/26/2023
                         VIEW ACA TRANSACTION HISTORY                08:59:04
    CURRENT INFORMATION                                            PAGE   1
    NAME:                                          SSN:

    SUFFIX POS SEQ POSITION NUMBER    STATUS    TENURE    TB   HEALTH COV NOTICE DATE
    CS 042    01    042-110-5284-834 ACTIVE      P       FT        12/31/2014
    ------------------------------------------------------------------------------
    YEAR  EFFECTIVE   TRAN   ACA      ENTRY      SCO USE ONLY    POSITION NUMBER
          DATE       CODE   STATUS    DATE       UPDATED BY
    2023  01/01/2023 ACA     3A     11/17/2023   SCO ADMIN       SEE PIMS
    2022  NO ACTIVITY
    2021  NO ACTIVITY
    2020  NO ACTIVITY
    2019  NO ACTIVITY
    2018  07/01/2018 ACA     4A     06/28/2018   CS 042          SEE PIMS
          07/01/2018 ACA     1A     06/28/2018   CS 042          SEE PIMS
          06/05/2018 ACA     2D     06/28/2018   CS 042          SEE PIMS
    2017  07/31/2017 ACA     5D     07/21/2017   CS 042          SEE PIMS
          07/31/2017 ACAV    5B     07/21/2017   CS 042          SEE PIMS
                         PRESS F8 FOR NEXT PAGE


    F2=EXIT ACAS  F3/PB=PREV SCREEN  F7=PREV PAGE  F8=NEXT PAGE
    _____
    TI▮                           »                    0   24,60  A
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    - Employee elected to enroll in health coverage in lieu of Flex Cash during the 2023 Open Enrollment
      - Key a 3A status code in ACAS, effective 1/1/2024

```
    ACAM400          AFFORDABLE CARE ACT SYSTEM (ACAS)              07/26/2023
                         VIEW ACA TRANSACTION HISTORY                10:03:14
    CURRENT INFORMATION                                            PAGE   1
    NAME:                                          SSN:

    SUFFIX POS SEQ POSITION NUMBER    STATUS    TENURE    TB   HEALTH COV NOTICE DATE
    CS 934    01    934-211-5479-001 ACTIVE      P       FT        12/31/2014
    ------------------------------------------------------------------------------
    YEAR  EFFECTIVE   TRAN   ACA      ENTRY      SCO USE ONLY    POSITION NUMBER
          DATE       CODE   STATUS    DATE       UPDATED BY
    2023  01/01/2024 ACA     3A     11/17/2023   SCO ADMIN       SEE PIMS
    2022  NO ACTIVITY
    2021  NO ACTIVITY
    2020  NO ACTIVITY
    2019  NO ACTIVITY
    2018  NO ACTIVITY
    2017  NO ACTIVITY
    2016  NO ACTIVITY
    2015  NO ACTIVITY
    2014  12/31/2014 ACA     4A     01/01/2015   INITIAL LOAD    SEE PIMS
                         PRESS F8 FOR NEXT PAGE


    F2=EXIT ACAS  F3/PB=PREV SCREEN  F7=PREV PAGE  F8=NEXT PAGE
    _____
    TI▮                           »                    0   1,1   A
```

- Cancellation of Benefits
  - Employee elected to cancel their health coverage during the 2023 Open Enrollment
    - Key a 5B status code in ACAS, effective 12/31/2023

```
    ACAM400         AFFORDABLE CARE ACT SYSTEM (ACAS)          07/26/2023
                       VIEW ACA TRANSACTION HISTORY              10:07:39
    CURRENT INFORMATION                                          PAGE    1
    NAME:                                    SSN:

    SUFFIX POS SEQ POSITION NUMBER   STATUS    TENURE   TB   HEALTH COV NOTICE DATE
    CS 900   01     900-170-1402-043 ACTIVE      P      FT        12/31/2014
    --------------------------------------------------------------------------
    YEAR  EFFECTIVE   TRAN   ACA      ENTRY       SCO USE ONLY    POSITION NUMBER
           DATE       CODE  STATUS    DATE        UPDATED BY
    2023  12/31/2023  ACA    5B     11/17/2023    SCO ADMIN       SEE PIMS
    2022  NO ACTIVITY
    2021  NO ACTIVITY
    2020  NO ACTIVITY
    2019  NO ACTIVITY
    2018  NO ACTIVITY
    2017  NO ACTIVITY
    2016  NO ACTIVITY
    2015  NO ACTIVITY
    2014  12/31/2014  ACA    3A     01/01/2015    INITIAL LOAD    SEE PIMS
                            PRESS F8 FOR NEXT PAGE



    F2=EXIT ACAS  F3/PB=PREV SCREEN  F7=PREV PAGE  F8=NEXT PAGE
    _____
    TI▮                           »                    0   1,1   A
```

- Cancelation – Move to Flex Cash
  - Employee elected in Flex Cash in lieu of health benefit coverage during the 2023 Open Enrollment
    - Key a 5B status code in ACAS, effective 12/31/2023

```
    ACAM400         AFFORDABLE CARE ACT SYSTEM (ACAS)          07/26/2023
                       VIEW ACA TRANSACTION HISTORY              10:13:04
    CURRENT INFORMATION                                          PAGE    1
    NAME:                                    SSN:

    SUFFIX POS SEQ POSITION NUMBER   STATUS    TENURE   TB   HEALTH COV NOTICE DATE
    CS 525   01     525-138-8739-003 ACTIVE      P      FT        12/31/2014
    --------------------------------------------------------------------------
    YEAR  EFFECTIVE   TRAN   ACA      ENTRY       SCO USE ONLY    POSITION NUMBER
           DATE       CODE  STATUS    DATE        UPDATED BY
    2023  12/31/2023  ACA    5B     11/17/2023    SCO ADMIN       SEE PIMS
    2022  NO ACTIVITY
    2021  NO ACTIVITY
    2020  NO ACTIVITY
    2019  NO ACTIVITY
    2018  NO ACTIVITY
    2017  NO ACTIVITY
    2016  NO ACTIVITY
    2015  NO ACTIVITY
    2014  12/31/2014  ACA    3A     01/01/2015    INITIAL LOAD    SEE PIMS
                            PRESS F8 FOR NEXT PAGE



    F2=EXIT ACAS  F3/PB=PREV SCREEN  F7=PREV PAGE  F8=NEXT PAGE
    _____
    TI▮                           »                    0   1,1   A
```

- Change in Health Plans
  - No ACAS update is needed when an employee changes their health plan
- Effective Dates For Open Enrollment
  - ACA Status Codes 3A and 4A will have an effective date of 1/1/2024 for the 2023 Open Enrollment

- - ACA Status Code 5B will have an effective date of 12/31/23 for the 2023 Open Enrollment
  - ACA Status Codes can be keyed 45 days in advance
    - The earliest date you can key for open enrollment is 11/17/2023
      - Please set a reminder on your calendar!
- Resources:
  - Job Aid: Affordable Care Act System (ACAS): Job Aid
  - User Guide: Affordable Care Act System (ACAS) User Guide

**PROGRAM UPDATES:**

**Statewide Training Program** – Cindy Lunger, Elizabeth Edwards, Gee Vang (Contact: PPSDTraining@sco.ca.gov)

− eLearning Modules
  • Access eLearning Modules: Go to the SCO website, type "eLearning" in the search field and choose "eLearning modules" from the search results.
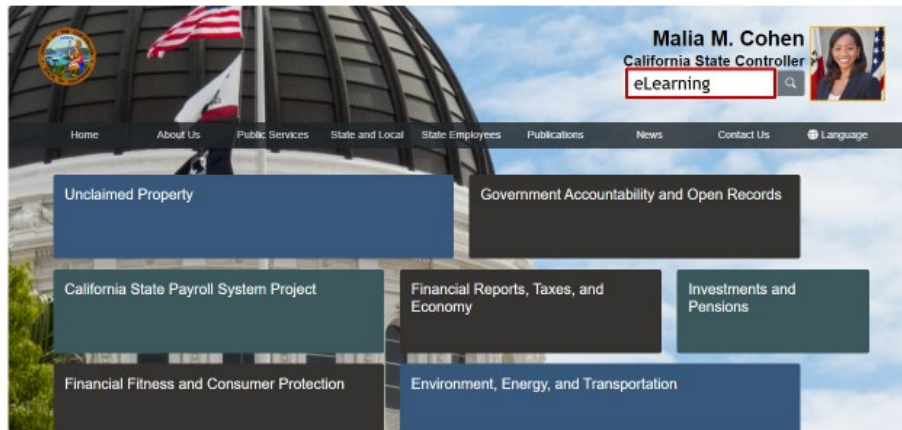


− Fundamentals of Personnel
  • Module 1 – Qualifying Pay Periods
  • Module 2 – Sick Leave & Vacation

− What's New
  • Introduction to Fundamentals of Personnel
    o Introduction to the Fundamental of Personnel series
    o SCO Contacts
    o Glossary of Terms
    o Control Agencies
    o Reference Library
  • Module 3 – Appointments
    o Permanent, Temporary and Limited Term appointments

− Employment History Overview (EHOV) – Arianna Fine-Muehe, September release
  • Access and understand the Employment History record
  • Interactive and personable
  • Background and interpretation of the PIMS screens
  • PAM Section 10 - Decentralized Procedures
  • Decentralized forms and resources
  • Fun activities

− Fundamentals of Salary Determinations - eLearning
  • Prerequisite to virtual classes
  • Know Qualifying Pay Periods
  • Know how employees gain status

- Introduction to Salary Determinations – Level I
  - Mirrors Fundamentals of Salary Determinations – eLearning (+ exercises)
  - Anniversary Dates (standard, accelerated)
  - Deep v. Non-deep classes
  - Formulas (compounding, comparison)

- Introduction to Salary Determinations – Level II
  - Non-deep class movement
  - No breaks in service rules (substantially the same, lower, higher)
  - Alternate Range Movement

- Virtual Salary Determination
  - Returning 3rd Trimester (Sept. – Dec.)

- Advanced Salary Determinations
  - Deep class movement
  - Discretionary movement (transfers)
  - Mandatory movement (List appointments)
  - Consecutive transfers

- Reinstatement of Civil Service Employees
  - Reinstatement from permanent separations
  - Reinstatement from temporary separations

- Statewide Training Repository and Toolkit – *Under development*
  - Statewide Training team is excited to announce plans to develop a Statewide Training Toolkit and repository.
  - The repository and toolkit will be designed to provide a single access point to access training, job aids, tools, videos, eLearning, webinars and/or documents
  - More exciting updates to come as we roll this program out.

**Human Resources (HR) Suggestions** – Shelley McCarthy (PPSDHRSuggestions@sco.ca.gov)

- We received 13 emails in the PPSD HR Suggestions inbox in the last three months
  - One suggestion is currently being implemented, and one is pending review
  - Verification of Employment—high volume
    - Direct all employees to the Work Number and/or Statewide Locator
  - Remember to submit your suggestions to SCO's HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov.

**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.
- 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 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.
- Share this information with your Human Resources Team!

**SCO EMAIL SUBSCRIPTION SERVICE:**

- To ensure you're receiving essential PPSD notifications, please subscribe to our email subscriptions listed below. Also, we invite you to share this information with anyone who would be interested in PPSD notifications.
  - California Leave Accounting System (CLAS) Letters
  - State Controller's Office Letters (Personnel / Payroll Operations)

**SCO RESOURCES:**

- Websites:
  - Human Resources (HR):  https://sco.ca.gov/ppsd_state_hr.html
  - State Employees:  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
- Cal Employee Connect (CEC) - Help and Feedback
- ConnectHR - Help and Feedback
- California Leave Accounting System (CLAS) Email CLAS@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- Decentralized Security Administration & ViewDirect Access - (916) 619-7234 or DSA@sco.ca.gov
- HR Suggestions Email (All HR Staff) PPSDHRSuggestions@sco.ca.gov
- Management Information Retrieval System (MIRS) Email ppsdmirs@sco.ca.gov
- Statewide Customer Contact Center (916) 372-7200

**FORUM QUESTIONS:**

The following questions were submitted during the forum:

**Question:** Any chance of expanding the Delta Dental PPO options? Delta Dental has made changes and many employees are reaching out because their dentists are no longer accepting the current plans.

**Answer:** Please email dental@calhr.ca.gov with the feedback you are receiving from employees.

**Question:** Will the Benefits Calculator be updated to reflect this year's dates?

**Answer**: Yes, it will.

**Question:** Can you provide the link to the Open Enrollment webpage?

**Answer**: Yes, access to the main Open Enrollment webpage can be found on the CalHR website.

**Question**: Is the 03/2021 version of the STD. 692 still the most recent form?

**Answer**: Yes, the 03/2021 is the most current version of the STD. 692 form.

**Question**: Do we have to write in the "Remarks" section on Open Enrollment forms?

**Answer**: Yes please, it helps SCO understand what the employee is trying to achieve.

**Question**: Will these sample completed enrollment forms be made available to us?

**Answer**: Yes, there will be examples available on the SCO website soon.

**Question**: Does box 1 and 10 have to be completed?

**Answer**: Box 1 has to be completed. Box 10 has to be completed only if they are doing a dental change.

**Question**: Do we have to checkmark on section E "NON-CSU- 351"?

**Answer**: Yes, this is a requirement.

**Question**: Do we have to enter 01/01/24 in box 14 or can it read as 01 24?

**Answer**: It needs to read as 1/1/24 in the box.

**Question**: Can you confirm that all employees should be using the benefits calculator for all dental enrollment forms and all changes moving forward?

**Answer**: It is highly recommended and encouraged that the STD. 692 be completed utilizing the benefits calculator. SCO also has the fillable STD. 692 form available for employees, this is to prevent any errors and to ensure that the form is legible.

**Question**: The examples show the Personnel Specialist's email address underneath their signature; however, departments were previously instructed to use the SCO dedicated email box. Is this changing for this year?

**Answer**: Please use the SCO dedicated universal email listed for your agency in the [California Personnel Office Directory (CPOD)](.).

**Question**: If marital status cannot be confirmed or it is incorrect, will the form be dinged back?

**Answer**: It is up to the agency to determine if this information is correct or not. SCO does not have a way of verifying marital status.

**Question**: Does box 4 on Section E read 12/23 only?

**Answer**: Since this is for Open Enrollment, yes, but you can change it depending on the effective date. For example, if you have a newly hired employee and want to enroll them with an effective date of 09/23, the pay period for box 4 should be 08/23.

**Question**: Do we always use the universal email or only during Open Enrollment?

**Answer**: Yes, the universal email address should be used at all times; it is how SCO communicates to Human Resources offices.

**Question**: Does the STD. 692 need to be filled out once a dependent turns 26 or do we reach out to Dependent Re-Verification to delete the dependent?

**Answer**: The employee must complete a STD.692 for a 26 year old dependent or any changes to their dependent to make sure that their dental deductions are updated.

**Question**: Are there instructions on how an employee is supposed to use vision for a dependent when they go to the optometrist?

**Answer**: Providing the subscriber's social security number is how the dependent's coverage may be verified.

**Question**: Regarding the Vision Service Plan (VSP), they relayed that they lost their password for my Patton State Hospital emails and cannot open them. I have faxed everything. Can I get a point of contact to help me?

**Answer**: Please email [Vision@calhr.ca.gov](mailto:Vision@calhr.ca.gov) for assistance.

**Question**: Last year, a retired employee was getting the run around from Vision Service Plan (VSP) customer service about how to enroll. He was informed that he had to contact his Human Resources (HR). State HR then told him that he would need to enroll through the VSP website. This went on in circles. Does VSP mail out letters to retirees about how to make changes or enroll during Open Enrollment?

**Answer**: At the time an employee retires, it is the HR responsibility to mail/fax/email the retiree vision form to VSP. It is also the HR office's responsibility to key the employee's retiree dental into the myCalPERS system prior to keying the S70/S71.

**Question**:  Our employees have been experiencing issues with Vision Service Plan (VSP) defaulting their birthdate to 01/01/1901.  We call and update the date but the next month it returns to the default.  Employees cannot access services when this occurs because the birthdate doesn't match.

**Answer**:  Please email Vision@calhr.ca.gov for assistance.

**Question**:  Does Dental have member portals where state employees can get a detailed explanation of what type of plans they offer?

**Answer**:  Yes, you can find the websites for dental carriers on page 17 of the dental handbook.

**Question**:  If a dependent turns age 26, do we have to complete Dental STD. 692 or just delete in the Dependent Re-Verification (DRV)?

**Answer**:  The STD. 692 is required to be completed.

**Question**:  Can we get the link to the Vision Services Plan (VSP) website that employees enroll/change benefits during Open Enrollment?

**Answer**:  The hyperlink to the VSP website can be found here: VSP Vision Care.

**Question**:  CalPERS is now telling us that retirement is not a qualifying event to change health care benefits, when did this change?  Some are no longer going to be eligible for their plan as they are dropping the union and are asking to change their plan.

**Answer**:  Public Employee Medical and Hospital Care Act (PEMCHA) governs the laws for health benefits.  We will forward this question to our CalPERS team.

**Question**:  Last year SCO sent all of these "How to" complete forms with Open Enrollment toolkit, will you be doing this again?

**Answer**:  Yes, it is now available on the SCO website under 2023 Open Enrollment Resources.

**Question**:  Can you please relist the plans that are not eligible for cash option?

**Answer**:  You can view the list on the Cash Option Non-CoBen webpage on CalHR.

**Question**:  Are Limited-Term employees with a one year term eligible for flex cash?

**Answer**:  For flex questions, please email flexelect@calhr.ca.gov.

**Question**:  The forms are locked and we cannot merge them, so we have to save it as a paper copy then merge them; can you share your screen so we can see what you are doing?  Alternatively, can we scan multiple documents as one document?

**Answer**:  If you print the form and select the printer as "Microsoft Print to PDF," then it will allow you to save a digital scan of the form and remove all passwords, locking, limiting formatting, etc.  Forms that are Microsoft Printed to PDF can be easily combined in Adobe without issues.  It is recommended to "Microsoft Print to PDF" the forms prior to combining them.

**Question**: Is there a state password for the standard forms? I try to save/edit forms and it asks for a password at times.

**Answer**: Unfortunately, the forms are created by Department of General Services (DGS) and they do not provide the password. You may use the file print option to override the locked forms.


**Question**: Does it matter the order at which form is saved first?

**Answer**: No, it does not matter.


**Question**: Alternatively, can we scan multiple documents as one document?

**Answer**: You may scan packages for one employee. The documents must be the same, for example, please do not upload a Personnel Action Request (PAR) package, with STD. 674s and dental forms as one package.


**Question**: When will Open Enrollment Resources webpage on CalHR be updated? Everything on that page is for last year's dates.

**Answer**: It will be updated within the next 30 days.


**Question**: Are fill and sign signatures being accepted or is the date stamped signatures being accepted?

**Answer**: Yes, all electronic signatures will be accepted.


**Question**: Do you have to send the STD. 692 cancel separately as well?

**Answer**: If you combine the STD. 692 Dental form with the STD. 701C / STD. 702 and upload it as one PDF under the appropriate Cash Option, then you do <u>not</u> need to upload the STD. 692 separately.


**Question**: When uploading a STD. 701C and STD. 692, what do we select when choosing the "document type"?

**Answer**: We will have an Open Enrollment dropdown.


**Question**: Just to clarify that the universal email address is to be indicated on Open Enrollment benefit forms and not on current benefit forms going forward, correct?

**Answer**: The universal email address is what SCO uses to communicate to Human Resources offices. Specifically PR 250 notices and PSD 40 forms. Take a look at the [California Personnel Office Directory (CPOD)](#) and you should view your agencies universal email address.


**Question**: Will the universal email be required for all Open Enrollment forms submitted through ConnectHR?

**Answer**: On June 2022, the SCO released a broadcast email stating that all forms must be submitted with the universal email address.

**Question**: If an employee is on an extended vacation during Open Enrollment, can they turn in their form before they go on leave?

**Answer**: Please review the permitting event code charts as this scenario is in there.

**Question**: To confirm, if the employee is canceling Flex and enrolling in Dental, we do not have to send the form separately for processing, correct?

**Answer**: Correct. If you combine the STD. 692 Dental form with the STD. 701C / STD. 702 and upload it as one PDF under the appropriate Cash Option, then you do not need to upload the STD. 692 separately.

**Question**: Will there be any 7K specific trainings? Like 7k salary d's or 7k lump sum? Department of Corrections and Rehabilitation (CDCR) is a large portion of state employment but it seems to get left out of certain trainings.

**Answer**: Statewide Training covers the CalHR and State Personnel Board (SPB) Laws and Rules relative to Salary Determinations. 7K is a part of Bargaining, which will not be covered in our trainings. Please direct your 7K questions to CalHR via your designated contact.

**Question**: Will there be an easier way to find what account code 505 to put people in? Right now it is very difficult to make sure we are putting employees in the correct one. Maybe include those on the payscales?

**Answer**: SCO have provided a 505 eLearning module on SCO website to assist you in your 505 keying. By identifying the employee's CalPERS membership status, e.g., Retirement Plan, Retirement Category, Tier, Classification, and Appointment Date, you can utilize the 505 Index Chart from the Personnel Action Manual (PAM) Section 2. This should help you determine what Retirement Account Code to input for your employee.

**Question**: Could we get a good definition of what Industrial Disability Leave (IDL) Regular, IDL Special, and IDL Complex is?

**Answer**: *Green Cycle/Currents*: Green Cycles are identified on the [Decentralized Payroll Calendars](#); issue time for the current month. Documents can be submitted starting the day before green cycle begins (the day after Monthly Cutoff) and documents may be submitted up to five (5) days after the last no cycle following a green cycle.

*Regular*: Request for pay when an employee is owed additional time in the current 12 month rolling period.

*Special*: Transfer of hours from regular pay to disability pay or salary change in a rolling 12 month period.

*Complex*: Hours, pay, transfer of funds for pay periods over 12 months, one (1) day up to 36 months.

**Question**: If there are discrepancies with Vision Services Plan (VSP) Premier, do we refer the employee to VSP for questions/concerns?

**Answer**: Please work with the employee to determine the discrepancy. If you are having issues between VSP and what the member indicates, please contact [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov) and we can assist as needed.

**Question**:  For Flex and CoBEN cash enrollments, do the documents get processed based on the dates on the forms or on a current basis?  For example, someone turns in their form in May but due to staffing shortages we are not able to submit the form until July; will the employee only receive the cash for the current month?  If retro payments are not made, what do we do?

**Answer**:  Retro payments won't be made as the effective date for Cash Option is based on when it is received at SCO (see CalHR Benefits Administration Manual Section 709).  Any retro payments due to delayed processing, requires an approved CalHR appeal.  Instructions for filing a CalHR appeal is also listed in the CalHR Benefits Administration Manual.