

## TRANSACTION SPECIALISTS' EDUCATIONAL FORUM QUESTIONS & ANSWERS – AUGUST 2025

The following questions were submitted during the forum:

**Question:** Why is the Virtual Lunch and Learn Session held after Open Enrollment begins?

**Answer:** The Lunch and Learn Session is held during Open Enrollment to ensure that we have information for the next year solidified. This also allows those who are collaborating with us (CalHR) time to prepare the materials for this session.

**Question:** Are we able to order health brochures from CalHR?

**Answer:** CalHR does not offer health brochures (this might be something CalPERS may have), but we do have a digital Benefits Summary Guide available on our website; to access that go to the [CalHR Benefits](#) website, scroll down to the What's New section, then select the third option. The 2025 version is available now; however, the 2026 version is currently being worked on.

**Question:** When will 2026 premiums be active?

**Answer:** For plan details, rates, and Open Enrollment resources, please visit the following links, [CalHR Open Enrollment](#) and [CalPERS Health Plan Changes](#).

**Question:** Will there ever be a second carrier option for PPO Dental plans? Delta Dental has alienated so many dentists and employees are having trouble finding in-network dentists.

**Answer:** Unfortunately, we do not have another option for a second carrier now.

**Question:** Can we get information regarding the Blue Shield Access+ for our employees who live in the Monterey County area since Blue Shield Trio will no longer be available for health benefits?

**Answer:** I apologize, we do not have information on this change; however, health benefits are administered through CalPERS, and they should have more information. You may find the [Annual Health Plan Changes](#) webpage helpful as it shows what changes are expected to come in 2026. According to the webpage, it appears while Trio is exiting Monterey County, Access+ is expanding into Monterey County.

**Question:** Regarding the 24-month restriction for dental, does that mean 24 months of state service or 24 months without the state service credits?

**Answer:** To clarify, the 24 months is state service. You can refer to [Dental Program Section 506](#) of the Benefits Administration Manual for additional information on the 24-month restriction.

**Question:** For dental, how do we identify dual/split coverage?

**Answer:** Please send an email to [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov) for a detailed list of the steps you can take to verify. To summarize, you will need to verify if the employee's spouse/domestic partner/parent are state employees, and if they are, is the employee or their children enrolled in a state sponsored dental plan already?

**Question:** Does Family Connect Portal (FCP)/CalHR/SCO have a report that shows the dental/FlexElect/vision forms that were received and completed to help Human Resources offices reconcile Open Enrollment?

**Answer:** FCP and CalHR do not retain completed dental/FlexElect/vision forms unless an appeal was submitted when the benefit did not post to the employee's pay warrant/check. ConnectHR keeps a rolling record of all Personnel Specialists' last 1,000 uploads in the bottom of the "upload files" section. It is the Personnel Specialist's responsibility to know what forms they uploaded. SCO highly encourages us to have a system of identifying forms uploaded under a specific batch/tied to a ConnectHR email receipt.

**Question:** If an employee (EE) has an appeal approved of FlexElect, are they due for back pay?

**Answer:** Please send an email to [flexelect@calhr.ca.gov](mailto:flexelect@calhr.ca.gov) and provide the EE's details for assistance.

**Question:** Are CalPERS Form HBD -12 and Form STD. 692 no longer required to be included with FlexElect Cash?

**Answer:** If your agency uses myCalPERS, then including the HBD-12 with the form is optional. However, you do need to make sure the new/cancel is keyed in myCalPERS prior to submitting the FlexElect/CoBen Cash Option Form. You only need to attach Form STD. 692 if there is a change to the Cash Option. If the employee is only signing up for "health only," then no STD. 692 attachment is needed.

**Question:** Regarding FlexElect Medical Reimbursement, can it be used for dependents' medical expenses if the dependent is not on the employee's (EE's) health plan?

**Answer:** The dependent must be on the EE's health plan in order for the EE to submit qualifying medical receipts for reimbursement. The EE could also contact [ASI Flex](#) for assistance. Please refer to the [2025 FlexElect Handbook](#) for more information.

**Question:** Upon submitting a form to ConnectHR, what do we do if we do not receive a ConnectHR confirmation email receipt, even though the form is shown on the list as uploaded?

**Answer:** Unfortunately, we cannot email you a copy of your submission. However, if the form is shown in your upload history, then that is your record of the submission. Additionally, if you want to confirm SCO received the form you may contact the Statewide Customer Contact Center at (916) 372-7200.

**Question:** What do we do for people who have established excess leave plans already? Do we need to revisit this for the new Benefit Over Max (BOM) report once the cap is reflected? Additionally, are we enforcing Personal Leave Program (PLP) usage first on employees with excess leave plans (ultimately resulting in them being hours short each month on the excess leave plan)? I would like guidance and clarification on how to proceed.

**Answer:** Regarding the BOM, if the contract reflected a temporary increase to the Annual Leave of Vacation benefit cap, then the BOM has been updated accordingly. To best address the other policy related questions, please reach out to CalHR.

**Question:** My department does not use the California Leave Accounting System (CLAS), but we have an employee (EE) that came to us from another department, and she still has active leave accruals in CLAS. I have tried canceling them with no success. Is this up to the prior department or SCO to fix the issue?

**Answer:** If the EE is still showing as "active," then you will need to use the P62 to key the employee Non-Leave System Eligible.

**Question:** Is there a report to assist in identifying fallout employees from the General Salary Increase/Personal Leave Program transactions?

**Answer:** We ran Management Information Retrieval System (MIRS) reports pulling Personnel Action Request transaction codes, GEN and 350 for July 1, 2025. Staff have reconciled their rosters.

**Question:** Regarding Section 6 of the STD. 701C, why do we need to include the spouse's, domestic partner's, or parent's social security number?

**Answer:** You can provide the last four digits only.

**Question:** Are M10 and S10 employees who are tied to Bargaining Unit (BU) 9 due to "Like Work, Like Pay," having their Other Post-Employment Benefits (OPEB) suspended?

**Answer:** OPEB is based on "OPEB CBID," and you can find this out by looking at their Personnel Action Request. For example, if they have BU 9 for OPEB CBID they should be tied to 9 rates.

**Question:** Is there any reason why pay would not be issued after Monthly Payroll Certification (MPC)?

**Answer:** Please double-check the employment history to make sure there is nothing that has changed or stopped pay from issuing. If there is nothing, you must recertify pay by keying it in the Payroll Input Process (PIP). If pay still does not issue, then please contact the Civil Service Audits Unit at (916) 372-7200.

**Question:** Will SCO provide standard language for employees that explain the July 2025 pay?

**Answer:** We are working on a memorandum to post to the CalHR website.

**Question:** Regarding the Statewide Training Program, will there be any military training offered at some point in the future?

**Answer:** We had modules created in the past and they have been under review by CalHR. However, I believe the review is currently deprioritized, but hopefully it will eventually move forward in the near future.

**Question:** Does SCO have a plan on speeding up the process of establishing accounts receivables (A/Rs) for payment type 0?

**Answer:** The Civil Service (CS) Payroll team continues to implement workload strategies that apply concentrated efforts to process the establishment of accounts receivables for payment type 0 transactions. We refer to this as "blitzing." We have been making steady progress in recent months and will continue to make these efforts. Please continue to monitor the [weekly processing dates](#) posted on the State Controller's Office website.

**Question:** Is there a job aid or cheat sheet for account codes/retirement codes that are easier to understand? What we have now is really confusing and I remember at a previous forum it was stated that it was being worked on. Is there an update on that?

**Answer:** Account codes are still being worked on, and we are working on it as fast as we can. Once it is completed communication will be sent out to the departments. Section H 214 of the Payroll Procedures Manual (PPM) has been updated with new information and new columns. Please take a look and see if that helps until the Personnel Action Manual (PAM) is updated. The PPM has been updated with all current and correct account codes. We are in the process of updating the PAM but do not have a release date for that update currently. You can use the Ctrl F feature (Find) in the PPM to locate account codes that have the attributes for your employee's situation. I use the contribution percentage (for example, 8.5) and scroll through all the account codes that have that contribution amount. Then I look for the appropriate retirement category (for example, miscellaneous), Classic or PEPRA, exclusion amount, and whether they are subject to Social Security, and use an account code that has all those things.

**Question:** To clarify, for Out of Class (OOC) calculation pay, would you use the based salary or the salary after the deductions/pay cut per Bargaining Unit changes effective July 1, 2025?

**Answer:** Please have your departmental authorized person contact [PSB@calhr.ca.gov](mailto:PSB@calhr.ca.gov) for OOC calculation questions.

**Question:** Is there online training available for State Disability Insurance (SDI)/Non-Industrial Disability Insurance (NDI)?

**Answer:** Please see the [Self-Paced Personnel and Payroll Training](#) webpage on the State Controller's Office website.

**Question:** Our department keyed two separations and no lump sum has been issued. How can we get the pay to issue?

**Answer:** Please contact the Statewide Civil Service Program at (916) 372-7200 for assistance.