



Transaction Specialists' Educational Forum

Presented By: Natalia Saferson

Contact: TSEF@sco.ca.gov

Office of State Controller Malia M. Cohen

February 1, 2024



Question





Question

Presenter: Tracy Gutierrez

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

When will Section 2.62 of the Personnel Action Manual (PAM): ITEM 505 – ACCOUNT CODE INDEX be updated with the new Retirement account codes effective 07/01/23 per the revised [Personnel Letter #23-014](#)?

Answer: SCO is aware that the Personnel Action Manual (PAM) Section 505 requires updates to Retirement Account Codes. We have begun work on a total reconciliation of those codes, which will include the update you are referencing. The reconciliation is complex and labor-intensive, so we currently do not have a date to share. We will provide updates as we have them. The most accurate information is on the [Personnel Letters](#) from recent years. Please reference those while we complete the reconciliation.



Question

Presenter: Karin Johnson-Anderson

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

Can you clarify how the employment history should be documented when Paid Family Leave (PFL) is used intermittently? Recently the Disability Unit asked that I key one Personnel Action Request (PAR) to begin PFL and another PAR when the claim has ended or is exhausted. [Payroll Letter #19-010](#) instructs us how to process PAR transactions when Non-Industrial Disability Insurance - Family Care Leave (NDI-FCL) is used intermittently but there is no mention of PFL. Please clarify the PAR documentation process when PFL is used intermittently and the corresponding payroll letter for reference.

Answer: PFL PAR documentation follows the same guidelines as NDI-FCL PAR documentation in Payroll Letter #19-010. It is correct to key one PAR to begin PFL and another when the claim has ended or is exhausted. Agency should track usage.



Question

Presenter: Tommy Fong

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

What will the impact be on the two-year tax deferrals that have already been submitted to SCO for processing prior to the mass update? Will the expectation be that we call to update items such as 962 codes with salaries and Personnel Action Request (PAR) Numbers?

Answer: SCO will update the Document Processing Number (DPN) and the 962 coded impacted by the General Salary Increase/Special Salary Adjustment (GSI/SAL) unless the salary in the 962 code is unidentifiable. (EX. EID not locked into the PAR) We will then send a ding notice for that information and give agency two (2) business days to respond back, or it will be cancelled.



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- CalHR and SCO had a record-setting amount of contract implementation to perform
 - General Salary Increase (GSI) for most of the 14 units ratified for 2023
 - More than 600 Special Salary Adjustments (SSA)
 - Changes to more than 90 Pay Differentials
 - Total of 207,193 records updated via mass update
- SCO and CalHR worked in close collaboration
 - CalHR provided technical documentation (Pay Letter drafts)
 - SCO is analyzing Pay Letter drafts to implement numerous mass updates



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed a General Salary Increase for Bargaining Units 5, 7, 16, and 19 on December 12th
 - [Personnel Letter #23-030](#)
- SCO processed a General Salary Increase for SEIU on December 14
 - [Personnel Letter #23-031](#)
- SCO processed a Salary Adjustment for Bargaining Unit 7 employees on December 19
 - [Personnel Letter #23-032](#)
- SCO processed a Salary Adjustment for SEIU on December 21
 - [Personnel Letter #23-033](#)



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed a Salary Adjustment for Bargaining Unit 12 on November 2
 - [Personnel Letter #23-024](#)
- SCO processed a General Salary Increase for Bargaining Unit 6 on November 27
 - [Personnel Letter #23-026](#)
- SCO processed a General Salary Increase for Exempt employees on December 7
 - [Personnel Letter #23-029](#)



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed all records that could be included in a mass update by the end of 2023
 - Departments must process any remaining records that were not included in mass updates
 - Please reference the appropriate [Personnel Letter](#) for Management Information Retrieval System (MIRS) reporting instructions
 - While processing those records, if you encounter an error message requiring an override code, only then contact SCO
 - SCO will continue to process updates that require override codes in the order received



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO processed updates in the most strategic manner
 - Some bargaining units were grouped together for efficiency
 - Larger and more complex updates, such as Service Employees International Union (SEIU), were processed later in December
 - SCO allowed as much time as possible for these to be as accurate as possible



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- Be aware of other impacts of retroactivity and multiple mass updates
 - Review supplemental pay that has issued
 - Some situations may require you to submit a STD. 674 for pay to issue
 - Some Special Salary Adjustment (SAL) updates occurred after Payroll Cutoff
 - December warrants may not have included full contract implementation
 - Please do not redeposit warrants unless all processing for the employee is complete
 - PPSD takes additional actions after mass updates that may impact some records
- Please use all available references to seek answers to your questions



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO is aware of rounding issues on some records that were processed via mass update
- This is a known issue with retroactive processing
 - This issue impacts some records for which there was a Merit Salary Adjustment (MSA) or Special In-Grade Salary Adjustment (SISA) after July 1, 2023
- SCO is keying corrections
 - This is labor intensive and will take some time
 - If you find a record that needs correction, please key the correction



Business Analysis and Reporting Section

Presenter: Tracy Gutierrez

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

Implementation of New Contract Provisions

- SCO is receiving calls and emails directly from employees regarding salary and Pay Differential updates based on the new contract provisions
- Reminder of Roles and Responsibilities
 - CalHR makes policy and eligibility determinations
 - SCO performs mass updates where feasible/appropriate, based on CalHR's technical documentation (Pay Letters, etc.)
- Departmental Human Resources are responsible for resolving employee questions
 - Authorized person to work with CalHR contact
 - HR representative to work with SCO on Personnel Action Request (PAR) and Payroll processing concerns



CalPERS- Customer Education and Outreach Division

Presented By: Hillary Sunada

Contact: calpers_employer_communications@calpers.ca.gov

Discrepancy Report in Cognos

Hillary Sunada

myCalPERS Employer Education & Training Unit (MEETU)

PowerPoint slides will be provided after this event.

Agenda

- What is Cognos?
- State Active Health Enrollment and SCO Health Deduction Discrepancy Report
 - Access Cognos
 - Run report
 - Export to Excel
 - Re-run the report
- Resources
- Q&A

What is Cognos?

- IBM reporting tool extracts data from myCalPERS
- System access roles
- Multiple formats: HTML, Excel, PDF
- Recommended browsers: Chrome and Safari
- You can't break it!

State Active Health Enrollment and SCO Health Deduction Discrepancy Report

- Compare myCalPERS health enrollment data and SCO payroll deduction data for state active subscribers
- Identify any discrepancies in premium amounts:
 - Unpaid
 - Underpaid
 - Overpaid
- Determine the cause of the premium discrepancy, and then take steps to address it

Report Criteria

Business Partner

Business Partner CalPERS ID : * California Public Employees Retirement System - 3434345389 ▼


Subscriber


Subscriber CalPERS ID : CalPERS ID (not SSN)

Select Issue Date Range or Coverage Period Range

Issue Date Range or Coverage Period Range : Issue Date Range Coverage Period Range **Reprompt**

Select Coverage Period Date Range

Coverage Period From Date : 

Coverage Period To Date : 

Select Report Output Criteria

Report Output Criteria : * Premiums with Discrepancies Only All Premiums

Resources

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [myCalPERS Employer Reports \(Cognos\) student guide](#)
- [Business Rules & myCalPERS Classes](#)

Cognos Contacts

- For a customized retirement or payroll report, contact myCalPERS System Support at employer_technical_support@calpers.ca.gov
- For a customized health report, contact the Health Account Management Division at hamd_data_services@calpers.ca.gov

Cognos Training Opportunities

- Employer training classes are free!
- Instructor-led training
 - In person at CalPERS Sacramento on Feb. 8th and 22nd
 - Virtual class taught monthly
- **myCalPERS Reports: Run & Schedule Employer Reports** online training class
- Request a special training request by email to calpers_employer_communications@calpers.ca.gov



STATEWIDE BENEFITS ADMINISTRATION



Statewide Benefits Program

Presenter: Ryan Baughman

Contact: ppsdcsbenefits@sco.ca.gov

Reconciling Employee Health Deductions with SCO

- Any actions taken in myCalPERS are sent automatically to SCO
 - Retroactive adjustments are either done automatically by Mainframe or
 - Civil Service Benefits Team processes transactions that require additional verification.
 - Late Dependent Eligibility Verification
 - Rescinding of a previous health transaction
- If myCalPERS is accurate, however Cognos / Mainframe is showing health plan discrepancy
 - [Payroll Letter #18-017](#)- Form STD. 674 A/R Processing For Missing Health Deductions
 - [Payroll Procedures Manual \(PPM\) Section H 722](#)
 - Submit STD. 674 A/R via ConnectHR for associated pay periods
 - ConnectHR dropdown: Benefits – STD. 674 A/R Benefits Accounts Receivable



BREAK



5 MINUTES

CalHR Transaction Specialists' Educational Forum Update



CalHR Benefits Division

February 1, 2024

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.

Benefit Project Updates



CalHR Benefits Division
February 1, 2024

Benefits Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment Updates

- ❖ The 2023 Open Enrollment season has officially closed and preparations for the 2024 Open Enrollment season has begun.
- ❖ During Open Enrollment, state employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, COBRA, and legal insurance.
- ❖ All changes made during the 2024 Open Enrollment will be effective January 1, 2025.

Benefits Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Post Open Enrollment Survey

- ❖ The CalHR Benefits Division released the Post Open Enrollment survey on November 22, 2023, and closed the survey January 8, 2024.
- ❖ In this survey, we asked for your opinion on the 2023 Open Enrollment season. The CalHR Benefits Team values the project collaboration with HR Professionals therefore, the feedback you provided us will be beneficial information to see what is working well and what we can do to improve our communication and collaboration to deliver high quality products during our annual Open Enrollment season.
- ❖ To sign up for future surveys, Open Enrollment information and updates, please subscribe to the Open Enrollment subscription list on the Benefits website. You can find the subscription box on the HR Professionals webpage: [State HR Professionals | Cal HR \(benefitsprograms.info\)](https://www.calhr.ca.gov/benefitsprograms/info)

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Contact

- ❖ Departmental Personnel Offices can send OE related questions via email to OpenEnrollment@calhr.ca.gov.
- ❖ Current response time is five (5) business days.

Resources

- ❖ [CalHR Benefits website](#)

Dependent Re-Verification (DRV)

Presenter: Amy McCarthy
Contact: DRV@calhr.ca.gov

What is DRV

Dependent Re-Verification (DRV) is the process of re-verifying the eligibility of employees' spouses, domestic partners, children, stepchildren, and domestic partner children (family members) enrolled in state health, dental, and vision benefits. Departmental personnel offices are required to process re-verifications on a triennial basis.

Government Code section 19815.9 mandates re-verifying the eligibility of these family members for health benefits. Government Code section 22959 authorizes extending this review to family members enrolled for dental and vision benefits. The bargaining unit contracts specify that family member eligibility for dental and vision benefits shall be the same as that prescribed for health benefits.

Dependent Re-Verification (DRV)

Presenter: Amy McCarthy
Contact: DRV@calhr.ca.gov

DRV Updates

- ❖ CalHR automated the DRV process for dental and Premier Vision effective January 2023.
- ❖ The current health Dependent Eligibility Verification (DEV) process through CalPERS and the MyCalPERS system remains unchanged.
- ❖ Departmental personnel offices are required to update dental and Premier Vision dependent re-verifications through the Family Connect Portal (FCP).
- ❖ All state agencies must establish an administrative account, who is at the supervisor or above classification, in the Family Connect Portal (FCP) to manage each agency's authorized user accounts to update DRV transactions.
- ❖ Department compliance with DRV regulation will be monitored and addressed by Health Benefit Officers and FCP Department Administrators.

Dependent Re-Verification (DRV)

Presenter: Amy McCarthy
Contact: DRV@calhr.ca.gov

DRV Updates continued

- ❖ March, June, and September 2023 birth month cycles: Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- ❖ December 2023 birth month cycle: Departmental personnel offices must process all DRV documents submitted on or before the end of January in FCP.
- ❖ January 2024 birth month cycle: 30-day cancellation notice was mailed December 1, 2023.
- ❖ April 2024 birth month cycle: 90-day reminder notice was mailed January 2, 2024 and the 60-day reminder notice was mailed February 2, 2024.
- ❖ The CAHP and CCPOA enrollment data in FCP is still pending.

Dependent Re-Verification (DRV)

Presenter: Amy McCarthy
Contact: DRV@calhr.ca.gov

Total notices mailed to date:

Birth Month Cycle	1st Notice 90 days before end of birth month	Total Mailings of 1st Notice	2nd Notice 60 days before end of birth month	Total Mailings of 2nd Notice	3rd Notice 30 days before end of birth month	Total Mailings of 3rd Notice	Total Mailings
March	N/A	N/A	Jan-2023	8,523	Feb-2023	8,219	16,742
June	Mar-2023	8,462	Apr-2023	7,511	May-2023	6,365	22,338
September	Jun-2023	9,822	Jul-2023	8,325	Aug-2023	6,582	24,729
December	Sept-2023	8,523	Oct-2023	8,379	Nov-2023	6,711	23,613
January	Oct-2023	8,330	Nov-2023	7,929	Dec-2023	6,475	22,734
April	Jan-2024	8,195	Feb-2024	N/A	Mar-2024	N/A	≈ 16,057

*90 notice for March birth month cycle only included DRV notices for Health benefits.

Dependent Re-Verification (DRV)

Presenter: Amy McCarthy
Contact: DRV@calhr.ca.gov

Contact

- ❖ Before contacting the DRV Unit with policy or procedure related questions, please review all DRV resources provided.
- ❖ Contact the DRV Unit at CalHR with questions related to the Disabled Dependent and Parent Child Relationship benefits program for dependents enrolled in dental and/or vision benefits only.
- ❖ Departmental personnel offices can send DRV and FCP related questions via email to DRV@calhr.ca.gov.
- ❖ Current response time is five (5) business days.

Benefit Open Enrollment (OE) Confirmation

Presenter: Kristin Wilsey

Contact: Vision@calhr.ca.gov

Benefit Open Enrollment (OE) Confirmation

- ❖ Pay History and Deduction Check:
 - ❖ Access and review pay history.
 - ❖ Verify pay deductions align with OE benefit changes.

- ❖ Live Demo of State Controller's Office (SCO) Pay History
 - ❖ Live demonstration showcasing the process of reviewing pay history in the SCO system.

CalHR Benefits' Resources

Benefits Website:

<https://calhr.benefitsprograms.info/>

BAM Training Questions:

BenefitsInquiries@calhr.ca.gov

HealthierU Connections: <https://www.calhrwellness.com/en/welcome-california-state-employees/>

Human Resources:

<https://calhr.benefitsprograms.info/state-hr-professionals/>

State Employees:

<https://calhr.benefitsprograms.info/state-employee/>

HR Manual:

<http://hrmanual.calhr.ca.gov/Home/ManualItem>

CalHR Benefits' Resources Continued

Contacts:

- ACA Program ACA.Policy@calhr.ca.gov
- Dependent Re-verification Program
DependentRe-verificationProgram@calhr.ca.gov
- Dental Program dental@calhr.ca.gov
- FlexElect/CoBen Program FlexElect@calhr.ca.gov
- COBRA COBRA@calhr.ca.gov
- Vision vision@calhr.ca.gov
- Dental/Vision Authorization Portal
VisionDental.Authorization@calhr.ca.gov
- Long Term Disability LTD@calhr.ca.gov
- Life Insurance Lifeinsurance@calhr.ca.gov
- Group Legal Grouplegal@calhr.ca.gov
- Third Party Pre-Tax Parking Pre-TaxParking@calhr.ca.gov



STATEWIDE PROGRAM UPDATES



Statewide Disability Program

Presenter: Catharine Thongban

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

Statewide Disability Toolkit Introduction:

- Industrial Disability Leave (IDL)
- Nonindustrial Disability Insurance (NDI)
- Statewide Disability Insurance (SDI)

Resource Link: [Statewide Civil Service Disability Program](#)



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

2023 Retro General and Salary increases

Statewide Disability Green Cycle:

Green Cycle Documents

A Green Cycle Document is a STD. 674 and/or STD. 674D requesting time (days and/or hours) be issued in the current pay period during days indicated as “Green Cycle” on the [decentralized calendar](#).

If an employee has already received all possible time, 21 or 22 days, then it is not a Green Cycle Document.

Example of Green Cycle Documents include:

- Time is owed in the current pay period within designated Green Cycle days.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Statewide Disability Document workload definitions:

Link: [Statewide Civil Service Disability Program](#)

Document Type Definitions:

Green Cycle: Document requesting time be issued for the current pay period within designated Green Cycle days.

Regular: Document requesting time be issued within the previous 12 months which is not current pay during a designated Green Cycle.

Special: Document requesting a transfer of funds or salary adjustment within the previous 12 months.

Complex: Any document requesting time be issued, transfer of funds or salary adjustment for a pay period older than 13 months.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Examples of Non-Green Cycle Documents include:

- Industrial Disability Leave (IDL) 2/3 being transferred into IDL Full or Enhanced Industrial Disability Leave (EIDL) with no additional time being owed.
- IDL or Nonindustrial Disability Insurance (NDI) being transferred into Regular with no additional time being owed.
- Regular time being transferred into IDL or NDI after a full warrant has issued.
- Request for salary adjustment with no additional time being owed.
- Request of time for any month other than the current pay period.

If a warrant is returned, do not submit a document requesting time be issued until the redeposit appears in pay history. Until the redeposit appears, it is considered a transfer of funds which is a Special.



Statewide Disability Program

Presenter: Karin Johnson-Anderson

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

Statewide Disability Document workload definitions:

The document type is determined by date of submission and does not change once batched into inventory to be processed. Inventory is processed by document type and receipt date.

- For example, a document for the 12/2022 pay period requesting a transfer of funds uploaded on 10/16/2023 would be batched as, and remain, a Special while in inventory. It does not change to a Complex even after the pay period becomes older than 13 months. Do not upload inquiries for previously submitted documents as these will be deemed invalid and duplicate.

Once the online weekly processing date reflected is more than 10 days past the original upload for the document type, submit the original ConnectHR file upload confirmation as an escalation.

[Escalation Email Instructions](#)

For PR250 corrections, mark “Amended” at the top of the document and include a copy of the PR250 notice email when uploading to ConnectHR.



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

- 1st Trimester is here; contact your training coordinator and register now!
- Be on the lookout for some of our new and updated training classes...
 - Employment History Overview eLearning Module
 - Fundamentals of Personnel: Appointments eLearning Module
 - Fundamentals of Payroll Virtual Training

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
- 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 \(SCCC\)](#) (916) 372-7200



FORUM QUESTIONS:

The following questions were submitted during the forum:

Question: Regarding Personnel Action Request packages for transfers between agencies for the General Salary Increase and Special Salary Adjustment that need to key by SCO, are these a priority to key or going by the processing date (currently is 03/16/2023)? Does this mean that these affected employees may not receive their additional pay for almost a year?

Answer: We are working on documents based on the date we receive them. HR offices have the authority to issue salary advances. The SCO audits team is doing their best to process packages. As a reminder, we are still in lump sum peak season. We appreciate your patience.

Question: When you say contact SCO for errors, are you talking about submitting a Personnel Action Request package to ConnectHR? Or is there another way we should be doing that?

Answer: Please contact the Personnel and Payroll Services Division (PPSD) [Statewide Customer Contact Center \(SCCC\)](#).

Question: Regarding Personnel Action Requests (PARs) submitted for Bargaining Unit 01 employees that still have not received their General Salary Increase and Special Salary Adjustments, will SCO process those PARs soon? The processing date states 03/16/2023.

Answer: Documents will be worked on based on the received date.

Question: If an amended Reduction in Salary (PUN) package needs to be sent, should a Personnel Action Request for the General Salary Increase be included? If so, should it list the reduced salary rate due to the PUN?

Answer: Yes to both questions.

Question: Are STD. 674s needed to update pay for overtime hours worked between July 2023 and December 2023?

Answer: HR offices may Payroll Input Process (PIP) key adjustments for overtime adjustments.

Question: I had two (2) doctors that needed corrections that I fixed, but I had to send back their retro pay. Do I need to submit a STD. 674 to get the retro pay to issue again correctly?

Answer: Yes.

Question: Why did we receive a PSD40 to document a 215 transaction and send to SCO for keying for an employee who separated 6/30/23 and had lump sum go into the 7/1/23 pay period? Can we just key the General Salary Increase effective 7/1/23?

Answer: If you receive a ding notice for this with instructions to send a 215, it's because it requires special processing for payroll to issue the adjustment. We need those documents to issue the pay correctly.

Question: Please provide an update on the 2nd tax year Personnel Action Request (PAR) packages for 12/23 retirements. The current processing date states you are currently keying packages received at 12/28/23. Does this mean that none of the 2nd tax year PARs are being worked on?

Answer: There was a discrepancy with the processing date that has since been corrected. The Payroll Program is processing lump sum separation pay for PARs with a received date of 02/06/24.

Question: Do ding notices (PR250) end up going back to the end of the line in terms of being addressed?

Answer: No, if the HR office uploads the corrected documents within two (2) business days of the PR250 notice, we work the corrected document immediately.

Question: If the General Salary Increase/Special Salary Adjustment and Personnel Action Request packages are delayed for more than 12 months, then will SCO ding them back due to the one year rule?

Answer: No, because it was submitted timely.

Question: How do we handle date of entitlement issues that now need the General Salary Increase/Special Salary Adjustment?

Answer: If the Personnel Action Request (PAR) needs to be updated, then please submit a PAR package to the Audits team. If you need retro pay adjustments, then you will submit STD. 674s.

Question: Are we okay to key the S70C to issue only the remaining cash portion of the 2024 deferrals?

Answer: We have advised HR offices that this could negatively impact the employee's deferral.

Question: We have had multiple employees contact us stating that their dependents are not enrolled in their dental plan. When we contact Delta Dental it only shows that the employee was added and not their dependents. Is there a reason this is happening to multiple employees?

Answer: Please send an email to dental@calhr.ca.gov. This will allow us to further investigate your query. Additionally, in your email, please specify whether this pertains to open enrollment documents.

Question: When looking at the Exceptions Report in Dependent Re-Verification, I have discovered that the employee (EE) names are incorrect. When I call the carrier to correct the EE name, they advise me that the first name can only be nine (9) characters. Would we just delete these exceptions each month when they appear on the report?

Answer: Yes. A system logic has been newly created for the 9-character limit issue in Family Connect Portal. When these exceptions appear in the Exceptions Dashboard, you can remove them by selecting the "Remove from Exception" button at the bottom of the page and save.

Question: I submitted a cancellation for an employee's flex cash, but it still has yet to be canceled. How long does it take for it to be canceled or do I need to submit an appeal for this situation?

Answer: See the [weekly processing dates](#) for that specific workload. If the date is past the date the form was uploaded, then contact the [Statewide Customer Contact Center](#).

Question: Once an appeal is approved by CalHR for an overpayment, how long does it take for SCO to issue the payment to the employee?

Answer: Approximately 30 days. If it goes past that, then contact CalHR for an update.

Question: For Dependent Re-Verification in dental and Vision Service Plan (VSP) premier, the same guideline for dependent(s), such as natural children, only need to verify once after enrollment?

Answer: Yes. Natural born and adopted children are re-verified once after their initial enrollment. All other dependents must be re-verified every three (3) years. Please reference section 1.0, The Dependent Re-Verification (DRV) Program of the Benefits Administration Manual (BAM) for additional information.

Question: What is the turnaround time for a Consolidated Benefits (CoBen) appeal?

Answer: We are currently on a 60 day time frame.

Question: What paperwork is needed for domestic partners for Dental Delta? There seems to be an issue with getting these processed.

Answer: A Declaration of Domestic Partnership and a copy of the first page of the employee's income tax return from the previous tax year listing the employee and the domestic partner, or copies of a combination of other documents, including but not limited to, a household bill, account statement, or insurance policy listing the name and address of the employee and the domestic partner, or other documents substantiating a current domestic partnership is needed. Other documents that are older than 60 calendar days are unacceptable. Please reference section 1.0, The Dependent Re-Verification (DRV) Program of the Benefits Administration Manual (BAM) for additional information.

Question: There was an employee whose dependent needed to be verified (triennial), I received all the necessary documents and confirmed on CalPERS about three (3) to four (4) days before the due date (end of the month), but health premiums were not deducted for one (1) year resulting in overpayment/Accounts Receivable. Can CalPERS change their way by changing the due date to one month before to avoid overpayments, as many employees turn in paperwork before the deadline?

Answer: Thank you for the question. Unfortunately, adjusting the system functionality is not something CalPERS can support at this time. We used to send our notices 90 days prior to deletion, and that was already extended to 120 days. The batch deletion of the dependent that is not certified is processed around 30 days before the effective date of deletion. If the dependent is certified any time in the 90 days before that is processed, there is no rescission to process, nor a premium deduction to update. This only occurs if the certification is processed the last 30 days. We cannot process a deletion after roll close, so our timing is restricted. We would encourage employers to remind their employees of the pending Dependent Eligibility Verification (DEV) certifications so that they do not wait until the due date or after, and transactions are processed within the initial 90 days of the notification. We have made the due date in the letters approximately 10 days before the SCO roll close date to allow some processing time. The letter also mentions the possibility of premium retroactivity if the documents are processed after the SCO roll cut off.

One thing that is complicating this issue is that a rescission that changes a premium deduction must be processed manually by SCO because their system cannot automate rescissions. The year-long time frame to correct the premium back is due to SCO's processing delays.

The best course to avoid the issue is certifying prior to the deletion being processed.

Question: Is there an update regarding the processing of STD. 674 A/Rs, as per the weekly processing dates still show 4/18/23 for General Pay?

Answer: We are working as fast as we can.

Question: If an employee received 10 days of regular pay and should be paid five (5) days of regular pay and 17 days of Industrial Disability Leave (IDL). When we send the STD. 674D and ask for additional pay and transfer of funds, would that be a green cycle? We have been told if it says transfer of funds it is not a green cycle.

Answer: If an employee is owed time for a current pay period, a STD. 674 and/or STD. 674D must be uploaded to the Green Cycle option in ConnectHR during the days indicated as "Green Cycle" on the Decentralized Calendar. If an employee has already received all possible time, 21 or 22 days, it is not a Green Cycle Document.

Question: Can we request additional Industrial Disability Leave (IDL) time for current pay period on the first days of the following month?

Answer: Documents requesting additional time for a current pay period after the Green Cycle has ended, will be batched as Regulars and worked by date in order received. Documents requesting current pay after the Green Cycle has ended must be uploaded to the specific disability type ConnectHR option.

Question: When sending a STD. 674D for a Psych Tech on Non-Industrial Disability Insurance (NDI), will that need to be sent for each half or just once on a green cycle after monthly pay cutoff?

Answer: NDI is a monthly benefit. When a semimonthly employee is on NDI, a single STD. 674D must be submitted certifying time for both the first and second half of the month. Please note that if a full warrant has issued and the STD. 674D is requesting a transfer of funds, this is a Special and not considered a Green Cycle document.

Question: If the employee (EE) is on a Non-Industrial Disability Insurance (NDI) claim and EE was already paid for the month, do we still need to send a STD. 674 form?

Answer: If an employee is on NDI and has already received a full regular warrant, you must submit a STD. 674D requesting funds to be transferred into the appropriate payment type based on the claim approvals received.

Question: Can we still send a STD. 674D for current pay period the day after payroll cutoff, before the first green cycle?

Answer: STD.674D documents to issue pay for the current month can be uploaded to ConnectHR the day prior to the first day of "Green Cycle" as indicated on the Decentralized Calendar. STD.674D documents submitted after Green Cycle, must be uploaded to the specific disability type in ConnectHR, and will be batched and worked in date order received.

Question: For General Salary Increase (GSI) retro pay adjustment requests, are those prioritized first and not categorized as "Special" typical transfer of funds? Still waiting for R18 pay adjustments that took effect 7/1/22.

Answer: GSI and Special Salary Adjustment (SAL) retro pay adjustments are being batched as a Special and worked in date order received.

Question: When are in-person trainings coming back?

Answer: We are continuing to explore all options and delivery of training. We can appreciate the importance of delivering training in a variety of options. Stay tuned for more information.

Question: When will Workers' Compensation training be available?

Answer: [Workers' Compensation training](#) is available as a self-paced course on the SCO website.

Question: Any update on when the Industrial Disability Leave (IDL)/Temporary Disability (TD) training will be available?

Answer: We are actively developing and revising our training program content. Please continue to view our [Statewide Training Programs](#) on the SCO website for the most current training offerings available.

Question: Will the Payroll Input Process (PIP) training be offered again? It is a requirement of the Personnel Specialist Certification.

Answer: We are actively developing and revising our training program content. We anticipate PIP training will be available in Fall 2024. Please continue to watch our [Statewide Training Programs](#) webpage on SCO website for the most current training offerings available.

Question: Since you are revamping several of your eLearning courses, are you interested in any feedback regarding glitches I may have encountered?

Answer: We are always interested in your feedback, please share with PPSDtraining@sco.ca.gov.

Question: I would like to ask a follow-up question to issuing the cash portion of the 2024 lump sum deferrals. Christina stated the reason SCO does not want us to key the cash only is in the event there is not enough leave balances remaining to process the deferral; therefore, causing a special process. In turn, this would also be a concern for us with issuing a salary advance. We need to ensure timely payment of wages as required in the California Labor Code 201, yet do not want to issue too much because the employee (EE) would then owe us. We have a few EEs to receive a substantial amount of cash in the 2024 tax year after deferral. What would you recommend be the fix for this concern we both share?

Answer: We have advised HR offices that this could negatively impact the employee's deferral.

Question: An employee separated before finishing their six (6) month waiting period for Vacation/Sick Leave credits. They came back to state service after leaving. Does their six (6) month waiting period start over?

Answer: Yes, the six months starts over.

Question: How do we know when an employee will receive a Form W-2C? Since we manually keyed General Salary Increase (GSI) and Special Salary Adjustment (SAL) in January 2024?

Answer: A Corrected Form W-2 will not issue for the GSI. The payment will issue in 2024 and will be reported on the 2024 Form W-2. Form W-2 reporting is based on issue date and not pay period.

Question: Where in the Personnel Action Manual or CalHR can I find information regarding Military Leave for an active duty soldier?

Answer: For policy information on Military Leave, please review [section 2118 - Military Leave](#) of the Human Resources Manual.

Question: Will pay warrants show the health stipend (\$165)? Many employees are asking to see where it is applied when they look at their paycheck.

Answer: It is in the employer share. If they check employer share between November and December, it is higher.

Question: Is there a change in the process for establishing an Accounts Receivable (A/R) for separated employees? Our prior instruction was to not submit to SCO until directed by the Statewide Customer Contact Center (SCCC), but we are having trouble reaching the SCCC line. What is the best practice?

Answer: You may contact the [Statewide Customer Contact Center \(SCCC\)](#) and leave a detailed message including the employee's information, date of separation, and upload date. The SCCC will locate the document and assign it.

Question: If a lump sum cash out was paid in 2023 tax year by mistake, how can this be corrected to 2024 tax year? That is what the employee wanted. There isn't a 401/457 deferral.

Answer: The original warrant or payment will need to be redeposited. The pay can then be reissued in 2024.

Question: Do we have a break down for the \$165 health stipend with the employer contributions? Employees are asking the breakdown and how it applies.

Answer: There is no breakdown available for what the checks look like.

Question: If an employee is deferring for two (2) years and requested to do a S70C to issue from the blanket, will this affect the deferral?

Answer: No, it will not affect the deferral.

Question: AB 2410 is not applied to lump sum, is that only due to the deferral?

Answer: Please review Labor Code 201 and 202.

Question: If we receive an approval to pay Industrial Disability Leave (IDL) after the green cycle and need to submit it on a STD. 674D for pay, do we submit it on the "674 green cycle" or the 674D (IDL) submission to ensure the pay is keyed in a timely manner?

Answer: The Green Cycle dropdown option in [ConnectHR](#) should only be used during Green Cycle for the current month as indicated on the [Decentralized Calendar](#). Outside of Green Cycle, Specialists should upload documents using the Disability STD. 674D IDL dropdown. The document will be batched by workload and processed in date order received.

Question: Regarding the contract update for Pay Differential 240, I see they changed the time in class to determine the rate of pay out as well as needing to be employed for twelve (12) consecutive qualifying pay periods to get the Recruitment and Retention (R&R). My question is, if you separated from state service for six (6) months then reinstated back into the Personnel Specialist (PS) class but you had 36 months of qualifying pay periods prior to separating, when you reinstate I know that you have to start the 12 qualifying pay periods over to receive the payout, but will the rate still include the time in class prior to separating for the 36 plus the 12 months once reinstated?

Answer: If you separate or otherwise leave the classification and then return to it, the time resets and it starts over. Prior time in the PS classification does not count and time must be continuous.

Question: Pay Letter 23-44A requires keying of a General Salary Increase (GSI) but there is already a GSI processed, and now there is a Special Salary Adjustment (SAL). When trying to key a GSI, there is an error because the salary is no longer valid in SCO pay scales. Would these Personnel Action Requests need to be sent to SCO for keying?

Answer: Yes, this requires an override code.

Question: What is a good number to contact disbursements?

Answer: For General Disbursements (Escalation) inquiries, please contact the main Disbursements phone number, (916) 445-7789. However, it is encouraged to contact Disbursements via email for general inquiries at DISBGDGeneral@sco.ca.gov.

Question: Regarding Cal Employee Connect (CEC), a retiree passed away and the family contacted me because they do not know if the retiree had enrolled in Paperless W-2. Is there a way the CEC team can assist the family member with this issue?

Answer: The retiree's departmental Human Resources office can provide a copy of the Form W-2 via ConnectHR, if needed. You can also refer to the reports in [Payroll Letter #23-026](#) as they indicate if an employee signed up for electronic delivery.

Question: When do you plan on going over the overtime, out of class, and other pay updates that were missed during the mass updates?

Answer: The State Controller's Office has an [Overtime Adjustment Toolkit](#) available for HR staff. We also offer [eLearnings](#) for HR offices.

Question: Regarding ding notices, we used to receive the ding notice with a copy of the document that had the error, now we just get the ding. Is it possible to get a copy of the document with the ding? Without it, sometimes we cannot determine who did it or find it, as our staff roster changes so often.

Answer: Our ding notices include the employee's name, and due to the State of California paperless initiative, we do not mail documents back.

Question: If an employee is out on leave under Family Medical Leave Act and California Family Rights Act (FMLA/CFRA) (not on State Disability Insurance/Non-Industrial Disability Insurance) and using leave credits for part of a month and dock for the remainder of the month, can we place the employee on an S50 code 34 and request pay to be issued via a STD. 674, or do we keep them on active pay status and instead key dock via Payroll Input Process (PIP) or 715? If we can place them on the S50 and request pay, where would we upload to PPSD?

Answer: If the employee is on Leave of Absence/CFRA/FMLA not tied to disability, you must determine if a 715 needs to be keyed to qualify or not qualify for the pay period. You will then have a supervisor/manager send an escalated email asking for the documents to be pulled from civil service payroll adjustments and worked for the current pay period. Please include the upload confirmations.

Question: Can we request to expedite a Benefit Accounts Receivable establishment while the employee is on State Disability Insurance, but while they were out they transferred to a new agency? The establishment is still pending.

Answer: Please contact the [Statewide Customer Contact Center](#) for situations like this.

Question: The pay issues in 2024 is in relation to issues into the 2023 pay periods. Are you sure there will not be corrected Form W-2's?

Answer: Form W-2 reporting is by issue date and not pay periods. If the pay issues in 2024, it will be reported on the 2024 Form W-2.

Question: We have a few employees that we keyed A01s but were transfers from other departments. We keyed them after cutoff but before green cycle was exhausted last month. The difference in pay still has not issued. Is there something else we should be doing to get the difference in pay to issue?

Answer: Please check the Monthly Payroll Certification (MPC) and work with the new department to ensure MPC is keyed for them. If so, then you will need to send a STD. 674 transfer of funds request.

Question: I understand that SCO is no longer doing more mass updates, however if we key off the Payroll Input Process, would the pay issue twice as it has issued once incorrectly and now has a new rate? Would we need to submit a STD. 674 premium pay to do the adjustments?

Answer: Pay will not issue twice, HR offices must key adjustments.

Question: If an employee was on waiting period and they resigned, are they entitled to receive their vacation hours that they accrued, and pay them out?

Answer: Please contact Personnel Services Branch at psb@calhr.ca.gov.

Question: We have a lot of turnover with Personnel Specialists everywhere. What if a ding notice was never addressed for benefits and the ding was not corrected? Can we get the ding notice from our inbox and resubmit? Or do we first create the appeal, then submit once it gets approved?

Answer: Please contact the [Statewide Customer Contact Center](#) for situations like this.

Question: If the \$50 telework stipend issued during a period of disability and an employee is not entitled to the \$50, then is it a STD. 674 A/R or STD. 674D to establish the overpayment? Also, what dropdown in ConnectHR should be selected when submitting the document to SCO?

Answer: If the employee was on Disability, please upload to Disability- STD. 674 EID (Earning ID) not on Personnel Action Request (PAR).

Question: Can Tax Support explain what this means: Box 14 (benefits as included in Box 1- wages and a \$ amount). I have only seen Box 14 - CASDI with a \$ amount.

Answer: This would be for fringe benefit reporting.

Question: When the STD. 674s get sent to SCO, what is the timeline of them adjusting that pay for the employees that did not get a General Salary Increase? Additionally, within that same month they got a Merit Salary Adjustment and a range change.

Answer: We are working on documents based on received date.

Question: Will there be a corrected Form W-2 for lump sum deferral employees?

Answer: Corrected Form W-2s will issue the month following the transaction for the movement of wages.

Question: CalHR has approved a footnote for one of our class codes at Department of Finance. We have had to upload the Personnel Action Requests to be processed for our current employees. Is it possible for our department to process in house? If so, what is needed to make this happen?

Answer: Please contact the System Activities Coordination and Support (SACS) mailbox at ppsdsacs@sco.ca.gov so we can work directly with you.

Question: Regarding Workers' Compensation (WC), is a pay period only qualified if there are 11 plus days of WC approved when regular pay does not qualify the pay period, or is a pay period qualifying no matter how much time is approved under WC?

Answer: Under the [California Code of Regulations 599.608](#), a "qualifying" pay period for full-time employees is at least 11 workdays. Workers' Compensation Leave should be treated as if the employee is still working and should follow the qualifying pay period guidelines.

Question: What is the rule about issuing a salary advance for employees who are separating and requesting a lump sum deferral?

Answer: HR offices may key an S70 to issue time to be paid new (item 606) on the Personnel Action Request to ensure timely payment of wages. Since the employee is deferring into a Savings Plus Program account, the vacation/annual and extra hours are not subject to AB2410 per Labor Code 202.

Question: If an employee is separating and not deferring into a Savings Plus Program account, is the lump sum cash out subject to AB 2410?

Answer: Yes, all time must be paid per the labor code. Current law generally requires that if an employer discharges an employee, the wages earned and unpaid at the time of discharge are due and payable immediately.

Question: If an employee is separating and only deferring 5K and has an exceptional amount of leave credits available, can HR issue a salary advance for the lump sum cash exceeding the 5K deferral amount?

Answer: HR must refer to the labor code on [timely payment of wages](#) and we recommend HR reach out to CalHR for further clarification.