



Transaction Specialists' Educational Forum

Presented By: Natalia Saferson

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Office of State Controller Malia M. Cohen

June 5, 2025



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

ConnectHR:

- Garnishment Feature Demonstration
 - The electronic Garnishment feature is an alternative to the paper Standard Form (STD.) 639 and will allow Human Resources (HR) staff the ability to key "New" Garnishments via a [ConnectHR](#) account.
 - Within the first iteration of the electronic Garnishment feature we currently allow submissions of "New" 339-004 Garnishments via a ConnectHR account, with plans to expand beyond this.
 - The Garnishment feature has been deployed and utilized by a few pilot agencies and has processed more than 350 garnishment transactions.
 - Release of the Garnishment feature is upcoming and communication to ConnectHR users will be sent when deployed.



SCOConnect: Cal Employee Connect/ConnectHR

Presenter: Mason Duarte

Contact: ConnectHRHelp@sco.ca.gov

Step one – Login:

Log in to a [ConnectHR](#) account.

CONNECTHR

Help & Feedback Login

Login

User Name

[Forgot User Name?](#)

Password

[Forgot Password?](#)

Submit

Cancel

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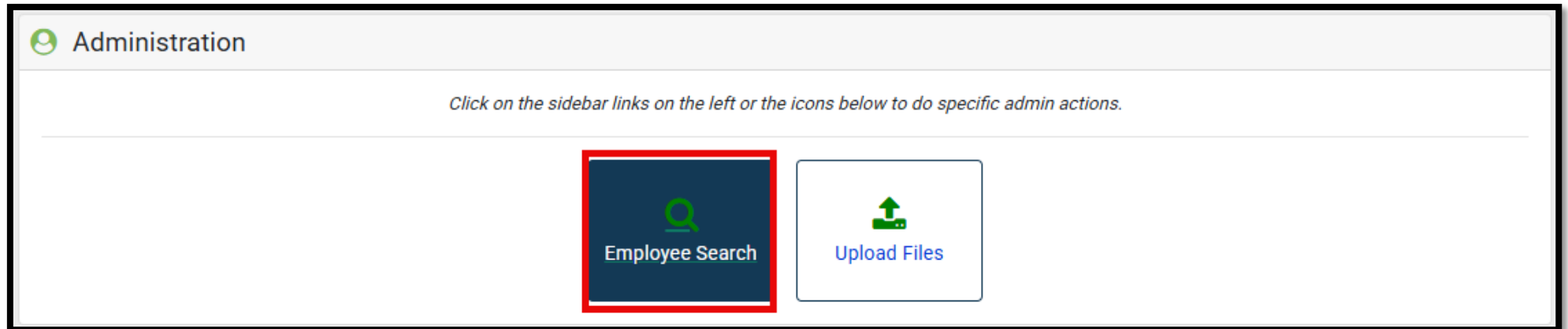
SCOConnect: Cal Employee Connect/ConnectHR

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Step two – Find an Employee:

After logging in to ConnectHR, the next step is to search for the employee you wish to establish a Garnishment for. To do this, navigate to the "Employee Search" feature.





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Within the "Employee Search" section, select a search option from the dropdown.

Employee Search

First Name Last Name

4 department(s) selected

Search By: Name

- Name
- Employee ID (UEID)
- SSN

The search will produce an employee record. Click anywhere on the record that is to the right of the left most feature icons.

	UEID	Last Name	First Name	DOB	Address
	9999-9999-0	DOE	JOHN D	07/04/1970	300 CAPITOL MALL



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After selecting an employee's record, ConnectHR will display an "Employee Detail" screen. Within the bottom right corner of the "Employee Detail" screen, the Garnishment feature will be listed within the "HR Operations" dropdown.

Employee Detail

First Name

JOHN D

Last Name

DOE

Date of Birth

07/04/1970

UEID

9999-9999-0

UUID

Address

300 CAPITOL MALL

Position

Agency

Address 2

SACRAMENTO CA

Zip Code

Classification

CBID

WWG

←

HR Operations ▾

035 Agency Collect Deduction
339/004 Garnishment




SCOConnect: Cal Employee Connect/ConnectHR

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Contact: ConnectHRHelp@sco.ca.gov

Step three – Garnishment Form:

Selecting "Garnishment" from the "HR Operations" dropdown, will open the electronic Garnishment form within ConnectHR. For "Step 1" of the Garnishment form, select the Garnishment type from the dropdown. If a Garnishment type is not listed within the available dropdown options, please utilize the Standard Form 639.

 Garnishment - (339 - 004)

Step 1: Select the type of garnishment deduction to be established.

Select Garnishment Type

Select garnishment type. Type here to filter

- FTB - State Taxes
- FTB - Court Ordered Debt
- FTB - Registration Collections
- FTB - Student Loan Collections
- Board of Equalization for Taxes
- Unemployment Insurance



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For "Step 2" of the Garnishment form, fill in the required fields.

Step 2: Fill in the required information below

Case number ⓘ

12345678

Effective date ⓘ

05/12/2025

Total garnishment amount ⓘ

\$ 0.00

If more information on a section is needed, the "i" information icon can be clicked next to each section.

Effective date ⓘ

Effective Date

Must be 10 calendar days after the date on which the garnishment was served. If the garnishment is a "Jeopardy" withholding order for state taxes, the effective date must be the date served.



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For "Step 3" of the Garnishment form, ConnectHR has the optional Garnishment fields listed.

Step 3: Complete **ONLY** one of the following if the court order specifically states

Maximum amount deductible per month ⓘ

\$ 0.00

Specific amount to be deducted per month ⓘ

\$ 0.00

Please check and confirm the address listed within "Payee Address Preview" matches the Garnishment. This field is pre-populated based on the selected Garnishment from the "Step 1" dropdown. After reviewing all fields, click "Submit Garnishment" at the bottom of the form.

Payee Address Preview:

FRANCHISE TAX BOARD

PO BOX 942867

SACRAMENTO CA 94267-0011

Submit Garnishment



SCOConnect: Cal Employee Connect/ConnectHR

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A Garnishment Confirmation window will allow an additional opportunity to review the keyed information. Please note, submitted Garnishment forms are not subject to revoke requests. A "Cancellation" or "Modification" Garnishment will need to be submitted via a STD. 639.

After submitting, the ConnectHR user will receive a confirmation email.

ConnectHR - Garnishment Request Confirmation

This is confirmation that your Garnishment Request has been submitted. Details below:

General Request Information	
Request Timestamp	
Employee UEID	
Employee Name	
Case Number	
Effective Date	
Total Garnishment Amount	
Specific Amt. per Month	
Max Amt. per Month	



STATEWIDE BENEFITS ADMINISTRATION



Trans Specialist's Educational Forum:

June 5, 2025

CalHR Benefits Division Updates

*Benefits That Support
a Life Well Lived.*

About the Benefits Division

The Benefits Division is responsible for the design, acquisition, and oversight of the various statewide benefit programs administered by the California Department of Human Resources (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

Presenter: Bobby Saetern

Special Open Enrollment – FlexElect Dependent Care Reimbursement Account (DCRA)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

The Special OE period for FlexElect DCRA started May 1 and ended May 30, 2025.

Reminders:

- Deductions begin: June 2025 pay period (appears on the July 1, 2025, pay warrant)
- Contribution period: June – November 2025 pay periods (six months)
- Coverage period: July 1 – December 31, 2025
- **All Special OE enrollment forms must be submitted to SCO by June 10, 2025.**

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Open Enrollment Updates

- The CalHR OE Team is collaborating with stakeholders to plan, prepare and host both In-Person and Virtual OE events for the 2025 season.
- The 2025 OE period will take place September 15 to October 10, 2025.
- Eligible state employees and retirees have the option to enroll, change, or remove benefit options for health, dental, vision, FlexElect, COBRA, long-term disability and legal insurance.
- All changes made during the 2025 OE period will be effective January 1, 2026.

Open Enrollment (OE)

Presenter: Bobby Saetern

Contact: OpenEnrollment@calhr.ca.gov

Coming this season:

- Expanding In-Person Benefit Fairs throughout California
- Three Open Enrollment virtual events
- Monthly communication emails beginning in June
- New [Open Enrollment webpage](#)
- Quarterly Open Enrollment updates at the [Transaction Specialists' Education Forum](#)

Open Enrollment (OE)

Presenter: Bobby Saetern
Contact: OpenEnrollment@calhr.ca.gov

Reminder:

- Please subscribe to the Personnel Officers CalHR Subscription list on the [CalHR website](#) to receive future updates.

CalHR Subscriptions

To receive updates by email, please fill out this form.

Send me updates on

- ☐ CEA Action Proposals
- ☐ Diversity, Equity, and Inclusion (DEI) Toolkit
- ☐ Pay Letters (State HR professionals only)
- ☒ Personnel Officers (State HR professionals only)
- ☐ Policy Memos
- ☐ State Recruiters (State HR professionals only)
- ☐ State Trainers (State HR professionals only)

My contact info

Email Address:

First Name:

Last Name:

Title:

Agency:

Phone:



Vision and Dental Updates and Reminders

Presenter: Parwana Mohabbat

Vision Program Updates and Reminders

Presenter: Parwana Mohabbat

Contact: Vision@calhr.ca.gov

Updates and Reminders:

- Improving VSP membership profiles for Basic Vision:
 - VSP now receives a demographics file for employees enrolled in Basic Vision.
 - All State of CA employees now have access to Eyeconic, VSP's online store.
- [2025 Vision Handbook](#) is available online.
- Departments should send VSP Premier enrollment or change forms directly to VSP for processing. Please do not send them to SCO, as this will delay enrollment or changes for the employee.
- Only permitting event transactions submitted beyond the 60-day eligibility window should be sent to CalHR as an appeal.
- Benefit premiums cannot be waived for months when services are not used by employees or dependents.

Dental Program Updates and Reminders

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

Updates and Reminders:

- Please allow 30 calendar days for an appeal to be reviewed.
 - Confirm that the employee is aware of applicable accounts receivables.
 - Once an appeal is approved, it cannot be retracted.
- STD. 692 forms must be complete and error free, and the most current version must be used.
- Do not submit an inquiry or appeal for multiple employees.
- Inquiries and appeals must be submitted to the dental email box. Do not send emails to individual staff email boxes.
- After CalHR responds to the agency the appeal is approved. Do not upload the enrollment form into ConnectHR as CalHR stamps the form, uploads and completes this portion as part of the appeal process.

Dental Program Updates and Reminders

Presenter: Parwana Mohabbat

Contact: Dental@calhr.ca.gov

Updates and Reminders:

- Make sure to consider the following:
 - Does the 24-month restriction apply to this employee? If yes, did they meet the 24-month restriction?
 - If an employee permanently separates from state service before completing 24 months of state service and subsequently returns, then their time before separation does not count towards meeting the 24-month restriction.
 - Mandatory deletions cannot be on a current month basis, they must take effect the month following the event.
 - Is the employee eligible to enroll in the enhanced dental plan?
 - Verify dual/split coverage for the employee and dependents.
 - Please refer to available online resources such as BAM, HR Manual, Open Enrollment Resources for more information.



Third Party Pre-Tax Parking Reimbursement Program Updates and Reminders

Presenter: Alex Smith

Third-Party Pre-Tax Parking Reimbursement Account Program Updates and Reminders

Presenter: Alex Smith

Contact: Pre-TaxParking@calhr.ca.gov

Program Updates:

- In March 2025, there was a transition in the team that supports the Third-Party Pre-Tax Parking Reimbursement Account Program (PTP).
 - The Policy Oversight and Management team (POM), in the CalHR Benefits Division, is now supporting the Pre-Tax Parking Reimbursement Account Program.
 - This was a seamless transition for our departmental personnel office partners.
- Continue to use Pre-TaxParking@calhr.ca.gov as the best way to reach the PTP team.
 - As a reminder this inbox is intended for Departmental Personnel Offices and Personnel Specialists.
 - We kindly ask that you address PTP related questions from employees within your department and escalate to the CalHR PTP team only when needed.

Third-Party Pre-Tax Parking Reimbursement Account Program Updates & Reminders

Presenter: Alex Smith

Contact: Pre-TaxParking@calhr.ca.gov

Program Reminders:

- **Who is best suited for this program?**
 - State employees are eligible to enroll in the Third-Party Pre-Tax Parking Reimbursement Account Program if they **do not** participate in a department-sponsored parking program or a state controlled/owned parking program, such as Department of General Services (DGS), Department of Transportation (CalTrans), etc.
- There is no open enrollment. Eligible employees can enroll at any time of the year!
- Enrolled employees are eligible to claim reimbursements starting the first of the month after the first payroll deduction.

Third-Party Pre-Tax Parking Reimbursement Account Program Updates & Reminders

Presenter: Alex Smith

Contact: Pre-TaxParking@calhr.ca.gov

Program Reminders:

- **Important deduction timeframes**

- **New enrollments, changes, or cancellations** - Deductions will start/stop in the current pay period if SCO's Miscellaneous Deduction Unit receives the CalHR 682 form **by the 10th of the month and it is processed successfully**.
 - Retroactive enrollment is **not** permitted with this program which makes it essential that enrollment forms are accurately completed and submitted to SCO timely. Enrollment is effective the first of the month after SCO processes the form and a deduction is taken.
 - Employees should submit CalHR 682 forms to their departmental personnel office, **not** CalHR.
 - Employees can request an increase or decrease to deductions at any time by submitting the CalHR 682 form to their departmental personnel office. These changes are effective the first of the month after SCO processes the enrollment form and the deduction is updated. Retroactive changes are **not** permitted.

- **Cancellations**

- If an employee requests a cancellation after the 10th of the month, but before the next period of eligibility (the first of the next month), they may be eligible for a refund for the month in question.

Third-Party Pre-Tax Parking Reimbursement Account Program Updates & Reminders

Presenter: Alex Smith

Contact: Pre-TaxParking@calhr.ca.gov

Program Reminders:

- **Where can you learn more?**

- Resources are available at the following links:
 - [BAM - Pre-Tax Parking Program - CalHR Benefits Website](#)
 - [Third Party Pre-Tax Parking Reimbursement Account Program - CalHR Benefits Website](#)
 - [Human Resources Manual – CalHR](#)
- We will be making updates and improvements to the BAM – we will share updates when available!



Dependent Re-Verification

Presenter: Alison Drummer

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

What is DRV?

- DRV is the process of re-verifying the eligibility of an employee's spouse, domestic partner, children, stepchildren and domestic partner children (family members) enrolled in state health, dental and Premier 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 Premier 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: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Highlights

- 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 will remain unchanged.
- Departmental personnel offices are required to update dental and Premier Vision DRV transactions through the Family Connect Portal (FCP).
- All state agencies must have an administrative account in the FCP, assigned at the supervisor classification or higher, 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: Alison Drummer

Contact: DRV@calhr.ca.gov

Program Updates

- [CalHR 781 Dependent Eligibility Checklist](#) and [CalHR 025 Affidavit of Parent-Child-Relationship](#) (dental/vision) have been updated to comply with CalPERS documentation revisions provided in the December 1, 2023, [Circular Letter #600-046-23](#), Eligibility Criteria for Dependents in a Parent-Child Relationship.
- CalHR has officially launched FCP Enhancements for disabled dependent and Parent-Child Relationship certifications.
 - Dependents enrolled in dental and/or Premier Vision only and require certification as a disabled dependent or PCR, will be certified by CalHR's DRV unit.
- The CAHP enrollment data in FCP is pending and CCPOA enrollment data is visible.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- January, April, July, October 2024, February 2025 birth month cycles have concluded. Departmental personnel offices must take necessary steps to remove unverified dependents from dental and Premier Vision benefits.
- May 2025 birth month cycle: All notifications have been mailed, and all alerts should be processed by the end of June 2025 in FCP for all employees who submit their documents by May 31.
- The current birth month cycle is August 2025, and the 90-day mailing was generated on or about April 15, and mailed May 1, 2025, by the Department of General Services.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Birth Month Cycle Updates

- Please note all employees in the current birth cycle will continue to receive DEV and DRV notices until their dependent verifications have been processed.
 - DRV mailings generate from FCP approximately on the 15th of the month prior to all scheduled mailings. All mailings are sent 90, 60 and 30 days prior to an employee's birth month.
- DEV for health benefits must be processed in myCalPERS by the first day of the birth month to avoid the automatic deletion from health coverage.

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Total Notices Mailed to Date

Birth Month Cycle	1 st Notice - 90 days before end of birth month	Total Mailings of 1 st Notice	2 nd Notice - 60 days before end of birth month	Total Mailings of 2 nd Notice	3 rd Notice - 30 days before end of birth month	Total Mailings of 3 rd Notice	Total Mailings
April	Jan-2024	8,196	Feb-2024	7,862	Mar-2024	6,254	22,312
July	Apr-2024	8,783	May-2024	8,230	Jun-2024	7,942	24,955
October	Jul-2024	9,018	Aug-2024	8,511	Sep-2024	6,501	24,030
February	Nov-2024	7,548	Dec-2024	6,965	Jan-2025	5,748	20,261
May	Feb-2025	8,671	Mar-2025	8,321	Apr-2025	6,461	23,453
August	May-2025	10,493	Jun-2025	9,654	Jul-2025	TBD	20,147

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

FAMILY CONNECT

CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Logout Delia Baulwin

Review Dependent

Dependent Type *

Disabled Child

Status

Status History

First Name *

Birth Date *

04/04/1989

Dental Plan *

Yes

Vision Plan *

Yes

Dependent Type Locked

Status Date

5/10/2023

Middle Name

Re-verification Effective Date

05/01/2020

Dental Plan Effective Date

01/01/2022

Vision Plan Effective Date

01/01/2024

Record Source

Carrier File

Last Name *

Re-verification End Date

04/30/2025

Dental Permitting Event

-- Record Source --

Vision Permitting Event

-- Record Source --

Delete Dependent

Comments

Added by Carrier File 2022-07-21

Save

Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer
Contact: DRV@calhr.ca.gov

Disabled Dependent Certification

Settings

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CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Logout Delia Baulwin

1 Year Notification: April 2019

☐ Is Notified

Notified Date

Notified By

90 Day Notification: January 2020

☐ Is Notified

Notified Date

Notified By

60 Day Notification: February 2020

☐ Is Notified

Notified Date

Notified By

30 Day Notification: March 2020

☐ Is Notified

Notified Date

Notified By

Certify Dependent

☒ Certified

Document Received Date *

Dependent Certified By

Re-certification Effective Date *

Re-certification End Date *

Date Coverage History

Certification Document List *

☒ Authorization to Disclose Protected Health Information (CalHR XXX) *

☒ Dependent Eligibility Verification Checklist (CalHR Form 781) *

☒ Disabled Dependent Member Questionnaire and Medical Report (CalHR XXX) *

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

FAMILY CONNECT

CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Logout Delia Baulwin

Review Dependent

Dependent Type *

Parent Child Relationship

Status

Pending

First Name *

[REDACTED]

Birth Date *

09/10/2012

Dental Plan *

Yes

Vision Plan *

Yes

Delete Dependent

Dependent Type Locked

Status Date

5/10/2023

Middle Name

[REDACTED]

Re-verification Effective Date

10/01/2023

Dental Plan Effective Date

01/01/2023

Vision Plan Effective Date

01/01/2020

Record Source

Carrier File

Last Name *

[REDACTED]

Re-verification End Date

09/30/2024

Dental Permitting Event

-- Record Source --

Vision Permitting Event

-- Record Source --

Comments

Added by Carrier File 2022-07-21

Save

Cancel

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Parent-Child Relationship Certification

Logout Delia Baulwin

90 Day Notification: June 2023

☐ Is Notified

Notified Date

Notified By

60 Day Notification: July 2023

☐ Is Notified

Notified Date

Notified By

30 Day Notification: August 2023

☐ Is Notified

Notified Date

Notified By

Certify Dependent

☒ Certified

Document Received Date *

Re-certification Effective Date *

Re-certification End Date *

Dependent Certified By

[Date Coverage History](#)

Certification Document List *

- ☒ Affidavit of Parent-Child Relationship (CalHR 025) *
- ☒ Dependent Eligibility Verification Checklist (CalHR Form 781) *
- ☒ Copy of first page of employee's federal or state income tax return such as IRS Form 1040 from the previous tax year listing child as a tax dependent (i)
- ☒ One Primary and two Secondary Supporting PCR Documents (see Supporting PCR Documentation on the CalHR 781) (i)

Dependent Re-Verification (DRV)

Presenter: Alison Drummer

Contact: DRV@calhr.ca.gov

Contact

- Before contacting the DRV Unit with policy and procedure related questions, please review all DRV resources including [BAM](#), [FCP Manual](#) and the [Human Resources Manual](#).
- Contact the DRV Unit at CalHR with questions on processes 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.

Resources – CalHR Benefits Webpages

- [Benefits Website](#)
- [State HR Professionals](#)
- [State HR Professionals Benefits Toolkit](#)
- [State HR Professionals OE Resources](#)
- [HR Manual](#)
- [Open Enrollment](#)
- [CalPERS Open Enrollment for Active Members](#)
- [Virtual Library](#)
- [Benefits Calculator](#)
- [State Employees](#)
- [Health](#)
- [Dental](#)
- [Vision](#)
- [Insurance Benefits](#)
- [Consolidated Benefits \(CoBen\)](#)
- [FlexElect Reimbursement Account](#)
- [Life Insurance for Excluded Employees](#)
- [Group Legal Services](#)
- [Group Long-Term Disability Insurance \(LTD\) – Excluded Employees Only](#)
- [Work Resources](#)
- [Engagement Resources](#)

Resources – CalHR Benefits Contacts

- ACA Program ACA.Policy@calhr.ca.gov
- BAM Training BenefitsInquiries@calhr.ca.gov
- COBRA COBRA@calhr.ca.gov
- Dental Program dental@calhr.ca.gov
- Dependent Re-verification (DRV) Program DRV@calhr.ca.gov
- FlexElect Program FlexElect@calhr.ca.gov
- CoBen Program CoBen@calhr.ca.gov
- Group Legal Grouplegal@calhr.ca.gov
- Life Insurance LifeInsurance@calhr.ca.gov
- Long-Term Disability LTD@calhr.ca.gov
- Third Party Pre-Tax Parking Reimbursement Account Pre-TaxParking@calhr.ca.gov
- Vision/Dental Authorization Portal VisionDental.Authorization@calhr.ca.gov
- Vision Program vision@calhr.ca.gov
- Open Enrollment OpenEnrollment@calhr.ca.gov
- General Questions BenefitsInquiries@calhr.ca.gov



Statewide Benefits Program

Presenter: Mike Imbach

Contact: ppsdcsbenefits@sco.ca.gov

2025 Special Open Enrollment – Dependent Care Reimbursement Accounts

- Dropdown for Special Open Enrollment is live
 - Open Enrollment Period: **May 1 – May 30, 2025**
 - Last day personnel offices can submit new forms: **June 10, 2025**
 - Last day personnel offices can submit corrected forms: **June 30, 2025**
 - Effective date of Benefit: **July 1, 2025**
- Please note that employees can enroll above the max of \$416.66 if:
 - They are not currently deducting the max from their warrants
 - There will only be six months of deductions, so max contribution can be \$833.33
- Resources are available on the SCO website:
 - [SCO – Special Open Enrollment Resources](#)



Statewide Benefits Program

Presenter: Mike Imbach

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- Basic vision coverage will be effective the first of the following month if the employee's Personnel Action Request (PAR) document is keyed into the SCO system prior to the 10th of the month. The vision coverage will be effective the first of the following second month if the employee's PAR document is keyed into the SCO system after the 10th of the month.
- *Example 1:* An employee is appointed on the 3rd and the PAR document is keyed prior to the 10th of the month. The coverage is effective on the first of the following month.
- *Example 2:* An employee is appointed on the 3rd and the PAR document is keyed after the 10th of the month. The coverage is effective on the first of the following second month.



Statewide Benefits Program

Presenter: Mike Imbach

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- Due to automatic enrollment, very few situations require a STD. 700 to be sent to SCO
 - The four (4) scenarios where a STD. 700 is needed are:
 - Enrolling Permanent Intermittent (PI) employee
 - Canceling PI employee coverage
 - Non-Consolidated Benefits (non-CoBen) employee cancelling coverage
 - Non-CoBen employee re-enrolling after previously canceling via STD. 700



Statewide Benefits Program

Presenter: Mike Imbach

Contact: ppsdcsbenefits@sco.ca.gov

Basic Vision – STD. 700

- 52% of STD. 700 forms received do not require action by SCO
 - Common Errors include:
 - Trying to add/change dependents
 - Enrolling employees with benefit already established
 - Enrolling/canceling Premier Vision (CalHR 774 form directly to VSP)
 - Canceling CoBen employee Basic Vision (mandatory benefit)
- To assist the personnel offices, SCO will be changing the ConnectHR dropdown to:
 - Benefits – STD. 700 Basic Vision PI ONLY (See exceptions in ConnectHR Directory)



Statewide Benefits Program

Presenter: Mike Imbach

Contact: ppsdcsbenefits@sco.ca.gov

Premier Vision – CalHR 774

- All Premier Vision is done between employees, personnel offices, and VSP
 - CalHR 774 includes:
 - Enrolling into Premier Vision (outside of Open Enrollment)
 - Add/change/delete dependents
 - Canceling Premier Vision
- Please refer to [CalHR Benefits Administration Manual](#) for more information



STATEWIDE PROGRAM UPDATES



Statewide Tax Support Program

Presenter: Caroline Kingsley

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

- Special Reporting Requirements
 - Deceased Employee and Form W-2
 - The deceased employee is entitled to social security and Medicare wages only up to the year that the S95 is keyed.
 - Wages issued after date of death are not entitled to federal and state tax withholding
 - [Deceased Employee and Beneficiary/Designee Guide](#)
 - SCO has created a guide to assist with any questions on the reporting process.
- Designee/Beneficiary 1099-Misc, Miscellaneous
 - Form 1099 MISC is used to report payments issued after date of death to the deceased employees beneficiary
 - **Do not advise the recipients that payments are not taxable.**
 - As a reminder, please be advised that SCO cannot give tax advice and please see a tax consultant or the Internal Revenue Service (IRS) for additional questions.



Statewide Tax Support Program

Presenter: Monique Perez

Contact: PPSDW2MiscDED@sco.ca.gov

Deceased Employee and Designee/Beneficiary Reporting

- Department Responsibilities for PSD21 Reporting
 - Employee Action Request (EAR) withholding change to PERM exempt
 - Pay issued after the date of death is not subject to federal or state taxes
 - IRS Lock
 - If any employee has an IRS Lock, please do not submit the EAR to SCO.
 - Please have your employee call the IRS to request that they issue an IRS Lock Release letter for deceased employees
 - **IRS contact: (855) 839-2235**
 - **SCO Fax number to send the IRS Lock Release letter: (916) 322-8137**



Statewide Tax Support Program

Presenter: Caroline Kingsley

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Deceased Employee and Designee/Beneficiary Reporting

- [About Form W-9, Request for Taxpayer Identification Number and Certification](#)
 - **Do not release any payments to designee until your HR is provided with a W-9 document from the designee**
 - The department must retain the W-9 in the employee file.
 - Failure to obtain the W-9 may result in penalties and interest charges to the department.
- **Resources**
 - [Deceased Employee and Beneficiary/Designee Guide](#) - **NEW**
 - [Payroll Letter #24-012](#)
 - [PPSD-21 Form Deceased Employee Data](#)
 - [Personnel Action Manual \(PAM\)](#): Section 6 - EAR Processing
 - [PAM](#): Section 8 - Processing of Transactions



Statewide Tax Support Program

Presenter: Monique Perez

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Salary Advance Initial/Offset Reporting - STD. 422

- [Paycheck Calculator](#)
 - Paycheck calculator calculations should be provided to your accounting office, as SCO will require a copy with submission of STD. 422.
 - Please work with your accounting offices to ensure that your department has reported **all outstanding** salary advances provided to employees for the 2025 tax year.
 - Wages must be reported in the year the employee constructively received the funds.
- [Salary Advance Reporting Guide](#)
 - SCO has created a Salary Advance reporting guide to assist with any questions on the reporting process.
- **Reminder:** If your department is waiting for a stipulation to process and issued salary advances, then those should be reported to SCO. All Salary Advances should be reported to SCO if the warrant has not been issued within 30 days following the pay period of which the advance was given. Advances should be calculated by pay period; for reporting purposes, do not combine pay periods as one payment.



Statewide Tax Support Program

Presenter: Monique Perez

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Salary Advance Initial/Offset Reporting - STD 422

- **Resources**

- [Salary Advance Reporting Guide](#)
- [Paycheck Calculator](#) calculations
 - Breakdown is based on the pay periods
- [Payroll Letter #24-013](#)
- [Payroll Procedures Manual \(PPM\)](#)
 - PPM: Section N 103 – Salary Advances
 - PPM: Section N 109 - Instructions for completing the STD. 422, Salary Advances Paid/Offset Report
- [STD. 422, Salary Advances Paid/Offset Report](#)



Statewide Training Program

Presenter: Michael Berlanda

Contact: PPSDTraining@sco.ca.gov

General Salary Increase (GEN) and Other Salary Change (SAL) Overview Video

Video: [General Salary Increase \(GEN\) & Other Salary Change \(SAL\) Transactions](#)



Business System Support and Maintenance Section

Presenter: Tracy Gutierrez

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

Scheduling of Mass Updates

- SCO considers many factors when proposing a schedule
 - What types of updates are required [for example, Retirement Contribution, General Salary Increase (GSI), Special Salary Adjustment (SSA), Other Post-Employment Benefits, etc.]
 - Whether a process can be automated (example of SSA with 12 qualifying pay periods needing to be keyed by department)
 - The size of the population subject to the update
 - Generally, the minimum is 1000
 - If less than 1000 records, we also consider if a small number of departments will have an unreasonable number of records to manually process.
- The number of class codes that require Pay Scale updates
 - The timing of keying Pay Scales is very specific
 - The number of Pay Scale updates to key must reasonably fit into the available time



Business System Support and Maintenance Section

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The Scheduling of Mass Updates

- Complexity of the population
 - More complex updates may be scheduled later to allow more time for analysis
 - Larger populations may also be scheduled later
- Whether one update depends on another
 - When the same population is receiving both a GSI and an SSA, we process the GSI approximately two (2) weeks prior to the SSA.
- Pay frequency of the population
 - If there are semi-monthly employees in a population, we prioritize processing prior to Semi-monthly Cutoff, especially for Retirement Contribution Updates.
- Whether the update may cause Accounts Receivables (A/Rs) if run after Cutoff



Business System Support and Maintenance Section

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The Scheduling of Mass Updates

- What days are available for mass updates
 - July has limited availability due to Fiscal Year End processes
 - Priority is given to dates prior to Payroll Cutoff
 - Salary increases can be processed after Payroll Cutoff but will result in a supplemental warrant
- How many bargaining units require updates
 - Bargaining Units may be processed together to accommodate the availability of processing dates
 - The total population and complexity of each update is analyzed to facilitate determination of the groupings



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Processing of Mass Updates

- Retirement Contribution updates
 - SCO uses Pay Letters to determine impacted populations based on criteria such as Bargaining Unit, Retirement Category, and Class.
 - Assuming the update is to the employee contribution and/or exclusion amount, SCO reports on which Account Code(s) impacted employees are in.
 - If there are no records in the impacted Account Code(s) that do not require the update, SCO updates the contribution and/or exclusion amount.
 - If there are other Collective Bargaining Identification Designation (CBID) or Class Codes in the impacted Account Code(s), SCO will identify appropriate Account Codes to move impacted records to.
 - SCO creates a request for our Information Technology (IT) resources to select the required records and update the Account Codes.
 - SCO releases a Personnel Letter informing departments of the population to be updated, the old and new Account Codes (if applicable), and any further instructions.



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Processing of Mass Updates

- What you need to know about Retirement Contributions and Account Codes
 - Account Codes are determined with the following attributes:
 - Classic or PEPRA status
 - Whether the employee is subject to Social Security
 - Exclusion Amount
 - Employee Rate (contribution percentage)
 - The appropriate Bargaining Unit Contract/Memorandum of Understanding specifies the Exclusion Amount and Employee Rate (contribution percentage)
 - There can be different values for these based on the employee's Retirement Category (Miscellaneous, Safety, Industrial, etc.) and whether they are subject to Social Security.



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Processing of Mass Updates

- What you need to know about Retirement Contributions and Account Codes (continued)
 - The appropriate Account Code will result in a correct retirement contribution deduction
 - There are several Account Codes with the same attributes
 - Any code that meets the appropriate attributes for the employee may be used
 - The day following an update, confirm that impacted employees on your roster have been moved to an Account Code with the correct contribution percentage.
 - Reference the Personnel Letter, which will be released on the day the mass update is processed and will have information on old and new Account Codes.
 - When certifying pay, confirm that impacted employees on your roster have the correct contribution percentage.



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Processing Mass Updates

- General Salary Increase updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - If yes, SCO determines whether the population is large enough to necessitate a mass update.
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



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Processing Mass Updates

- Special Salary Adjustment updates
 - SCO uses Pay Letters to determine updates based on criteria such as Bargaining Unit and Class
 - SCO determines whether the update can be automated based on criteria such as qualifying pay periods
 - If yes, SCO determines whether the population is large enough to necessitate a mass update.
 - SCO creates a request for our IT resources to select the required records and update the salary
 - SCO releases a Personnel Letter informing departments of the population to be updated, their new salaries, and any further instructions.



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- Frequently Asked Questions
 - Why does SCO not share the mass update calendar with departments?
 - There are many factors that determine whether a mass update will move forward, and decisions can be made at the last minute.
 - The calendar is subject to change
 - Why does SCO prioritize one Bargaining Unit over another?
 - No Bargaining Unit is prioritized; scheduling is based on the factors in the previous slides.
- Other Processes that SCO performs:
 - Records that fall out from the mass update process are worked by our Operations Team



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- CalHR Pay Letters
 - There are many contract implementation items that are not subject to mass update
 - For example, new Earnings IDs for special pays.
 - When SCO is not performing a mass update, a Personnel Letter will not be released.
- CalHR will release a Pay Letter with instructions
 - SCO contributes system update instructions to these Pay Letters
 - Be sure to monitor Pay Letters



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- What you need to do when we run mass updates:
 - Reference appropriate contracts on the CalHR website to understand what changes are coming
 - Ensure Employment History is up to date for impacted employees
 - However, do not key updates to impacted records on the day of the update.
 - Review letters carefully
 - You may need to manually key some records
 - You are responsible for processing out of sequence transactions
 - Some payroll adjustments will require you to submit a STD. 674 to SCO, if what you key doesn't generate payroll as expected.
 - Also review the CalHR Pay Letter that will be referenced in our Personnel Letter



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- What you need to do when we run mass updates (continued)
 - On the day following the update, confirm that impacted employees on your roster have the correct updated salary.
 - Manually key any records that were incorrectly not included in the mass update
 - As always, certify pay for your roster on payday and confirm that all eligible records were appropriately included in the mass update.



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- What you need to know about retroactive mass updates:
 - The process is similar with some key differences:
 - Due to the complexity of retroactivity, more records may fall out from the mass update and require manual keying.
 - Retroactive pay will not issue until the first pay cycle following the update
 - Retroactive pay may not issue due to payroll errors
 - It is especially important to certify payroll for impacted records
 - Departments may have to submit STD. 674 forms for pay to issue



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.

Resource: Payroll Procedures Manual (PPM) [Section M](#)



PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Please **do not** email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- Update [California Personnel Office Directory \(CPOD\)](#)
- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- The [PPSD Register](#) – PPSD's Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- 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!



Helpful Resources

State Controller's Office:

- [SCO Website](#)
- [Library and Resources](#) - Communication. Manuals/Guides/Toolkits. Forms. FAQs.
- [Personnel Action Manual \(PAM\)](#)
- [Payroll Procedures Manual \(PPM\)](#)
- [Statewide Customer Contact Center \(SCCC\)](#)

CalHR:

- [CalHR Website](#)
- [Contact CalHR](#)
- [Human Resources Professionals](#)
- [Benefits Website](#)

CalPERS:

- [CalPERS Website](#)
- [Circular Letters](#)
- [my|CalPERS](#)
- [State Reference Guide \(PDF\)](#)
- [CalPERS Email Subscriptions](#)

When in doubt, ask your Supervisor or Manager for guidance!



SCO Contacts

Websites:

- [Human Resources](#) (HR)
- [State Employees](#)

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