

TRANSACTION SPECIALISTS' EDUCATIONAL FORUM QUESTIONS & ANSWERS – AUGUST 2024

The following questions were submitted during the forum:

Question: Regarding Bargaining Unit (BU) 06 employees (that are new to state), are they eligible to receive \$140 (health and dental) if their spouse/domestic partner has the acceptable coverage? I was informed they were only eligible to receive \$128 (health) as dental was required for BU 06 employees per contract, is this correct?

Answer: Correct, BU 06 employees are only eligible to receive \$128 Flex Cash Option per the Union Agreement. See CalHR [Benefits Administration Manual](#) Section 714.

Question: Do we need to submit a STD. 422 form if an outstanding salary advance was paid off by the employee?

Answer: For current year, if a salary advance was provided to the employee and a SCO warrant never issued, then a STD. 422 form for the initial should be reported to report the funds on the Form W-2. Salary advances should be reported to SCO if the warrant has not issued within 30 days of issuance.

Question: I keyed an A01 for an employee (EE) on 07/25/2024 that went into effect the same day as the general salary increase (GEN) on 07/01/2024. The rate is correct on the Personnel Information Management System (PIMS) Personnel Action Request (PAR), however, the difference in pay did not issue. I called SCO and received an email response from the Payroll Unit stating that the system can take a few days to issue the pay. The EE has reached out inquiring about their pay. When, (if at all) should I contact the Payroll Unit again?

Answer: If the pay has not issued, then you must submit a STD. 674 adjustment request.

Question: Can the retirement codes guide in the Personnel Action Manual (PAM) be updated to be more user friendly and easier to understand?

Answer: Yes, PPSD is beginning to work on a total reconciliation of the retirement codes in PAM Section 505. This will likely take us a significant amount of time; however, we have completed a first draft of updates to Section B 015 of the Payroll Procedures Manual (PPM) that is now under review. The PPM updates will be available prior to the PAM updates, and we will announce this at the next Transaction Specialists' Educational Forum when that work is complete. In the meantime, please reference all recent [Personnel Letters](#) regarding retirement account codes to determine the correct code for your employees.

Question: An employee (Bargaining Unit 15) was keyed into the wrong retirement code when they were appointed, it was then corrected with an A01C keyed months later. How does the pay get corrected (social security/CalPERS deductions) or where can we find the information on the process to correct this issue?

Answer: The SCO Retirement Unit processes retro adjustments for A01C related to corrected retirement codes. The adjustment process can be found in Section H of the [Payroll Procedures Manual](#) (PPM).

Question: Are telework stipends still good to issue or is it being terminated?

Answer: The telework stipend is still in effect and has not been abolished. If there are changes to a pay differential, then a pay letter will be released, and the pay differential will be abolished. The Department of General Services holds authority over the statewide telework policy. Each department should have a telework agreement. We recommend working with CalHR Labor Relations on any telework policy and/or agreement you issue for your employees.

Question: Is there anyone I can contact directly about a Stipulation question?

Answer: You may contact the Stipulation Unit via [Statewide Customer Contact Center](#) (SCCC) and leave your information, someone will call you back.

Question: When will Permanent Intermittents (PIs) Open Enrollment (OE) FlexElect Cash option issue?

Answer: Permanent Intermittent OE FlexElect Cash Option issues after July 1. Agencies may submit the STD. 701C or STD. 702 along with the STD. 674 to SCO after verifying eligibility. Please see CalHR [Benefits Administration Manual](#) Section 710 for further information.

Question: Is there a training on how to handle employees who go out on Military Leave? Any resources or links would be helpful.

Answer: Military leave questions should be directed to CalHR as this is in relation to policy.

Question: I have an employee who is enrolled in dental benefits, but it keeps getting cancelled by SCO. Is there something that I can do to prevent this from happening?

Answer: Please contact the [Statewide Customer Contact Center](#) (SCCC) for further research.

Question: Where can I find the current rates for health care premiums?

Answer: Please see the [Plans and Rates \(Active Member\)](#) CalPERS webpage for information.

Question: Will we be receiving direction on how to handle Retired Annuitants in Bargaining Unit (BU) 18 that are not eligible for a SAL transaction? We have previously keyed a 330 Anniversary Date changing their MAX to NONE, is this still correct?

Answer: For Retired Annuitant employees who are not eligible for the SAL, moving their Anniversary Date from MAX to NONE is the correct action. Please see revised [Personnel Letter #24-012](#) for more information.

Question: I do the in-house garnishment training for my department, and I noticed that forms STD. 639 and or STD. 639 CFS has been updated but it is not reflected in the Payroll Procedures Manual (PPM) to complete. Can the PPM be updated to include this information in Section H?

Answer: We are currently working on several PPM updates. Please review our [Garnishment](#) trainings available on the SCO website.

Question: Regarding Bargaining Unit (BU) 16 employees who needed Personnel Action Request (PAR) packages sent to SCO for the GEN/SAL transactions, when can we expect those to be keyed?

Answer: Personnel Action Request packages are being processed based on received date.

Question: What is the timeframe to wait until reaching out to SCO to request a STD. 674 to issue Lump Sum (LS) for a Stipulation package? The Personnel Action Request (PAR) has been keyed, but I have not heard from SCO as to when they want the STD. 674 to issue the LS pay.

Answer: Per the guidelines, the Payroll Team will contact you when we need the STD. 674s. Please refer to the stipulation guidelines.

Question: Is there a list of classifications that received the Special Salary Adjustment this year?

Answer: Please refer to the [SCO Personnel and Payroll Letters](#) and the CalHR Payroll Letters.

Question: Requests to set up payroll Account Receivables (A/Rs) for late dock have not been processed since May 2023. Will these requests be processed soon?

Answer: Please refer to the [weekly processing dates](#) on the SCO website.

Question: If an employee is retiring in November or December, can they select full deferral option, but only defer into one (1) tax year?

Answer: Yes, an employee can choose to defer only into one tax year even if they are retiring in November or December. They have the option to defer into a second tax year, but it is not required.

Question: When will the benefits calculator be updated?

Answer: The benefits calculator is scheduled to be updated by the start of Open Enrollment. We are actively working on updating and preparing the calculator for the upcoming year's rates.

Question: Is a Bargaining Unit 04 employee not eligible for the Delta Dental PPO Blue Premier Basic until after 24 months?

Answer: Employees with Collective Bargaining Identification Designation (CBID) R04 are not eligible for Delta Dental PPO Plus Premier Basic until after the 24-month restriction has been met. See CalHR [Benefits Administration Manual](#) 506 for clarification.

Question: A dependent's dental and vision benefits were terminated because they turned 26. The dependent then went on the same dental and vision plan through Consolidated Omnibus Budget Reconciliation Act (COBRA) for a couple of months; shortly after, they became a fulltime state employee. Can they enroll in their indemnity dental plan, or do they adhere to the 24-month waiting period and must enroll in a state dental plan?

Answer: If the employee's Collective Bargaining Identification Designation (CBID) appointment is under the 24-month restriction, then they must adhere to it. Deleted dependent who previously had Delta Dental is not one of the eligible exceptions. Please see CalHR [Benefits Administration Manual](#) 506 - Exceptions to the 24-Month Restriction Period for clarification.